

InGenius® Connector Enterprise 5.0

November 2017 - Version 5.0.22472



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Introduction

These release notes provide information on the latest features and changes to existing functionality for InGenius® Connector Enterprise.

Software Version

InGenius Release 5.0.15.22472

Salesforce APEX Release 1.42

Upgrades

To upgrade to the latest version, please contact support at icesupport@ingenius.com. We will request logs from your active system to determine your install requirements, including any workflow integrations you may have. Once your configuration has been verified, a member of our deployment team will contact you to coordinate the upgrade.

Customer Portal Access

The InGenius Customer Portal is available from the Resources section on www.ingenius.com. The Customer Portal provides customer access to Documentation, Report Packages, and detailed Release Notes. Please contact icesupport@ingenius.com to request access.

Server Requirements - InGenius Connector Enterprise

The following configuration will support up to 1,000 users, on a virtual or physical machine:

- Operating System: Windows Server 2012 R2 and Windows Server 2016.
- Processor:
 - 3+ GHz - 4 cores (*up to 1000 concurrent users*) or
 - 2.6 GHz - 4 cores (*up to 800 concurrent users*).
- Memory: 8GB.
- Disk: 20 GB available space.
- Network: 1GbE network interface card.
- .NET Framework 4.6 or .NET Framework 4.7.

NOTES:

- Currently, Microsoft Dynamics 365 Version 9.0 is not supported with InGenius Connector Enterprise 5.0. InGenius will provide Microsoft Dynamics 365 Version 9.0 support in early 2018.
- Existing customers upgrading to InGenius Connector Enterprise 5.0 may not require processor upgrades if there are less than 500 concurrent users, however, the listed processor specifications are strongly recommended for optimal system performance.
- Some Cisco UCM versions are not supported on Windows Server 2016 per Cisco DevNet <https://developer.cisco.com/site/tapi/wiki/supported-windows-os>.

Supported Platforms

Salesforce and Microsoft Dynamics 365

The following browser, phone system, and CRM platforms are supported with this release.

Phone System

- Cisco UCM 9.1, 10.5, 11, 11.5
- Cisco UCCE 10.5, 11, 11.5
- Cisco UCCE Finesse 10.5, 11
- Cisco UCCX 9.5, 10.5, 10.6, 11, 11.5
- Cisco UCCX Finesse 10.5, 11
- Avaya AES 6.3.3 SP7, 7.0.1
- Avaya IP Office Server Edition 9.1 SP10, 10.1
- Avaya IP Office 500 V2 9.1 SP10, 10.1
- Asterisk 13.8, 13.13, 14
- MiVoice Business 6.0 SP3, 7.2 SP1, 8.0 SP1
- Mitel MiContact Center 8.1, 8.1.2
- Broadsoft Broadworks R21

CRM

- Salesforce Winter '18
 - Classic - Sales Cloud & Service Cloud
 - Lightning - Sales Cloud & Service Cloud

- Microsoft Dynamics CRM (Online and On-premise)
 - 2013 SP1 Rollup 3, 2015 RTM, 2016 SP1
 - Microsoft Dynamics 365

Server OS

- Windows Server 2012 R2, 2016

Microsoft .Net Framework

- 4.6, 4.7

Client OS and Browser

- Windows 8.1, Windows 10
 - Google Chrome 55+
 - Mozilla Firefox 50+
 - Microsoft Internet Explorer 11
 - Microsoft Edge 38 (For Salesforce Lightning support)
- Mac OS 10.11
 - Safari 10.0.1 (For Salesforce Sales Cloud)

ServiceNow

The following browser, phone system, and ServiceNow platforms are supported with this release.

Phone System

- Cisco UCM 9.1, 10.5, 11, 11.5
- Cisco UCCE 10.5, 11, 11.5
- Cisco UCCE Finesse 10.5, 11
- Cisco UCCX 9.5, 10.5, 10.6, 11.5
- Cisco UCCX Finesse 10.5
- Avaya AES 7.0.1

Supported Versions

- ServiceNow CSM
 - Helsinki
 - Istanbul
 - Jakarta
- ServiceNow ITSM
 - Istanbul
 - Jakarta

Server OS

- Windows Server 2012 R2, 2016

Microsoft .Net Framework

- 4.6, 4.7

Client OS and Browser

- Windows 8.1, Windows 10
 - Google Chrome 55+
 - Mozilla Firefox 50+
 - Microsoft Internet Explorer 11

New and Updated Features

This document details important new features, enhancements, and changes to the latest software version of InGenius Connector Enterprise 5.0.15. For specific release patch updates, refer to the Resolved Issues grid at the end of these notes.

