uptivity
by inContact.

Uptivity WFO On-Demand User Guide, v5.7

on Premises

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Introduction

Audience

This document is designed for administrators who will install the Uptivity WFO On-Demand client application, as well as for those who will use Uptivity WFO On-Demand. Readers should have a basic level of familiarity with usage of a PC and its peripherals, the Windows operating system, and Uptivity Call Recording. Readers who will install the client application should additionally be familiar with installing Windows applications, with their network environment, and with the desired configuration and use of on-demand recording in their organization.

Goals

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

Assumptions

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

Need-to-Knows

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

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

The Uptivity WFO On-Demand client is not aware of RTP, and will not start or stop or otherwise alter recording status explicitly based on any RTP events. If your integration relies on RTP, discuss this with your Uptivity WFO administrator and/or Uptivity WFO Support.
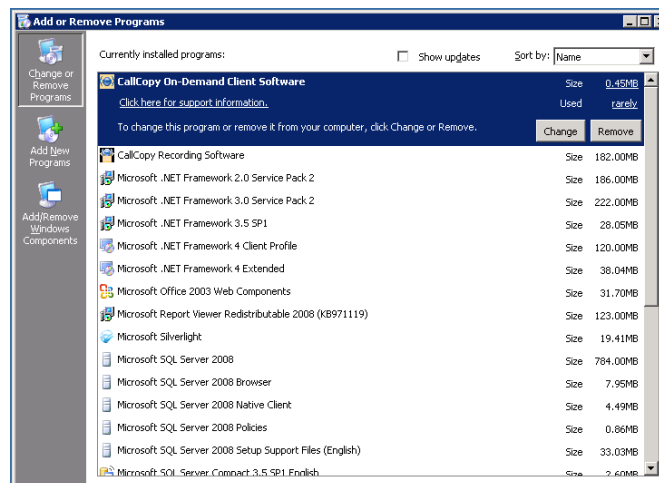
Installing the Uptivity WFO On-Demand Client

> ⓘ This section is designed for administrators or other personnel who will install the Uptivity WFO On-Demand Client.

Before You Install

Uninstall Old Clients

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

Enable .NET 3.5 (Windows 8.1 Only)

The Uptivity WFO On-Demand installer requires .NET 2.0 on the client PC. This version is included in the .NET 3.5 framework, which is not enabled by default in Windows 8.1. To enable .NET 3.5 in the Windows Control Panel:

1. Press the Windows logo key on your keyboard to display the **Start** screen and then type and choose **Control Panel**.

2. Choose **Programs** and then choose **Turn Windows features on or off**.

3. Select the checkbox for **.NET Framework 3.5 (includes .NET 2.0 and 3.0)**.

For additional information, search the phrase "Installing the .NET Framework 3.5 on Windows 8 or 8.1" on the Microsoft website.

Configure the User Account

The user account running the client (or a security group of which the user is a member) must have read/write access to the following folders and their subdirectories on the workstation where the client is installed:

- Logs directory:
  - **Windows XP:** C:\Documents and Settings\All Users\Application Data\CallCopy
  - **Windows Vista/7/8.1:** C:\Users\[username]\AppData\Roaming\CallCopy
- INI directory:
  - C:\Program Files (x86)\CallCopy\OnDemand

Locate the On-Demand Client Installer

The client installer can be obtained from any Uptivity WFO server by browsing to:

C:\Program Files (x86)\CallCopy\Installers

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

Install the Uptivity WFO On-Demand Client

To install the On-Demand Client:

1. Copy the installation MSI file to the destination PC.

2. Double-click the MSI file and click **Next** to continue on the Setup Wizard screen.

3. Select the checkbox accepting the License Agreement and click **Next**.

4. To configure the directory where the client software will be installed, click the **Browse** button and select a folder.

