



DISCOVER ON-DEMAND ADMINISTRATION GUIDE, V5.4

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Reference Guide

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Revision	Change Description	Effective Date
0	Rebranded all content. Clarified content related to support for multiple On-Demand servers.	2014-04-30

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Introduction

This document is designed for application and system administrators, and assumes a basic level of familiarity with Discover, the PBX integration in use, the Windows OS, and the network in place at the customer site.

Discover On-Demand is a client/server application that allows users to:

- Control (i.e., initiate, stop, blackout) recording of their calls from a desktop application. For example, some agents may only need to record certain types of calls, or some agents may receive calls that should not be recorded, such as personal calls.
- Add information into the database call record, such as caller name or subject of the call.

Before using this guide, you should have:

- Completed the tasks in the *Discover by Uptivity Installation Guide*.
- Created Agent accounts and possibly configured On-Demand settings for those accounts in Discover. For details, see [User Settings and Permissions](#).

Note Discover allows administrators to customize field names and terminology in the Web Portal to fit your unique environment. Therefore, screen examples and field names used in this manual may differ from those seen in your implementation.

Discover On-Demand Server

Service Installation

The Discover On-Demand service manages connections for workstations running the On-Demand Client software, and processes requests made by the clients for the purpose of controlling call recording. The service is included with the base Discover install package. This package must be installed on any server that will act as an On-Demand server. For more information on the Discover installation, see the *Discover by Uptivity Installation Guide*.

Register Service

Once the Discover software is installed on the system; open a Command Prompt window on the server that will run the service. Change to the Recorder directory and run the following command:

```
cc_ondemandServer.exe -svcinst -autostart
```

If successful, the Command Prompt will print the message "Service Installed." You will be returned to the working directory prompt.

Configure INI

The service has an INI file that **must** be configured for the proper operation of the module. The INI file used by the service is located in the base folder where the Discover software was installed, at

Recorder\cc_OnDemandServer.ini.dist. The INI filename should always match the name of the executable it configures. Open the file in Notepad and save an .ini version.

This is an example output of a configuration file, with important settings detailed in the table to the right:

[server]	Server Settings Section
port=2007	TCP Port Server listens for connections from clients on.
refresh=5000	This setting is deprecated.
[api]	Module Configuration Section
useapi=true	Always set to true.
host=127.0.0.1	IP address for the API Server to which the On-Demand service will connect.
port=5620	The TCP Port on which the API server listens for connections. Default is 5620.
reconnect=3000	The time in milliseconds between connection attempts to the API server
[logging]	Logging Settings
Failsilently=False	Prevents logging from throwing an exception when it is not running. If the logger is missing, it will fail silently, and the server will continue running. Set to 'True' if no notification is needed when the logger fails.

Web Portal Configuration

Add the Application to the Service Manager

To add the On-Demand service to the Service Manager:

1. Click the **Administration** tab and expand **Tools** in the left navigation menu.
2. Click the **Service Manager** link from the menu.
3. Expand the server that will run the On-Demand service.
4. Click **Add** application.
5. In the **Application** field of the new line, enter **cc_ondemandServer.exe**. It must be entered exactly as the name EXE.
6. Select **Yes** from the drop-down list under **Auto-Restart**.
7. Click **Save**.

On-Demand Settings

The On-Demand Client enables users to update some call record data. The data that can be updated is specified by administrators using the Web Portal's On-Demand Settings page. By default, users can update all fields. To set permissions for specific fields:

1. Click the **Administration** tab and expand **Recorder Settings** in the left navigation menu.
2. Click **On Demand**.
3. To prevent users from updating a field, select **No** from the drop-down menu. Select **Yes** if they should be able to update a field.
4. Click **Save**.

Changes do not take effect until the On-Demand client is restarted.

The data field labels can be changed on the Terminology page. In this example, the first field label has been changed from User1 to Account. The fourth field label has been changed from User4 to Case Number. See the *Discover by Uptivity Administration Manual* for additional information on using the Terminology page.