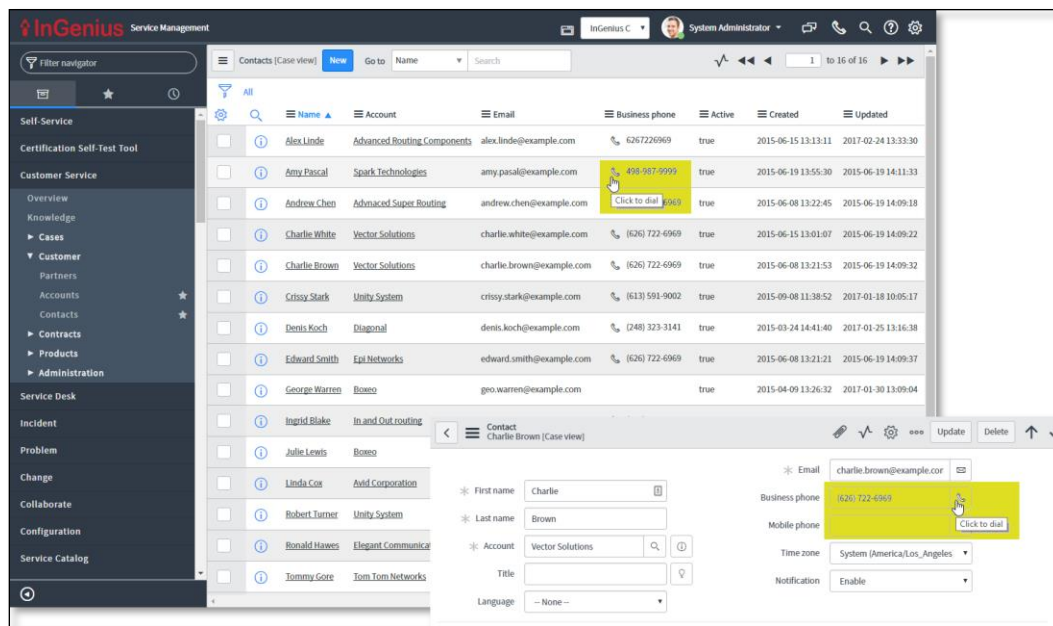
1. InGenius Connector Enterprise support for ServiceNow Customer Service Management (CSM) and IT Service Management (ITSM).
2. Preview Dialer for Cisco Unified Contact Center Enterprise (UCCE) 10.5 and Salesforce Sales Cloud.
3. InGenius Connector Enterprise Lightning Support for Salesforce Sales and Service Clouds.
4. Integration of Salesforce Omni-Channel work items within the InGenius interface.
5. Updated InGenius Report Package with new contact center reports.
6. General software improvements.

1. InGenius Connector Enterprise for ServiceNow Customer Service Management and IT Service Management

InGenius now connects Avaya and Cisco to ServiceNow® Customer Service Management or IT Service Management applications. The new InGenius integration provides features like screen pop, click-to-dial, automated call logging within the ServiceNow platform.

With this new integration, organizations can optimize productivity with telephony integration to ServiceNow Customer Service Management and IT Service Management applications.

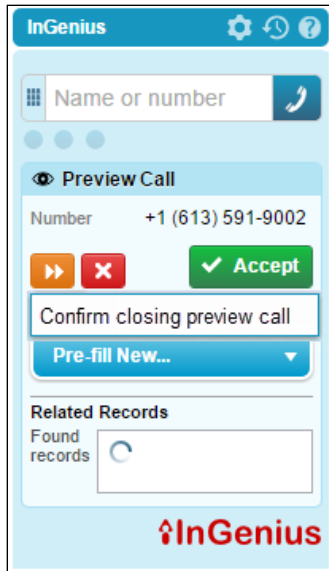
Customer Service and Help Desk agents manage all phone controls and call activities directly within the ServiceNow interface.



For more information please visit <https://www.ingenius.com/resource/servicenow-ingenius-telephony-integration/>.

2. Preview Dialer for Cisco Unified Contact Center Enterprise 10.5

Version 5.0.3 of InGenius Connector Enterprise introduced Preview Dialer for customers with outbound dialing requirements. Preview Dialer is native to Cisco Unified Contact Center Enterprise, and can be configured on the phone switch. InGenius supports the feature for organizations using UCCE 10.5 and Salesforce Sales Cloud.