5. (Optional) To verify the workstation has enough disk space to install the software, click the **Disk Usage** button.
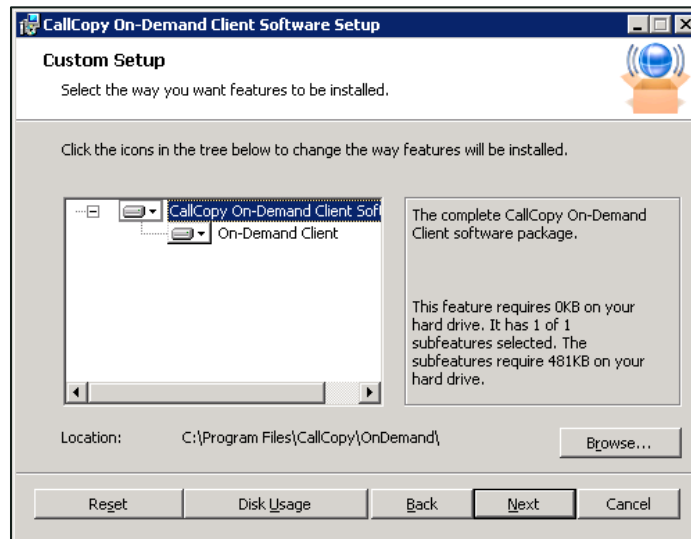
6. Click **Next**.

7. In the **Host IP Address** field, type the IP address of the On-Demand Server host to which the client will connect. If multiple servers are used, type the address for the primary server.

8. Click **Next** and then click **Install**.

9. Click **Finish**.

The Uptivity WFO On-Demand software will launch automatically during the next Windows startup.

Silent Options for Installing the Uptivity WFO On-Demand Client

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

```
Install Options

     </package | /i> <Product.msi>

          Installs or configures a product

     /a <Product.msi>

          Administrative install - Installs a product on the network

     /j<u|m> <Product.msi> [/t <Transform List>] [/g <Language ID>]

          Advertises a product - m to all users, u to current user

     </uninstall | /x> <Product.msi | ProductCode>

          Uninstalls the product

Display Options

     /quiet

          Quiet mode, no user interaction

     /passive

          Unattended mode - progress bar only

     /q[n|b|r|f]

          Sets user interface level

          n - No UI

          b - Basic UI

          r - Reduced UI

          f - Full UI (default)

     /help
```

```
            Help information

Restart Options

      /norestart

            Do not restart after the installation is complete

      /promptrestart

            Prompts the user for restart if necessary

      /forcerestart

            Always restart the computer after installation
```

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

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

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

Configure the Uptivity WFO On-Demand Client INI File

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

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

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

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

Security and PCI Compliance

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

Using the Uptivity WFO On-Demand Client

ⓘ This section is designed for agents and Uptivity WFO end users who use the On-Demand Client as part of their daily work.

Uptivity WFO On-Demand Overview

Uptivity WFO On-Demand is a client/server application that allows you to do one or more of the following from your desktop, depending on how your organization has configured the Uptivity WFO system:

- Initiate or stop recording of your calls. For example, some agents may only need to record certain types of calls, or some agents may receive calls that should not be recorded, such as personal calls.

- Initiate or stop blackouts. For example, an agent could initiate a blackout prior to collecting sensitive health or credit card information.

- Add information to the database call record, such as caller name or subject of the call.

When the Uptivity WFO On-Demand Client launches, it tries to connect to the server (or servers) configured during installation. A balloon tip will tell you the status of the connection attempt.

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

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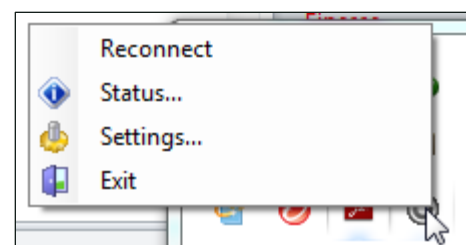

When connected, the client sends the local machine's currently logged in username and domain (if any), as well as the machine's name, to the designated On-Demand server.