Permissions	On Demand
Scheduling	Allow Account Update : No
Tools	Allow User2 Update : No
Recorder Settings	Allow User3 Update : No
CTI Cores	Allow Case Number Update : No
Custom Lookup	Allow User5 Update : No
IP Phones	Allow User6 Update : No
On Demand	Allow User7 Update : No
Transcoder	Allow User8 Update : No
Voice Boards	Allow User9 Update : No
	Allow User10 Update : No
	Allow User11 Update : No
	Allow User12 Update : No
	Allow User13 Update : No
	Allow User14 Update : No
	Allow User15 Update : No

User Settings and Permissions

For an agent to be recorded with On-Demand, his/her Discover user account must have these settings configured:

- **System Username:** Network ID the Agent uses to log in to the Windows Network. Not the fully qualified user name.
- **System Domain:** Windows domain the Agent logs in to. The field is optional.

Note Each agent to be recorded with On-Demand must have a unique username, even if they are on different Windows domains. Duplicate usernames will result in login failures. The logs will report that multiple agents were returned with the same username and On-Demand will not log them on.

Users also must be assigned roles that have On-Demand permissions. See the *Discover by Uptivity Administration Manual* for more information.

Schedule

See the *Discover by Uptivity Administration Manual* for more information.

You must create an On-Demand schedule (i.e., Schedule Type is 'On-Demand'). Keep the following in mind as you work with On-Demand schedules:

- Agents with On-Demand are given the privilege of deciding if their calls are recorded. Therefore, the schedule typically should never expire.
- Set Target Percentage to 100%. The percentage is ignored in favor of the start/stop from the client.
- When you enter no schedule requirements, the schedule is typically available for all users, although other factors may be involved as well (e.g. permissions, installation of the software client, and call direction).
- You can use schedule requirements to limit the schedule to specific users, extensions/devices, ACD groups, or ACD gates.

Core Settings

On-Demand uses the API server to communicate with the Discover core. To ensure good communication:

- Confirm in the logs that events are being received by each component.
- Check that the Core's **Enable Event Interface** setting is **Yes**.
- Check that the Core's **API Commands to Script** setting is **Yes**. This setting is recommended for most integrations.

Scripts

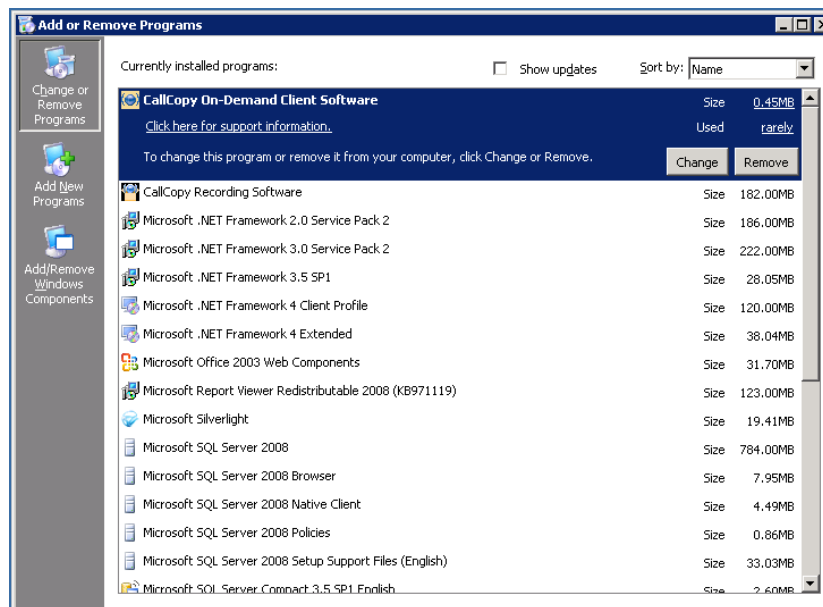
Scripts for On-Demand customers typically must handle API events. Different Uptivity scripts use different methods for handling API events. Review the script to confirm that it does have an API handling method and that the method handles call event data.

Discover On-Demand Client

Client Installation

Uninstalling Old Clients

If you are upgrading from a previous version of Discover, you will need to remove any old versions of the client before new versions are installed. You can do this by using the Add/Remove Programs functionality in the Windows Control Panel. The software is labeled "CallCopy On-Demand Client Software".