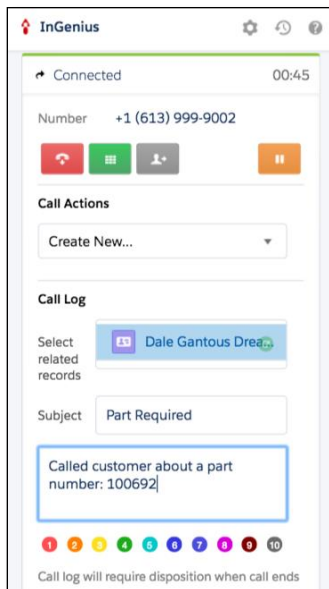
When a preview call is pushed to an agent, InGenius Connector Enterprise will pop the Salesforce record that matches the phone number.

Insight like this means that agents can immediately begin a conversation that's specific to their needs, leading to more productive interactions.

For more information please see the Preview Dialer video at <https://www.ingenius.com/resource/preview-dialer-ingenius/>.

3. InGenius Delivers the Lightning Experience in both Sales Cloud and Service Cloud

InGenius Connector Enterprise 5.0 has a new and improved look! InGenius Connector Enterprise has a re-designed user interface that complements the Salesforce Lightning Experience for Sales Cloud and Service Cloud.



Simply enable the CTI softphone for Lightning, and enjoy the productivity benefits of the Lightning Experience.

For more information see the Salesforce Lightning video at <https://www.ingenius.com/news/ingenius-telephony-integration-salesforce-lightning/>.

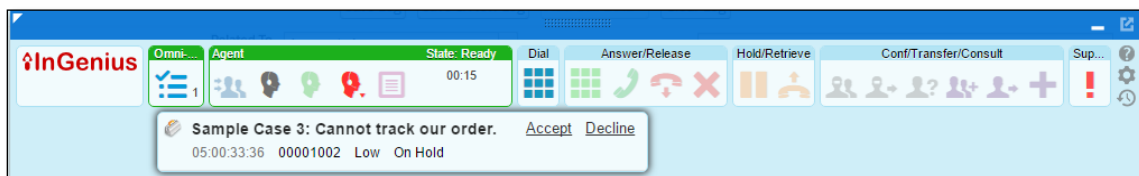
Note: InGenius continues to support Classic mode for both Sales and Service Cloud.

4. Integration of Salesforce Omni-Channel Work Items within the InGenius Interface

With version 4.0 and 4.1, InGenius implemented the ability to keep Omni-Channel states and Telephony states synchronized. The primary use case solved in the original InGenius / Omni-Channel implementation was to block Omni-Channel work items from being delivered to an agent while the agent was on a call.

With version 5.0, InGenius is delivering a broader set of features to ensure that InGenius and Salesforce Omni-Channel are fully integrated. Organizations can choose to integrate Salesforce Omni-Channel work items directly into the InGenius interface. This ensures that a blended agent has a single view of all the work items assigned to them. From a productivity perspective, it reduces clicks by ensuring agents can accept both calls and work items from a single interface.

In the example below, the Omni-Channel button displays a Case, which the agent can choose to accept or decline.

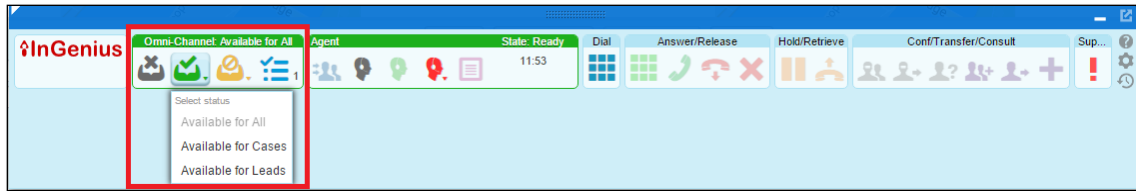


For more information, please see the Omni-Channel Integration video at <https://www.ingenius.com/resource/salesforce-omni-channel-ingenius-telephony-integration/>.

Set Availability for Different Work Item Queues

Some environments may want the agent to set themselves into specific availability for different queues such as Voice, Cases, or Leads. If this is the case, an Omni-Channel Presence button can be added to the InGenius UI to allow the end user to make themselves “Available for All” work items, “Available for Cases,” or “Available for Leads”.

When an agent uses this capability, InGenius can supply Omni-Presence Status information so that Salesforce can provide reports for each queue.

