UPTIVITY DISCOVER ON-DEMAND USER GUIDE, V5.5.1

February 2015

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Version:	5.5.1
Revision:	February 2015
About inContact:	inContact (NASDAQ: [SAAS](#)) is the cloud contact center software leader, helping organizations around the globe create high quality customer experiences with a complete workforce optimization portfolio (WFO). Key portfolio offerings are **inContact Discover WFO** (tightly integrated with the core platform and completely available in the cloud) and **Uptivity Discover WFO** (comprehensive, premise-based WFO that integrates with a wide variety of telephony and contact center solutions). The portfolio also includes the WFO Suite powered by Verint®, ECHO ™ Customer Feedback Survey, inView ™ Performance Dashboard.
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Introduction

Audience

This document provides information and procedures for installing the Discover On-Demand Client and for using the Uptivity Discover On-Demand module. 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 to the database call record, such as caller name or subject of the call.

Readers should have a basic level of familiarity with usage of a PC and its peripherals, the Windows operating system, and Uptivity Discover Call Recording. Readers who will install the client application should additionally be familiar with installing Windows applications, with their network environment, and with the desired configuration and use of on-demand recording in their organization.

Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary to install the Discover On-Demand Client and use Discover On-Demand. The document is NOT intended as a specific system or network design document.

Assumptions

This document assumes that Uptivity Discover has been installed and integrated with your PBX if applicable. It also assumes that your application administrator has configured the application for use based on your business rules and environment. This includes configuring user accounts, schedules, etc., for the use of Discover On-Demand. See the *Uptivity Discover Administration Manual* for details.

Need-to-Knows

Several Discover features use pop-up menus and other windows that may be considered as "pop-ups" by some browsers. inContact recommends that you configure your browser to allow pop-ups for the Discover site.

Tasks described in this manual may be limited by permissions. If you need to perform a task and are unable to do so, see your supervisor or Discover WFO administrator.

The Discover 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. If your integration relies on RTP, discuss this with your Discover administrator and/or Uptivity Discover Support.

Discover On-Demand Client Installation

Note: This section is designed for administrators or other personnel who will install the Discover On-Demand Client.

Before You Install

Uninstall 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".
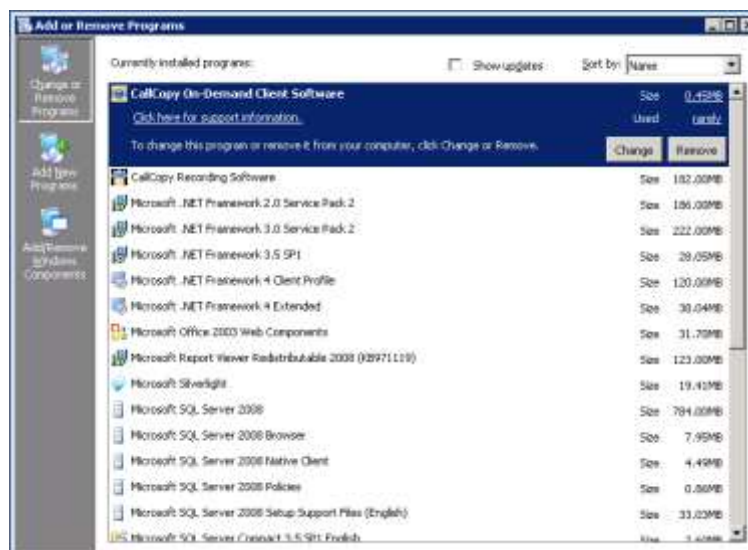
Configure the User Account

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 on the workstation where the client is installed:

- 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

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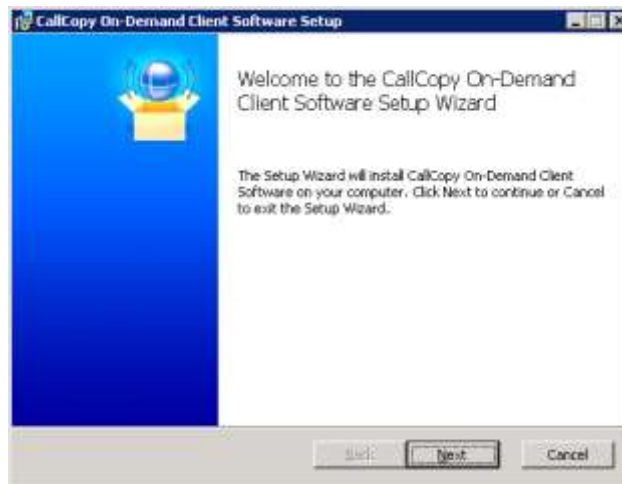
C:\Program Files (x86)\CallCopy\Installers

