



CallCopy[®]

Innovations in Call Recording
and Contact Center Solutions

cc: Discover Administration Manual Version 4.5, Revision 3

March 2012

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Reference Guide

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Security Classification: CallCopy Confidential

Distribution: Approved internal CallCopy staff only and licensed CallCopy customers

Note: Applicable non-disclosure agreements must be in force for authorization.

Revision History			
Revision	Change Description	Author	Effective Date
0	Initial Release	Matt Madzia	5/18/2011
1	Updates	JThomas	6/8/2011
2	Added section in Schedules explaining how/why schedules can be related to a Core.	JThomas	11/08/2011
3	Corrected page 47, Look for Code/Transcode by Board setting. Code number sequence was inverted. Copy was 1+voice board ID. Correct format is voice board ID+1, ex. '31' for Voice Board 3. Based on feedback from E. Kononovich. Corrected page 46, New Transcoding Delay setting is minutes, not seconds. Based on feedback from Mitch Sharma and Matt Garrett.	JThomas	03/22/2012
4	Revised page 19 to reflect that phoneIDs must be removed from deactivated agents to be reused. Revised page 78 to suggest restarting Service Loader if not all services show in the Service Manager.	GGeorge	06/16/2014

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Introduction

cc: Discover is a workforce optimization (WFO) suite that interfaces with your existing ACD/PBX technology and personal computers. It enables organizations to maximize customer satisfaction by leveraging call recording, quality management, screen capture, speech analytics, and performance management capabilities.

Most cc: Discover suite modules and services are administered through a Web Portal.

This manual provides System Administrators with information required to use the functionality of cc: Discover's Administration tab.

This manual assumes that the system administrator is familiar with

- The ACD/PBX configuration relative to the cc: Discover and all relevant settings and identifiers for their location.
- Basic Windows PC usage such as right and left clicking the mouse.
- Basic computer networking.

Web Portal Basics

Requirements

The CallCopy Web Portal has a light-weight administrative system, but the Web Player component does have minimum system requirements due to the processing required for full audio and video playback. With those tasks in mind, CallCopy recommends exceeding the minimum system requirements listed below.

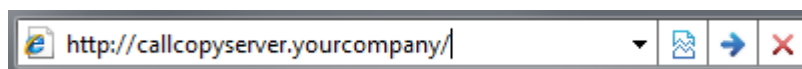
- Microsoft Windows XP/2003/Vista/2008/7
- Internet Explorer 7; Firefox 3.0
- Microsoft Silverlight browser plug-in, v4.0 or higher
- 2.0Ghz Processor
- 1GB RAM
- 1280 x 800 screen resolution at 16 bit color depth

Logging In

The CallCopy Installation team will provide you with a user account with system administrator level privileges during installation and Administrator training. Your User account will consist of a Username and Password

It is recommended you change your password from the default provided as soon as possible.

Additionally, a hostname or IP address for the server will be established so that you may access the web-based administration interface.



Type in the hostname or IP address for your server into your browser's address bar (http://callcopyserver.yourcompany in the example above). You will be presented with a login page similar to the one displayed below.



Login Screen Fields

Login Mode: There are two authentication modes available.

Database mode utilizes cc: Discover's internal user database that has been populated from manually entered user accounts.

Active Directory Mode This mode uses Kerberos authentication to validate an Active Directory user is logged in and a member of the proper AD groups to access the CallCopy system. With this mode, entering a username and password is not necessary as the user is already logged into the computer with their domain credentials.

Username: Enter your CallCopy username

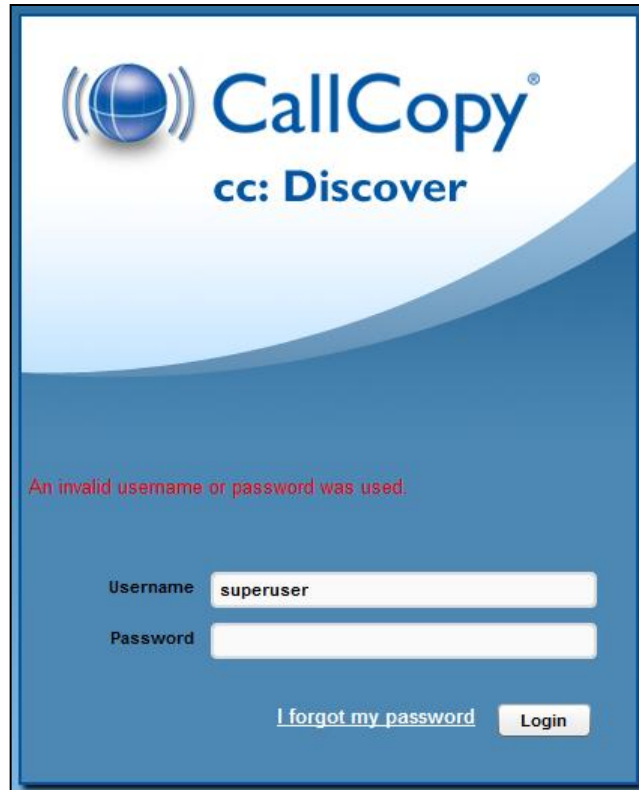
Password: Enter your CallCopy password

Fill in the listed field and click the '**Login**' button to continue.

Login Errors

If your login fails you will be presented with the following error:

"Username or password is incorrect."



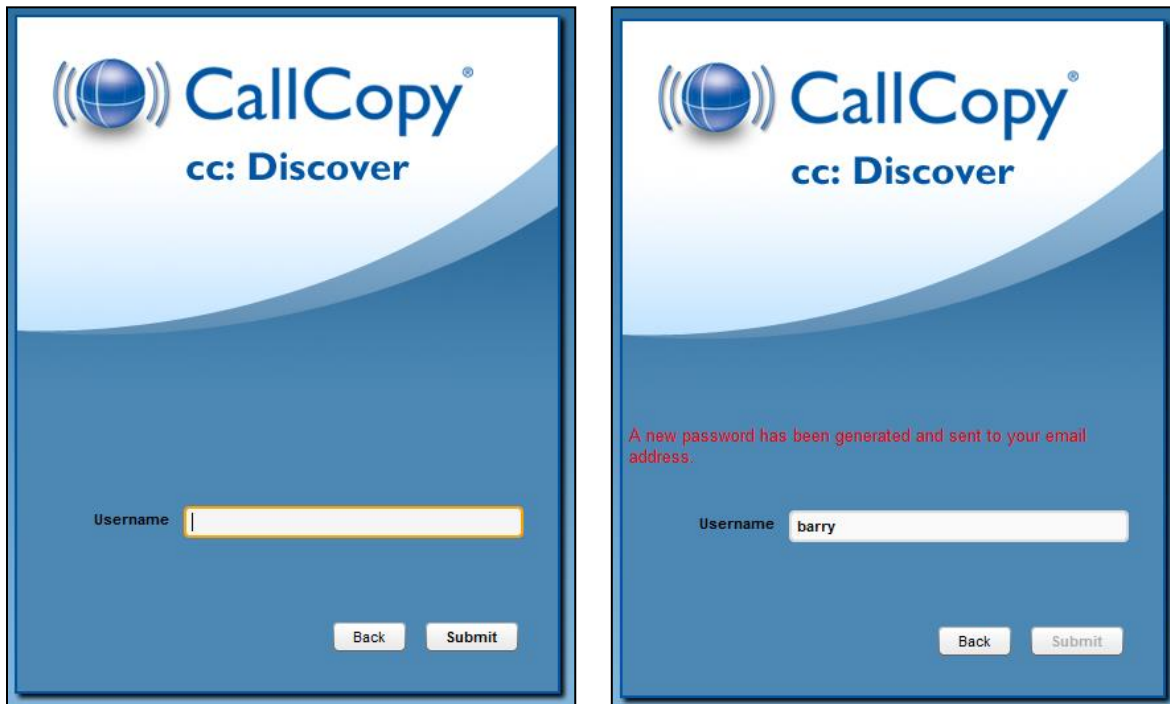
Note: Passwords are case sensitive. If you are unable to login using the username and password you believe to be correct, please contact your CallCopy Support provider.

“Forgot Password” Reset

If you are unsure of or have forgotten your password, you can use the “Forgot Password” function on the login page. Your password will be reset and a temporary password will be e-mailed to you if you use this option.

To use the feature, first click the **‘Forgot Password’** link on the login screen.

You will be taken to a page asking for the username that you wish to reset the password for. Enter the username and click **‘Submit’**.



If the system is able to locate your username, a randomly generated password will be sent to the email address associated with your username. Once you have logged into the system you will be able to change your password.

If there was an issue locating your username, or if your user account does not have an e-mail address associated with it, a “User doesn’t exist, or e-mail address unavailable” message will appear. Please contact your cc: Discover system administrator to resolve this issue.

Locating Version Number

The version number for your cc: Discover software is displayed in the upper-right corner of the login page. This version number can be useful for locating correct documentation for your software and when obtaining support for your system.



Navigating the Web Portal

Web Portal navigation is achieved by functional tabs and menus. The tabs available depend on the user's security permissions and the cc: Discover modules purchased. The navigation menu for a functional tab is on the left side of the page.

On the navigation menu, pages are organized under menu headers. Clicking a menu header will display the list of page links, menu items, or other content. When you click on a header to display its content, any other open sections of the menu will collapse. You can expand that section again by clicking on its header.

cc: Discover

Home Web Player Coaching Reporting Administration Logged in as su

Call List Live Monitor

Calendar

March, 2011

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Agent

CallCopy group

Queue

Group

Categories

Filter Current Filter: **Time Recorded** X

	First Name	Last Name	Extension	Time Recorded	Duration	Score	CallerID ANI	Call Direction
▶	BOBBY	KIM	1151	3/28/2011 9:27:38 PM	00:04:15	-		O
▶	ROSALIND	MOODY	1174	3/28/2011 8:17:26 PM	00:07:44	-	2123845296	I
▶	FERN	MORSE	1419	3/28/2011 5:41:05 PM	00:06:12	95.7 %		O
▶	WALTER	JUAREZ	1357	3/28/2011 5:34:56 PM	00:08:11	-		O
▶	PERRY	FARMER	1053	3/28/2011 2:33:45 PM	00:04:15	-		O
▶	JOANN	ABBOTT	1034	3/28/2011 11:08:33 AM	00:03:57	-		O
▶	MABEL	BOYER	1051	3/28/2011 10:42:54 AM	00:08:11	-	2127917495	I
▶	KATELYN	MCCLURE	1320	3/28/2011 9:45:52 AM	00:07:44	97.1 %		O
▶	CORA	LOTT	1427	3/28/2011 9:37:02 AM	00:08:11	97.7 %	2127993476	I
▶	MABEL	BOYER	1315	3/28/2011 4:50:13 AM	00:07:44	-	6145536393	I
▶	NELDA	CONRAD	1289	3/28/2011 4:06:13 AM	00:08:11	87.1 %		O
▶	NELDA	CONRAD	1254	3/28/2011 1:46:25 AM	00:04:15	-		O
▶	KATELYN	MCCLURE	1043	3/28/2011 12:52:25 AM	00:08:11	-	2122934868	I

Changing Your Password

Clicking on the 'Change Password' link in the upper right-hand corner of every page will direct you to a page that prompts you to enter a new password, and then confirm the password you have just entered. After you have entered your new password, click the Save button to save the new password.



The screenshot shows the top navigation bar of the CallCopy web portal. It features the CallCopy logo on the right and the text "Logged in as superuser | Change Password | Logout" on the left. Below the navigation bar is a form titled "Change Password". The form contains two input fields: "New Password:" and "Confirm New Password:". The "New Password:" field has a cursor in it, and the "Confirm New Password:" field is empty.

Logging Out

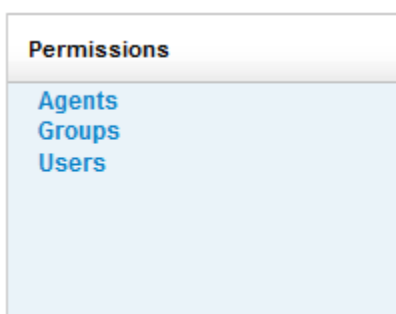
Once you have completed your session, it is very important to log out, for security purposes. To logout, simply click the '**Logout**' link located at the top-right of every page. Once you have successfully logged out, you will be returned to the login window.



Permissions

Permissions define what records each end-user can access and the actions that can be taken on those records.

To locate the Permissions menu, click the Administration tab. Expand the Permissions menu located on the left side of the page. Click any of the options to go to the respective Permissions settings page.



Agents are people who will be recorded. Each agent is an individual who may have one or more Phone IDs (extensions) associated with his/her cc: Discover profile. Agents cannot access cc: Discover unless they are created as Agent-Users.

Groups are collections of agents. They are most commonly used to control users' access to agents, to assign forms for evaluating agents, and for reporting. An agent may belong to one group, multiple groups, or no groups. Examples of groups include:

- Departments (sales, service, etc.)
- Teams (John's Team, Jane's Team, etc.)
- Clients (for an outsourcer, Client A, Client B, etc.)

NOTE: *These are also sometimes called CallCopy groups to distinguish them from ACD groups.*

Users are individuals who have access to agents' call records for playback or evaluation. User Permissions determine which records that User can access and what actions that User can take on those records.

Agents

Agents are people who will be recorded by cc: Discover. They may have one or more Phone IDs (extensions) associated with their profile. For desktop screen capture, the profile also identifies the agent's network login information.

In the Permissions menu, click Agents to display the Agent List.

Agent List			
Quick Search :	<input type="text"/>	Go	Show Active Agents ▼
		Import	Export
		View Report	Add Agent
Name ▼	Status	Phones	Groups
Agent, Bob	Active	8957	Boss
Anderson, Chris	Active	5031	Boss, Developers, Testers
Bohac, Ray	Active	5525, 5526, 5527	Boss, Executives, Testers

The list displays the following information for each agent:

- **Name:** Appears in '*Last Name, First Name*' format. This field is sortable by clicking the column header.
- **Status:** Can be Active (i.e., agent can be recorded or evaluated, etc.) or Inactive (i.e., not in use). This field is sortable by clicking on the column header.
- **Phones:** Lists any phone IDs associated with the agent.
- **Groups:** Displays what CallCopy groups the agent is a member of.

To help locate specific agents quickly, the Agent List has a Quick Search field at the top of the list. You can enter the name of the agent, and the field will show a list of possible matches. You can also toggle between showing active agents only and showing all agents from the drop down menu at the top of the page.

Add an Agent

Click **Add Agent** located at the top of the Agent List. In the **New Agent** form, enter the necessary information and click Save. Click Back to return to the Agents List.

New Agent

First Name :

Last Name :

Employee ID :

Email Address :

System Username :

System Domain :

CRM Username :

Server Node : Master Node ▼

Phone ID's :

✕

+

On-Demand Settings

Allow Recording by DeviceID <input type="checkbox"/>	Prevent DeviceID Changes <input type="checkbox"/>
Allow Recording by Device Alias <input type="checkbox"/>	Prevent Setting Changes <input type="checkbox"/>
Allow Desktop Recording <input type="checkbox"/>	Prompt for DeviceID <input type="checkbox"/>
Allow Call Updates <input type="checkbox"/>	
Allow Recording Stop <input type="checkbox"/>	

Agent-User Settings

Add Agent As User *(Creates a special user account)*

Username :

Password :

General Information

Fill in the **First Name** and **Last Name**.

Employee ID: A tracking number that you can assign to each agent. Employee ID is not a required field; it is typically used as a unique numbering system to identify employees, often mirroring some form of internal employee identification system.

Email Address: The unique email address for this specific employee, if applicable. This is used to automatically email completed Quality Assurance forms directly to an agent.

System Username: Mainly used for recording desktop activity. The System Username would be the Network ID the Agent uses to login to the Windows® Network. The recorder would then use the System Username to locate an Agent's desktop. This username can also be used for recording standard desktops, if all of the agents are required to log into their PC.

System Domain: The Windows® domain that the Agent logs in to. Only specify a domain if the Agent has Windows® network IDs on more than one Windows® domain, and you wish to only record the desktop activity on that specific domain. This field may be left blank.

CRM Username: This field is typically used in conjunction with an API call from a CRM, and is an additional relational value that can be employed with 3rd-party application integrations.

Server Node: Allows you to assign an agent to a specific recording server for distributed multi-node configurations. For single node systems, the default 'Master Node' setting will be the only option.

Phone IDs: The logins and/or extensions associated with each Agent.

On-Demand Settings

The following settings are used in conjunction with the cc: Discover On-Demand Client, which is a desktop utility. Please refer to the On-Demand Application Guide for more information.

Each agent must be individually configured for use with the On-Demand Client. The following is a list of the available settings for each agent:

Allow Recording by Device ID / Voice Port / Extension: This setting will allow the agent to record using the physical device extension.

Allow Recording by Device Alias / Agent Number / Phone ID: This setting will allow the agent to record using a device alias, which is a device ID that does not physically exist, but is mapped to an existing physical device. This allows the agent to use different physical devices while using the same extension.

Allow Desktop Recording: This setting allows the agent to start and stop the screen capture agent feature, if it is installed on their machine. The screen capture agent records the activity on the agent's screen for later retrieval.

Allow Call Updates: This setting allows the agent the ability to update the call recording with additional information. These correspond to the User Variables found under the **Settings → On-Demand Application** page.

Allow Recording Stop: This setting will allow the agent the ability to stop call recordings that they initiate or that are already in progress. If you are using a Recording 100%, Update Retention scheduling scenario (see Chapter 2), this allows the user to stop the recording even if it is set to always record.

Prevent Device ID Changes: This setting prevents the agent from setting or changing their device's ID / extension / voice port from the Client. When this option is selected, the device ID must be set up in the **Settings → Stations** page. Also note that if this option is selected, you cannot also select **Prompt for Device ID**.

Prevent Setting Changes: This setting prevents the agent from changing any other settings beside the Logging Level and Device ID / Extension / Voice Port. To prevent the user from changing the Device ID, you will need to check **Prevent Device ID Changes**.

Prompt for Device ID: This setting will prompt the agent to input their physical device's ID / extension / voice port each time they log in. This setting cannot be used with the **Prevent Device ID Changes** set checked.

Insight Settings

Allow Access through Desktop: For systems that have purchased and installed the cc: Insight product, this setting allows the agent to load and access the Agent Desktop application. For more information see the *cc: Insight Administration Manual*.

Agent-User Settings

Add Agent as a User: This option creates a user account with the same information as the agent account. This is a quick way to create accounts for agents who also need to log into the Web Portal to play back calls, view reporting data, or perform other user-only functions.

Permissions

View or Edit an Agent

On the Administration tab, click an agent from the Agent List. This will display the agent's information.

Edit Agent [Deactivate] [Save] [Cancel]

First Name :

Last Name :

Employee ID :

Email Address :

System Username :

System Domain :

CRM Username :

Server Node :

Phone ID's :

On-Demand Settings

Allow Recording by DeviceID Prevent DeviceID Changes

Allow Recording by Device Alias Prevent Setting Changes

Allow Desktop Recording Prompt for DeviceID

Allow Call Updates

Allow Recording Stop

Agent-User Settings

Add Agent As User *(Creates a special user account)*

Username :

Password :

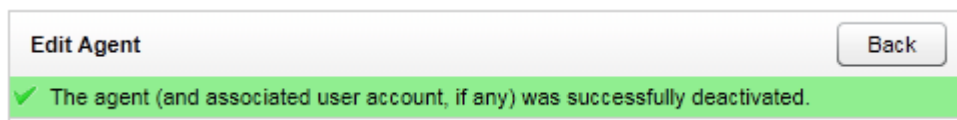
On the Edit Agent page you can update any relevant information. The most common use is to add or remove Phone IDs. If you make changes, click Save. You will be returned to the Agent List.

Deactivating Agents

Agent accounts cannot be removed from the system entirely. This is done to maintain historical accuracy for reporting data. If an agent account is no longer being used, it can be deactivated to hide it from being displayed.

In the Agent List, click the Agent you wish to deactivate.

Click Deactivate. The following message will be displayed:



The agent will now appear in the Agent List only if All Agents is selected in the filter at the top of the page. The agent's Status will be Inactive. Agents can be reactivated by clicking them in the Agent List and clicking Reactivate.

If you wish to reuse the phoneID/extension/device for another agent, edit the deactivated agent as described previously and remove the phoneID from the agent's information.

Assigned Agents Report

This report provides a summary of all Agents that are configured within the system.

First, access the Agent List by selecting Agents in the Permissions menu.

Click View Report.

To display the report, set the Status option to view Active, Inactive, or All Agents. Click Generate Report.

System ID	Agent	User Name	Status	Phone ID
1	CHARLES, WILLARD		Active	4001
2	AGUIRRE, CHERI		Active	4002
3	DELACRUZ, KIRK		Active	4003

Permissions

The report will list the following information:

- **System ID:** This is the cc: Discover database index value for the agent. This auto-increments as agents are added to the system. The first agent added to the system will be "1," and so on.
- **Agent:** Name of the agent in 'Last Name, First Name' format.
- **Username:** The System Username entered for the agent.
- **Status:** Status of the agent.
- **Phone ID:** These are the **Phone IDs** assigned to the Agent. These may be the physical devices on the ACD/PBX system which are associated with the Agent in a fixed-seating environment, or phone extensions and/or phone login IDs associated with the Agent in a free-seating environment.

Importing Agents

Agents can be imported into the system in batches using the CSV (Comma Separated Value) file import function. If you have a database or Excel spreadsheet of agents, you may be able to generate a CSV data file of your agents. That information can then be imported into cc: Discover, saving time by minimizing data entry tasks.

A file must be in the following format: `ident, first_name, last_name,active, sys_username, sys_domain, employee_id, email1, phone1;phone2;phone3; ,secureid, secureall, promptid, allowrecordid, allowrecordalias, allowrecorddesktop, allowupdateaudio, allowrecordstop`

To begin this process, create the CSV file and store it on a local or network drive.

Click **Import** on the Agent List. Browse to locate and open the file. Then click **Upload File**.