User Account Configuration

To function properly, the user account running the client (or a security group of which the user is a member) must have read/write access to the following folders and their subdirectories:

- Logs directory:
 - **Windows XP:** C:\Documents and Settings\All Users\Application Data\CallCopy
 - **Windows Vista/7:** C:\Users\[username]\AppData\Roaming\CallCopy
- INI directory:
 - C:\Program Files (x86)\CallCopy\OnDemand

Discover On-Demand Client

Locating Client Installer

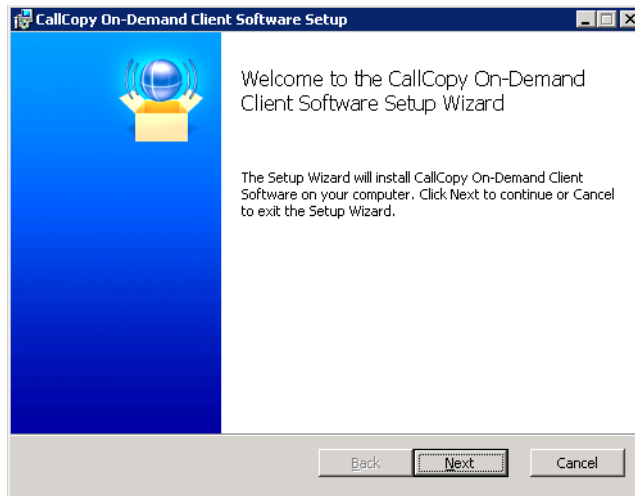
The client installer can be obtained from any Discover server by browsing to the **C:\Program Files (x86)\CallCopy\Installers** folder.

The application installer is named "**CallCopy On-Demand Client Setup.msi**".

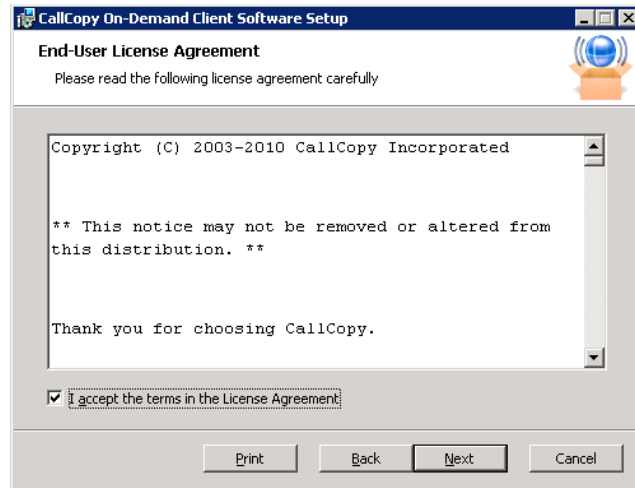
Installing the Client

To install the Discover On-Demand client software:

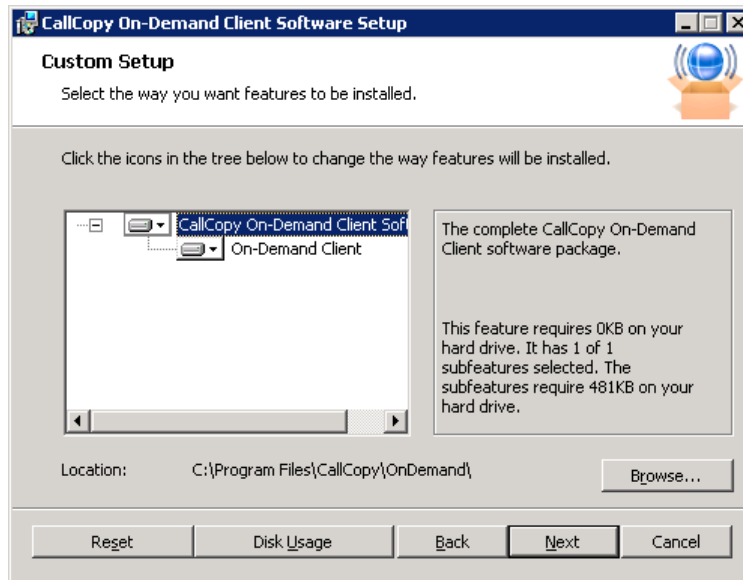
1. Copy the installation MSI file to the destination PC.
2. Double-click the MSI file and click **Next** to continue on the Setup Wizard screen.