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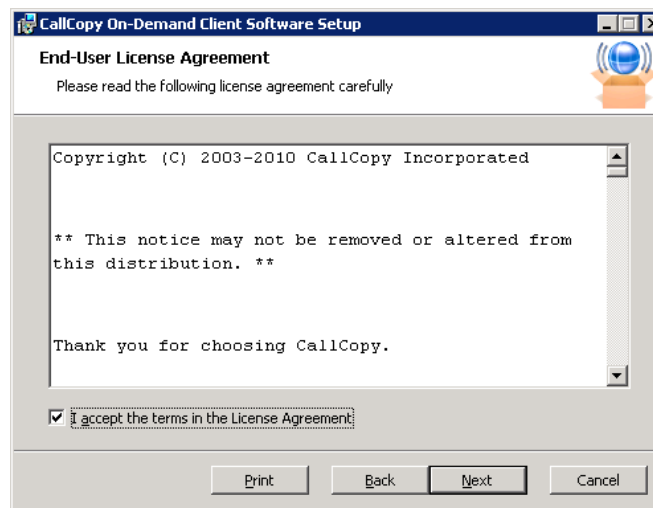
Install the Discover On-Demand Client

To install the Discover On-Demand Client:

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.
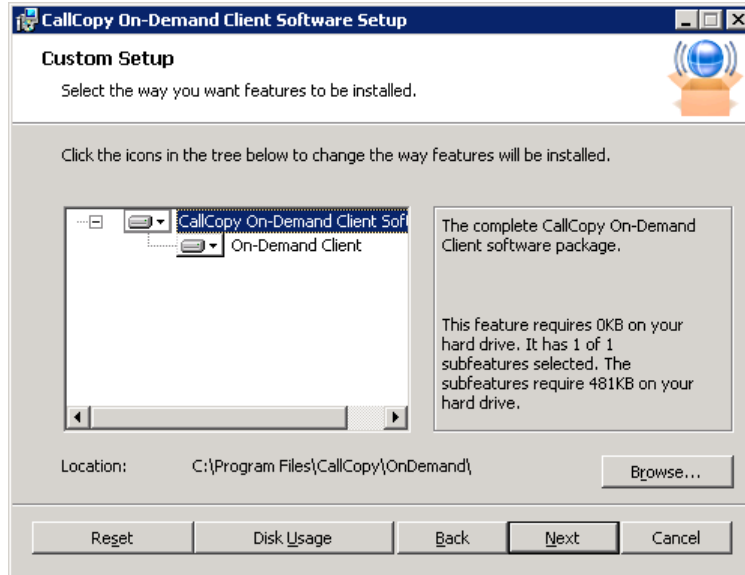
5. Click **Next**.