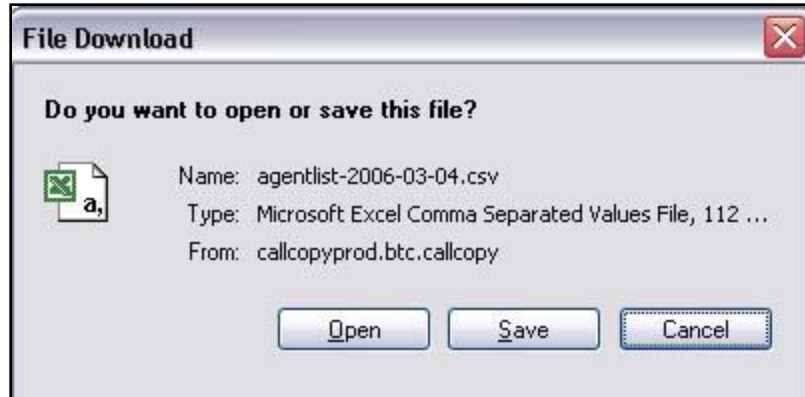
cc: Discover verifies that the data is in the correct format and that the CSV data does not duplicate existing agent names or Phone IDs. If the data is verified, click **Import** to create the agents. Otherwise, review the error message and make the necessary corrections.

NOTE: *Agent data can be added or extracted via the CallCopy API. Please refer to the CallCopy API Manual for more information.*

Exporting Agents

Click **Export** to generate a CSV file of Agent information. This allows you to create a back up file of the Agent configuration data stored in the cc: Discovery database. You may also use this list to import Agent information into other applications.

This function will prompt you to download a file to your local system:

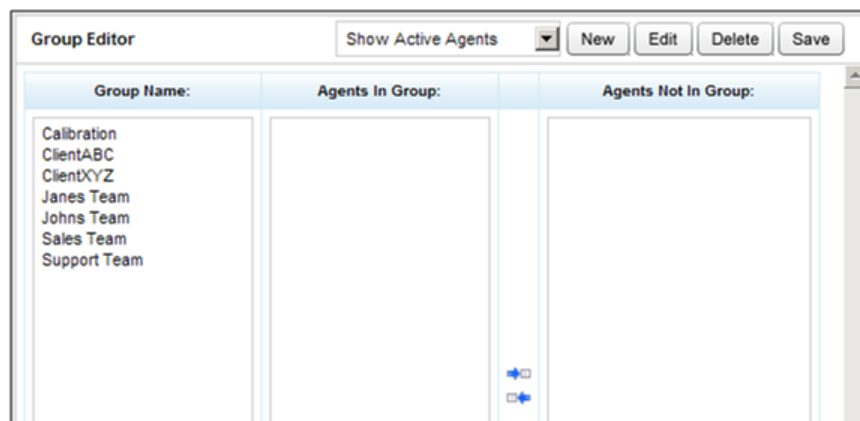


Follow the prompts to choose the location to save the CSV file.

Groups

A Group is a defined list of agents. CallCopy groups are often used to mirror the labor/hunt/skill groups on your ACD/PBX. Supervisors and managers of these groups are then given a cc: Discover user account with specific permissions to access records, evaluations, and reports for agents from the groups they manage.

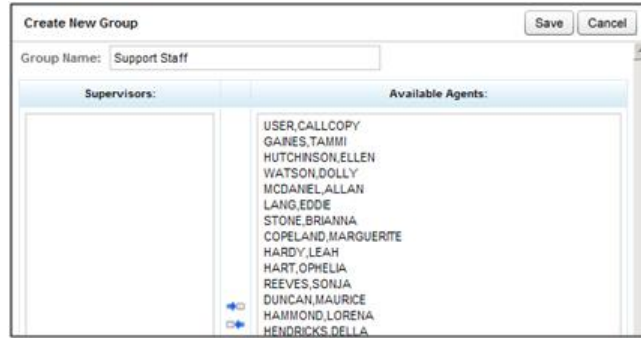
Click Groups in the Permissions menu. The Group Editor displays a list of current Groups. Click any group to see agents in it. Use the dropdown list to filter agents by Active/Inactive status. Inactive agents appear in red text.



Create a New CallCopy Group

In the Group Editor, click **New**. Type in a new group name. Click **Save**

Permissions



Group names must be unique. If a Group already exists with the name you have chosen, the following error will be generated: "That group name already exists! Change the group name and try again."

Delete a CallCopy Group

Deleting groups is not recommended. It will affect historical reporting because the group will not be available as a filter. Also, deleted groups cannot be recovered. Deleting groups does not delete the agents in those groups.

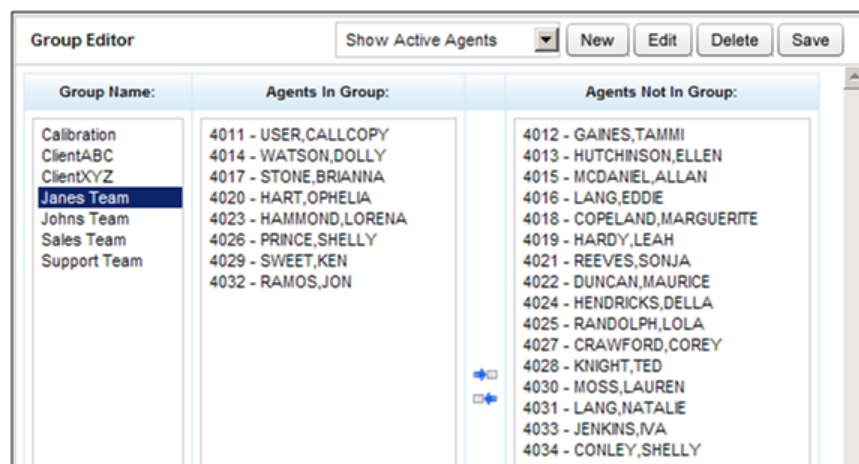
To delete a group, click the group and click Delete.

You will be presented with a confirmation message. If you wish to delete the Group, click OK.



Add/Remove Agents in a CallCopy Group

In the Group Editor, click a group.



From the Agents Not in Group box, choose the agents you wish to add to the group. You can use the Control or Shift keys to select more than one agent at a time.

Click the ← button to insert the agents into the group.

If you need to remove agents from the group, then click the agent or agents in the **Agents in Group** box and click on the → button.

When the **Agents In Group** box properly reflects the Agents in your Group, click **Save** to save the changes.

Users

Users are individuals who have access to agents' call records for playback or evaluation depending on the permissions granted to them.

Click **Users** in the **Permissions** menu. The CallCopy **User List** shows all cc: Discover users.

Use the Quick Search field to locate specific agents. You can enter the name of the agent, and the field will drop down with a list of possible matches.

User List		Quick Search :	Go	Add User
Name	Username			
Administrator2	superuser			
asdf	abcde			
Ben Wheless	bwheless			

Note: | *If your network has multiple cc: Discover Web servers, this list is relative to the server (i.e., URL) you are logged onto.*

Create a New User

Click **Add User** located at the top of the **User List**. The screenshot on the following page shows the window that will pop up.

Enter a **Username**. Usernames must be unique. If you try to save a new User with a Username that already exists, then you will receive the following error: ***That username already exists! Change the username and try again.***

Note: *cc: Discover has no restrictions on characters and spacing in the username. However, if the system is integrates with Active Directory (AD), AD might have restrictions.*

Enter a password for the new User. Passwords must be at least 6 characters long. There are no character restrictions for passwords.

Permissions

Type in the full name of the User (Ex: John Doe).

You may choose to copy the rights from another User. To do so, simply choose the User listed in the **Copy From** dropdown box.

For legacy cc: Discover installations (i.e. prior to version 4.0), a **User Quota** sets disk space limits for the user. This value is in megabytes. A quota must be assigned to any User who can set a schedule. If the Quota is left blank, any schedules other than system schedules created by that User will fail to write records, as the User has no disk storage space. This value really only applies when non-administrators are creating schedules.

Note: See *New User* graphic below.

System Permissions

Grant superuser access: Grants the User full administrative permissions to all functions. This permission should only be granted to users that should have full control to add, delete, or change any information in the system.

Allow password changes: Allows the User to modify their own password in cc: Discover. If unchecked, a system administrator will have to modify the password for the User.

Allow Scheduling: Allows the User to set system-wide schedules. Recordings based on system schedules are not governed by the disk quota of the User who created the schedule. This is typically administrator-level permissions.

Allow system configuration: Allows the User to modify system configuration settings. This should only be given to system administrators.

Allow file deletes: Allows the User to delete records from the system using the CallCopy Player™.

Allow Archive Administration: Allows the user to create and edit Archives. This is an administration-level permission.

Allow user administration: Allows the User to add, edit, and delete other system Users. This is administrator-level permissions.

Allow agent administration: Allows the User to add, edit and delete agents.

Allow group administration: Allows the User to create and edit CallCopy Groups.

New User
Cancel Save

Username : Account Locked

Password :

Full Name :

Email Address :

Copy From : <None Selected>

User Quota (MB) :

Display datetime by timezone :

Date & Time Display Format : AM/PM Military Time

System Permissions

Grant superuser access : Allow password changes : Allow Scheduling :

Allow system configuration : Allow file deletes : Allow Archive Administration :

Allow user administration : Allow agent administration : Allow group administration :

Coaching Permissions

Allow QA View Forms : Allow Edit QA Form : Allow Perform QA Evaluation :

Allow Edit Completed QA : Allow Delete Completed QA : Allow Content Management :

Reporting Permissions

Allow call reporting : Allow QA reporting : Allow system reporting :

Allow Audit reporting : Allow survey reporting : Allow Analytics Reporting :

Allow Report Subscriptions :

Player Permissions

Allow viewing own records : Allow viewing all records : Allow viewing video :

Allow Export via Download : Allow Export via Email : Allow Blackout Override :

Allow Comments : Allow Live Monitor :

Survey Permissions

Allow View Surveys : Allow Edit Surveys : Allow Survey Administration :

Analytics Permissions

Allow View Analytics : Allow Analytics Management :

Legacy Player Permissions

Allow Export Call List : Allow Play Link in Export : Allow Export via FTP :

Edit User Fields

Account Number <input type="checkbox"/>	CSN <input type="checkbox"/>	3 <input type="checkbox"/>
4 <input type="checkbox"/>	5 <input type="checkbox"/>	6 <input type="checkbox"/>
7 <input type="checkbox"/>	8 <input type="checkbox"/>	9 <input type="checkbox"/>
10 <input type="checkbox"/>	11 <input type="checkbox"/>	12 <input type="checkbox"/>
13 <input type="checkbox"/>	14 <input type="checkbox"/>	15 <input type="checkbox"/>

Unattached CallCopy group

AgentGroup5004
Team Awesome

Attached CallCopy group

↔

Group

ACD Gate

✕

+

✕

+

Coaching Permissions

Allow QA View Forms: Allows a user to view evaluations on any group to which that user has permission.

Allow Edit QA Form: Allows a user to build and edit a QA form within any group to which that user has permission.

Allow Perform QA Evaluation: Allows a user to issue an evaluation upon an agent in any group to which that user has permission.

Allow Edit Completed QA: Allows a user to alter the score or responses of any completed evaluation within any group to which that user has permission.

Allow Delete Completed QA: Allows the user to delete individual QA evaluations within groups to which that user has permission. This allows for a disputed score to be deleted, and then reissued when appropriate.

Allow Content Management: Allows the user to upload and manage files in the Content Library.

Reporting Permissions

Allow call reporting: Allow the user to run reports based on call detail data.

Allow QA reporting: Allow the user to run reports based on QA data.

Allow system reporting: Allow the User to perform system-level reporting. This is typically administration-level permission.

Allow audit reporting: Allow the user to run audit reports to monitor actions taken by other users in the system.

Allow Survey Reporting: Allow the user to run survey reports (Only for systems that have the optional cc: Survey product installed)

Allow Analytics Reporting: Allow the user to run survey reports (Only for systems that have the optional cc: Analytics product installed)

Allow Report Subscriptions: Allow the user to set a specific report to run at a scheduled time, and provide the results to multiple users via e-mail.

Player Permissions

Allow viewing own records: Allow the User to view calls recorded from their associated agent account.

Allow viewing all records: Allow the User to view all records in the system, regardless of Group and/or Gate settings.

Allow viewing video: Allow the User to view video screen capture associated with records.

Allow Export via Download: Allow the User to export records from the Web Player directly to their workstation.

Allow Export via E-mail: Allow the User to export records from the Web Player and be sent to an e-mail address directly from the system.

Allow Blackout Override: If the system has the option of blacking out data from recordings, enabling this setting will allow the user to view blacked-out data that a normal user would be unable to view.

Allow Comments: Enables the user to leave bookmark comments attached to call records. These bookmarks can be personal or public to all other users that can view the record

Allow Live Monitor: Allows the User to listen to audio of contacts in "real-time." This feature is not available on all systems.

Survey Permissions (with Optional cc: Survey product installed)

Allow View Surveys: Allows the user to view completed Survey results.

Allow Edit Surveys: Allows the user to manage Survey forms.

Allow Survey Administration: Allows the user to manage Survey configuration.

Analytics Permissions (with Optional cc: Analytics product installed)

Allow View Analytics: Allows the user to view Analytics data in the Web Player.

Allow Analytics Management: Allows the user to manage Analytics configuration.

Legacy Player Permissions (CallCopy Player Application Only)

Allow Export Call List: Enables the user to export the current call list view to an Excel file.

Allow Play Link in Export Call List: Displays a hyperlink in the exported list that will play the selected recording back directly through the workstation's default media player.

Allow Export via FTP: Allow the User to upload records to FTP sites using the CallCopy Player™.

Group Permissions

Group permissions give a user access to call records and other items for a set of CallCopy or ACD system groups. A User has access to the Groups that are listed in the **Attached CallCopy Group** list.

Permissions

To attach a CallCopy group to a user, select a group from the **Unattached CallCopy Group** list. You can use *Control* or *Shift* to choose multiple groups. Click the **Attach** (➔) button.

If there are Groups in the **Attached CallCopy Group** list you wish to remove from the User's access permissions, select the Group or Groups and click the **Remove** (⬅) button.

To add an ACD Group or Gate/Queue to the user's permissions, identify the Labor/Hunt/Skill Groups the User will access, and enter them in the text field below the appropriate ACD Group or Gate list. Click the **Add** (+) button to add a value to the User's allowed lists.

To remove a value, select it from the list and click the **Delete** (✖) button.

When you have completed entering all needed permissions, click the **Save** button at the top-right of the form to save the User's profile.

Edit a User

Editing a user gives you access to the same data fields listed in the 'Create a New User' section. To open a user's properties for editing, select the user record from the User List, and the Edit User page will load.

When you are done editing information, click **Save** and you will be returned to the User List.

Edit or Delete a User

To open a user's properties for editing, click the user record in the User List, and the Edit User page will load.

Users can be deleted from the Web Portal. The account information is retained in the cc: Discover database but cannot be seen in the portal. To delete a user, click the **Delete** button on the top-right corner of the form. You will be presented with a confirmation button. If you wish to delete the User, click **OK**.



Lock a User Account

Locking a user account prevents the user from logging into cc: Discover but retains the account information used for reporting. If the account is needed again, it can be unlocked and will function normally. Users whose accounts have been locked receive a locked account message if they attempt to login.

Accounts should be locked if a user leaves the company, transfers to another role in the company and no longer needs access to cc: Discover, or is prohibited by the company from accessing the system for other reasons.

To lock a user account, click it in the User List and select the Account Locked option.

Clear this option to unlock the account.

Note: For additional information on locking out users, see the section about Web Portal settings.

System Settings

The options in the Settings menu enable you to administer the settings and displays of your system. There are also options that allow you to customize CallCopy to your operating environment. You can change how files are named, the type of data stored with each file, the names of custom variables associated with a recording, and other terms displayed in the CallCopy Player™ and the Web Portal.

Your installation engineer will work with your staff to configure your system. Should you ever desire to change these settings, please refer to this chapter for definitions and examples. You may wish to consider contacting your CallCopy support provider before making any changes to your system settings.

Archiver

Typically, disks on a local CallCopy system only have enough space to store recordings (i.e., audio and video files) for a short time period. By establishing archives, additional drives can be attached so that recordings can be stored indefinitely.

Recordings can be archived to local attached disks or to Windows Network File Shares (SMB). Archived recordings are still available for playback, providing that the local disk is attached or the network file system (SMB) is properly configured and available.

Archiving is controlled by

- Archiver – This tool manages the storage of recordings and the backup of the cc: Discover SQL database. The Archiver settings page controls the overall performance of the tool.
- Archive Actions – Archive actions control archiving for types of calls. For example, Client A requires calls to be retained for one year, while Client B requires calls to be retained for two years. A One-Year-Action and a Two-Year-Action can be created to archive the calls by clients.
- Schedules – Schedules control when and what calls are recorded as well as how many days a recording is retained. Archive actions are attached to schedules to control whether the recordings are archived or purged once they exceed their retention days.

Note: *If a recording belongs to more than one schedule, the archive action for the schedule with the highest priority takes precedence. If priorities are equal, the earliest created schedule takes precedence.*

Note: *Retention Days and Archive Actions are applied when the call is recorded. Changing this value in a schedule only applies to calls made AFTER applying the schedule change. Changing this value DOES NOT apply to already recorded records.*

Before you create a schedule that will require archived recordings, you should first configure the archive action. Typically, only administrators have permissions to create archives, so administrators will need to be responsible for communicating archive settings to users. Schedules should be audited on a monthly basis to ensure all necessary information is being archived.

Note: | See the section on Archive Actions and Schedules for more information.

Archiver Settings

The main purpose of the Archiver settings page is to throttle disk and network usage caused by Archive Actions. This will prevent cc: Discover Archive Actions from overwhelming local system resources or network bandwidth

Note: See Archiver Settings graphic below.

General Settings

Archiver Server Host: The IP Address or Hostname of the server running the Archiver service.

Archiver Server Port: The TCP Port the Archiver service is configured to listen on. (Default is 5639)

Purge Limit: This setting throttles the number of records purged from the local CallCopy system per Purge job. A setting of 0 (zero) means unlimited: the system will purge all records ready to be purged in the database.

Purge Interval: Time interval in minutes between running Purge jobs.

Archive Limit: Number of records sent to the archive per Archive job. A value of zero (0) will cause no recordings to be archived, so it's best to have a value greater than zero.

Archive Interval: Time interval in seconds between running Archive jobs. The system default is 60 seconds, and this value should be sufficient for most installations.

Enable Settings Reload: If set to 'Yes', settings on this page will automatically reload on an interval. If set to 'No', the service will need to be restarted for the settings to take effect.

Settings Reload Interval: The time in seconds that the module will reload its settings from the database. Any changes made to the settings on this page will not take effect until this interval has completed.

Hash Filename: When the record is archived, associated files are renamed as the SHA-1 hash of the original path the record was stored at. This is to prevent possible duplicate filenames in the archive location. This setting is not normally needed unless the original recording files have the potential of being named the same.

System Settings

Archiver Settings Save

Archiver server Host :

Archiver server Port :

Purge Limit :

Purge Interval (minutes) :

Archive Limit :

Archive Interval (seconds) :

Enable Settings Reload :

Settings Reload Interval (seconds) :

Hash Filename :

Enable Empty Directory Purge :

Enable Record Purge on No RTP :

System Purge Action

Use Schedule :

Start Time : : End Time : :

Removable Media

Removable Media - Playback Temp File Location :

Removable Media - Temp File Retention(days) :

Send Users Email Alert :

MSSQL Database Backup

Enable MSSQL Database Backup :

Database Name :

Backup Filename :

Database Backup Time :
 :

Empty Directory Purge: Enabling this setting will have the Archiver module periodically scan all directories in any recording locations and remove any folders that have no files inside.

Record Purge on no RTP: This setting will remove records that are recorded when no audio is present on the line. This setting is only effective in VoIP configurations and is mainly used to compensate for false positive recording triggers in passive VoIP installations

System Purge Action

Use Schedule: If enabled, the Purge job will only run between the specified hours of the day. This setting is used to prevent overloading the system or connected environments with additional I/O during peak hours.

Start Time/End Time: The time of day restriction for the Purge job. The job will only run between these hours if the Use Schedule setting is enabled.

Removable Media Settings

Playback Temp File Location: This is the location that any records restored from DVD backup will be copied to for playback.

Temp File Retention: The number of days a restored recording will be available for playback before it will need to be restored from DVD again.

Send Users Email Alert: If set to 'Yes', the Archiver will send an e-mail notification to the user that requested a record be restored from backup when that record is available for playback.

MSSQL Backup Settings

Enable MSSQL DB Backup: Enabling this setting will have the Archiver initiate a daily backup of the recorder databases. This feature is useful if the installation is utilizing an SQL Express database that cannot use scheduled backups.

Database Name: The name of the database that will be backed up.

Backup Filename: The location of the backup file that will be used

Database Backup Time: The time of day that the backup job will be run. It is highly recommended that this time be set to the lowest usage period of the day.

Archive Actions

NOTE: Review the Archiver section for information on cc: Discover's archiving process and before creating Archive Actions.

System Settings

To create an Archive Action, browse to the **Administration** tab of the Web Portal. Under the **Settings** menu, click **Archive Actions**.

A list of the Archive Actions configured on the server will appear.

Archive Action List				Add
Identity	Name	Location	Status	
1	Back Up to NAS	\\nas-server\archive	A	

Note: An archive will still display as active (i.e., Status equals A) even if an archived location is technically unavailable. If an archived location is unavailable, the system notification tool will issue an alert.

Add/Edit an Archive Action

To edit an existing archive action, click that Action's name in the list.

To create a new Archive, click **Add**.

The Archive Action settings page will allow you to configure the desired archive actions.

Cancel Save

Edit Archive Action - 1

Name : Back Up to NAS

Storage Type : SMB

User ID :

Password :

Location : \\nas-server\archive

Archive Restriction : Archive Everything

Archive Type : Normal

Status : Active

Next Archive Action : Purge

Days Until Next Archive : 365

Use Schedule : Yes

Start Time : 01 : 00 AM

End Time : 06 : 00 AM

Number of schedules that are set to use this archive action: 0

Number of recordings in archive queue with this archive action: 0

Name: Name of the Archive Action. This name will also appear in the list of available Archive Actions in the Scheduling section.

Storage Type: Choose the available storage type. The Archiver allows archiving to the following types:

- **Disk:** The Location field must be a local drive path to Windows. The Archiver service credentials must have read/write access to the drive for proper operation.
- **SMB:** A SMB/CIFS network file storage share. If selected, the following options will appear:
 - **User ID:** If the storage location requires credentials, enter the username here.
 - **Password:** If the storage location requires credentials, enter the password here.
 - **Location:** The UNC path to the CIFS storage location used for archiving

Note: *If the cc: Discover is unable to write to the SMB file share, the cc: Discover Notification System will generate an alert.*

- **DVD:** Recordable disc media. (DVD+R, DVD-R, DVD+RW, DVD-RW single layer supported) If selected, the following options will appear:
 - **DVD Drive:** The Archiver will auto-detect any compatible DVD drives installed on the system and display their corresponding Windows drive letter assignments here. Select the drive letter to be used.
 - **Archive Time:** The time of day the Archiver will start creating the DVD archive. It is recommended this time is set to the lowest usage period for the system, as creating the archive requires high system resources.