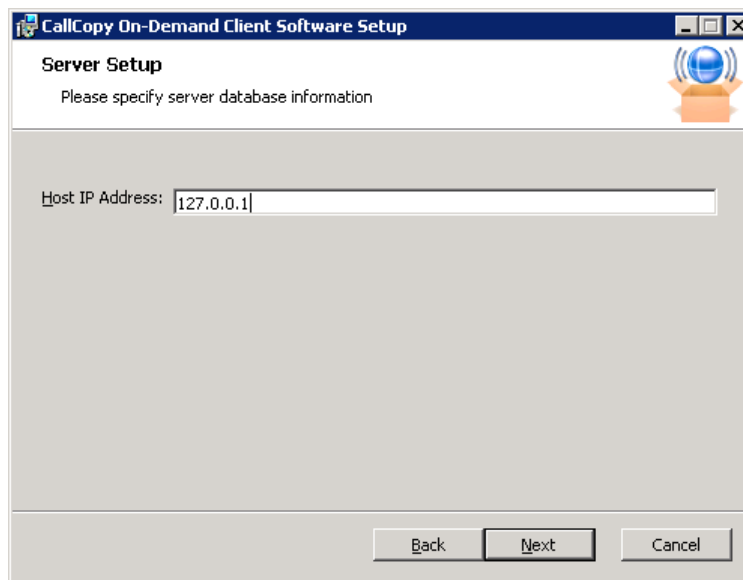
3. Select the check box accepting the License Agreement and click **Next**.



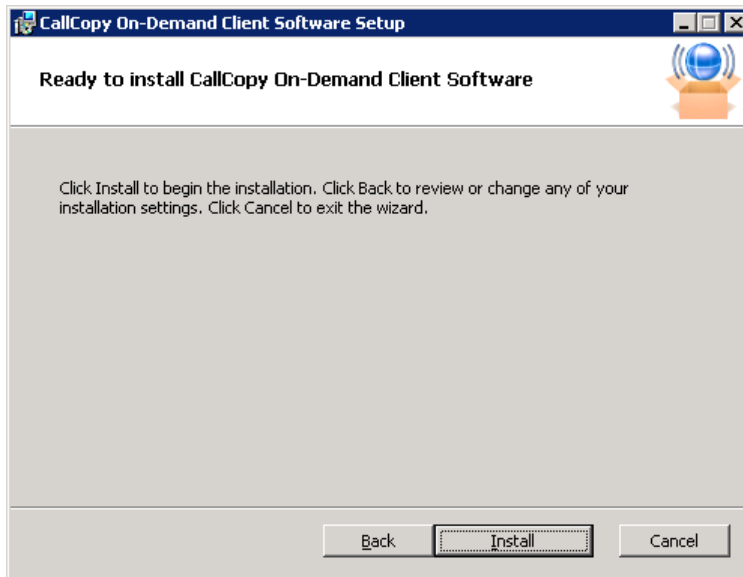
4. On the Custom Setup page, you can set the directory where the client software will be installed by clicking the **Browse** button and selecting a folder. To verify the workstation has enough disk space to install the software, click the **Disk Usage** button.



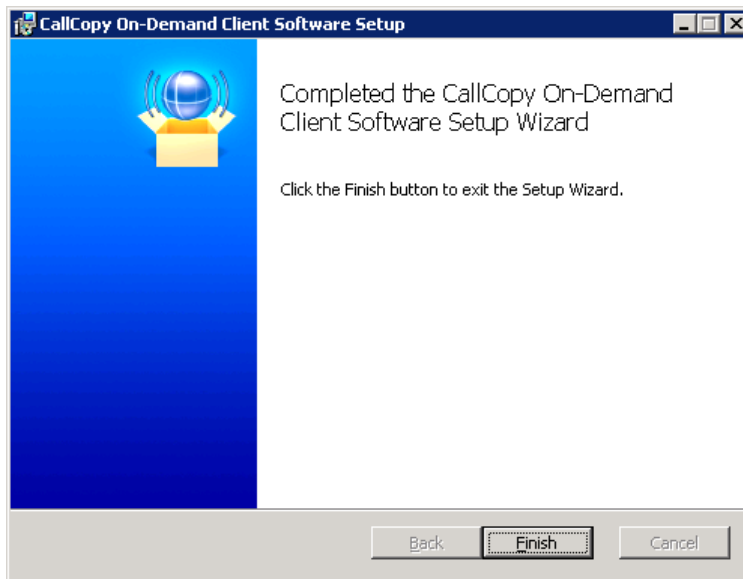
5. Click **Next**.
6. In the **Host IP Address** field, enter the IP Address of the server running the On-Demand Server module to which the client will connect. If multiple servers are used, enter the address for the primary server. Click **Next**.