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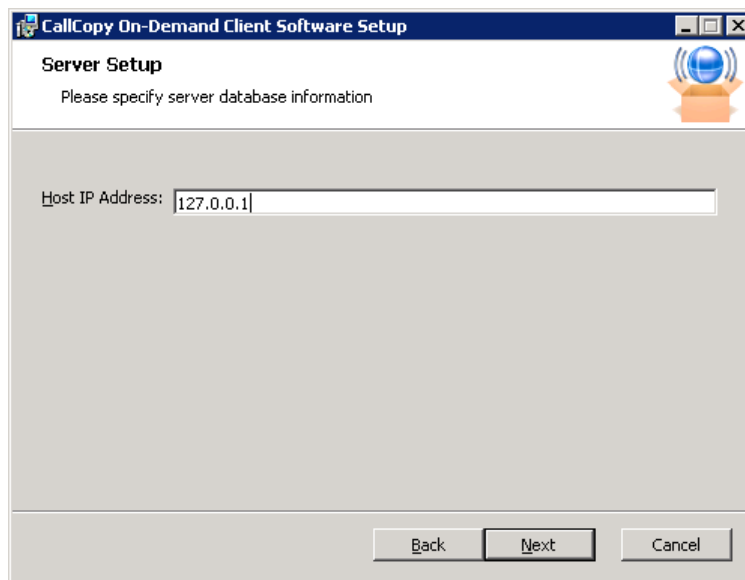
7. Click **Install**.
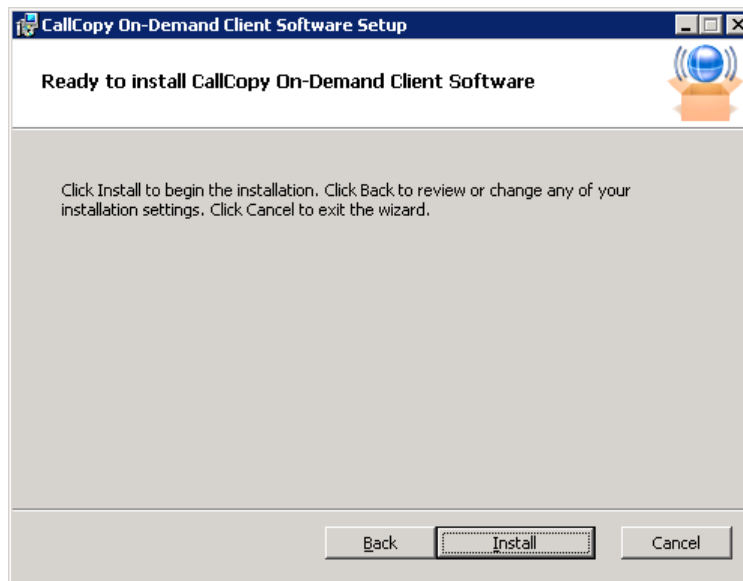
8. Click **Finish**. The On-Demand software will run automatically during the next Windows startup.