Note: *Archive actions using the DVD storage type will only execute once per day. DVD media must be manually removed and new media inserted on a daily basis.*

Archive Restriction: This option specifies whether archived recording files are saved with Audio, Video, and Analytics data, or if only a single component will be archived with the recorded audio.

- **Archive Everything:** Archives Audio, Video and Analytics data.
- **Archive Audio Only:** Archives only the audio portion of the record.
- **Archive Audio & Analytics Only:** Archives Audio and Analytics data.
- **Archive Audio & Video Only:** Archives Audio and Video data.

Archive Type: The Archive Type determines how the files will be moved from the original location to the archive location.

- **Normal:** The files are moved to the archive location and then deleted from the original location. The cc: Discover database call records for the files are updated with the new location of the file. Users can access the archived file from cc: Discover if the archive location is accessible. Otherwise, the location must be made accessible. If the recording

was archived to a DVD, cc: Discover notifies an administrator to load the disk and notifies the user when the recording file is available.

- **Copy:** A copy of the original files is created in the archive location, and the files in the original location remain untouched. If the files are later purged from the original location, they must be manually restored for cc: Discover to access them.
- **Backup:** The files are copied to the archive location and the original files are left alone. The call records are copied to a backup table in the cc: Discover database and updated with the address of the backup location. When the original file and call record are purged, the backup call record is moved into the live database, making the file retrievable from the backup location.

Status: This is an indicator set by the administrator to show if the action is available for use. This does not affect the operation of the action or how it is attached to any recording schedules.

Next Archive Action: Sets the next desired action to be taken against the archived data. If there is multiple archive actions created, another action can be selected. This allows chaining actions together to move data between multiple archive locations. The **Purge** action can also be selected to delete the data after the archive action is performed. If no changes are to be taken on the files after the archive action completes, select **<None>**.

Days until Next Archive: This sets the number of days between the successful execution of the current archive action against the record, and the execution of the action in the **Next Archive Action** field above.

Use Schedule: When enabled, the archive action will only run during the time of day specified. This setting is used to prevent overloading the system or connected environments with additional I/O during peak hours.

Start Time/End Time: The time of day restriction for the action. The action will only run between these hours if the Use Schedule setting is enabled.

Press the **Save** button after you have entered in the appropriate options.







Note: *After an archive action is created, it can then be attached to a schedule. Refer to the section on Schedules for more information.*

Custom Extensions


This page is reserved for custom settings if Professional Services development was completed for your installation. Please contact CallCopy Support if you have any questions regarding settings listed on this page.


Disk Space Notifications


The Disk Space Notifications page can be used to monitor Free Space on any local or mapped network drives that the Archiver tool accesses. (The Archiver tool manages disk utilization for original recordings, archives, and the SQL database.) If a specified drive drops below the free space threshold set, the Archiver will send out a notification message, which will be sent to any e-mail addresses in the Notifications list that have the **Disk Alert** notice type selected.

Disk Space Notifications Settings			Add
Drive	Notification Threshold (MB)		
c:	12000	 	
d:	50000	 	
		 	

To add a drive entry to the list, click **Add** in the top-right of the page. A new entry will appear at the end of the list. In the Drive column, enter the drive letter followed with a colon. In the Notification Threshold field, enter the minimum free space (in megabytes) that needs to be available on the drive.

Click the Save icon  to add the entry to the list.

To edit an existing entry on the list, click the Edit icon . The fields in that row will become editable. Make any changes needed and click the Save icon to update the entry.

To delete an existing entry, click the Delete icon . A confirmation window will pop up. To confirm the delete, click OK.

Exporter Settings

The **Exporter Settings** manage the exporting of records via email. All features that utilize e-mail notifications will use the SMTP settings listed here.

Allow Export via SMTP :	Yes
SMTP Host :	mail.callcopy.com
SMTP Port :	25
SMTP Username :	
SMTP Password :	
SMTP Confirm Password :	
SMTP From Address :	callcopy@callcopy.com
Create Audit Trail on Export :	Yes

Allow Export via SMTP: Options available in this drop down menu are Yes and No. You can use this as a global setting to determine if Users system wide will have the ability to export records via email. If this Exporter setting is not configured with the proper mail protocol information and authentication, exporting via email will not be available, regardless of User permissions allowing it.

SMTP Host: Enter the hostname or IP address of the SMTP mail server the CallCopy server will be using to export recordings via email.

SMTP Port: Identify the SMTP port that will be used.

SMTP Username: Enter the Username for authentication onto the SMTP server.

SMTP Password: Enter the Password for authentication onto the SMTP server.

SMTP From Address: This can be any email address, real or fake. It does not have to be an address tied to the account for the entered username and password.

Create Audit Trail on Export: Clicking 'Yes' logs all exports via SMTP from the system.

Click on the **Save** button when you have finished entering your settings. In order for SMTP changes to take effect, the CallCopy Exporter and Logger modules must be restarted.

Notifications

The **Notification** page allows you to configure maintenance alerts. These alerts can be audible or email based. Multiple email addresses can be configured to allow alerts to be customized to specific users

Audible Alert Settings

These settings allow audible alerts to be played by the server PC speaker.

The screenshot shows a window titled "Notification Settings" with a "Save" button in the top right corner. Under the "Audible Alert Settings" section, there is a dropdown menu for "Enable Audible Alerts" set to "No". Below this, there are checkboxes for "Audible Alert Subscriptions": Debug, Info, Notice, Warning, Error, Critical (checked), Emergency (checked), Security, Testing, and License.

Enable Audible Alerts: Select Yes or No.

Audible Alert Subscriptions: Check which alert type you wish the server to audibly notify. Definitions for the various subscription types are detailed at the end of this section.

Disk Logging Settings

The Logger service will keep files from the current date and the previous number of days specified in the Number Of Days To Save Log Files field. Any log files older than that date will be deleted from disk.

The screenshot shows a window titled "Disk Logging Settings" with a text input field for "Number Of Days To Save Log Files" containing the value "14".

E-Mail Notification Settings

These settings help configure e-mail alerting from the server. E-mail notifications can be sent any time a log message is generated. To send e-mail, the Logger service shares mail server settings with the Exporter. To configure mail server settings see the section on *Exporter Settings* in this guide.

E-Mail Notifications Settings

Enable FloodWall : Yes

FloodWall - Number of Allowed Messages : 10

FloodWall - Number of Minutes : 1

Disk Space Notification Interval (minutes) :

E-Mail Subscription Add E-Mail

Email Address : support@mycompany.com

Subscriptions : Debug Info Notice Warning Error Critical Emergency Security Testing License Archive Disk

Email Address : pager@mycompany.com

Subscriptions : Debug Info Notice Warning Error Critical Emergency Security Testing License Archive Disk

Enable Floodwall: Enabling will throttle e-mail alerts to prevent overloading the mail server.


Floodwall - Number of Allowed Messages: This value specifies the number of email messages that the server will send per interval. Any further messages of the same type will be blocked until the interval expires.

Floodwall - Number of Minutes: This defines the number of minutes per interval.

Disk Space Notification Interval: The interval in minutes between sending low disk space e-mail alerts.

E-Mail Subscriptions

Click the **Add E-Mail** button to specify e-mail addresses that will receive alerts.

Email Address: Enter an e-mail address that will receive alerts. (Click the Delete() icon to delete an email subscription.)

Subscriptions: Check the event types the email address will to be alerted on. Definitions for the various subscription types are detailed at the end of this section.

SNMP Notification Settings

These settings help configure SNMP traps for the system. SNMP traps can be sent any time a log message is generated. Utilizing SNMP trapping requires the use of a Management Information Base (MIB) file that can be loaded in an SNMP Manager to define trap types. This file can be obtained from CallCopy Support.

SNMP Notifications Settings

Enable SNMP Notifications :

SNMP Community :

SNMP Enterprise :

SNMP Gen Trap :

SNMP Version :

SNMP Subscriptions Add SNMP

SNMP Address : ✕

Subscriptions : Debug Info Notice Warning Error Critical
 Emergency Security Testing License Archive Disk

SNMP Address : ✕

Subscriptions : Debug Info Notice Warning Error Critical
 Emergency Security Testing License Archive Disk

Enable SNMP: Enabling allows SNMP traps to be sent from the system.

SNMP Community: Optional value if required by SNMP Manager to allow the cc: Discover system access.

SNMP Enterprise: The identifier for CallCopy generated SNMP events (IANA Registered as 26393).

SNMP Gen Trap: Optional Generic type value that can be used to distinguish between multiple cc: Discover systems.

SNMP Version: Version 1 or 2 traps can be generated depending on what is supported by SNMP Managers being used.

SNMP Subscriptions

Click the **Add SNMP** button to specify an SNMP Manager that will receive alerts.

SNMP Address: Enter an IP Address/Hostname for an SNMP Manager that will receive traps. (Click the Delete(✕) icon to delete an SNMP subscription.)

Subscriptions: Check the event types the SNMP Manager will receive traps on. Definitions for the various subscription types are detailed at the end of this section.

Subscription Types

Recommended Alerts

Critical: A service or system has stopped functioning completely due to an error. It is recommended that at least one email subscription notify on this alert type.

Emergency: A service or system has stopped functioning completely due to a configuration or resource issue.

License: The system is reaching a license limitation or someone is attempting to use an unlicensed feature.

Error: A system error has occurred that caused a single operation or transaction to fail.

Security: A security event, such as multiple password failures, has occurred.

Additional Events

Warning: An event occurred that could be related to further errors. This event type is mainly used in troubleshooting and is not recommended to be enabled by default.

Info: General system information.

Notice: An informational notice regarding system events.

Testing: Enhanced debugging and development information enabled for troubleshooting.

Debug: Highest volume/detail output for all modules. This type is not recommended for alerting.

Stations

The Station List is used to manually assign Windows workstations to phones in order to facilitate recording screen activity along with the associated voice call. This page and the Stations Import page are only used for systems running the optional cc: Screen product. For more information on this page, please see the *cc: Screen Integration Guide*.

Terminology

The cc: Discover Web Portal can be customized with terminology used in your operating environment. The listed fields will change the displayed terminology throughout the entire system when modified.

Terminology Settings Save

Switch Type :	Custom
Agent :	Agent
Group :	Group
ACD Gate :	ACD Gate
Called Number (DNIS) :	Number Called DNIS
CallerID (ANI) :	CallerID ANI
Device/Port ID :	Voice Port
Agent Number (Device Alias) :	Agent Number
Group Name :	CallCopy group
User 1 :	Account Number
User 2 :	CSN
User 3 :	User3
User 4 :	User4
User 5 :	User5
User 6 :	User6
User 7 :	User7
User 8 :	User8
User 9 :	User9
User 10 :	User10
User 11 :	User11
User 12 :	User12
User 13 :	User13
User 14 :	User14
User 15 :	User15

System Settings

Switch Type: This is a list of common ACD/PBX hardware manufacturers. Choosing one of these connection types will auto-populate the terminology names with commonly used descriptions for that type. You can overwrite these defaults as needed.

Agent: This is what you call the employees you staff in your contact center. For example: Agent, CSR, TSR, Associate, etc.

Group: This is the Group setting in your ACD/PBX, for example a Hunt Group, a Skill Group, or a Labor Group. This does not refer to the CallCopy Group.

ACD Gate: This field refers to a queue. Different ABD/PBX systems have different terms for the queue, for example Application, Split, Gate, etc.

Called Number (DNIS): Dialed Number Identification Service - call identifier from the telecommunications carrier.

CallerID (ANI): Number of the calling party provided from the telecommunications carrier.

Device/Port ID: This is the ACD system's hardware identifier. It may be referred to by the ACD/PBX manufacturer as a position ID, phone port, DN, or extension.

Agent Number (Device Alias): ACD or PBX phone number/extension which calls are delivered to. This is commonly an Agent phone login or extension.

CallCopy Group: CallCopy agent group: This group is configured in "*Chapter 3 – Permissions – Groups.*"



User 1 – 15: These are custom data fields that are not normally utilized in the system. If your system is performing custom API integrations, it is common for data received from third party IVR, CRM, or ACD platforms to insert data into these fields. The fields may be renamed on the Terminology page to be more descriptive regarding the data contained within the field.



Click on the **Save** button when you have finished customizing the Terminology to reflect your operations.

Note: | *The settings on this page can be automatically populated via the CallCopy API. Further documentation regarding the API can be found in the CallCopy API Manual.*

Transcoder

A Transcoder converts raw audio files recorded by the system into compressed audio files in WAV format, optimized for storage and playback retrieval. From the Settings menu, click Transcoder to see the ones currently configured in the system.

Transcoder List :		Add
Identity	Name	
1	QA2008x86	Configure Payloads  

To view or change the settings for a Transcoder, click the **Edit** () icon on the right side of the row. Clicking the **Delete** () icon will remove the configuration.

To add a Transcoder to the list, click the **Add** button. A new entry will appear on the list. See below for settings

Configure Transcoder Settings

Each Transcoder has a list of available settings. When the settings have been configured as needed, click the **Save** button to commit the settings.

Note: See *Edit Transcoder graphic below*.

Identity: An integer value used as an internal identifier for configuring distributed transcoding environments. This ID needs to be configured in the corresponding Transcoder module INI file.

Name: A friendly name to reference the specific Transcoder instance.

Max Retries: Number of times the module will attempt to process a file before it is considered unreadable.

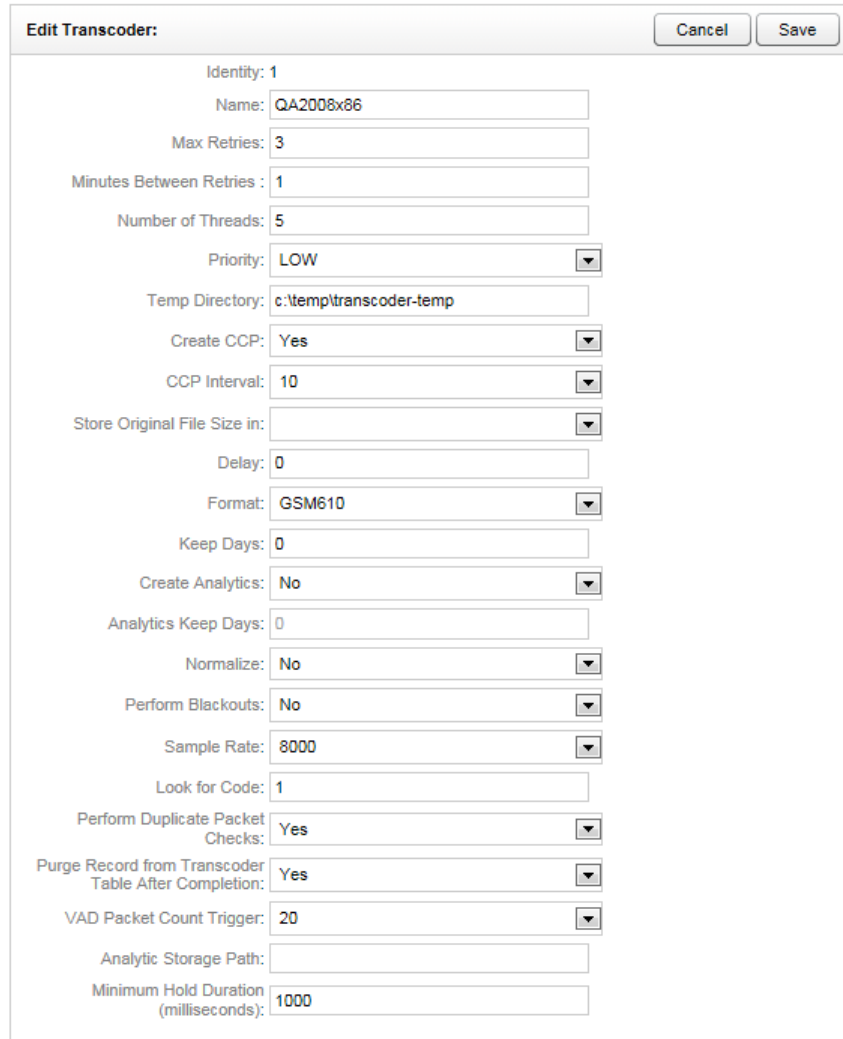
Minutes between Retries: The number of minutes to wait to retry a failed transcoding operation.

Number of Threads: Number of concurrent transcoding sessions. Raising this value may increase Transcoder module performance, but can cause performance issues with other modules if the system cannot process more concurrent threads in parallel. The default number of sessions is five (5).

Priority: System CPU priority assigned to Transcoding processing threads. Increasing this value can increase performance, but may degrade any other components on the same server. The default is "Low."

Temp Directory: Local directory where temporary conversion files are stored.

System Settings



Identity:	1
Name:	QA2008x86
Max Retries:	3
Minutes Between Retries :	1
Number of Threads:	5
Priority:	LOW
Temp Directory:	c:\temp\transcoder-temp
Create CCP:	Yes
CCP Interval:	10
Store Original File Size in:	
Delay:	0
Format:	GSM610
Keep Days:	0
Create Analytics:	No
Analytics Keep Days:	0
Normalize:	No
Perform Blackouts:	No
Sample Rate:	8000
Look for Code:	1
Perform Duplicate Packet Checks:	Yes
Purge Record from Transcoder Table After Completion:	Yes
VAD Packet Count Trigger:	20
Analytic Storage Path:	
Minimum Hold Duration (milliseconds):	1000

Create CCP File: Creates a custom graphical representation of the audio waveform from a recorded call. The representation is stored in a CCP file along with the audio file. Enabling this setting will result in faster playback times as the waveform will not need to be recomputed for each playback.

CCP Interval: Time interval (in milliseconds) between waveform data points in the graphical display. Increasing intervals can improve performance, but will create a less precise waveform display.

Store Original File Size in Field: This setting will insert the original file size of a VoIP recording in a selected USER-defined field. This is useful for diagnosing and troubleshooting network issues.

New Transcoding Delay: Delay in minutes between conversion attempts for audio files. Increasing this value may be needed for systems under heavy load, but will cause a delay in making the recording available for playback in the system.

Transcoder Format: Audio format for storing audio. The following formats are available:

- **GSM610:** (~1.7KB/s) Compresses to smaller file sizes, but can have lower playback quality. Can be played in standard media player.
- **VOX6K:** (~2.9KB/s) Higher quality audio format, but will produce audio files that are 1.8x larger than GSM.
- **VOX8K:** (~4KB/s) Higher quality audio format, but will produce audio files that are 2.5x larger than GSM.
- **CSA:** (~1KB/s) Creates smaller files than GSM610, but are the highest quality of all available formats. Requires CSA format license from CallCopy for use, files cannot be played in standard media players.
- **CSASTEREO:** (~2KB/s) Stereo version of CSA format. Creates files comparable in size to GSM, but allows additional per-channel post-processing options (per channel volume level and VAD). Requires CSA format license from CallCopy for use, files cannot be played in standard media players.

Keep Days: Value in days to keep original (raw) audio files after they have been transcoded. This setting will allow files to be recovered if there are errors in the transcoding process, but will add additional disk space usage to keep the original files available in storage. Entering a value of **'-1'** will prevent the original file from being automatically deleted.

Create Analytics: If enabled, the system will create an additional very high quality stereo PCM WAV audio file for each recording. The audio files are used for speech analytics processing. Requires optional cc: Analytics module for processing.

Analytics Keep Days: Value in days to keep stereo (analytics) audio files after they have been created. This setting will allow files to be stored for processing by a speech analytics engine, but will add additional disk space usage to keep the stereo files available in storage. Entering a value of **'-1'** will prevent the original file from being automatically deleted.

Normalize: Enables audio normalization, equalizing volume levels between PBX/Customer side and extension/agent side of a recorded call.

Perform Blackouts on Disk: Destroys any audio data recorded during periods in a call where a blackout command was received via API. *(Requires API integration)*

Sampling Rate (ms): Sample rate passed to the conversion module. Higher rates usually result in higher quality audio files, but will cause audio files to use more disk space in storage.

Look for Code: The record codes reserved for this specific Transcoder. If the CTI Core setting **Transcode by Board** is enabled, each Voice Board in the core will have its own identifier (voice board ID+1, ex. '31' for Voice Board 3). This allows a Transcoder to be dedicated to specific boards. If a Transcoder has capacity to service multiple boards, the codes can be comma separated in the field (ex. '11,21,31').

Perform Duplicate Packet Checks: Enabling this setting causes the transcoder to check for duplicate packets in recordings. Duplicate packets can occur in passive VOIP recording integrations if the customer’s recordings are not setup correctly. They will cause the recording to appear to be skipping.

Purge Record from Transcoder Table After Completion: Disabling this option will keep a record in the Transcoder queue after it has been successfully processed. This is useful for troubleshooting if reprocessing of files may be needed.

VAD Packet Count Trigger: The number of RTP packets with audio needed to trigger Voice Activity after a period of silence.

Analytic Storage Path: A hardcoded UNC or Disk path that all Analytic WAV files will be written to. Useful if files are being analyzed by a third party product.



















Note: *If this setting is used, the cc: Discover system will no longer manage the files after creation.*

Minimum Hold Duration: The amount of silence (in ms) before the Transcoder will insert a Hold event in a recording.

Configure Payload

In order for a Transcoder to properly read recorded audio files, it needs to know which audio codec is being used for the file, which for VoIP recording, is stored in the RTP Payload Type. The RTP Payload should match with the types defined in Network Working Group RFC 3551 (<http://www.networksorcery.com/enp/rfc/rfc3551.txt>). By default, the Transcoder module is configured to follow the specified RFP. Some PBX vendors specify Payload Types that do not follow the RFC. When this occurs, the audio files cannot be properly transcoded, and the audio codec must be manually configured.

To manually configure a Payload Type, click the **Configure Payload** button for the desired Transcoder. The **Transcoder RTP Payload Mappings** list will open:

Transcoder Rtp PayloadMappings: Back Add		
Payload Code	Codec Type	
0	ULAW	 
8	ALAW	 
9	G722	 
18	G729	 
72	IGNORE	 
73	IGNORE	 
99	L16	 
110	iLBC	 
116	L16	 

To change the settings for a Payload, click the **Edit** (✎) icon on the right side of the row. Clicking the **Delete** (✖) icon will remove the configuration.

Web Portal

The Web Portal page contains settings for configuring the Web Portal and Web Player. The page can be accessed by browsing to the **Administration** tab, selecting the **Settings** menu, and clicking the **Web Portal** link.

Web Portal Setting
Save

PCI Password :

Password Strength Enforcement

Password expires Enforcement

Number of days before password expires.

Prompt user to change password before expiration

Number of days before password expires.