7. Click **Install**.



8. Click **Finish**. The On-Demand software will run automatically during the next Windows startup.



Silent Options

The client installer also has options to install silently, with no user intervention required or allowed. The installer uses standard Windows Installer options available by running the "**msiexec.exe**" application.

```

Install Options
  </package | /i> <Product.msi>
    Installs or configures a product
  /a <Product.msi>
    Administrative install - Installs a product on the network
  /j<u|m> <Product.msi> [/t <Transform List>] [/g <Language ID>]
    Advertises a product - m to all users, u to current user
  </uninstall | /x> <Product.msi | ProductCode>
    Uninstalls the product

Display Options
  /quiet
    Quiet mode, no user interaction
  /passive
    Unattended mode - progress bar only
  /q[n|b|r|f]
    Sets user interface level
    n - No UI
    b - Basic UI
    r - Reduced UI
    f - Full UI (default)
  /help
    Help information

Restart Options
  /norestart
    Do not restart after the installation is complete
  /promptrestart
    Prompts the user for restart if necessary
  /forcerestart
    Always restart the computer after installation

```

Using these parameters, you can install the software automatically and require the computer to be restarted after. An example command for that configuration would be:

```
Msiexec.exe /i "C:\ CallCopy On-Demand Client Setup.msi" /passive /forcerestart
```

This command must be run from the command prompt to process properly. If the silent install is used with default settings, the configuration settings will not be set to connect to any server. The configuration files must be modified afterwards, or the MSI package will need to be extracted, and the configuration file replaced.

Client Configuration

The client settings are stored and read from a configuration file that is stored in the directory where the client was installed. The file is named **cc_OnDemandClient.ini**. The INI filename should always match the name of the executable it configures. This file contains the settings configured during installation.

This is an example output of a configuration file, with important settings detailed in the table to the right:

[server]	Server settings section
host=127.0.0.1	IP address of the Discover On-Demand Server
port=2007	TCP Port used to connect to the Discover On-Demand Server. Default port is 2007.
[logging]	Logging settings section
Level=DEBUG	Log level. Set to DEBUG to provide the most information, but can result in larger log files. Setting to ERROR will only log out error messages.

Security and PCI Compliance

Interactions between the Discover suite components (e.g., servers, Web Portal), file servers, and archive devices use SSL and TLS for data in transit, which is encrypted to disk when written. More information on Discover's PCI Compliance status and how to configure components to utilize encryption/SSL/TLS is available in the *Discover by Uptivity Administration Manual*.

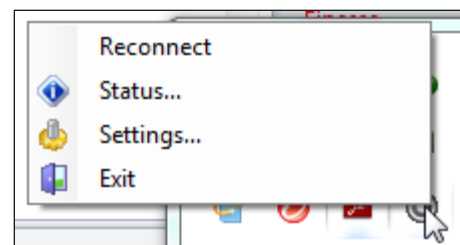
Using the Client

When the On-Demand Client application launches, it tries to connect to the server (or servers) configured during installation. A balloon tip will pop-up informing the user of the current connection status.



If the connection fails at start-up, or if there is a disruption in the server that causes a disconnection, you will see an error message appear. The application will continue to try to reconnect every 10 seconds.

After ten failed reconnect attempts, the Client will enter standby mode, and the user will need to select **Reconnect** from the menu to try again. If the Client is not connected to the server, users will not be able to record, the On-Demand icon will be grayed out, and On-Demand menu choices will be limited as shown here.