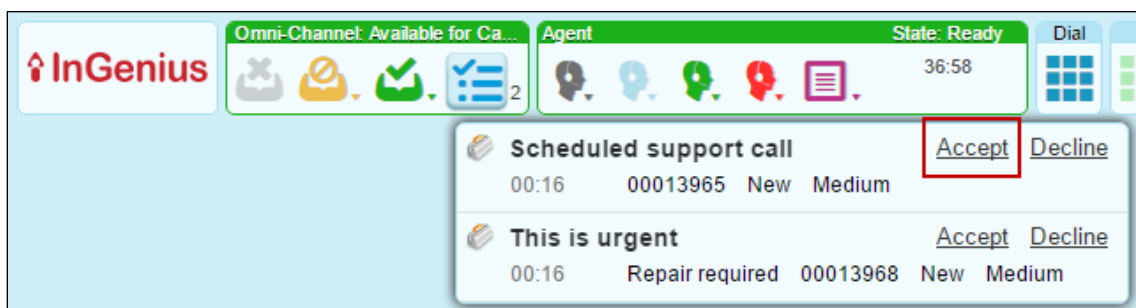


Revert to the Last Available State

Administrators can configure InGenius to revert an agent back to their last available state for work items. This means, for example, that when an agent has finished working on a Case, their state will revert to “Available for Cases” if that was their last available state. This improvement decreases clicks, and increases call productivity by ensuring the agent is set automatically to an available state.

Manage Agent Work

InGenius 4.1 and Salesforce Omni-Channel integration provided the ability to prevent work items from being pushed to the agent when the agent was on a call. With InGenius 5.0, InGenius and Salesforce Omni-Channel now also prevent telephone calls from being routed to an agent when they are at the work item capacity defined in Salesforce. This ensures the agent can focus on their current work item, thereby providing the best possible customer experience.



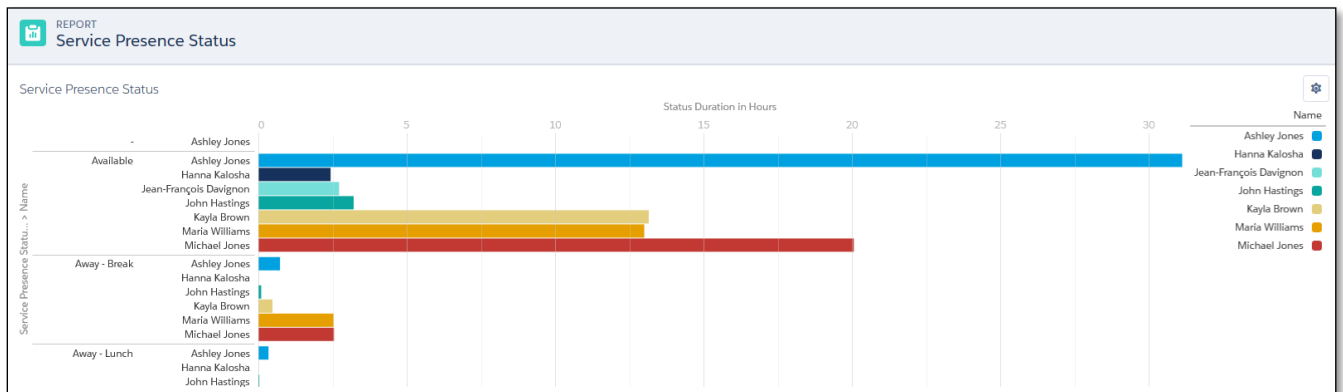
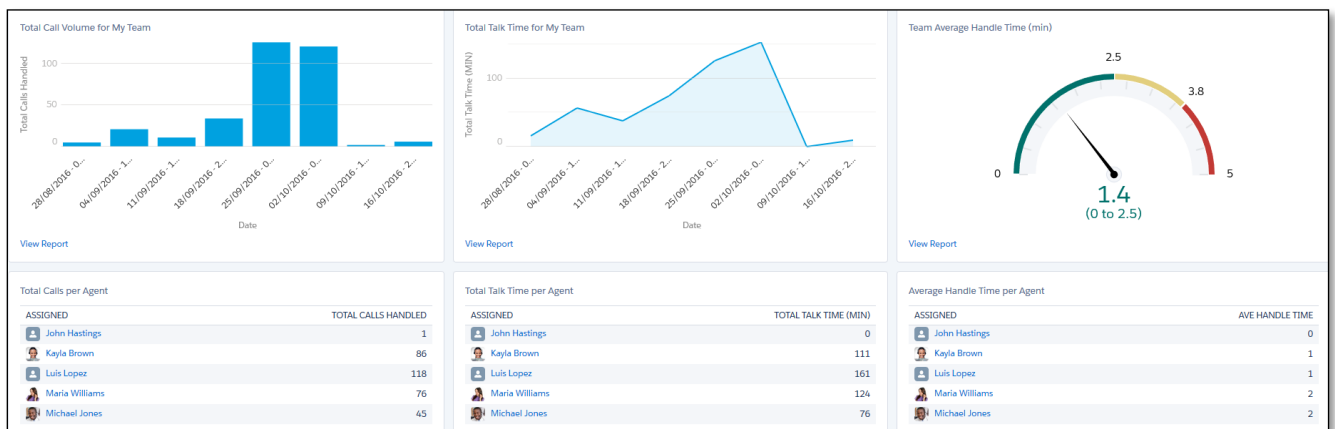
5. Updated InGenius Report Package