Prevent Re-use of Passwords

Number of previous passwords to check

Number of days to prevent password re-use

Limit Failed Login Attempts

Maximum number of failed login attempts to allow.

Lock out Superuser after limit reached?

Content Management :

Upload Directory :

Call List Quick Filters :

Agent

Group

ACD Gate

CallCopy group

Number Of Items To Display :

default number of results to display (except Printable Reports and the Call List)

The following settings are available on the page:

PCI Password

PCI Password settings control the password policy on the server. The policies followed were detailed by the PCI Security Standards Council in the Data Security Standard v2.0

(https://www.pcisecuritystandards.org/security_standards/documents.php)

Password Strength Enforcement: When selected, forces all new passwords to be a minimum of seven characters in length and contain at least three of the following character types:

- lower case letters
- UPPER case letters
- Numbers
- Special characters

Password Expires Enforcement: Controls how long a password can remain active. Use the top entry field to specify the number of days that a password can be valid before it expires. Use the second entry field to automatically prompt users to change their password before the hard expiration date is available.

Prevent Re-use of Passwords: When a password is changed, it can be checked against a password history to prevent re-use. Re-use can be defined as the last x passwords set OR a use in a defined number of past days.

Limit Failed Login Attempts: If enabled, a user's account will be locked after the defined number of failed login attempts. When an account is locked, a User Administrator must unlock the account from the User's profile page before they may attempt another login.

Lockout Superuser after limit reached: Typically, this option should not be selected. By default, the Superuser account cannot be locked out regardless of the number of failed login attempts. If this option is selected and the Superuser exceeds the failed login attempts, the account is locked and cannot be unlocked.

Content Management

Upload Directory: The disk or UNC path where files uploaded to the Content Library are stored.

Call List Quick Filters

Checking these items will wither show or hide the corresponding menu section on the Call List of the Web Player. The following items can be set: Agent, Group, ACD Queue, and CallCopy Group.

Number of Items to Display: This sets the number of rows to return per page on any table listing on the site, except Printable Reports and the Call List.



cc: Voice Configuration Settings

The settings pages listed here are intended for a cc: Voice system using the **CTI Core** architecture released in v4.3 of the product. Legacy cc: Voice configurations that do not utilize CTI Core are detailed in the *cc: Voice Legacy Configuration* appendix of this manual.

API Servers List


The API Server module handles connections from any application that is using the CallCopy API service. This includes call control, management functions, and event stream service. API Servers are required for Live Monitoring and Call Exporting features in the cc: Discover software. For more information on CallCopy API Services, see the *CallCopy API Manual*.


The module is configured on the **API Servers List** page.

API Server List				Add APIServer
#	Location	Name		
1	10.100.5.55	API Server		

The List displays the following data for each API Server:

- **#** : The internal identifier for the specific API Server. This identifier is an integer value, and is needed for configuring distributed API environments.
- **Location**: The hostname/IP Address of the server running the API Server.
- **Name**: A friendly name set by the user given to the listed API Server.

Click the **Delete** () icon to remove the configuration for the listed API Server.

To add an API Server, click **Add API Server**. A new API Server entry will appear in the list. Click the **Edit** () icon on the right side of the row to configure it.

Note: *Install the application or service that will use the API server before adding the API server to this list. For example, a CTI Core must be installed and added to the CTI Core List before it can be added to an API server.*

API Server Settings



Each API Server has a list of available settings. When the settings have been configured as listed below, clicking the **Save** button will commit the settings.

Server Settings

Name: A friendly name given to the API server for reference.

Server Host: The hostname or IP address of the server the API module is running on.

Type: Can use Call Control (recording functions, i.e. CALLSTART/CALLSTOP) and/or Management Control (management functions, i.e. IMPORTAGENT/GROUP).

Related Cores: The CTI Core modules that are being serviced by this specific API Server instance. Multiple Cores can be associated to a single API Server. Select the desired Core from the drop down menu, and click the Add () button to add it to the list. To remove a CTI Core, select it from the list and click the Delete () button.

Allowed Subnets: The API Server can be limited to accept requests from specific subnets only. By default, requests from all addresses (255.255.255.255/0) are accepted.

Export Directory: Temporary location used for writing out files that are requested for export in the Web Portal.

Web Server Settings

Port: The TCP port number that the API Server will accept HTTP WebAPI requests on. (Default is 2012)

Require Authentication: If enabled, all HTTP requests will have to provide the credentials of a user in the cc: Discover system in HTTP Basic Authentication format.

Response Format: Determines if API responses will be sent to clients in XML or SOAP format.

SSL: When enabled, all HTTP requests must utilize a secure SSL connection with a specified certificate.

SSL Certificate: Local path to the SSL certificate to use for encryption. Certificate must be in P12 format.

SSL Password: Password for the listed SSL Certificate.

Note: *The server must be rebooted for changes to this configuration to be effective.*

TCP Settings

















Port: The TCP port the API Server will listen for socket based requests on. Default is 5620.


Event Port: The TCP port the API Server listens for Event Service calls from the CTI Core. Default is 5621.


Require Authentication: If enabled, cc: Discover user credentials must be passed on every connection to the API socket.


Device Alias Map

The Device Alias Map is used in free seating environments where agents are identified by a Login number instead of the phone extension they are using. In these environments if there are phones that will be used without an agent login number, one can be created for use in cc: Discover, so that agent data can still be associated to recordings made at this phone.

Device Alias Map List		Import	Add
Voice Port	Agent Number		
1111	6000		
1112	6001		
1113	6002		
1114	6003		
1115	6004		
1116	6005		
1117	6006		
1118	6007		

To add a mapping to this list, click the **Add** button at the top-right of the page. This will add a blank entry at the bottom of the list. Under the first column, enter the extension of the phone that you want to assign an agent to. In the second column enter a number that you want to identify the phone with. Click the Save icon  to add the entry to the list.

To edit an existing entry on the list, click the Edit icon . The fields in that row will become editable. Make any changes needed and click the Save icon to update the entry.

To delete an existing entry, click the Delete icon . A confirmation window will pop up. To confirm the delete, click OK.

Importing a Device Alias Map List

You may also import a list of mappings from a Comma Separated Values (CSV) text file. To perform an import, click the **Import** button.

Device Alias Map Import (CSV) Cancel

Please select a .csv file to import: Browse... Upload File

File must be in a Device ID, Device Alias format.

Perform Import Import Now

Voice Port	Agent ID
1200	7000
1201	7001
1202	7002

The Device Alias Map Import page will load. To load a list of mappings, click the **Browse** button at the top of the page. A File Browser window will pop open. Select a CSV file that contains the mappings, and then click the **Upload File** button to load the file.

The CSV file must be in an **'Extension', 'Agent Number'** format such as the following:

```
1200,7000
1201,7001
1202,7002
```

Upon uploading the file, a preview list of your data will display below the **Perform Import** section. If the data is correct, click the **Import Now** button to save the entries.

IP Phones

The **IP Phones** settings allow an administrator to manually register an extension with an IP Address. This list is only used in passive VoIP recording configurations where a phone cannot be automatically registered to the desired extension number. In most configurations, the use of this list is not necessary.

Click **IP Phones** under **Settings** to open the registration list.

IP Phone List			Import	Add	Save
Extension	IP Address				
1234	10.100.8.20				
5555	10.100.8.22				

Adding Phones

To add an additional phone, click **Add** at the top of the page. A new row with text fields will appear at the bottom of the list.

IP Phone List			Import	Add	Save
Extension	IP Address				
1234	10.100.8.20				
5555	10.100.8.22				
6789	10.100.8.40				

Enter the extension and IP Address for each device. Once you have finished inputting values, click **Save**. See the section on "CSV Import" for adding multiple phones at once.

Edit/Delete Phone

To change an existing entry, click the Edit (✎) icon next to the desired row. Change the extension and/or IP Address, then click the Save (💾) icon. Extensions can be deleted by using the Delete (✖) icon from this page as well.

CSV Import

IP Phones can be imported into the system via a CSV file by clicking **Import** on the IP Phone page.



The dialog box titled "IP Phones Import (CSV)" has a "Cancel" button in the top right corner. Below the title bar, there is a text input field with the placeholder text "Please select a .csv file to import :". To the right of this field are two buttons: "Browse..." and "Upload File". Below the input field, there is a note: "File must be in a Extension, IP Address format".

To upload a list of IP Phones, click **Browse** at the top of the page. In the dialog box, select the CSV file that contains the list and click Open. Then click **Upload File**.

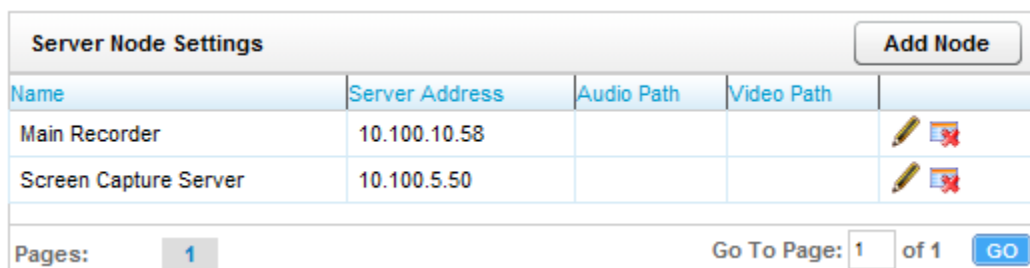
The CSV file must be in an '**Extension**', '**IP Address**' format such as the following:





```
1200, 10.100.1.40
1201, 10.100.1.41
1202, 10.100.1.42
```

If all the data in the file is formatted correctly, a preview list of your data will display below the **Perform Import** section. If the data is correct, click **Import Now** to save the entries.

Server Nodes


The Server Nodes page under the Settings menu lists servers that are running cc: Discover software modules. This list is the basis for the central Service Manager in the Web Portal. A separate entry must be created for each server in the system.




Server Node Settings				Add Node
Name	Server Address	Audio Path	Video Path	
Main Recorder	10.100.10.58			 
Screen Capture Server	10.100.5.50			 

Pages: 1 Go To Page: 1 of 1 GO

To add a Server Node, click **Add Node** on the Server Node Settings.

To View or change the settings for a Server Node, click the **Edit** () icon on the right side of the row.

Clicking the **Delete** () icon will remove the configuration for the listed Server Node. Nodes should not be deleted if services are attached to them.

If services are being added or moved to new servers, complete the new installation, then add the services to the new node. Delete the old node only after the new services are running correctly.

Server Node Settings

Each Server Node has a list of available settings. When the settings have been configured, click **Save Node** to commit the settings.

The screenshot shows a dialog box titled "Edit Server Node" with "Cancel" and "Save Node" buttons. The form contains the following fields:

- Name: Main Recorder
- Address: 10.100.10.58
- Is Screen Capture Server: Yes (dropdown menu)
- Screen Capture Path: (empty text field)
- Screen Capture User: (empty text field)
- Screen Capture Password: (empty text field)
- Is Legacy Audio Node: Yes (dropdown menu)
- Audio Path: (empty text field)
- Audio User: (empty text field)
- Audio Password: (empty text field)

Server Node

Name: A friendly name for the Server Node for reference.

Address: The hostname or IP address of the Server Node.

Screen Capture Server

Is Screen Capture Server: If the Server Node is running a Screen Capture Server module, this setting must be enabled.

Screen Capture Path: The UNC path to the local directory Screen Capture files are written to.

Screen Capture User: The username for an account that has read/write access to the Screen Capture Path.

Screen Capture Password: The password for the Screen Capture User account.

Legacy Audio Node

Is Legacy Audio Node: This setting is only enabled if the server is a Legacy distributed audio recorder.

Audio Path: The UNC paths to the local directory audio files are written to.

Audio User: The username for an account that has read/write access to the Audio Path.

Audio Password: The password for the Audio User account.

CTI Core List

The CTI Core List displays all configured CTI Core modules in the system. A CTI Core is the module that provides the PBX/ACD Integration, and makes call recording decisions based on Scheduler business logic. The CTI Core is also responsible for recording the raw audio files used for playback. The configuration of a CTI Core is dependent on the ACD/PBX Integration Type installed on the system.

Integration specific configuration documents are available to detail the required configuration for each supported PBX/ACD platform. If integration documents were not provided, please contact CallCopy Support to obtain a copy.

Voice Boards

The Voice Boards provide configuration information specific to the PBX/ACD Integration type the cc: Discover is using.





Integration specific configuration documents are available to detail the required Voice Board configuration for each supported PBX/ACD platform. If integration documents were not provided, please contact CallCopy Support to obtain a copy.

Voice Boards are licensed components of the cc: Discover software. The software will allow an unlimited amount of Voice Board configurations to be added to the system, but the software will deny usage of any unlicensed components. It is recommended that users contact CallCopy Support before adding or removing Voice Boards to prevent any negative impact on the operation of the installed system.

The information detailed below is an example to provide a listing of all available Voice Board settings. For required settings pertaining to a specific PBX/integration type, see the corresponding *cc: Voice Integration Guide*.

Voice Boards List

To manage Voice Boards, browse to the **Administration** tab of the Web Portal, open the **Settings** menu, and click the **Voice Boards** link.





Voice Boards List				Add Board	Clear Boards	Save Configuration
#	Name	Channels				
1	VOIPSNIFFER	25	 			
2	CISCODMS	5	 			

To View or change the settings for a Voice Board, click the **Edit** (✎) icon on the right side of the row. Clicking the **Delete** (✖) icon will remove the configuration for the Voice Board.

To clear all Voice Board entries from the system, click the **Clear Boards** button.

Note: | *Any changes to these settings will require the recorder process to be restarted, Please refer to the Console Maintenance section for information on restarting the Recorder Process.*

Add a New Board

Voice Boards List				
		<input type="button" value="Add Board"/>	<input type="button" value="Clear Boards"/>	<input type="button" value="Save Configuration"/>
#	Name	Channels		
1	VOIPSNIFFER	25	 	
2	CISCODMS	5	 	

Click on the **Add Board** button to add a new board to the system.

Note: | *Proper licensing must be purchased for a board to be used in recording.*

On the New Board page, select the type of voice board to be used from the **Hardware Type** list.

New Board

Select Hardware Type : <Supported Hardware>

<Supported Hardware>

Diallogic D/240PCI-T1

Diallogic D/240SC-T1

Diallogic D/300PCI-E1

Diallogic DMV/960A-4T1

AI-Logix NGX800 8 Channel Passive Tap

AI-Logix NGX1600 16 Channel Passive Tap

AI-Logix NGX2400 24 Channel Passive Tap

AI-Logix LDA409

AI-Logix LDA809

AI-Logix LDA1609

AI-Logix LDA2409

AI-Logix DP3209 T1/E1 Passive Tap

AI-Logix DP6409 T1/E1 Passive Tap

AI-Logix DT3209 T1/E1 Terminate Board

AI-Logix DT6409 T1/E1 Terminate Board

CallCopy Loopback

Shoretel Media Redirection

Avaya DMCC

Nortel MLS

CallCopy VoIP Sniffer

Mitel SRC

RTP Logger

Cisco Active Recording

Note: | We recommend you contact your CallCopy support provider prior to adding or removing any hardware components from your CallCopy system, as altering the hardware configuration may void your warranty.

When the Hardware Type has been selected, click the **Next** button to display the Voice Board Options page.

Board Options

These are options specific to the board type selected. Detailed information on board options can be located in the corresponding *cc: Voice Integration Guide* for the specific PBX/ACD integration in use.

An example Board Options list is displayed below for reference.

Channel Configuration

The channel configuration settings will vary depending on your specific integration. In this section the available options are described, but not all options are available for some integration types. Detailed information on board options can be located in the corresponding *cc: Voice Integration Guide* for the specific PBX/ACD integration in use.

Board 3 of 3 :: Channel Configuration		
#Assign	Assign Val	Name
1	Anything	
2	Anything	
3	Anything	
4	Anything	
5	Anything	

Channel Number (#)

This Field is the logical internal identifier for the recording port/channel. The recorder will use this number to refer to any actions taken on the channel.

Assignment Type (Assign)

Not in Use: Select this value if the assignment type will not be used.

Anything: This allows the channel to be used for all recording and playback events. Use is governed by schedule priorities.

Playback Anything: Limits this channel to playback of records via telephone.

Record Anything: Any schedule or API event may record calls using this channel.

Instant Record: This channel is dedicated to requests from the API

Dedicated Record Group: Limits channel to recording only the specified ACD/PBX group (not the CallCopy Group). This recording is performed independently of schedules.

Dedicated Record ACD Gate: Limits channel to recording a specific ACD queue type.

Dedicated Record Voice Port: Limits the board to recording a channel.

Dedicated Record Device: Limits channel to recording of a specific hardware resource (e.g., voice port or DN) on the ACD/PBX.

Dedicated Record Agent Number: Limit channel to recording only an Agent Number.

Dedicated Record Device Alias: Limits channel to recording of an agent extension.

Dedicated Record DNIS: Limits channel to recording a specific inbound number, such as an 800-number carrying traffic to your facility.

Dedicated Record CallerID ANI: Limits recording to a specific ANI. Full or partial ANI matches may be used, e.g., limit to a matching area code.

Dedicated Record User 1-5: Limits recording to a specific user defined value specified by the API.

Playback and Instant Record: Limits a channel to only playback and instant recording from the API.

Playback and Record: Limit calls to scheduled recordings and to playback.

Record and Instant Record: Limit calls to any recording type.

Assignment Value (Assign Val)

In Fixed Port configurations, this is the value assigned to the physical port that is being tapped on the PBX (Usually an extension number). The value in this field is also used as the Agent Phone ID in Fixed Seating configurations.

Description (Desc)

An additional data field for the channel Assignment Value. This field is ignored in most integrations, and can be used for any description data needed. In specific integrations the values in this field are used for additional configurations, and its use will be outlined in the integration specific documentation.

Channel Name (Name)

An optional field that can be used to assign another reference name for the channel. Useful in Fixed Port configurations where a channel may be referenced as an extension number on the front end, and a port identifier on the back end. Data in this field is optional and is not used by any components.

On Demand

These settings are available only if CallCopy's OnDemand module has been purchased.

The OnDemand module is a client/server application that allows users to control the recording of their calls from a desktop button. It also enables user to manually input data into the recording's cc: Discover call record. The OnDemand settings control the call record fields that users can update. Many of the fields are User fields that are configured on the Terminology page.

On the Administration tab's Settings menu, click OnDemand. By default, users can update all fields (i.e., the setting is 'Yes'). To prevent users from updating a field, change its value to 'No'. Click Save.

The screenshot shows a web interface titled "On Demand" with a "Save" button in the top right corner. Below the title is a list of settings, each consisting of a label and a dropdown menu. All dropdown menus are currently set to "Yes".

Setting	Value
Allow Account Number Update :	Yes
Allow CSN Update :	Yes
Allow User3 Update :	Yes
Allow User4 Update :	Yes
Allow Public Bookmark Update :	Yes
Allow User6 Update :	Yes
Allow User7 Update :	Yes
Allow User8 Update :	Yes
Allow User9 Update :	Yes
Allow User10 Update :	Yes
Allow User11 Update :	Yes
Allow User12 Update :	Yes
Allow User13 Update :	Yes
Allow User14 Update :	Yes
Allow Special Customer Discount Update :	Yes

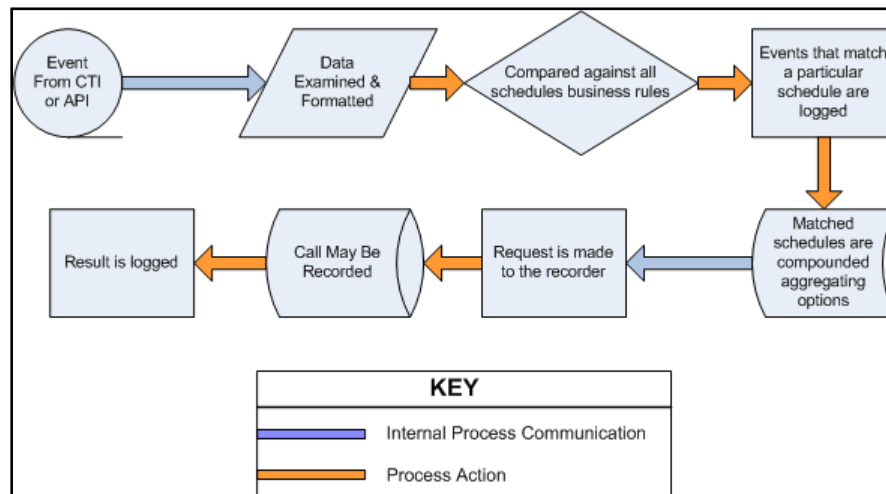
Scheduling

Administrators and users can create multiple schedules based on business rules that determine what is recorded. The scheduler is flexible enough to allow for 1% to 100% recording and other types of recording such as time based blocks or a set number of calls that match a particular schedule.

Schedules can be set up across any combination of call variables. All requests, including CTI messages and API requests related to call or agent information, are routed to the scheduler for processing.

Note: In legacy cc: Discover installations (i.e., versions prior to 4.0), schedules are governed by User Quotas.

Scheduling Process Flow



Every event that is received by the scheduler is compared against the business rules of all active schedules. An event may match any number of schedules or none at all. When an event matches one or more schedules, an entry is logged for each individual match.

Schedule options are aggregated, meaning that as an event matches schedules the least restrictive values are assigned to the event. These values include minimum and maximum recording lengths, priorities, retention & archiving, etc. The call is then sent to the recorder with the aggregated values assigned to it, and the recording is then written to the system disk.

Note: | *Schedules operate inside the constraints of the configured Voice Boards. When configuring schedules, keep items such as recording capacity (fixed or concurrent), in mind when designing schedules.*

Relating Schedules to a Core

Schedules can be related to a Core but do not have to be related. If no schedules are related to a Core, that Core will use all schedules. If one or more schedules are related to a Core, that Core will use only those schedules. Relating schedules to one or more Cores can be useful if

- You want a specific Core(s) to record specific agents' calls, such as agents dedicated to a customer or language.
- You want to balance the load of calls recorded by each Core.

The CallCopy Sales Engineer and Install team will discuss this issue before installing the system. See the CallCopy integration guide for your specific PBX for information on configuring the Core and relating a schedule.

Configuring Unique Schedules

The ability to create schedules is based on User permissions. A User with appropriate permissions can create User and System schedules through the Web Portal.

To create a schedule, browse to the **Administration** tab on the Web Portal, select the **Scheduling** menu, and click **Create Schedule**. The schedule wizard will open and the following options can be selected:

Schedule Wizard	
1	Record All Calls For An Agent During A Time Range
2	Create A Custom Schedule (Advanced)
3	Record The Next N Calls For An Agent

Agent Schedules – Time Based

A time based schedule records all calls for an agent between a specified date range. Schedules created using this procedure will use default values for Retention Days and other settings described in the Custom Schedules section. Those values can be edited using Find Schedule function.