About Silent Options for Installing the Discover On-Demand Client
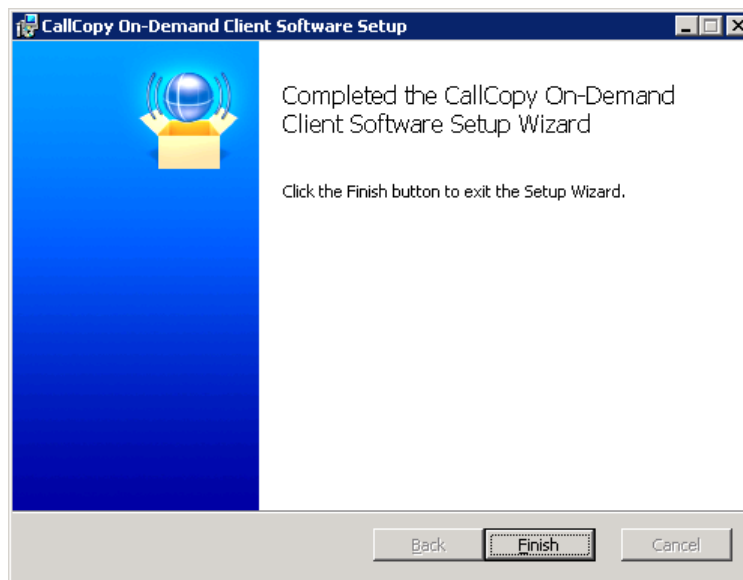
The client installer also has options to install silently (see below), with no user intervention required or allowed. The installer uses standard Windows Installer options available by running the "**msiexec.exe**" application.

```
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.

Configure the Discover On-Demand Client INI File

The client settings are stored and read from a configuration file that is stored in the client installation directory. 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.

In most cases, you will not need to make any changes to the INI file. However, there may be times when you are asked to do so under the supervision of Uptivity Support.

For reference, Discover On-Demand Client INI settings and their default values (if applicable) are shown on the left in this table, with additional explanation of the settings detailed on the right.

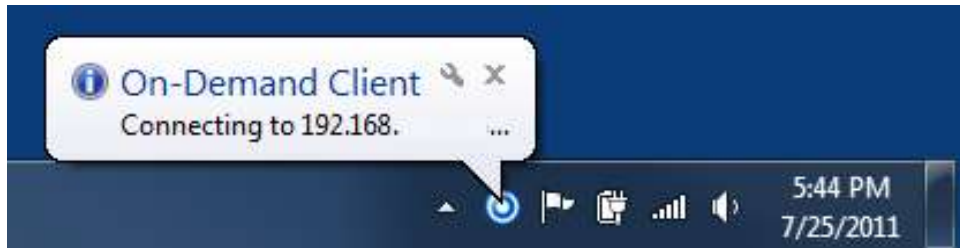| [server]	
host=127.0.0.1	Specifies the IP address of the Discover On-Demand Server to which this client should connect.
port=2007	Specifies the TCP Port used to connect to the Discover On-Demand Server.
[logging]	
Level=DEBUG	Specifies the application logging level. The "debug" level gathers more client information but may cause performance issues. Set the value to "error" to log only 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 *Uptivity Discover Administration Manual*.
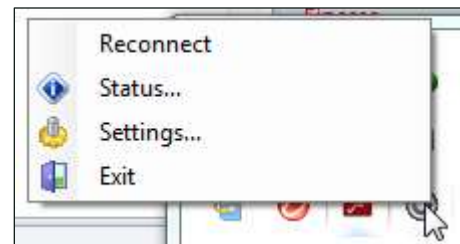
Using the Discover On-Demand Client

Note: This section is designed for agents and Discover end users who use the Discover On-Demand Client as part of their daily work.

When the Discover On-Demand Client launches, it tries to connect to the server (or servers) configured during installation. A balloon tip informs 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 you will need to select **Reconnect** from the menu to try again. If the client is not connected to the server, you 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 sends the local machine's currently logged in username and domain (if any), as well as the machine's name, to the designated On-Demand server.

Some organizations use Discover On-Demand to supplement fulltime or QA recording that is controlled in other ways. In this scenario, agents are granted the "Notify On-Demand Recordings Only" permission so that they can tell when the recordings they have initiated start and stop. Users with this permission can stop and/or blackout *only* those recordings that they started with the On-Demand Client and the options will be grayed out at all other times.

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

You can verify your 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

To start call recording using Discover On-Demand:

- Right-click the On-Demand Client icon in the system tray and choose one of the options in the **Start Audio Recording** menu.

There are two available options, depending on the permissions set by your 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 your administrator has not selected to run in secure mode. Any calls made on that physical device will be recorded. Depending on how your administrator has configured Discover On-Demand, you may be prompted to enter your device ID each time you log in to the On-Demand Client.