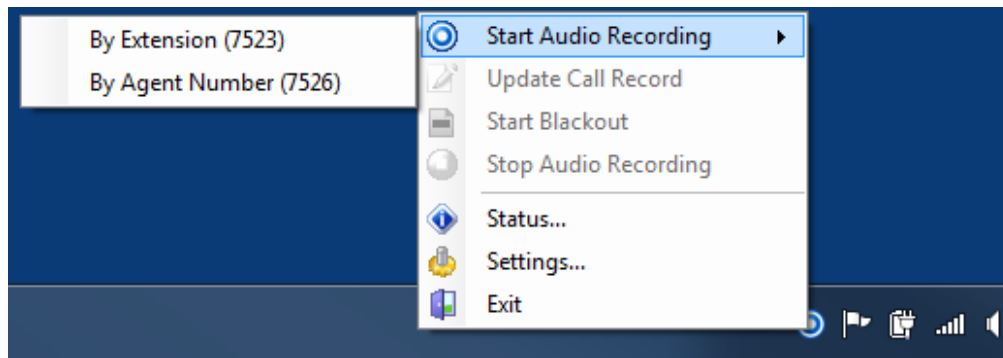


When connected, the Client application sends the local machine's currently logged in username and domain (if any), as well as the machine's name.

Both user and machine must be properly configured by the administrator before the Client application can be used. If the application can't find the user by the username, it will display a "Login Failed" message.

Users can verify their login by checking the Status menu or by watching the name that appears at login. *Using the incorrect account can cause recordings to be mislabeled or not recorded at all.*

Start/Stop Audio Recording



Call recording can be started by right-clicking the On-Demand Client icon in the system tray and choosing one of the options in the "Start Audio Recording" menu.

There are two available options, depending on the permissions set by the administrator:

- **By Device ID** (aka **By Extension** or **By Voice Port**): This method records a call using the actual physical device identifier and is available if the administrator has not selected to run in secure mode. Any calls made on that physical device will be recorded.
- **By Device Alias** (aka **By Agent Number**): This method uses an agent identifier, rather than a device identifier, to determine what call is to be recorded. Typically, it requires the user to log in to the phone, and the login ID identifies the agent. This allows users to sit at different stations, while having the same identifier.

In most installations, **By Device ID (Extension)** is sufficient.

Once recording has started, it will continue until the call is completed or is explicitly stopped when the agent selects **Stop Audio Recording**.

Note The On-Demand client is not aware of RTP, and will not start or stop or otherwise alter recording status explicitly based on any RTP events.

Start/Stop Blackout

Blackouts can be triggered two ways:

- Manually by an agent using the "Start Blackout" and "Stop Blackout" options from the client menu.
- Automatically by using Uptivity Desktop Analytics or a similar third-party application to send a scripted call to the API server that issues BLACKOUTSTART and BLACKOUTSTOP commands to the recording core.

Blackouts do not stop the recording; they just prevent reviewers from hearing/seeing the blacked out information. When the call and screen data is processed by the transcoder, these start/stop events tell it when to blank the screen and audio to protect sensitive information. More information on blackouts can be found in the "System Security" section of the *Discover by Uptivity Administration Manual*. Information on configuring the API server to perform blackouts can be found in the "API Server" section of the *Discover by Uptivity Installation Guide*.

Update Call Records

If you have set up fields for the agent to update (see [On-Demand Settings](#)), agents can access them by right-clicking on the On-Demand Client icon in the system tray and choosing "Update Call Record".

Update Call Record only allows agents to insert or replace information about a call, and does not allow them to view previous information.

If a call recording is already in progress, the On-Demand Client application will update the call with the new information while simultaneously informing the agent that a call recording is already in progress.

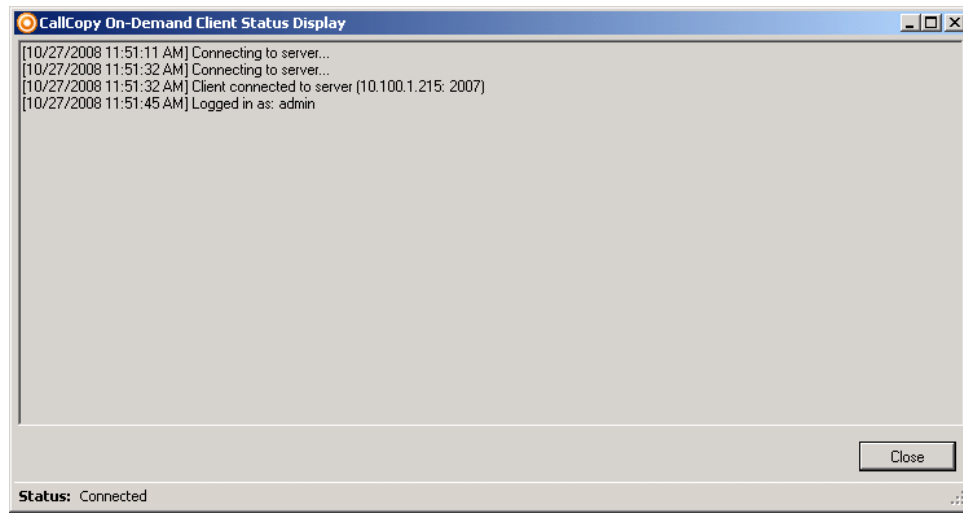
For example: The administrator sets up a schedule which records all calls on device 1321 with a single day's retention and another schedule for agent-initiated recordings which changes the retention to indefinite. When the agent selects **By Agent Number (2123)** the information about that call is updated to reflect that device 1321 was recording agent 2123, the retention date is updated, and the agent is informed that a recording was already in progress and the information updated.