To create a time based agent schedule, click the option **Record All Calls For An Agent During A Time Range**.

The following information needs to be entered for the schedule:

Name: A friendly name for the schedule

Description: A field to enter more specific details regarding the schedule

Agent Number: The Phone ID that will be recorded

Never Expire: If selected, the schedule will be in effect indefinitely

Start/End Date: If the schedule should only be effective between a range of dates, select them here.

Click Save. The schedule begins recordings on the entered start date.

Agent Schedules – Number-of-Calls Based

A call based schedule records a specified number of calls for an agent within, or outside a given date range. Schedules created using this procedure will use default values for Retention Days and other settings described in the Custom Schedules section. Those values can be edited using Find Schedule function.

To create a call based agent schedule, click the option **Record the Next *n* Calls for an Agent**.

The following information needs to be entered for the schedule:

Name: A friendly name for the schedule.

Description: A field to enter more specific details regarding the schedule.

Agent Number: The Phone ID that will be recorded.

Scheduling

Number of Calls: The number of calls to record for the agent.

Never Expire: If selected, the schedule will be in effect until the specified number of calls is reached.

Start/End Date: If the schedule should only be effective between a range of dates, select them here.

Click Save. The schedule begins recordings on the entered start date.

Custom Schedules

A Custom schedule enables you to create diverse sets of schedules to meet your business needs. To create a custom schedule, click the **Create a Custom Schedule (Advanced)** option.

New Schedule Save Schedule

Name: Description:

Owner: Administrator

Never Expire:

Start Date and Time: 5/22/2011 12:00 AM End Date and Time: 5/22/2011 12:00 AM

Type: Percentage Target Percent:

Random Probability:

Direction: both Priority: 50

Min Record Length (Sec): 10 Max Record Silence(Sec): 600

Max Record Length (Sec): 6000 Retention Days: 365

Screen capture wrap length (Sec): 0 Archive Action: Purge

Audio Capture: Yes Screen Capture: No

Disk Location: C:\Recordings Comparison: AND

Schedule Requirements

	Value Type	Comparison	Value	Case Sensitive
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

General Settings

Name: A friendly name for the schedule.

Description: These fields are helpful when searching for a schedule in the system

Owner: Field to define the schedule as belonging to the CALLCOPYSYSTEM or to that User.

Start/End Date/Time: If the schedule should only be effective between a range of dates, select them here.

Schedule Types

Set Number: This schedule type records a set number of calls that match the business rules that you apply. For example, if you need to record the next five calls for a specific phone extension, you would use this schedule type.

Options

- **Minutes Between:** If set, the schedule will prevent another recording from starting if the previous call was recorded within the value set here.
- **Target Calls:** The total number of calls to be recorded by this schedule.
- **Calls Between:** If set, the schedule will prevent another recording from starting if the previous call was recorded within the value set here.
- **Random Probability:** Set the random probability to a number (0-100). See note at end of section for more details.

Percentage: This schedule type gives you the flexibility to create randomized schedules as well as schedules for complete call logging. Simply enter the percentage of calls that you would like to record (1-100). Use a number below 100 for randomized recording for quality assurance, or set a schedule to 100% for complete call logging.

Options

- **Target Percent:** The percentage of calls to be recorded out of the total number delivered.
- **Random Probability:** Set the random probability to a number (0-100). See note at end of section for more details.

Agent Percentage: This schedule type allows you to create a schedule to record a percentage of every agent's calls. Simply enter the percentage of calls that you would like to record (1-100). This percentage will apply to each agent, so if you set the percentage to 50%, then 50% of each agent's calls will be recorded.

Options

- **Days:** The days of the week this schedule will be in effect.
- **Target Percent:** The percentage of calls to be recorded out of the total number delivered to an agent.
- **Random Probability:** Set the random probability to a number (0-100). See note at end of section for more details.

Scheduling

API Initiated: This schedule type will only be run if the call delivered was triggered by a 3rd Party application via the CallCopy API. This is useful for defining different rules for these calls vs. internally generated calls via CTI or passive methods.

Options

- **Target Percent:** The percentage of calls to be recorded out of the total number delivered to an agent.
- **Random Probability:** Set the random probability to a number (0-100). See note at end of section for more details.

OnDemand: This schedule type will only be run if a delivered call was triggered via the CallCopy OnDemand Client.

Options

- **Target Percent:** The percentage of calls to be recorded out of the total number delivered to an agent.
- **Random Probability:** Set the random probability to a number (0-100). See note at end of section for more details.

Note:

On Random Probability: When a call is delivered and the schedule is at or above its target percentage, the system generates a random number for the call, between 0 and 100. If the random number is equal or less than the Random Probability value, the call will be recorded. Otherwise, the call is skipped.

Schedule Priority

Priority: Schedules can be given a priority rating from 1 (lowest) to 100 (highest). If a call is delivered that matches multiple schedules, the schedule with the highest priority will be used. If no schedule has a higher priority, then the schedule with the oldest creation date will be used.

Call Parameters

Direction: If the data is available, you can specify to record only inbound/outbound calls, or both.

Min Record Length (sec): The minimum length, in seconds, for records matching that schedule. You can use this setting to avoid recording hang-ups.

Max Record Length (sec): The maximum length, in seconds, for records matching that schedule. Longer calls require more disk space, so some companies prefer to cap the recording length to prevent long calls from depleting system resources.

Max Record Silence (sec): The maximum length, in seconds, for silence in the call before a recording is automatically stopped.

Screen Capture Wrap Length: The duration (in seconds) to keep recording an agent's screen after a call has ended. Only available if the optional *cc: Screen* product is installed on the system.

Retention Rules

Retention Days: The number of days you would like calls matching that schedule to be saved in the system before being (purged) deleted or archived.

Archive Action: Available Archive Actions for the call can be selected here. For more information on Archive actions, see the section on the **Archiver** in this manual. The default action is "Purge," which means that the system will purge records when the record reaches the specified number of retention days.

Note: | *Retention Days and Archive Actions are applied when the call is recorded. Changing this value in a schedule only applies to calls made AFTER applying the schedule change. Changing this value DOES NOT apply to already recorded records.*

Capture Options

Audio Capture: If set to **Yes**, audio/voice will be captured for this record if available.

Screen Capture: If set to **Yes**, screen activity will be captured for this record if available.

Disk Location: Location audio/video files for the record will be written to. Can be a disk or UNC path.

Simple Business Rules

To use the simple business rule editor, select the **AND** or **OR** value from the **Comparison** setting. cc: Discover can set up simple schedules by matching up to five variables within a schedule. The Value Type variables include:

- **Voice Port/DeviceID (physical device)**
- **Agent Number (agent or phone number)**
- **Group (Labor group)**
- **ACD Gate/Call Type (VDN, Queue, Application, etc.)**
- **Number Called DNIS**
- **CallerID(ANI)**
- **User Variables** There are 5 fields available for user-defined variables that can be used to store values received by your cc: Discover application server from other applications. For further information see the *CallCopy API Manual*.

For each of these variables, the system can use the following comparison operators:

- **Equal to**
- **Less than (<)**
- **Greater than (>)**
- **Not equal to**
- **Starts with**
- **Ends with**
- **Contains**
- **Does not contain**

For non-numeric values, you can also perform a case sensitive match.

Utilizing the **AND** comparison, each rule set in the editor must match for a call to begin recording. Using the **OR** comparison, only one of the rules must match to the call in order to start a recording.

Advanced Business Rules

To engage advanced business logic, select the **Expression** value from the **Comparison** setting. This allows the user to enter a free form expression of up to 64,000 characters in length. This allows for much more complicated decision making to be available for the recorder.

The variables that can be matched in a schedule include:

- **DeviceID:** The Voice Port/Extension receiving or placing the call
- **Devicealias:** The ACD Agent number for the person receiving or placing the call.
- **Group:** For inbound routed ACD calls, this is the Hunt Group or Skill value
- **Gate:** For inbound routed ACD calls, this is the ACD Queue or Group the call was delivered to
- **Ani:** The calling party for the call.
- **Dnis:** The called party for the call.
- **user1 – user15:** received by your CallCopy application server. There are 5 fields available for user-defined variables. For further information see the *CallCopy API Manual*.
- **CallID:** The Call ID assigned from the PBX/ACD to identify the call
- **Calldirection:** Inbound or Outbound
- **Callinstancediscriminator:** An internal variable assigned to the call by the CTI Core for tracking purposes.
- **Initiatedby:** how the call was initiated – possible values are: cti, agent, supervisor, api, timed, apichat, agentchat
- **Month:** Numeric value for the month. 01-12 with 0 padded numbers < 10
- **Day:** The numeric day of the month with 0 padded numbers < 10
- **Year:** The 4 digit year
- **Time:** The time of day, formatted as 24 hour time, 00:00 to 23:59
- **Weekday:** 3 letter day codes - mon, tue, wed, thu, fri, sat, sun
- **Date:** formatted as yyyy-mm-dd
- **Pvalue:** a random number from 0 to 99 that can be used for cases where a certain percentage needs to be met.

The available Operators to be used against the variables:

- == Equal to
- != Not equal to
- > Greater than
- < Less than
- >= Greater than or equal to
- <= Less than or equal to
- =~ Match a Regular Expression (Perl Formatted)
- !=~ Doesn't match a Regular Expression (Perl Formatted)
- ' Both single and double quotes can be used to signify strings in expressions

Scheduling

- **c'** prefixing quotes with a c indicates case-insensitive matching. This applies to normal string comparisons, **IN**, **!IN**, **=~** and **!=~** operators.
- **IN** tests if an identifier is in a bar separated list of values.
 - Ex. deviceid IN "1234|5678|9101"
- **!IN** test if an identifier is not in a bar separated list of values
- **&&** Boolean AND operator
- **||** Boolean or operator
- **()** Parenthesis used for grouping and precedence

Note: | *Boolean && operators are evaluated before || operators*
| *Parenthesized groups can be used to override the default*
| *precedence*

Find Schedules

To search for a specific schedule, browse to the **Administration** tab on the Web Portal, select the **Scheduling** menu, and click **Find Schedule**. The Schedule Query will be displayed.







To search for all schedules, click **Search** to display the Schedules list.

If you want to search for schedules created by or assigned to specific users, select the users from the Schedule Owners column, and click the right **Move** icon (➡) to move them to the Schedule Owners Listed column.

To remove a user from the Schedule Owners Listed column, select the user and click the left **Move** (←) icon.

When you have the list of Owners defined, click **Search** to display the Schedules list.

Schedule List

	ID	Name	Description	Complete	Created	Owner
  	1	QA Testing	QA Testing	N/A	3/2/2011	superuser
  	2	On Demand	On Demand	N/A	3/2/2011	superuser
  	3	API	API	N/A	3/2/2011	superuser
  	4	Cisco QA	Cisco QA	N/A	3/7/2011	superuser

On The Schedule List, the following information is displayed:

ID: The internal identifier for the schedule.

Name: The name of the schedule.

Description: The description details for the schedule.

Complete: If a schedule is set to expire, this value compares start date, end date, and today's date to get a percentage. If a schedule is set to record a number of calls, the percentage of recordings completed.


Created: The date the schedule was created.


Owner: The user assigned to the schedule.


Scheduling

Schedule List Operations

From the Schedule List, you can perform the following operations on a schedule:

Edit: To edit a schedule, click the () icon. Changes made to a schedule do not affect calls that have already been recorded.

Copy: To copy the schedule rules into a new schedule, click the () icon.

Delete: To delete a schedule, click the () icon. Previously recorded calls are not affected by deleting a schedule.

Timed Schedules





Timed schedules are used to record chat or email agents where beginnings of recordings are not triggered off of phone events. Timed schedules give the scheduler the capability to record an agent's desktop for a specified time period, dividing the recordings up incrementally according to the scheduler's needs.

Licensing

The ability to use timed schedules is licensed separately from voice and screen recording. These schedules require a **Desktop Only** license seat for each agent scheduled. Please consult your CallCopy Account Manager for more information.

Timed Schedule List

To access the timed schedules, browse to the **Administration** tab on the Web Portal, select the **Scheduling** menu, and click **Timed Schedule**.

Timed Schedules						New Schedule
	ID	Name	Start Time	End Time	Date Created	
 	1	Timed Schedule 1	12:00 AM	12:00 AM	5/22/2011	
 	2	Timed Schedule 2	12:00 AM	12:00 AM	5/22/2011	

On the Timed Schedule List, the following information is displayed:

ID: The internal identifier for the schedule


Name: The name of the schedule.


Start/End Time: The time of day the schedule will begin and end recordings.


Created: The date the schedule was created.

Timed Schedule List Operations

From the Timed Schedule List, you can perform the following operations on a schedule:

Edit: To edit a schedule, click the () icon. Changes made to the schedule do not affect data that has already been recorded.

Copy: To copy the schedule rules into a new schedule, click the () icon.

Delete: To delete a schedule, click the () icon.

Create a Timed Schedule

To create a Timed Schedule, click the **New Schedule** button on the Timed Schedules page.

Timed Schedules
Save

Name :

Type : Desktop Only ▼

Days : Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Start Time : 00 : 00 AM

End Time : 00 : 00 AM

Record Interval(Minutes) :

Retention Days :


Archive Action : Back Up to NAS ▼

Schedule Requirements

Unassigned Agents

Assigned Agents

Agent 1,Cisco
Agent 2,Cisco
Agent4449,Agent4449
Agent5004,Agent5004
Agent5009,Agent5009
Agent5014,Agent5014
Agent5016,Agent5016
Agent5017,Agent5017
Agent5019,Agent5019
Agent5028,Agent5028
Agent5031,Agent5031
Agent5032,Agent5032
Agent5131,Agent5131
Agent5228,Agent5228
Agent5525,Agent5525
Agent5555,Agent5555
Agent5703,Agent5703
Agent5704,Agent5704
Agent5706,Agent5706
Agent5707,Agent5707



The following fields are required:

Name: A friendly name for the schedule.

Type: Set to Desktop Only.

Days: The days of the week that the schedule will be in effect.

Start/End Time: The time of day the schedule will begin and end recording.

Scheduling

Record Interval (Minutes): The length each individual record will be.

Retention Days: The number of days you would like records to be saved in the system before being (purged) deleted or archived.

Archive Action: Available Archive Actions for the call can be selected here. For more information on Archive actions, see the section on the **Archiver** in this manual.

Schedule Requirements

To schedule an Agent to be recorded, select the agent from the **Unassigned Agents** column and click the right **Move** icon (→) to move them to the **Assigned Agents** list.

To remove an Agent from the schedule, highlight the agent and click the left **Move** (←) icon.









System Tools

Service Loader

The Service Loader page is located under the **Tools** menu on the **Administration** Tab.



If the cc: Discover application modules are installed on the server nodes as Windows services, the service names can be added to the Loader so they can be controlled from the Service Manager page.



To add a Service, click **Add** on the Loader Applications list.

Loader Applications			Add
Site Name	App Name	Restart	
Main Recorder	cc_cticore.exe	False	 
Main Recorder	cc_logger.exe	True	 
Screen Capture Server	cc_screencapserver.exe	True	 
Main Recorder	<input type="text"/>	<input type="checkbox"/>	 

A new Service entry will appear on the list. The list displays the following data for each Service:

- **Site Name:** The Server Node where the service is installed
- **App Name:** The service executable name
- **Restart:** Check the box if the ability to restart this service remotely needs to be added.

When the settings are configured, click the **Save** () icon to save the service to the Loader. To cancel the entry, click the **Delete** () icon.

To change the settings for an existing service, click the **Edit** () icon on the right side of the row. Clicking the **Delete** () icon will remove the configuration for the listed Service.

Service Manager

The Service Manager page is located under the **Tools** menu on the **Administration** Tab.

The Service Manager is a tool to centrally manage all application services in a cc: Discover system. In order for the Service Manager to load and control application services, the **Server Loader Client** module must be installed, configured, and running on each Server Node.

During the cc: Discover software installation wizard, The Loader Host setting on the Web Portal Setup will direct the Service Manager on the address and port to connect to the **Server Loader Client**.

If the Service Loader Client is running properly, the Service Manager should display all services from the Service Loader along with the current status of each service. If you do not see these services, check the Service and Applications in Windows on the call recording server and verify that cc_loader_serverclient is running. Restart it if necessary.

Application	Site	Status	
<input type="checkbox"/> CC_ScreenCapServer.exe	10.100.1.203	Running	<input type="button" value="Start"/> <input type="button" value="Stop"/>
<input type="checkbox"/> cc_cticore.exe	10.100.1.203	Running	<input type="button" value="Start"/> <input type="button" value="Stop"/>
<input type="checkbox"/> CC_Transcoder.exe	10.100.1.203	Running	<input type="button" value="Start"/> <input type="button" value="Stop"/>
<input type="checkbox"/> CC_APIServer.exe	10.100.1.203	Running	<input type="button" value="Start"/> <input type="button" value="Stop"/>
<input type="checkbox"/> cc_webMediaServer.exe	10.100.1.203	Running	<input type="button" value="Start"/> <input type="button" value="Stop"/>
<input type="checkbox"/> cc_loggerService.exe	10.100.1.203	Running	<input type="button" value="Start"/> <input type="button" value="Stop"/>

The Manager displays the following data for each Service:

- **Application:** The name of the service installed.
- **Site:** The Server Node that the service is installed on
- **Status:** Displays if the service is **Running** or **Stopped**.

Controlling Services

Managing a single service

To stop a running service, click the **Stop** button next to the service you wish to shut down.

Application	Site	Status	
<input type="checkbox"/> CC_ScreenCapServer.exe	10.100.1.203	StopPending	<input type="button" value="Start"/> <input type="button" value="Stop"/> Stop command sent.

The service status will switch to 'StopPending' and the message "**Stop command sent.**" will be displayed next to the service.

Once the Service is stopped, the service status will display as 'Stopped' and the **Start** button will be activated.

Application	Site	Status	
<input type="checkbox"/> CC_ScreenCapServer.exe	10.100.1.203	Stopped	Start Stop

To start a stopped service, click the **Start** button on the right side of the service listing.

Application	Site	Status	
<input type="checkbox"/> CC_ScreenCapServer.exe	10.100.1.203	StartPending	Start Stop Start command sent.

The service status will switch to 'StartPending' and the message "**Start command sent.**" will be displayed next to the service.

Once the Service is started, the service status will display as 'Running' and the **Stop** button will be activated.

Managing multiple services

To start or stop multiple services at once, check all of the services you wish to control from the Service Manager list.

Service Manager			
<input type="button" value="Check All"/> <input type="button" value="Uncheck All"/> <input type="button" value="Start Selected"/> <input type="button" value="Stop Selected"/>			
Application	Site	Status	
<input checked="" type="checkbox"/> CC_ScreenCapServer.exe	10.100.1.203	Running	
<input type="checkbox"/> cc_cticore.exe	10.100.1.203	Running	
<input checked="" type="checkbox"/> CC_Transcoder.exe	10.100.1.203	Running	
<input checked="" type="checkbox"/> CC_APIServer.exe	10.100.1.203	Running	
<input type="checkbox"/> cc_webMediaServer.exe	10.100.1.203	Running	
<input type="checkbox"/> cc_loggerService.exe	10.100.1.203	Running	

You can then click the **Start Selected** or **Stop Selected** buttons to perform the specified action on all of the selected services. You may also use the **Check All** or **Uncheck All** buttons to quickly select or de-select all services.

Archiver

The Archiver can provide manual control for many Archiver module functions. To access the manager, browse to the **Administration** tab, select the **Tools** menu, and click the **Archiver** link.

Archiver								
Archive Actions		Refresh List	Refresh Settings	Run File Purge	Delete Empty Directories			
ID	Name	Run Now	Storage Type	Location	Restriction	Archive Type	Next Archive	Next Archive Days
1	Two Year Retention	Run Now	Disk	C:\Archive	Archive Everthing	Normal	Purge	730
2	Standard Archive	Run Now	Disk	c:\Standard Archive	Archive Audio Only	Normal	Purge	365
3	Back Up to NAS	Run Now	SMB	\\nas-server\archive	Archive Everthing	Normal	Purge	365

Optical Drives					
		Load Archived Files	Refresh Disk Status	Update Drive Letter	
Drive	Model	Erase Disk	Volume	Status	Media
D	VMware IDE CDR10	Erase Disk		Error Reading Disc	No media detected

Output
- File Archiving Completed.
10:38:54 AM - File Archiving Completed.

Archive Actions

Archive actions can be managed with the following commands:

Refresh List: Forces a refresh of the list of active Archive actions from the database. The List automatically refreshes every 5 minutes.

Refresh Settings: Manually reloads the Archiver settings page options. The module can be configured to automatically refresh these settings on an interval from the settings page.

Run File Purge: Forces an immediate processing of the File Purge queue.

Delete Empty Directories: immediately runs a job to clear out any folders that are managed by the Archiver that are empty.

Any listed Archive Actions can also be forced to run immediately by clicking the **Run Now** button.

Optical Drives

Optical drives can be managed with the following commands:

Load Archived Files: Will cause any queued calls to be burned immediately to disk. Once this operation occurs, the disk must be replaced with a new one, as only one archive job can be executed per disc.

Refresh Disk Status: Refreshes the status of discs in all drives.

Update Drive Letters: Scans the server for any added/removed DVD drives and updates the Drive List.

Output

The results of any commands issued will be displayed in the Output window.

Reporting

Note: See the cc: Discover Reporting Guide for information about other reports.

Printable Reports

Navigating Printable Reports

Reports in cc: Discover are standardized in many ways for ease of use. The following options are available on all reports:

Saved Search Bar

The Saved Search bar is present as a collapsed section in all printable reports. Clicking the chevron icon on the far right of the section will expand the Saved Search options. This allows you to access any saved searches for the report. You can also save your current report settings into a new Saved Search by filling out a search name and clicking the Save Search button.

The screenshot shows the 'System Activity Summary' report header with 'Back' and 'Generate Report' buttons. Below the header is a table with the following data:

Creator	Name	Date Created	Date Modified
superuser	Activity for Administrator, May 2010	~/Reporting/Tools/ReportLibrary.aspx?searchid=586	06/10/2010

Below the table is a 'Search Name:' input field, a 'Public:' checkbox, and a 'Save Search' button. A chevron icon is visible on the right side of the bar.

Report Options Bar

The Report Options bar contains data settings that need to be selected to generate the report. These options can include date ranges, user or agent selections, and other data fields depending on the report type. Once you have the report options entered, you can click the **Generate Report** button in the top-right to run and display the report results with the selected options.