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

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

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

Start/Stop Audio Recording
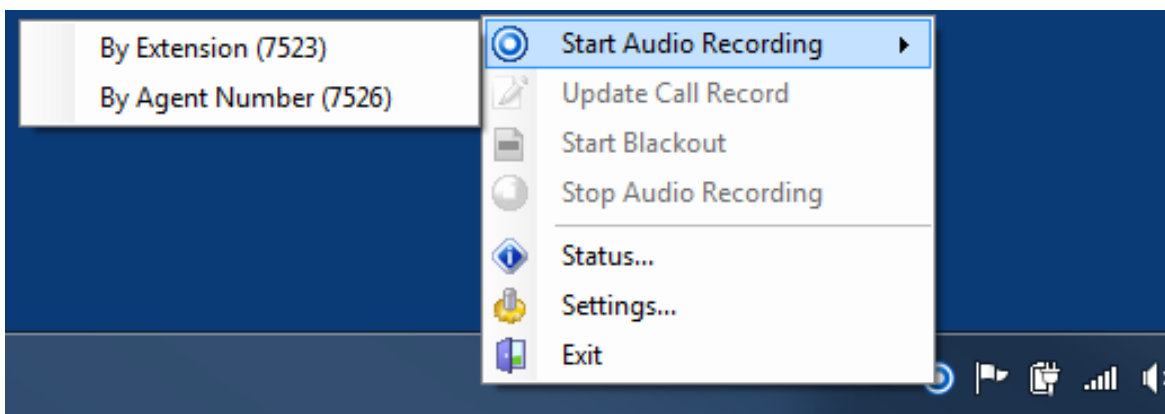
To start call recording using Uptivity WFO On-Demand:

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

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

- **By Device ID** (aka **By Extension** or **By Voice Port**): This method records a call using the actual physical device identifier and is available if your administrator has not selected to run in secure mode. Any calls made on that physical device will be recorded. Depending on how your administrator has configured Uptivity WFO On-Demand, you may be prompted to enter your device ID each time you log in to the client.

- **By Device Alias** (aka **By Agent Number**): This method uses an agent identifier, rather than a device identifier, to determine which calls are to be recorded. Typically, it requires the user to log in to the phone, and the login ID identifies the agent. This allows users to sit at different stations, while having the same identifier.

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

Once recording has started, it continues until the call is completed or is explicitly stopped when you:

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

Start/Stop Blackout

To trigger a blackout using the Uptivity WFO On-Demand Client:

- Right-click the On-Demand Client icon in the system tray and choose **Start Blackout**.
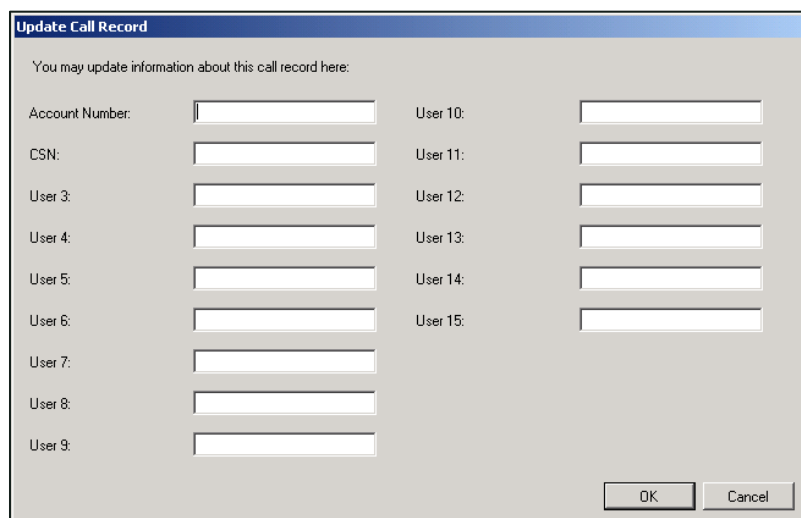
To end a blackout in the Uptivity WFO On-Demand Client:

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

Blackouts can also be triggered automatically by using Uptivity Desktop Analytics or a similar third-party application. If your organization does not use automatic blackouts and you would like to learn more about this functionality, contact Uptivity WFO Support.

For more information on blackouts, see the "Blackout Sensitive Data" section of the *Uptivity WFO Administration Manual*.