InGenius has created an update to the InGenius Reports Package located on the InGenius Customer Portal. These new reports provide administrators with the data they need to understand agent productivity. All existing customers are invited to log into the portal to

download pre-created reports that can be customized to help Call Center managers manage their business.

Managers can view:

- Individual agent information: total talk time, average handle time, total calls, time spent in each service presence status, call results and successful call counts.
- Team information: call volume, call center ROI, average handle time per team and service presence status by total team.



The InGenius Report Package is available from the InGenius Customer Portal. Please contact customer support at icesupport@ingenius.com to request access.

6. General Improvements

- Usability improvements have been applied to the Salesforce Omni-Channel configuration UI in the InGenius Runtime Admin.
- InGenius Connector Enterprise 5.0 supports Salesforce Omni-Channel Supervisor.
- Agent support for Avaya IP Office was introduced in 5.0.2.

InGenius End of Support Announcements

With the release of InGenius Connector Enterprise 4.0 in February 2016, InGenius discontinued support for all versions of the 2.x and 1.x software series.

Third Party Platform End of Support Announcements

InGenius Connector Enterprise 5.0 is not certified on the following platforms.

Platforms No Longer Supported by InGenius	Vendor End of Support Date
Asterisk 11.x	October 25, 2017
Microsoft Dynamics CRM 2011	July 12, 2016
Cisco UCCE 8.x	April 30 2016
InGenius integration with Microsoft USD	January 20, 2016
Internet Explorer 9	January 12, 2016
Internet Explorer 10	January 12, 2016
Asterisk 12.x	December 20, 2015
Asterisk 1.8	October 21, 2015
Internet Explorer 8	August 31, 2015
Windows Server 2008 R2	January 13, 2015
Cisco Unified Call Manager 8.5	July 31, 2017
Cisco UCCX 8.5	August 31, 2017
When a vendor declares a platform end of life, InGenius will re-evaluate on-going support for that platform, and support for that version may end. Below is a table that includes the upcoming end of support date for some platforms.	

Future	Announced End of Support Date
Windows 8.1	January 9, 2018
Cisco UCCE 9.x	March 31, 2018
Cisco UCCX 9.x	July 31, 2018
Asterisk 14.x	September 26, 2018
Windows Server 2012 R2	October 9, 2018
Cisco UCM 9.x	December 31, 2018

InGenius is committed to providing the best possible support. As a CTI solution merging multiple platforms, our testing and certification effort is incremental based on the supported configurations. As platforms and features become sparsely used, InGenius will issue an End of Support announcement.

Frequently Asked Questions (FAQs)

Q1: I am still using Microsoft Dynamics CRM 2011, or a different platform that may be unsupported by InGenius. How can I find out more about the support options available to me?

A1: Please contact your account manager or sales@ingenius.com to discuss options.

Q2: Do I have to do anything to receive these new features and enhancements?

A2: Yes. Simply contact icesupport@ingenius.com to schedule your upgrade. InGenius customer care will take you through the upgrade process.

Q3: Is there a fee associated with this upgrade?

A3: No, as part of the license fee with InGenius these features and enhancements are at no cost to our clients.

Q4: What is involved in upgrading?

A4: Upgrades are assisted by an InGenius customer care agent. Upgrades may be arranged outside of regular business hours as required. Contact Customer Care for more information.

Contact Us

For any queries about the latest release or to update, please contact your support team at icesupport@ingenius.com. To add additional licenses, please contact our sales team at sales@ingenius.com.