- **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 you:

- Right-click the On-Demand Client icon in the system tray and select **Stop Audio Recording**.

Start/Stop Blackout

Blackouts can be used to prevent parts of a recording from being heard or seen during playback.

To trigger a blackout using the Discover On-Demand Client:

- Right-click the On-Demand Client icon in the system tray and choose **Start Blackout**.

To end a blackout in the Discover On-Demand Client:

- Right-click the On-Demand Client icon in the system tray and choose **Stop Blackout**.

Blackouts can also be triggered automatically by using Uptivity Fusion 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. To learn more about triggering blackouts automatically, contact Uptivity Discover Support.

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 Discover Transcoder, these start/stop events tell it when to blank the screen and audio to protect sensitive information.

For more information on blackouts, see the "System Security" section of the *Uptivity Discover Administration Manual*.

Update Call Records

Discover offers fifteen custom information fields that can be configured for use with Discover On-Demand, allowing agents t0 insert or replace information about a call but not view previous information. Access to each field is controlled by permissions that your administrator sets up.

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

For example: your 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)**, 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.

To update call records:

- Right-click the On-Demand Client icon in the system tray and choose **Update Call Record**.

    Note: You should not use angle brackets (< or >) or the following special characters and symbols (!, =, +, %) when updating call records. These characters can cause updates not to work.

Check Status

While the On-Demand Client 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
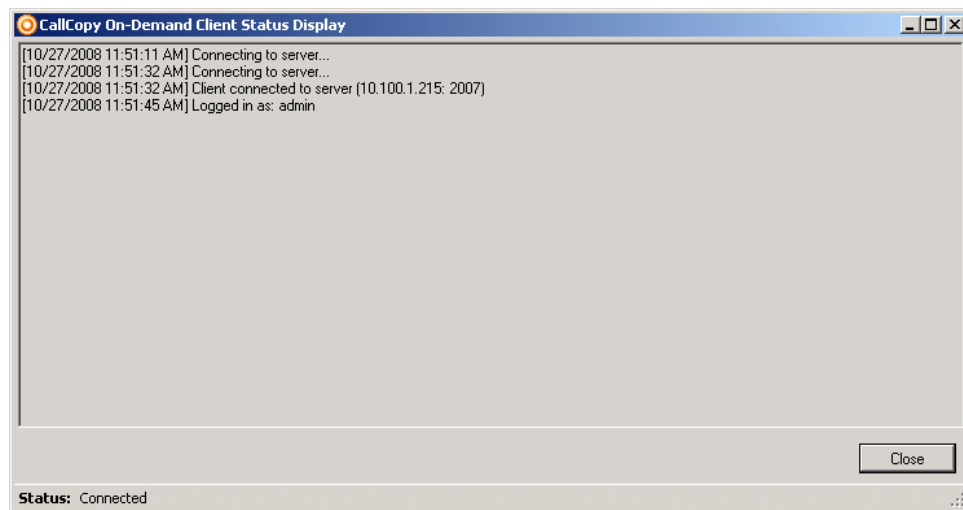
To check the status of the client:

- Right-click the On-Demand Client icon in the system tray and select **Status** or observe the balloon tips that pop up after any action.
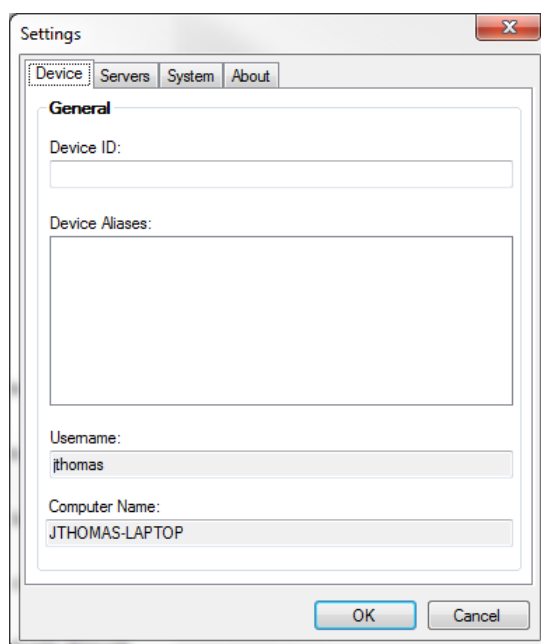
Discover On-Demand Client Settings

About Client Settings

You may be able to configure some or all of the Settings on the following tabs, depending on how your administrator has set up the application.

- **Device**: allows you to change the physical device identifier (for example, the **Device ID** or voice port) associated with the client. The **Device** tab also shows any **Device Aliases** (agent identifiers such as agent ID or login) currently associated with recording, the **Computer Name**, and the currently logged in **Username**. Configurability of this setting is controlled by permissions. If you need to change the physical device identifier in your Discover On-Demand Client and are unable to do so, talk to your Discover administrator.

- **Servers**: allows you to add, delete, and prioritize the Discover On-Demand Server(s) with which this client communicates.

- **System**: allows you to specify the level of logging for the On-Demand Client.
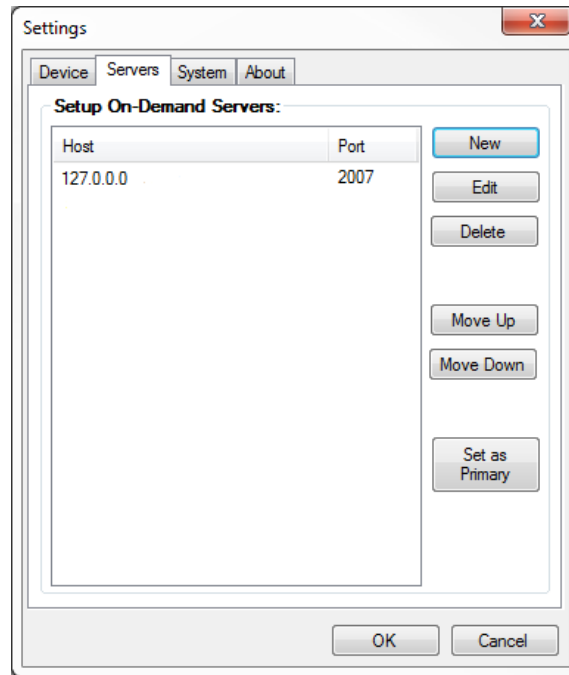
Configure Device Settings

To configure the physical device associated with the Discover On-Demand Client:

1. Right-click the On-Demand Client icon in the system tray and select **Settings**.

2. Click the **Device** tab.

3. Enter the desired **Device ID** in the text field and then click **OK**.

When you change the physical device identifier (Device ID), a dialog box will appear warning that the Device ID must be restored to its previous value to stop recordings on that Device ID.

Configure 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.

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

To add other servers for the client to access:

1. Right-click the On-Demand Client icon in the system tray and select **Settings**.

2. Click the **Servers** tab and then click **New**.

3. In the **Host** field, enter the IP address of a Discover On-Demand Server and click **OK**.

4. Click **OK** again.

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

1. Right-click the On-Demand Client icon in the system tray and select **Settings**.

2. Click the **Servers** tab.

3. Click a **Host** IP address in the On-Demand Servers pane and then click either **Move Up** or **Move Down**.

4. Repeat for other servers if needed.

5. When the servers appear in the desired order, click **OK**.

To designate one host as the main Discover On-Demand Server for this client to use:

1. Right-click the On-Demand Client icon in the system tray and select **Settings**.

2. Click the **Servers** tab.

3. Click a **Host** IP address in the On-Demand Servers pane and then click either **Set As Primary**.

4. Click **OK**.

To remove a host from the Discover On-Demand Servers list:

1. Right-click the On-Demand Client icon in the system tray and select **Settings**.

2. Click the **Servers** tab.

3. Click the desired **Host** IP address and then click **Delete**.

4. Click **OK** and then click **OK** again.

Configure System Settings

The On-Demand Client logs store up to a week's worth of entries. These log files can be sent to Uptivity Discover 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 **ERROR** providing the least amount of detail and **DEBUG** providing the greatest. You can also turn **OFF** logging altogether. Unless instructed to do otherwise by your Discover administrator or Uptivity Discover Support, you should not change the logging level.

To configure system settings if necessary:

1. Right-click the On-Demand Client icon in the system tray and select **Settings**.

2. Click the **System** tab.

3. From the drop-down list, select the desired **Logging Level**.

4. Click **OK**.

Close 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 the On-Demand Client icon in the system tray and select **Exit**, then click **Yes**.
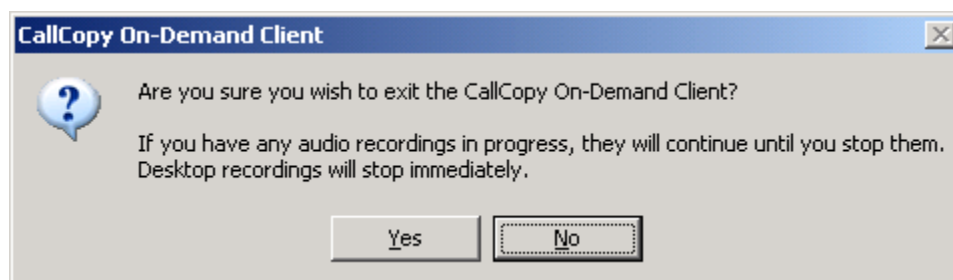
Obtain Client Logs for Uptivity Support

If problems occur with this application, you or your Discover administrator may need to contact Uptivity Support for further assistance. The Support team will need the latest On-Demand Client log files for use in troubleshooting. These logs can be found in and copied from the following directory:

\Users\User\AppData\Roaming\CallCopy\OnDemand\logs

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 *'yyyy-mm-dd.log'* format (for example, 2010-09-01.log).

Document Revision History

Revision	Change Description	Effective Date
0	Initial release for this version	2015-02-13