Note Agents should not use angle brackets (i.e., < >) as well as some special characters and symbols (e.g., !, =, +, %) when updating call records. These characters can cause updates not to work.

Check Status

While the On-Demand Client application is running, it maintains a list of the actions it has performed, and the current state of the client. The client keeps track of:

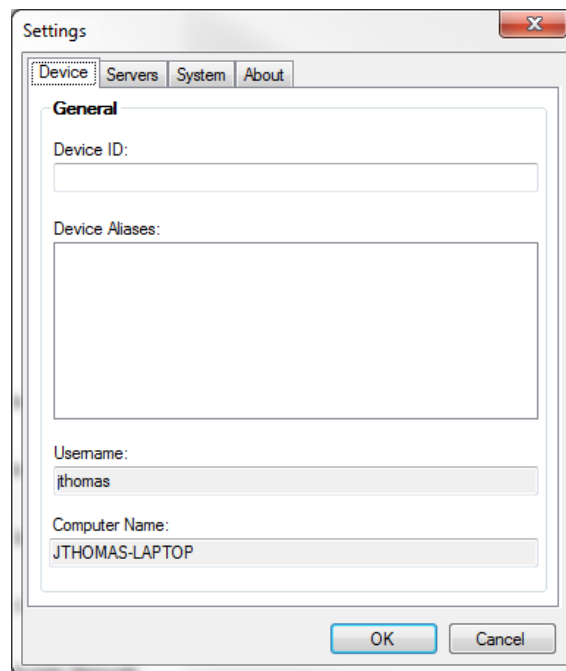
- Audio Recordings
- Desktop Recordings
- Connection Status
- Errors



To check the state of the Client, select the **Status** menu item or observe the balloon tips that pop up after any action.

Change Settings

The On-Demand Client application has several settings which may be user-configurable, depending on how you have set up the Client. Agents can access these settings by right-clicking on the system tray icon and clicking the **Settings** menu option.



Device Settings

To permanently set or change the Device ID / Extension / Voice Port, enter the physical device's identifier in the appropriate box.

If the Device ID / Extension / Voice Port is changed, a dialog box will appear warning that the Device ID must be restored to its previous value to stop recordings on that Device ID.

The Device ID/Extension/Voice Port can also be set each time the On-Demand Client is launched by selecting **Prompt for the Device ID** on the agent's On-Demand permissions in the Web Portal.

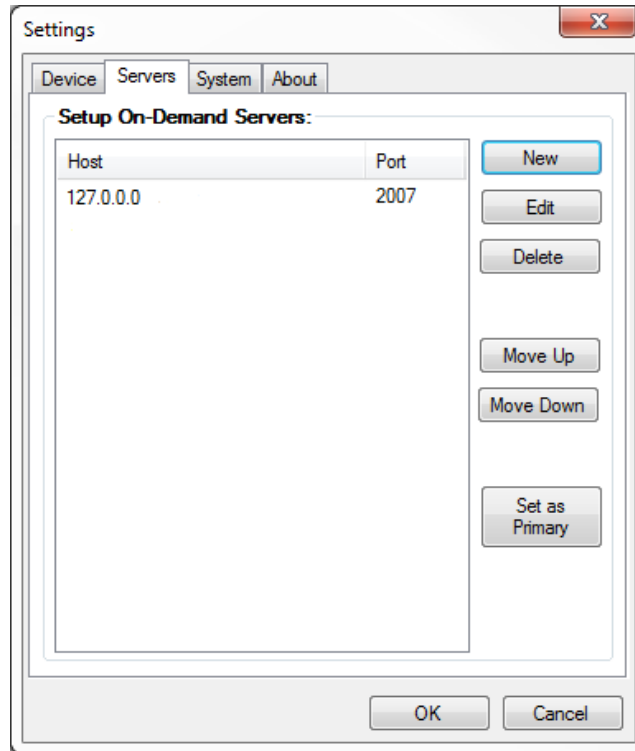
The Device Aliases field displays any agent identifier, such as phone login, that is currently used for recording.