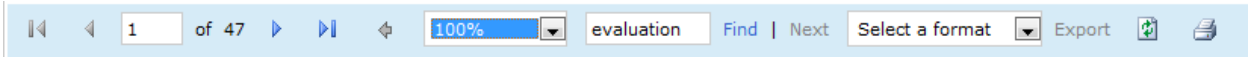
The screenshot shows the 'System Activity Summary' report header with 'Back' and 'Generate Report' buttons. Below the header is the Report Options Bar with the following settings:

Start Date: 5/10/2010 (with calendar icon) End Date: 6/10/2010 (with calendar icon) User ID: All (with dropdown arrow)

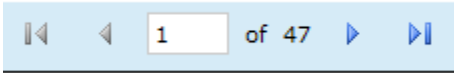
Chevron icons are visible on the right side of the bar.

Feature Bar

The feature bar is present on all printable reports. The feature bar contains the functionality to navigate, search, and format the report to your needs. There are four components of the Feature Bar

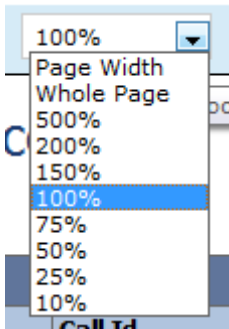


Page Navigator



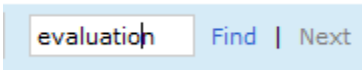
Use the navigation menu to move back and forth across appropriate report pages

Zoom Format



Use the zoom menu to format the size of the report output in your browser window.

Search



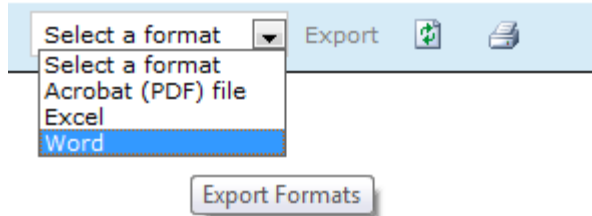
Use the search input box to find specific text or values within the report. Select "Find" to find the first option, then "Next" to find subsequent matches.

Reporting

Report Exporter

From the report management interface, choose an option from the “Select a Format” drop-down menu .

Choose the preferred format (PDF, Excel, or Word):



After selecting the option, select “Export ”to output your report to the desired format.

Refresh & Print

The refresh button reloads the report display after any formatting changes were made. The print button brings up the Windows print controls with standard print options available.

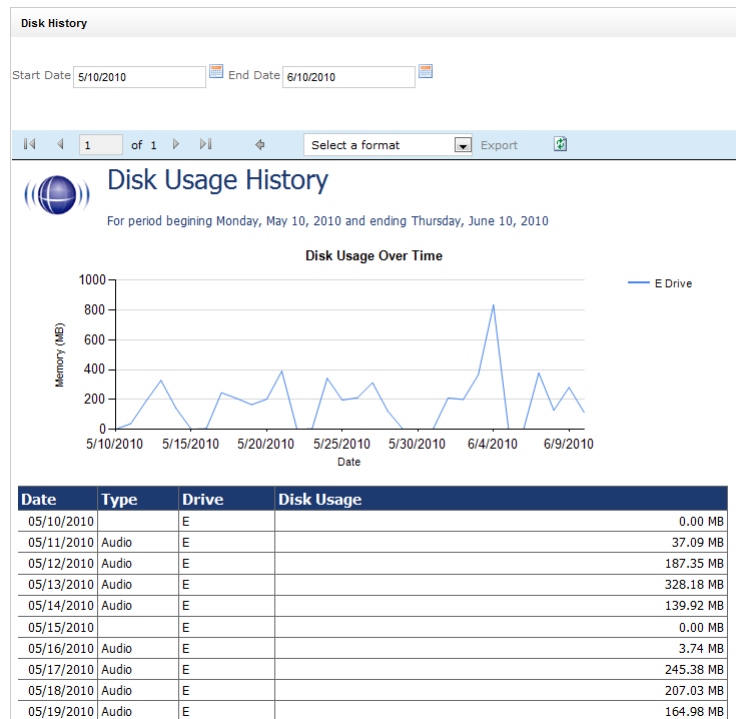
Accessing Printable System Reports

These reports provide historical data in a format that is easily displayed on both the screen and printed. To access these reports from the Web Portal, click the Reporting tab at the top left of the page, click the ‘Printable Reports’ section from the navigation menu, and click the link for **System Reporting**.



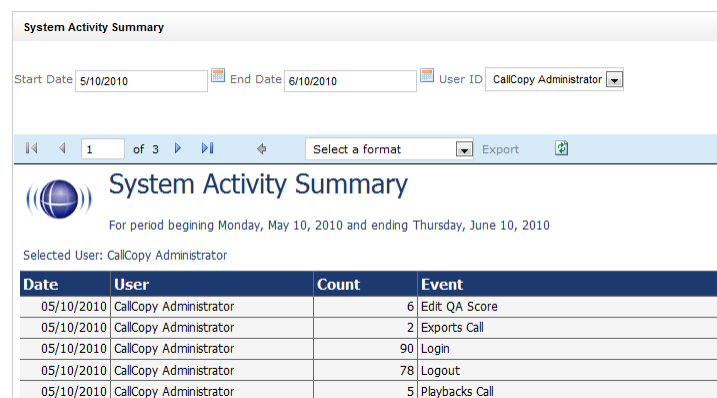
Running Printable System Reports

Disk History



The Disk Usage History Report Displays the historical disk usage in MB for recording data over a range of days defined by the user. The results are displayed in both line chart and list format.

System Activity Summary



The System Activity Summary Report displays what actions a specified user performed in cc: Discover during a given date range. The report is separated with a different section for each date in the range selected that has activity. Actions such as login/logout, call playback, call deletes, and QA functions are all tracked with this report.

System Usage

System Usage

Back Generate Report

Start Date 6/1/2010 End Date 6/2/2010 User ID CallCopy Administrator

1 of 1 Select a format Export

System Usage

For period beginning Tuesday, June 01, 2010 and ending Wednesday, June 02, 2010

Selected User: CallCopy Administrator

Date	User	Time In System
06/01/2010	CallCopy Administrator	8h 56m 33s

System Usage - 6/11/2010 CallCopy Recorder Reporting Service Page 1 of 1

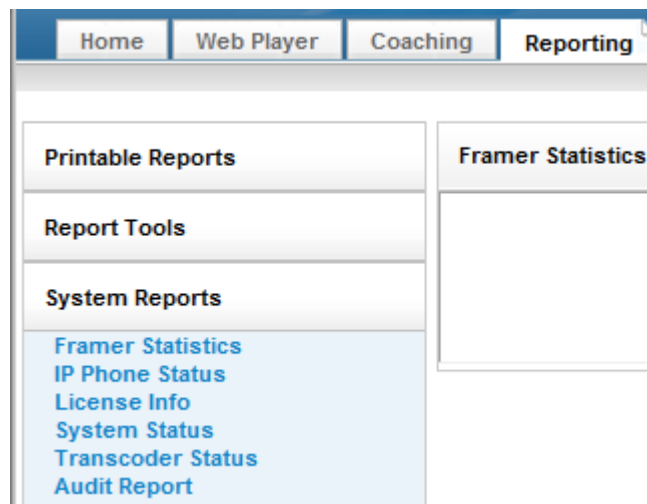
The System Usage report displays the total time a user was logged into the system based on the time range given in the report options.

System Reports

Accessing System Reports

System Reports provide data that is not suited for printing or exporting. These reports are usually interactive or provide real-time updates to the user.

To access these reports from the Web Portal, click the Reporting tab at the top left of the page, and click the **'System Reports'** section from the navigation menu. You will be presented with the list of available reports to run.



Running Non-Printable System Reports

Framer Statistics

TBD

IP Phone Status

IP Phone Status Export					
<i>This page automatically refreshes every 5 seconds. Last Refresh Time: 6/11/2010 11:23:46 AM</i>					
IP Phone Information					
Voice Port	Device Alias	IP Address	Board	Confidence	Last Update
7506		10.100.6.25	1	(3)Parsed	4/27/2010 1:28 PM
7507		10.100.6.36	1	(3)Parsed	4/30/2010 8:29 PM
7505		10.100.6.41	1	(3)Parsed	5/3/2010 2:47 PM
7503		10.110.18.2	1	(3)Parsed	6/1/2010 7:36 PM
7504		10.110.19.2	1	(3)Parsed	4/26/2010 10:16 PM

Reporting

The IP Phone Status Report shows the status of all IP phones detected on the network for Passive VoIP integrations. The report list shows the device extension number, the IP address of the device, the Voice Board number the device was detected by, the confidence level of the detection, and the date/time the device was detected on the network.

This report is useful when verifying that all phones are ready to be recorded on the network. The report auto-updates the list every 5 seconds, and can also be exported into a CSV file by clicking the Export button at the top-right of the report.

License Info

License Information

System License Available :**Yes**

License ID :1

Created On :08/10/2009

Licensed To :Devel01

CallCopy

License Type :Production

Expires On :Never

Licensed Audio Ports :500

Licensed Screen Capture Ports :500

Licensed Desktop Only Ports :500

Maximum Concurrent Recordings :-1

The License Information report shows in real time if the system is currently licensed for recording. It displays the License ID number, the date the license was issued, the expiration date, and the number of channels the system is licensed for.

System Status

This report shows the current call channel and agent activity on the system.

System Status						
<i>This page automatically refreshes every 5 seconds. Last Refresh Time: 6/6/2011 4:24:57 PM</i>						
System Information			Memory: 866MB / 1023 MB			
Uptime: 3 days, 1 hours, 1 minutes, 14 seconds.			Recording Disk Space: 10.38GB / 17.00 GB			
Logged In Users						
No Users Logged In.						
Channel Summary						
Idle		Recording			Total Channels	
17	10				27	
Channel Status						
Channel	State	Last State Change	Agent Name	Recording Device	Recording Device Alias	
1	Recording	6/6/2011 4:00:13 PM		5021		
2	Recording	6/6/2011 4:21:50 PM	Agent7504, Agent7504	7504		
3	Recording	6/6/2011 4:16:04 PM	Agent5980, Agent5980	5980		
4	Recording	6/6/2011 4:16:07 PM	Agent7524, Agent7524	7524		
5	Recording	6/6/2011 3:57:58 PM		5737		
6	Recording	6/6/2011 4:00:57 PM	Agent7538, Agent7538	7538		
7	Recording	6/6/2011 4:23:22 PM	Agent5703, Agent5703	5703		
8	Recording	6/6/2011 4:01:21 PM		5022		
9	Idle	6/6/2011 4:21:43 PM				
10	Idle	6/6/2011 4:07:39 PM				
11	Idle	4/21/2011 12:59:06 PM				

Transcoder Status

Transcoder Status				
<i>This page automatically refreshes every 5 seconds. Last Refresh Time: 6/11/2010 11:29:00 AM</i>				
Completed Records				
Identity	Source	Destination	Queued Time	Last Update Time
102866	E:\Recordings\20100611\7536\7536-11-19-24.cca	E:\Recordings\20100611\7536\7536-11-19-24.wav	6/11/2010 11:20:36 AM	6/11/2010 11:20:38 AM
102864	E:\Recordings\20100611\7536\7536-11-09-12.cca	E:\Recordings\20100611\7536\7536-11-09-12.wav	6/11/2010 11:17:06 AM	6/11/2010 11:17:13 AM
102861	E:\Recordings\20100611\7504\7504-11-08-23.cca	E:\Recordings\20100611\7504\7504-11-08-23.wav	6/11/2010 11:12:18 AM	6/11/2010 11:12:20 AM
102860	E:\Recordings\20100611\5707\5707-11-11-05.cca	E:\Recordings\20100611\5707\5707-11-11-05.wav	6/11/2010 11:12:12 AM	6/11/2010 11:12:13 AM
102859	E:\Recordings\20100611\7517\7517-11-11-21.cca	E:\Recordings\20100611\7517\7517-11-11-21.wav	6/11/2010 11:11:56 AM	6/11/2010 11:11:56 AM
102858	E:\Recordings\20100611\7517\7517-11-07-13.cca	E:\Recordings\20100611\7517\7517-11-07-13.wav	6/11/2010 11:07:50 AM	6/11/2010 11:07:50 AM
102857	E:\Recordings\20100611\7502\7502-11-06-40.cca	E:\Recordings\20100611\7502\7502-11-06-40.wav	6/11/2010 11:07:42 AM	6/11/2010 11:07:43 AM
102856	E:\Recordings\20100611\5980\5980-11-07-08.cca	E:\Recordings\20100611\5980\5980-11-07-08.wav	6/11/2010 11:07:40 AM	6/11/2010 11:07:41 AM
102855	E:\Recordings\20100611\7517\7517-11-05-50.cca	E:\Recordings\20100611\7517\7517-11-05-50.wav	6/11/2010 11:07:04 AM	6/11/2010 11:07:05 AM
102854	E:\Recordings\20100611\7513\7513-10-49-39.cca	E:\Recordings\20100611\7513\7513-10-49-39.wav	6/11/2010 11:06:35 AM	6/11/2010 11:06:53 AM
In Progress Records				
Failed Records				

The Transcoder Status report gives a near real-time display of what audio files are being processed by the Transcoder module. The list displays the last 10 Completed and Failed records, and will display any records that are in progress at the time the report is run. This is useful in verifying the proper operation of the Transcoder.

Audit Report

Audit Record Search			
User	All	Function Type	All
Start Date		End Date	
Search			
Time	Function	User	Message
1/21/2010 11:53:18 AM	Login	CallCopy Administrator	
1/21/2010 11:53:33 AM	PlaybackCall	CallCopy Administrator	70675
1/21/2010 11:57:03 AM	PlaybackCall	CallCopy Administrator	70675
1/21/2010 11:57:03 AM	PlaybackCall	CallCopy Administrator	70675
1/21/2010 11:57:28 AM	PlaybackCall	CallCopy Administrator	70675
1/21/2010 12:16:02 PM	Login	CallCopy Administrator	
1/21/2010 12:16:06 PM	PlaybackCall	CallCopy Administrator	70675
1/21/2010 12:16:57 PM	Login	CallCopy Administrator	
1/21/2010 12:17:01 PM	PlaybackCall	CallCopy Administrator	70675
1/21/2010 12:18:15 PM	PlaybackCall	CallCopy Administrator	70675
1/21/2010 12:19:00 PM	PlaybackCall	CallCopy Administrator	70675






The Audit Report displays the log of specific actions taken by each user in the CallCopy system. Using this report you can search for specific actions performed by a user over a date range.


The actions that are logged by the system are the following:

Function	Message
Login	None
Logout	None
ChangePassword	Success/Failure
ExportCall	Record ID
Playback Call	RecordID
ForgotPassword	None
DeleteQAScore	Record ID, User Comments
EditQAScore	Record ID

Report Library

The Report Library is available under the **Report Tools** menu on the Reporting tab. This page will list any saved searches you have created, or any saved searches created and marked as public.

Report Library			
Private Listing			
Report Name	Create Date	Owner	
Jane's Call Summary for May	5/13/2010 9:26:38 AM	superuser	
QAR_20100518_002	5/18/2010 10:18:31 AM	superuser	
QAR_20100518_002	5/18/2010 10:19:53 AM	superuser	
Public Listing			
Report Name	Create Date	Owner	
Everyone This Year	5/13/2010 9:51:53 AM	superuser	
Mable's QA Summary	5/14/2010 11:46:46 AM	superuser	

Here you will have the option of selecting a saved search from the list to run the report, or to delete the saved search by clicking the  **Delete** icon.

Report Subscriptions

Report subscriptions allow you to set a specific report to run at a scheduled time, and provide the results to multiple users via e-mail.

To access Report Subscriptions, click the **Reporting** tab in the Web Portal, and click on the **Report Tools** menu. The link to Report Subscriptions will be listed on the menu.

Managing Subscriptions

When you load the Report Subscriptions page, you will be presented with a list of any subscriptions you have already configured.

Report Subscriptions							New Advanced	New
Subscription	Report	Status	Owner	Last Run	Date Created			
agents	Agent Ranking By Period	New Subscription	Administrator	01/01/0001	06/09/2010			
agents	Assigned Agents Report	New Subscription	Administrator	01/01/0001	06/09/2010			
agents	Assigned Agents Report	New Subscription	Administrator	01/01/0001	06/09/2010			
calls	Call Recording Detail	New Subscription	Administrator	01/01/0001	06/09/2010			

Clicking on any of the subscriptions listed will display the subscription settings for editing. To delete an existing subscription, you can click the **Delete** icon from this list.

Creating New Subscriptions

To create a new subscription, click the **New** button at the top-right of the page. The new subscription page will load, displaying sections of settings that need to be entered to create the Subscription.

Subscription Details

Back Save

Subscription Details

Select a Report:

Description :

Active :

Event Type :

Modified By:

Owner:

Last Executed :

Date Modified:

Path:

Status:

In the subscription details section, you will need to select a report to subscribe to. Any Printable Report currently installed on the system is available to use for a subscription. Choose a report from the **Select a Report** field. The **Description** field is a custom title for your subscription. Enter a description in the field.

Report Delivery Options

Specify options for report delivery.

To:

Cc:

Bcc:

(Use (;) to separate multiple e-mail addresses.)

Reply-To:

Subject:

'@ReportName' is the name of the report. '@ProcessingTime' is the time the report was run.

Include Report Render Format:

Include Link

Priority:

Comment:

The report delivery options specify who the report results are e-mailed to, and the format the results will be displayed in.

Enter the e-mail addresses the report will be sent to in the **To**;, **CC**;, or **BCC**: fields.

The **Reply-To** field will be the e-mail address that any replies to the subscription e-mail will be sent to.

By default, the **Subject** field will display the Report name and the time the report was generated. A custom subject can be entered by the creator into this field.

The **Include Report** option will generate a file containing the report results, and attach it to the subscription e-mail. Using the **Render Format** option, you can select the type of file that will be attached. Currently, the following file types are supported:

- Acrobat (PDF) File
- Excel (XLS) File
- Image (TIFF) File
- MS Word (DOC) File
- Data (XML) File

You can set the **Priority** field in order to flag the subscription e-mail at a higher or lower priority for the recipients. A custom message can also be included with each subscription e-mail by using the **Comment** field.

Subscription Schedule

Choose whether to run the report on an hourly, daily, weekly, monthly, or one time basis.

Daily
 Weekly
 Monthly

Monthly Schedule

Months: Jan Feb Mar Apr
 May Jun Jul Aug
 Sep Oct Nov Dec

On week of month: 1st

On day of week: Sun Mon Tue Wed Thu Fri Sat

On calendar day(s): (Comma separated list)

Start time: 02 : 00 A.M. P.M.

Reports can be scheduled to be run on a Daily, Weekly, or Monthly schedule. For each option you can select the day(s) of the week the report will be generated and e-mailed out. You can also select the **On Calendar day(s)**: option and enter specific dates (*in mm/dd/yyyy format*) for the report to be generated on.

For any schedule option that is selected, you must select the time of day the report will generate with the **Start Time** fields.

Note: *It is recommended to select Report Subscription start times outside of peak usage hours for the CallCopy system to minimize impact on performance for other CallCopy functions.*

Report Parameters

Set report parameters.

Start Date: 6/1/2010 Use Default

End Date: 6/30/2010 Use Default

Group: All Use Default

Call Direction: Incoming Use Default

Report Parameters are the data options that will be used to run the selected report. The options in this section will vary depending on the **Report Type** selected in the Subscription Details section of the page. These options will be the same as the options for the report when viewed through the **Printable Reports** menu.

Once the Report Parameters are selected, click the **Save** button at the top of the page to save your Report Subscription. You will be taken back to the Report Subscription list, where the newly created report will be displayed as the first item on the list.

License Requests

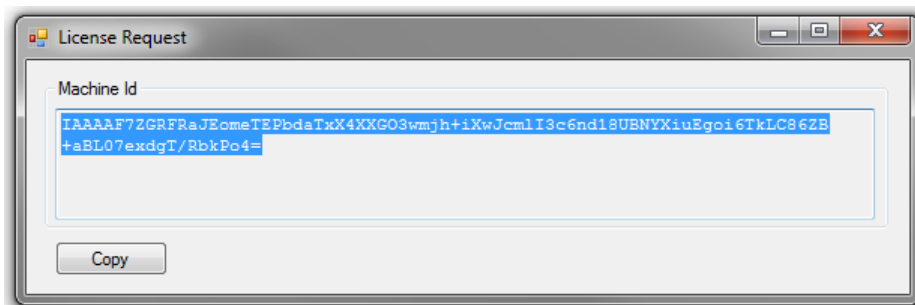
Making major changes to your cc: Discover system (e.g., such as changing the Windows machine name, changing a motherboard, etc.) will cause your system to become unlicensed. The server will not function until a new license is created and applied to the system.

CallCopy recommends any such maintenance be scheduled for an approved maintenance time, as the system will be non-operational after the maintenance until a new license is applied. Contact your CallCopy Support team if any such maintenance is planned, so a new license can be issued immediately after the system maintenance is completed.

In order to create a new license file, a Machine ID must be generated on the server, and the ID supplied to CallCopy. This must occur *after* any maintenance is completed.

To generate a new Machine ID, run the "LicenseRequest.exe" application, which is located in the Recorder directory on your cc: Discover server.

The application will open the following window:



Inside the window will be a Machine ID that will be used to create the license file. Clicking the copy button will copy the Machine ID string to the clipboard, where it can be pasted into a text file, e-mail, etc.

This ID should be sent to the CallCopy Support team, either via email or FTP, so that a new license file can be created.

Appendix A: Legacy cc:Voice Configuration

Legacy Settings are configurations for modules that are no longer needed for systems utilizing the new *Core* recording platform released in v4.3 of the cc: Discover software. These settings pages are still available to support integration types that have not been migrated to the *Core* platform.

To obtain a list of integration types that utilize the *Core* platform, see the cc: *Discover Release Notes* for your software version.

CTI Configuration

CTI Configuration is set according to the installed PBX/ACD Integration type.

Integration specific configuration documents are available to detail the required CTI configuration for each supported PBX/ACD platform. If integration documents were not provided, please contact CallCopy Support to obtain a copy.

CTI Monitors

CTI Monitors are configured according to the installed PBX/ACD Integration type. Your CallCopy administrator will provide and configure the necessary CTI Monitors required for your specific installation.

Integration specific configuration documents are available to detail the required CTI configuration for each supported PBX/ACD platform. If integration documents were not provided, please contact CallCopy Support to obtain a copy.

Data Server

These are global settings that allow you to configure of the types of connections that the CallCopy Player may make to the CallCopy server. These settings may be configured at installation, and are not likely to require change.

Require Client Version: Use this value to require Users to use a specific minimum version of the CallCopy Player™. This is particularly useful if you will require all Users to upgrade to a new version. If a user connects using an outdated version, they will be prompted to download a new version.

Allow Telephone Playback: This option allows Users to playback audio via telephone. The number dialed for playback may be internal or external to your PBX. Each user can set the number to be dialed in the CallCopy Player™. Video will still be streamed to the CallCopy Player™ over the data network.

A terminate connection to the ACD/PBX is required for this feature (e.g., T1/E1 tie line, direct analog line(s), etc.).

Allow Streaming Playback: This option allows Users to stream audio to the CallCopy Player™ to be played on the User's PC. Video will also be streamed to the CallCopy Player™ over the data network.

Allow Download Playback: This option allows Users to download the whole audio and video portions of the file directly to their PC. Playback will not begin until the complete file has been downloaded. This may be useful for users on slow or remote network connections.

Maximum number of records to download: This option limits the number of records that the client will initially download upon logging into the system with the player.

Note: | *Any combination of the above can be enabled. Each User will have the option of specifying **Playback Type** in the CallCopy Player™*

Enable Blackout Features: This option will require the Player to not play audio/video when a "Blackout" API call has been triggered for the recording. See the "CallCopy PCI DSS Guide" for more information.

Enable Message Inbox: This option controls if the Message Inbox tab is displayed in the CallCopy Player.

Active Directory Support: If enabled, the Player application will check to see if the user launching the application is authenticated to the domain, if they are the Player will log the user in without prompting for a username and password. *(Requires Dataserver module to be running under domain credentials.)*

Active Directory SPN: The Service Principal Name for the domain must be entered here for Active Directory support to be operational.

Convert non-8K GSM files to 8K: Enabling this setting may help users that are reporting issues with audio and video syncing up properly. This feature may slow down playback requests slightly.

Recording Filters

Recording filters can be used to prevent the recording of calls based off specific call detail information, including the number dialed, Caller ID, or the agent/extension the call was delivered to.

The main purpose of this feature is for regulatory compliance due to Two-Party Notification states.

They can also be used to insure that calls to or from specific internal parties are not recorded (*i.e. calls to an executive team*).

Functionality

The Recording Filter is a global system wide setting. As a call passes out of the CallCopy Scheduler module, the Recording Filter list is checked before the call is passed to the CallCopy Recorder. If a match in the filter is found, the call will not be passed to the Recorder Module. The call will not be recorded.

A scheduler log entry is generated on a denied event, with a log entry of "SCHEDULE BLOCKED."

Note: *Filtered call detail must be available at the call start trigger. In a CTI-based recording environment, this should not be a concern, as call detail is delivered on CALLSTART. However, in a channel-map based recording environment, the channel map will need to have ANI or DNIS values prior to the CALLSTART event*

The filter will use a 'begins-with' match on the values loaded into a filter list. For example, a typical filter is based on entering specific Area Codes into the ANI. So, for example, if calls from the 614 area code are to be blocked, adding 614 as an entry will cause any call starting with "614" to not be recorded.

Configuration

The Recording Filter feature can check against 3 call detail values: ANI (CallerID), DNIS (Dialed Digits), and Agent/Extension. ANI is typically used to filter an inbound call, DNIS would be used to filter an outbound call, and Agent/Extension would be used to filter all calls to a specific employee.

Filter Device

Voice Port: Matches the values in the Device list to the Voice Port that received or placed the call.

Agent Number: Matches the values in the Device list to the Agent Number that received or placed the call.

Filter Type

Require Both: requires a match of a value in both the ANI and DNIS list.

Require One: requires a match against only one of the values in the list

Require ANI: Requires a match against a value in the ANI column

Require DNIS: Requires a match against a value in the DNIS columns

Deny: Denies the recording if any filters are met.

Filter Call Type

Inbound: Only filters against inbound calls.

Outbound: Only filters against outbound calls

Both: Filters against both inbound and outbound calls

Filter Values

Prefix: This allows you to add a prefix to the beginning of a string

Postfix: This allows you to add a postfix to the end of a string.

Recording Filter Import

Multiple filters can be added at one time by using a CSV file and the Recording Filter Import page. The CSV file must use this format: DNIS List, ANI List, Device List.

Click Import from the Recording Filters page or click Recording Filter Import from the Settings menu. Browse to locate and open the CSV file. Click Upload File. The system validates the file formatting. If the data is valid, click Import Filters. Once they are imported, the filters can be managed from the Recording Filters page.

Recorder Settings

The **Recorder Settings** allow you to set system defaults for records that will be recorded and stored using your CallCopy system. Typically, these options are set at installation by your CallCopy installation team.

Recorder Settings
Save

Log Directory : C:\Program Files\CallCopy\Logs

Critical Security Debug
 Emergency Notice Testing
 Warning Info License
 Error

Time Server : Enter the hostname or IP Address of you time server, or leave blank to turn the option off.

Recorder Server : Last Update : Enter the hostname or IP Address of your main recorder server.

Channel State Machine Server : Enter the hostname or IP Address of your channel state machine server.

Default Maximum Record Time (seconds) : 6000

Default Minimum Record Time (seconds) : 10

Default Maximum Silence (seconds) : 600

Default Keep Recordings (days) : 365

Number of Desktop Only Channels :

Default Desktop Only Maximum Duration(seconds) :

Silent Monitor Prefix : #*

Trunk Silent Monitor Prefix :

Silent Monitor Dial Delay (ms) :

Channel OnHook Delay (ms) :

Use AI-Logix Standalone module : Select

Free Seating : Yes

Screen Capture by IP : No

Default Screen Capture Port : 5999

Recorder VoIP XML Listen Port : 2001

Generate XML with recordings : Yes

Generate Hash on Recording Files : No

Overwrite when out of disk space : No

VoIP Phone Registrations via Channel Map : Off

VoIP Phone Registrations Confidence : None

VoIP Phone Registrations Caching Enabled : No

Call Start Throttle Time (ms) : 1000

Channel Map Phone Registration Throttle Time (s) : -1

Channel Map - Enable Activity/Silence : No

Channel Map - Split Logs per Channel : No

Channel Map - Auto Clear Event Flag on Negative Logic Match : Select

Device Alias Map - Auto Login : Select

Channel Selection : First Available

Default Recording Path : C:\Recordings

Default File Name Mask : %Y%M%D\%A\%A-%H-%N-%S

%Y	4 Digit Year
%y	2 Digit Year
%M	2 Digit Month
%m	Month Name (String)
%D	2 Digit Day
%d	Day Of Week (Name)
%H	Hour
%N	Minute
%S	Second
%A	Agent Number
\	SubDirectory

Log Directory: specify where on the system CallCopy system logs should be stored. A typical location would be:

C:\Program Files\CallCopy\Logs

Log Types: These settings determine what events will be written out to the application logs. The fewer items selected, the smaller the generated log files would be. For troubleshooting purposes, it is recommended that all log levels are selected.

Time Server: This option allows you to specify a network or Internet resource to enable system to synchronize to a standard time. Servers have a tendency to drift over the course of time. If your ACD/PBX is syncing to an external source, we recommend using that source here, so that records between CallCopy and your ACD/PBX will be in sync. The last date the system synchronized with the time server will be displayed here.

Note: | *The following are defaults for the recording and storing of contacts. These defaults will auto-populate when a user creates a recording schedule (see Schedules), but may be adjusted accordingly for the specific schedule created.*

Recorder Server: In multi-node systems, the server running the Recorder module, will act as the 'master' node. Enter the IP address of the server here.

Channel State Machine Server: If the Channel State module is in use and located on a different server than the Recorder module, enter the IP address of that server here.

Default Maximum Record Time (seconds): the default maximum duration of a call recording. If the call exceeds this time, the recording stops, and the file is written to the system.

Default Minimum Record Time (seconds): If a call lasts less than the time indicated, it is not saved to the system.

Default Maximum Silence (seconds): Stops recording if a long duration of silence is detected. This feature is not supported in all operating environments.

Default Keep Recordings (Retention) (days): this is the number of a record will be kept on the system before being automatically purged to free up disk space.

Note: | *The following two settings are determined by your ACD/PBX type and configuration. These settings should not be changed after the system is launched.*

Desktop Only Channels: If Desktop Only screen capture is being used, you can specify the number of licenses to reserve for this mode of screen capture recording.

Silent Monitor Prefix: This is the prefix used to silently monitor agents on your ACD/PBX. This is only used in Open Port (service observe) recording.

Trunk Silent Monitor Prefix: This is the prefix used to silently monitor a trunk member on your ACD/PBX. This setting is only used in Open Port (service observe) recording.

Silent Monitor Dial Delay: The time in milliseconds the Recorder will wait between dialing the monitor prefix, and the extension that will be monitored. Only used if the PBX is having issues switching to silent monitor mode quickly enough to capture the entire dialed extension.

Channel OnHook Delay: In service observe configurations, if the monitor is disconnected too quickly after the call has ended, it can be interpreted as a hook-flash by some PBX's and leave the channel in use. Entering a delay in milliseconds here will delay a disconnect after we receive notification that the call is ended to prevent a hook-flash on the channel.

Enable Event Interface: This setting enables the Event Interface stream in the API Server. This is only enabled if third party applications need to receive CallCopy event information from the system in real time.

JCOM Timeout Interval: The time in milliseconds that the recorder will wait for JCOM message responses sent from the recorder.

JCOM Reconnect Interval: The time in milliseconds the Recorder module will wait after a disconnection is detected before attempting to re-connect.

Free Seating: *Free Seating* refers to Agents who do not always sit in the same seats; the opposite of free seating is fixed or assigned seats. This variable depends on the ACD/PBX type and the nature of your operating environment. This option should not be modified without consulting your CallCopy support personnel.

Screen Capture - .NET Version: Tells the recorder to try and connect to the screen capture module with the Legacy version messages if set to 'No'. If the setting is enabled it will communicate with the newest protocol.

Screen Capture by IP: Select "Yes" if you wish to perform and identify screen capture sessions from desktops via IP Address and system username. This is typically done in thin-client environment. Select "No" if you wish to use the CallCopy default of capturing by Windows PC Network Name and associating them with a specific telephony device.

Default Screen Capture Port: is the TCP/IP network port that the screen capture software on the agent's workstation uses for screen capture traffic. The defaults are either 5610 or 5999, chosen by the CallCopy installation team.

Recorder VoIP XML Listen Port: The TCP Port number the Recorder module will listen for messages from the VoIP Recorder module.

Generate XML with recordings: Flagging this option to “yes” generates an XML file corresponding to the record. This record contains all relevant call information and can be used to archive the record into a database format. Also, archived records can be imported back into the system at a future date. These files are each 1kb in size.

Generate Hash on Recording Files: Creates an MD5 hash for each recording file after the recording has completed. Can be used for file integrity verification with the *Export Verification Tool*.

VoIP Phone Registrations via Channel Map: If enabled, the recorder will communicate with the Channel State Machine for phone registration detection. If disabled, the module will rely on Channel Scripting.

VoIP Registration Confidence: If VoIP phones are being registered from multiple sources, an order of precedence can be established if multiple registrations are received for the same extension. **Low** is the lowest confidence level, **Override** is the highest. Set to **Parsed** by default.

VoIP Registration Caching: Determines if registrations are stored in the database to be read in if the software is restarted. If set to ‘No’ the software will wait until another registration event is received after a restart before recording the extension.

Call Start Throttle Time: The time in milliseconds that needs to transpire between events to trigger a recording for a device. In some passive integrations, multiple events can occur at the same time that will all be interpreted as a call starting. Enabling this setting ensures only the first event is acted on.

Phone Registration Throttle Time: The time in seconds that needs to transpire between events to trigger a registration of a device. In some passive integrations, multiple events can occur at the same time that will all be interpreted as a registration. Enabling this setting ensures only the first event is acted on.

Channel Map - Enable Activity/Silence: For passive TDM configurations, this setting determines if line activity messages are written out to the application log. As these events can occur multiple times per second, it is recommended this setting is enabled for troubleshooting purposes only.

Channel Map – Split Logs per Channel: Enabling this setting creates a separate application log file for each recording channel. As this can create many log files to be generated, it is recommended this setting is enabled for troubleshooting purposes only.

Channel Map – Auto Clear Event Flag on Negative Match: This setting will clear event flags used in Channel Maps if a negative match occurs. This setting is reserved for use by the CallCopy Support team for the creation of recording logic maps in passive recording configurations.

Device Alias Map – Auto Login: Enabling this setting will automatically associate the Agent Number mapped to a device on the *Device Alias Map* list when the Recorder module is started.

Channel Selection – In concurrent recording configurations where any recording channel can be utilized to record any device, this setting determines how the Recorder will decide which channel will be utilized for a given recording.

- **First Available:** Uses the lowest assigned channel value available for recording.
- **Round Robin:** Rotates use through each channel before re-using a channel.
- **Board Load Balance:** If multiple boards are available for use, it will determine which board has the most free channels available and use the first available channel on that board.

Default Recording Path: This field allows you to set the directory where records will be saved on the system. The system default is "D:\Recordings".

Default File Name Mask: This allows you to specify the default directory structure and file name of the records.

This path is critical, as it will allow you to efficiently maintain and organize your records.

The following is a list of variables that may be used for the file name.

%Y	4 Digit Year
%y	2 Digit Year
%M	2 Digit Month
%m	Month Name (String)
%D	2 Digit Day
%d	Day of Week (Name)
%H	Hour (24 hour time format)
%N	Minute
%S	Second
%A	Agent Number
\	Subdirectory

So, for example, the system default is:

D:\Recordings:\%Y%M%D\%A\%A-%H-%N-%S

This means that files are saved in a YearMonthDate Directory, then under an Agent Subdirectory, and files are saved as AgentNumber-Hour-Minute-Sec

So, a voice file from March 30, 2004, at 1:05 PM, from agent number 1234 would be saved to directory "20040330\1234" with a filename 1234-13-05-30.vox.

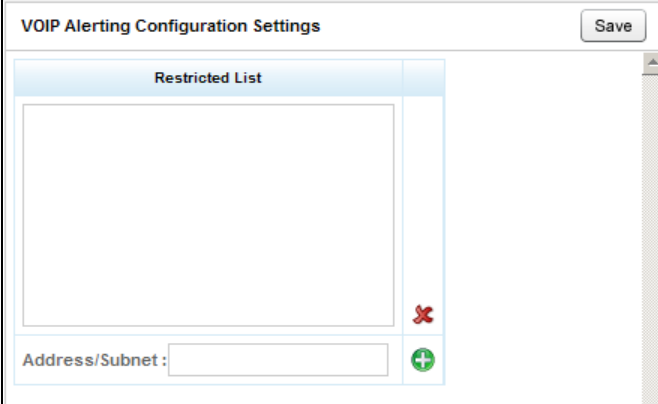
Typically, the CallCopy installer will consult with you prior to installation on the best naming convention for your organization, and then this variable will not change over the life of the system.

VoIP Alerting

In a VoIP recording environment, CallCopy has a security feature which will notify an administrator if the recorder has been passed restricted IP traffic. Alerts will be emailed as the following Notification types:

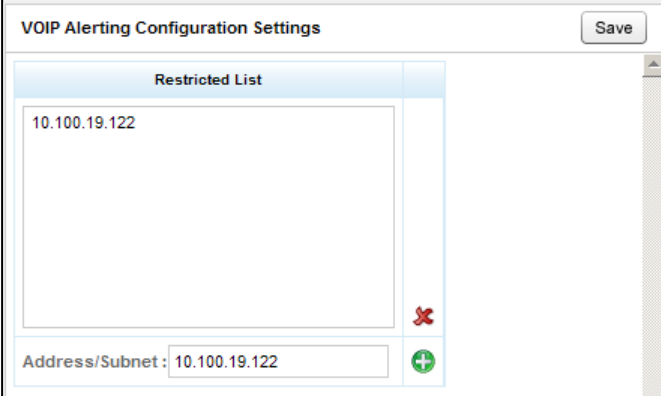
If the server has merely detected traffic from a restricted IP, Notification of type "Warning" and of type "Security" will be emailed.

If the server actually records traffic from a restricted IP, Notification of type "Critical" and of type "Security" will be emailed. Email alerts must be configured under the **Notifications** settings page.



The screenshot shows the 'VOIP Alerting Configuration Settings' page. At the top right is a 'Save' button. Below it is a section titled 'Restricted List' which contains an empty table. To the right of the table is a red 'X' icon. Below the table is an input field labeled 'Address/Subnet:' followed by a green '+' icon.

To add a restricted IP address, or a restricted IP range, key in the Address or Subnet, and click **Add**. The new IP Address will appear in the list.



The screenshot shows the 'VOIP Alerting Configuration Settings' page after adding an IP address. The 'Restricted List' table now contains one entry: '10.100.19.122'. The 'Address/Subnet:' input field at the bottom also contains '10.100.19.122'. The red 'X' icon is still present to the right of the table.

To commit your changes, press the "Save" button at the top of the page.

Loader

The **Loader** menu is used to configure the application modules with their respective parameters.

Loader Applications								Add	Save	
Order	Name	Parameters	Path	Wait Time	Restart	Hide App				
0	Logger		cc_logger.exe	500	Y	Y				
1	User Manager		cc_dataserver.exe	500	Y	Y				
2	Archiving & Cleanup		cc_archiver.exe	500	Y	Y				
3	Scheduler		cc_scheduler.exe	500	Y	Y				
4	Screen Capture		cc_screencaptureserver.exe	500	Y	Y				
5	API Server		cc_APIServer.exe	500	Y	Y				
6	Agent Manager		cc_agent_server.exe	500	Y	Y				
7	Export Manager		cc_exportsrvr.exe	500	Y	Y				
8	Toolbar Server	-v	cc_ToolbarServer.exe	500	Y	Y				
9	Chat Server	-v	cc_ChatServer.exe	500	Y	Y				

The Loader Component sets the order in which components launch upon server startup, and the duration between the launching of each component.

Components can be set to restart automatically if they stop running. Components can also be hidden from the server display to prevent accidental closure.

These components will be installed and configured by your CallCopy installation team. Do not modify these settings without first consulting your CallCopy support personnel.

Adding Loader Components


To add a new component, key the component information into the blank dialog box at the bottom of the component list.

9	Chat Server	-v	cc_ChatServer.exe	500	Y	Y				
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>				


Click the **Add** button. This will add the component to the loader list. Use the loader navigation menu buttons to set the loader order.

- Moves the selected loader component up.
- Moves the selected loader component down.
- Removes the loader component entirely.

Altering Component Options

To make changes to an item, select the component's row in the loader menu or press the  button. This allows you to edit the row.

Save Loader Configuration

To save any additions or changes you have made, press the  button.

SSL Settings

This page is used by the legacy CallCopy technology that does not use CTI Core. By default, the cc: Discover Web Player and server do not use SSL encryption. If additional security is needed or required, create an SSL certificate for the player/server and configure the SSL Settings.

On the Administration tab's Settings menu, click SSL Settings. Select 'Yes' to enable player/server transport SSL encryption. Then enter the certificate password. Click Save to commit the changes.

VDNs via Trunk

VDN (Vector Directory Numbers) values can be added to the system by using the VDNs via Trunk page under the Administration tab's Settings menu. This is a legacy setting used in conjunction with Avaya TSAPI. The TSAPI module will monitor VDNs in this list. Any calls that come across those VDNs are recorded as a separate record and follow the caller. Calls that go to agent/devices are still recorded normally. In a typical setup, there will be one VDN recording that will span over a couple agents if they have been transferred.

Enter the VDN number and click .

To remove a VDN, select it from the VDNs list and click the red X.

Channel Mappings

These mappings are used to specify the events and actions that are trigger call recordings.

Web API/Export Servers

The Web API/Export Server Settings page is located on the Administration tab's Settings menu and only used by those clients that have not upgraded to the cc: Discover Core technology (i.e., v4.0 and later). These settings control the legacy system's Web API and Export server's communications. The information in these fields is based on the machine on which the server is installed. Click Save after editing any of the fields.

Web API/Export Server Settings		Save
Server Connection		
Allowed Subnets :	<input type="text" value="255.255.255.255/0"/>	
Server Host :	<input type="text" value="127.0.0.1"/>	
Server Port :	<input type="text" value="5620"/>	
Type of Instances :	No SSL ▾	
HTTP Settings		
Address :	<input type="text"/>	
Port :	<input type="text" value="2012"/>	
SSL Settings		
Address :	<input type="text"/>	
Port :	<input type="text" value="2013"/>	
Additional Export Settings		
Local Directory :	<input type="text" value="C:\Exports\"/>	
Export Port :	<input type="text" value="5621"/>	

Server Connections

Allowed Subnets: The Web API Server can be limited to accept requests from specific subnets only. By default, requests from all addresses (255.255.255.255/0) are accepted.

Server Host: The hostname or IP address of the server the Web API module is running on.

Server Port: Port number the server uses for communicating.

Type of Instances: The server can connect respond to requests that are SSL, Non-SSL, or Both SSL and Non-SSL.

HTTP Settings

Address: IP address of the server the API module is running on.

Port: The TCP port number that the API Server will accept HTTP WebAPI requests on. (Default is 2012)

SSL Settings

Address: IP address of the server for SSL requests.

Port: Port number that the server listens to for SSL requests.

Note: *The certificate location and other information are recorded in the cc_webapi.ini file.*

Additional Export Settings

Local Directory: Directory where files are stored while they are being transferred.

Export Port: Port number the server uses to export files.

Export Verification

This is a data integrity feature. When the system finishes recording, it calculates an MD5 hash of the recording file and stores it in the database. If users export files, they can run an MD5 hash on the files to get a checksum. Then they go to the Export Verification page and enter the ID and checksum. The system compares the entered and stored checksum to see if they match. If there is a match, then the file has not changed. If there is not a match, then the file is different somehow, and someone may have tampered with it.

Custom Lookup

These settings provide the ability to add custom data to a recording record. When the system receives a callstart, it will compare the lookup value in this list to the call's ANI or DNIS. Account will match ANI, and DNIS will match DNIS. If a match is found in the list, then the system adds the match value to a User field in the recording record.

The User field used is configured on the Custom Extensions page. "SAP Account Number Integration" determines the User field for "Account" match. "DNIS custom lookup" determines the User field for the "DNIS" match.

To add a custom lookup, click Add New Lookup. Enter in the Lookup Value field the ANI or DNIS value for calls in question. Enter the value to be added to the call record in the Match Value field. For the Lookup Key, select Account for ANI matches or DNIS for DNIS matches. Click the save icon.