The Computer Name and the Username of the user currently logged into the computer are also displayed to help in diagnosing login problems.

User-configurability of these settings can be limited. See the "On-Demand Permissions" section of the *Discover by Uptivity Administration Manual*.

Servers Settings

To communicate properly, the server **Host** setting must be set to the IP address or hostname of the Discover Server. The **Port** is provided for diagnostic purposes only and cannot be changed through this interface. Since the port must be the same on both the client and the server, it is only possible to change the port through the configuration file.



Multiple On-Demand Servers can be installed for redundancy. To add other servers for the client to access:

- Click **New**.

When the server host is changed, the Client will break any existing connection and try to reconnect using the updated address.

The client will attempt to connect to the servers in the order in which they appear in the panel. To change this order:

- Click the server IP address and use the **Move Up/Move Down** buttons.

To designate one server as the main server for that client to use:

- Click the server IP address and then click **Set as Primary**.

System Settings

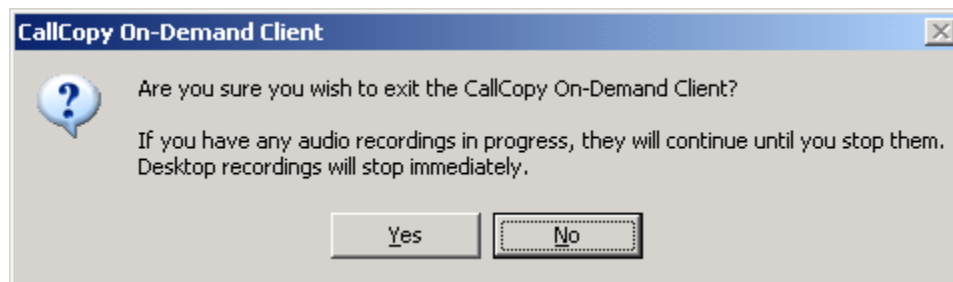
The On-Demand Client application logs store up to a week's worth of entries. These log files can be sent to Uptivity support to help resolve login issues, crashes, and other unexplained problems.

The level of detail the logs provide is determined by the **Logging Level**, with **ERRORS** providing the least amount of detail and **DEBUG** providing the greatest. You can also turn **OFF** logging altogether. Unless instructed to do otherwise, you should leave the Logging Level at **WARNING**, which will only record errors and potential problems.

Closing the Application

When a user exits the On-Demand application, any current audio recordings will continue. However, desktop recordings will be cancelled. To exit the application:

- Right-click on the On-Demand Client system tray icon and select **Exit**, then click **Yes**.



Troubleshooting

Obtaining Client Logs

If problems occur with this application, it may be necessary to contact Uptivity Support for further assistance. Before contacting Support, you should have access to the On-Demand Client log files for use in troubleshooting. The log files are located in the following directory on the workstation:

- %APPDATA%\CallCopy\OnDemand\
- \Users\User\AppData\Roaming\CallCopy\OnDemand

The client log files are listed inside, with one log file listed for each date the On-Demand client was running. The log files follow a '*yyy-mm-dd.log*' format (e.g. 2010-09-01.log). Copy these log files so they may be forwarded to Uptivity Support for analysis.

About Uptivity

What boosts the bottom line for any company with a contact center? How about getting the best that every agent can deliver from their first day on the job and constantly optimizing contact center management and performance? Only Uptivity gives you the tools you need to continuously improve every aspect of each step of every agent's life cycle and enhance customer satisfaction. You get exactly what you need thanks to a modern, integrated, and easy-to-use suite of tools that offers a unified system for performance management, workforce management, speech analytics, and call recording. Unparalleled customer service and support from our in-house staff combine with a better bundle for a better value, and a lower total cost of ownership.

Headquartered in Columbus, Ohio, and on the Web at www.uptivity.com.