In addition, on the Custom Extension Page:

- Pick a User field for "SAP Account Number Integration".
- Pick a User field for "DNIS custom lookup".

Appendix B: Legacy Server Administration

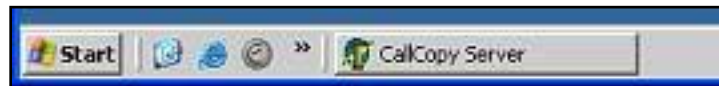
This section will detail various maintenance procedures that may be required for the operation of Legacy Recorder systems. These procedures all take place on the physical console of the CallCopy Server. If the cc: Discover system is utilizing the new Core platform, these processes will not apply.

At times, CallCopy support personnel may ask that you perform these procedures. Some of these tasks may be required as part of a regular maintenance routine, so as an administrator, you should make yourself familiar with them.

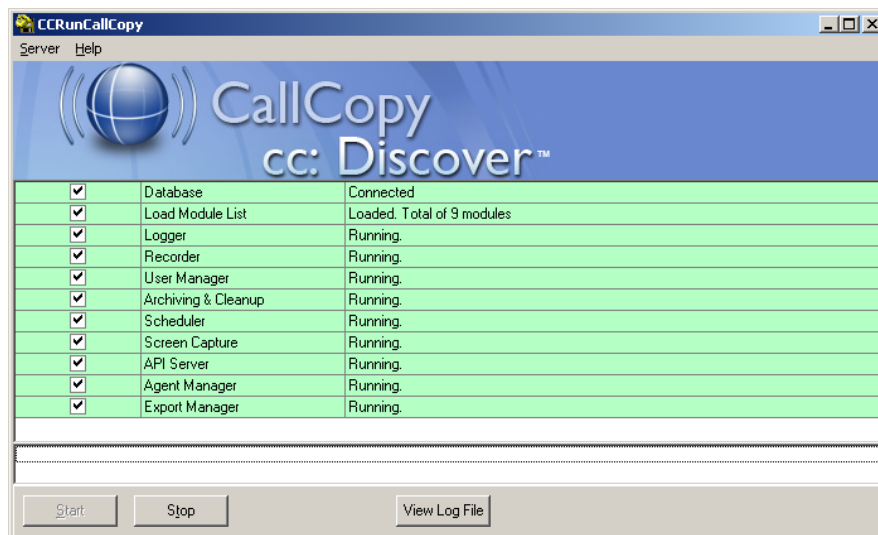
Shut Down Process

The shut down process will immediately terminate all active recordings. You may be required to shutdown the server to add additional disk space, physical memory, or additional voice boards.

Note: | *Make sure to schedule a maintenance window during periods of anticipated low usage*

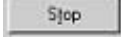


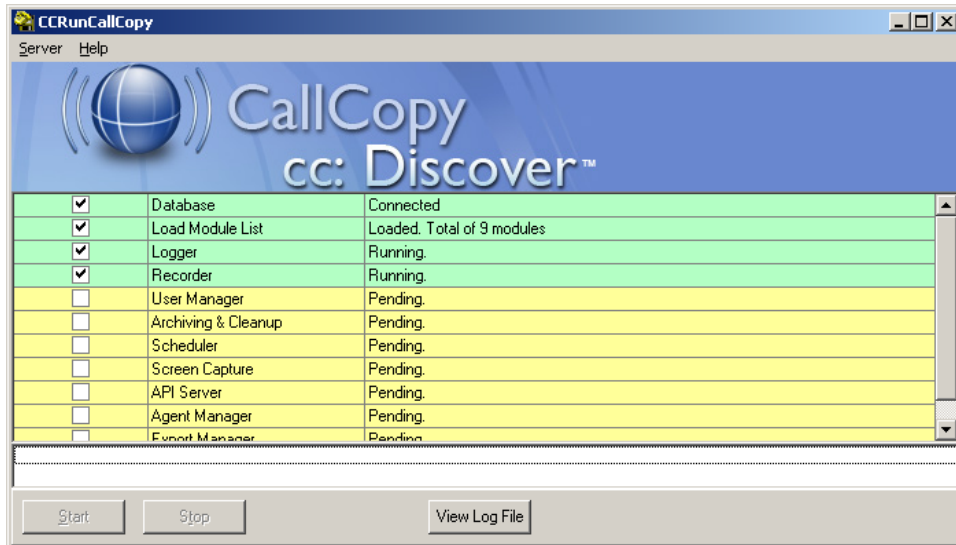
The CallCopy Server application will already be running. Maximize the application from the Windows Task Bar.



Appendix B: Legacy Server Administration

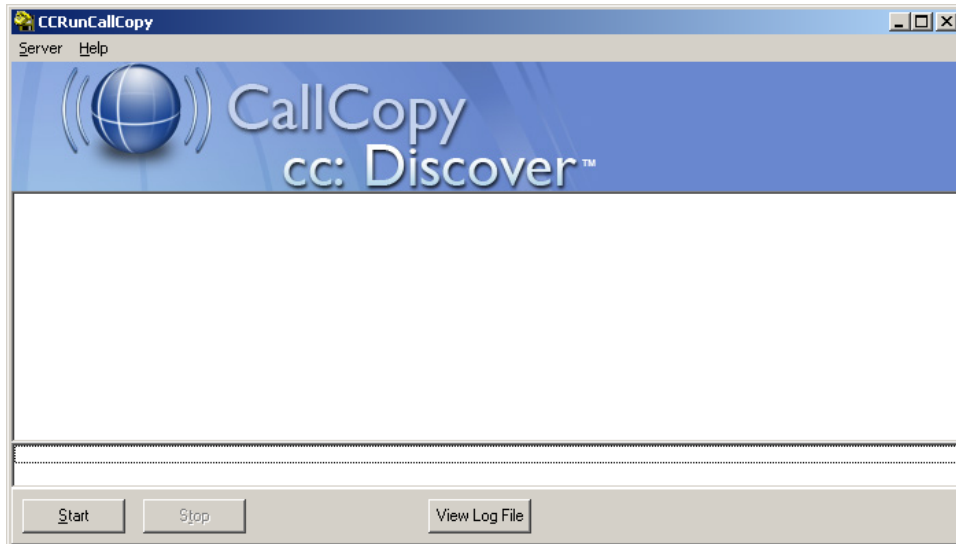
This is what a normal, healthy CallCopy Server window looks like. All services are running without any error conditions.

Click on the  button to halt the CallCopy Server processes.

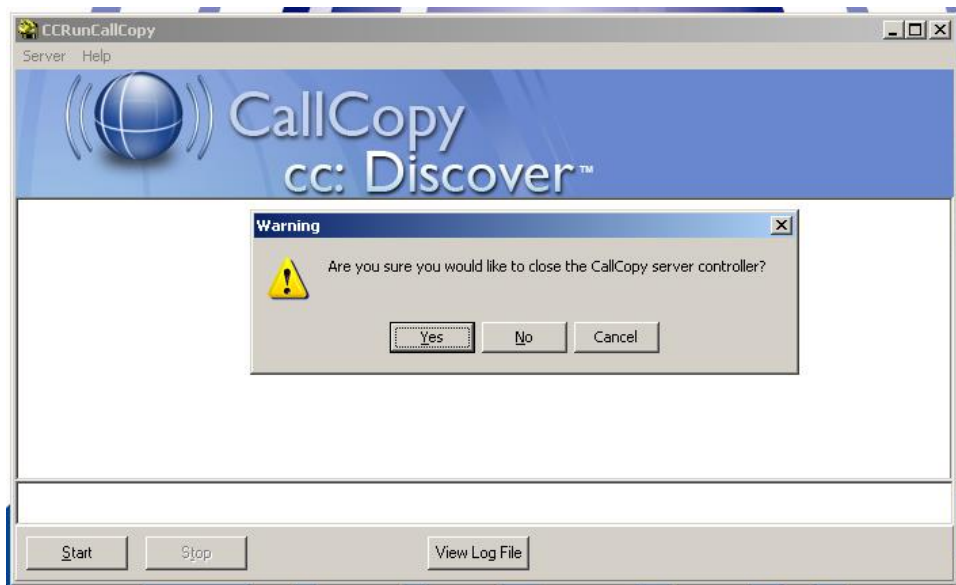


The server will now stop processes in the reverse order of launch.

Note: | *The application process order can be changed in the “Loader” configuration manager discussed in the “Settings” chapter.*

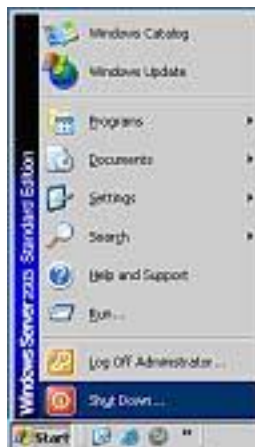


All the processes have been stopped. The application window can now be closed cleanly.



Close the server controller window and click "Yes" on the confirmation dialog box.

The Windows server itself is ready to be shutdown or restarted.



Shut down or restart the server using the standard Windows procedure. At this point, perform any hardware maintenance that may need to be done.

Start-up

Start Windows server

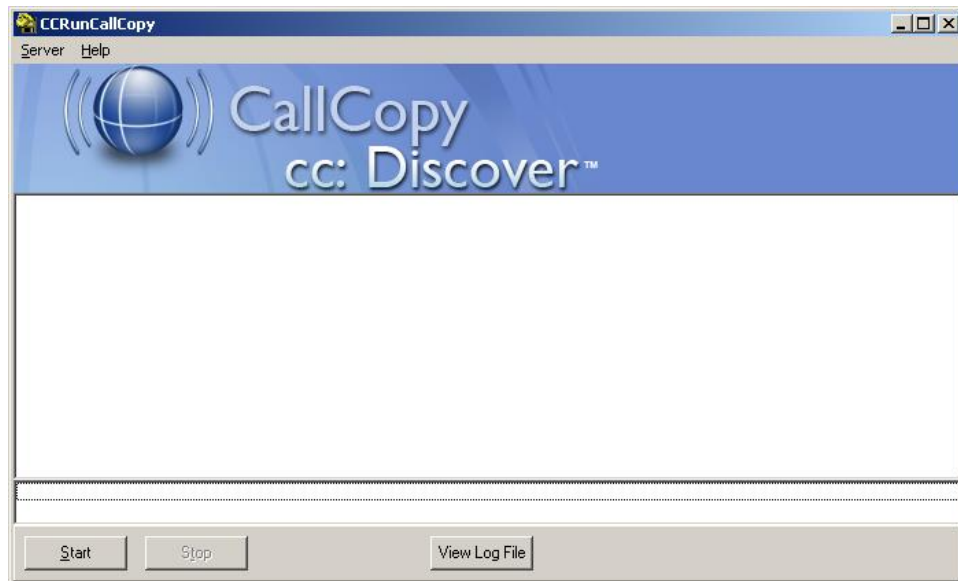
Once any hardware maintenance is complete, you can physically start the server. Log in to Windows as an administrator. Please speak to a local systems administrator if you do not know the administrator credentials on the system.

Start CallCopy Server

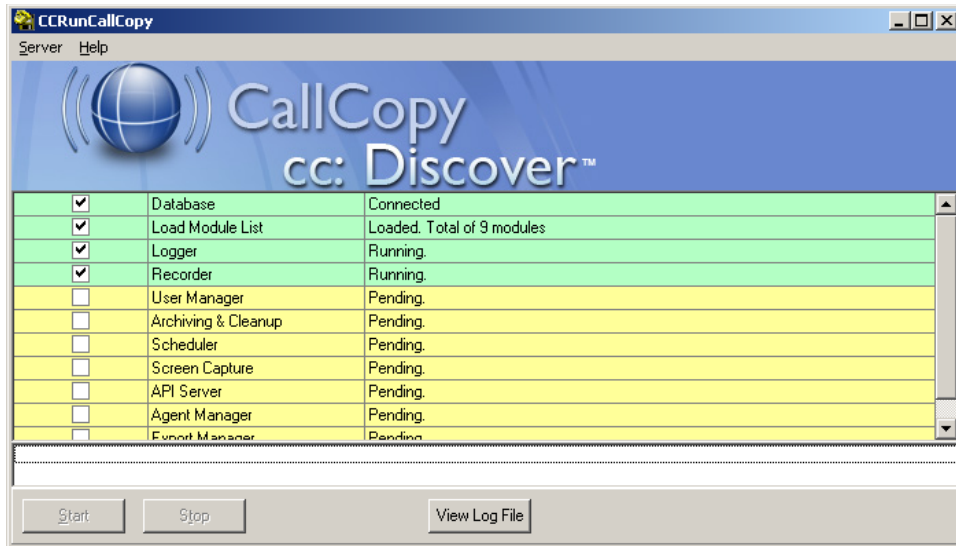
When all system maintenance has been completed, click the CallCopy Server icon to launch the CallCopy Loader.



Clicking on the CallCopy Server icon will launch the CallCopy Server Application.



On the CallCopy Server interface, click on the  button. The CallCopy Server will now load the application services in order as configured in the Web Portal. See the “Settings, Loader” section for more information.

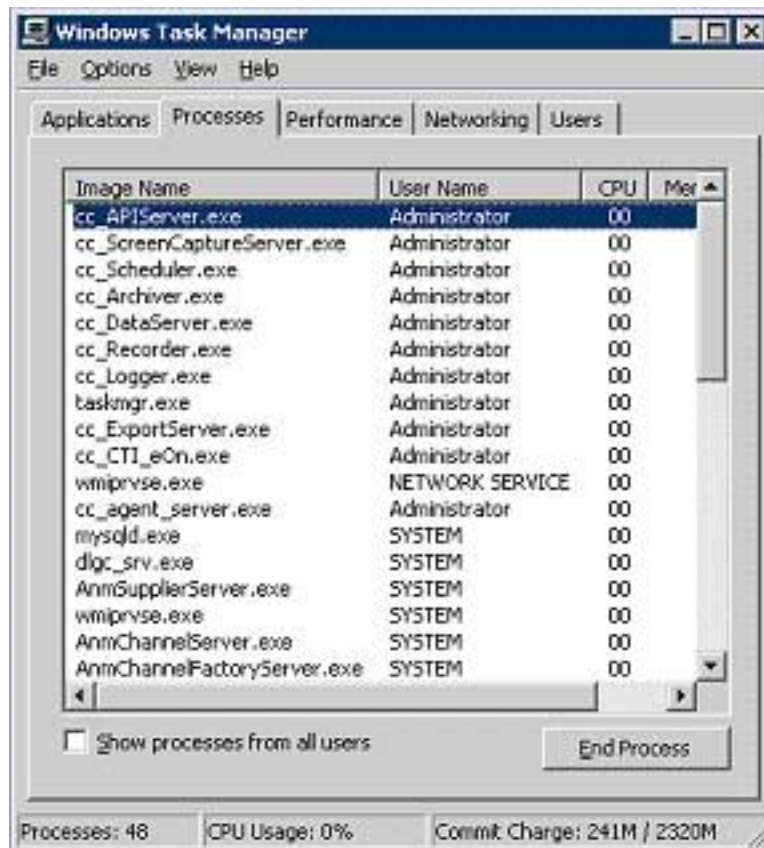


The CallCopy Server will launch the application services. If there are problems or errors with this process please contact your CallCopy Support Personnel.

Note: | Loader configuration in the Web Portal checks for a path relative to the root path for the recorder directory, e.g., *C:\Program Files\CallCopy\Recorder*

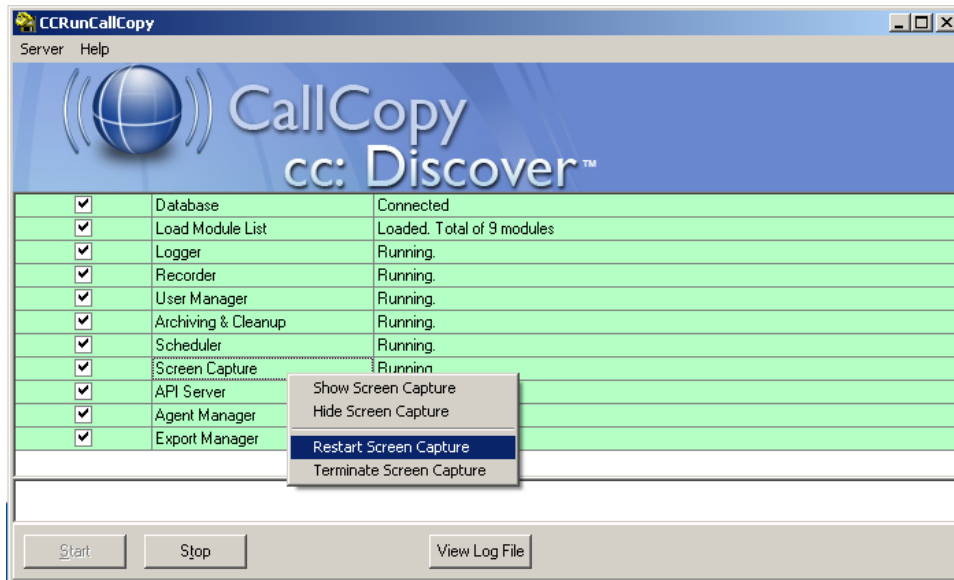
Using Windows Task Manager

Once the services have loaded, it is critical DO NOT CLOSE THE SERVER WINDOW without stopping processes via the CallCopy server interface. If you do this, CallCopy services will not stop cleanly. If you launch the server again, it will not have control over the services that are already running. You will need to stop them manually in Windows task manager.



Within Windows Task Manager, click on the "Processes" tab. To reach the specific CallCopy processes, sort by Image Name. Any process that starts with "cc_" is a CallCopy application process. Select a process and click "end process" to stop these individual processes.

Managing Individual Services



To restart an individual service, right-click on that service and select the restart option.

Note: *An administrator should never be required to stop or restart any of the following individual processes. During troubleshooting, maintenance, or support, CallCopy support personnel may ask that individual processes be restarted, so it is important that you are familiar with the processes and how to navigate them.*

Server Processes

Database: An administrator should never be required to re-start the database individually. This can cause critical errors to any recordings in progress, as well as loss of saved configurations or other data. **DO NOT EVER RESTART THIS PROCESS!** If you feel you need to re-start the database, then restart the entire server cleanly using the "Restart Server" process described above. If you have further questions or concerns, please contact your CallCopy Support personnel.

Load Module List: This controls the order in which modules are loaded.

Logger: This module controls event logging. Messages will not be logged while this is down, and notifications will not be sent.

Recorder: This process controls the Recorder sessions. If your environment utilizes the SmartTrunking capability of CallCopy, then any changes to those options will require this process to be restarted. For information regarding SmartTrunking, please refer to that section in the manual.

Note: | *Stopping this process this will stop any recordings currently in progress.*

User Manager: This module controls user rights and permissions within the system.

Archiving & Cleanup: Archiving process that are running will be stopped, but they system will continue where it left off when the service is re-started.

Scheduler: Any new calls that come through while this process is not down will not be recorded, as the scheduler will not recognize them.

Screen Capture: Any screen recordings currently in session will be terminated if this process is stopped.

API Server: Stopping this process will prevent any features that are driven by the API from functioning, such as on-demand recording, communication with third-party devices, etc.

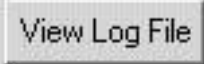
Note: | *This would also cause trunk-side recording to lose track of the call status of recordings in progress, and all active recordings would not stop.*

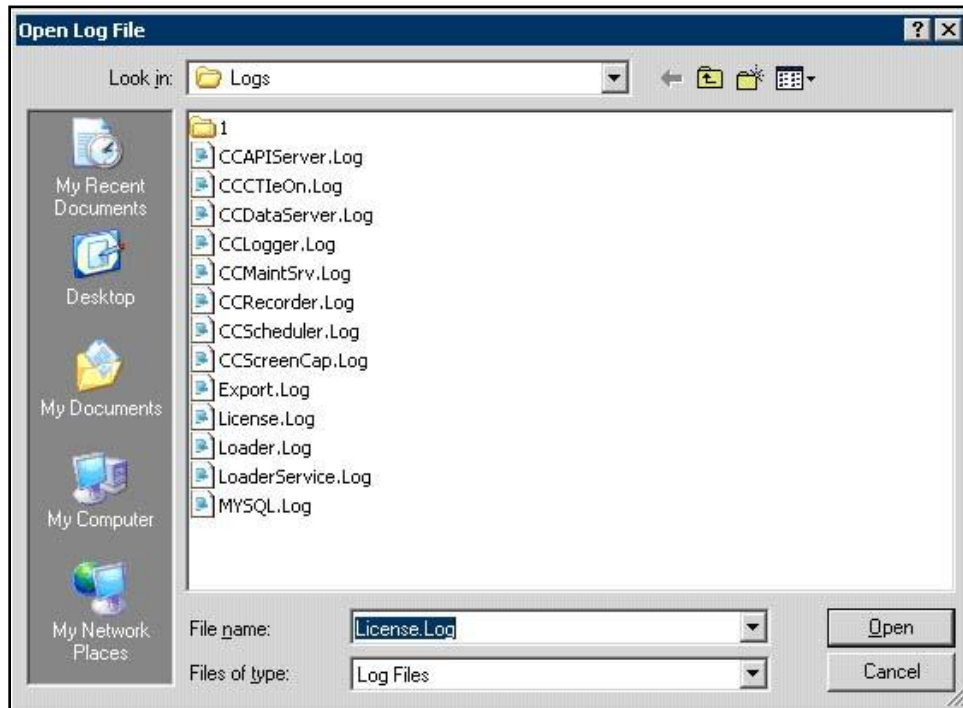
Agent Manager: If a call ends and a new call comes in for an agent while this is stopped or re-starting that new call may not be recorded. You will also lose the display in the Agent Administration Portal.

Export Manager: File export processes that are running will be stopped, but the system will continue where it left off when the service is re-started.

Troubleshooting

To assist CallCopy Support personnel in troubleshooting, you may be asked to pull logs off of the CallCopy system.

From inside the CallCopy server application window, click on the  button. This will launch the "Open Log File" window.



Select any pertinent logs that may be required and copy them to an accessible network location. You may need to email specific logs to CallCopy support.

About CallCopy

CallCopy, a leading provider of innovative call recording and contact center solutions, is dedicated to ensuring the highest standards of customer and employee satisfaction. The award-winning, enterprise-proven cc: Discover suite delivers advanced call recording, screen capture, quality management, speech analytics, performance management, customer survey and workforce management capabilities to organizations of all sizes and industries across the globe.

CallCopy empowers these organizations to gather business intelligence, which is leveraged to maximize operational performance, reduce liability, achieve regulatory compliance and increase customer satisfaction.

For more information, visit www.callcopy.com.