Update Call Records

Uptivity WFO offers fifteen custom information fields that can be configured for use with On-Demand, allowing you to insert or replace information about a call but not view previous information. Access to each field is controlled by permissions configured by your administrator. If you do not have permission to update any fields, the option to update call records will be disabled in your On-Demand Client.

To update a call record:

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

2. Update the desired field(s) and click **OK**.

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

Check Status

While the On-Demand Client is running, it maintains a list of the actions it has performed, and the current state of the client. The client keeps track of the following events/actions and displays a balloon tip after each:

- Audio Recordings

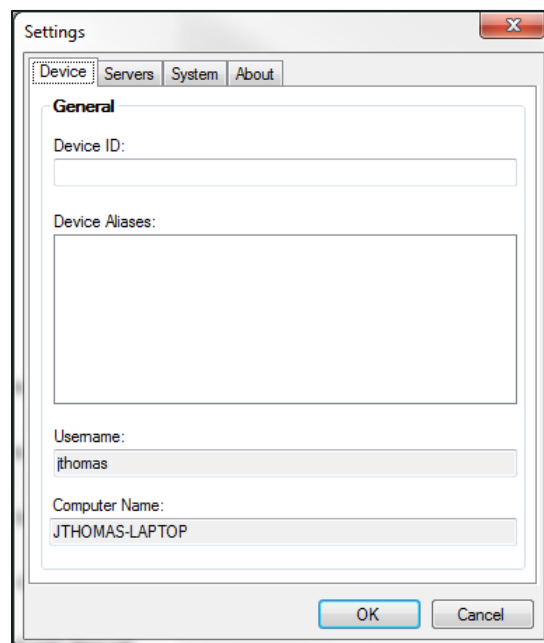- Desktop Recordings

- Connection Status

- Errors
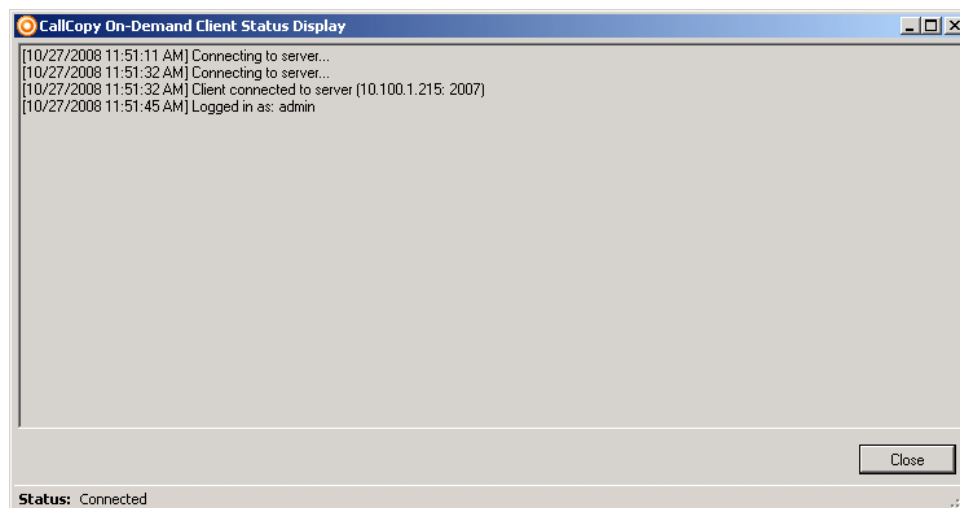
To check the status of the client:

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

Uptivity WFO On-Demand Client Settings Reference

Configure Device Settings

Settings on the **Device** tab allow you to change the physical device identifier (for example, the **Device ID** or voice port) associated with the client. The **Device** tab also shows any **Device Aliases** (agent identifiers such as agent ID or login) currently associated with recording, the **Computer Name**, and the currently logged in **Username**. You can configure this setting only if you have appropriate permissions. If you need to change the physical device identifier in your On-Demand Client and are unable to do so, talk to your Uptivity WFO administrator.
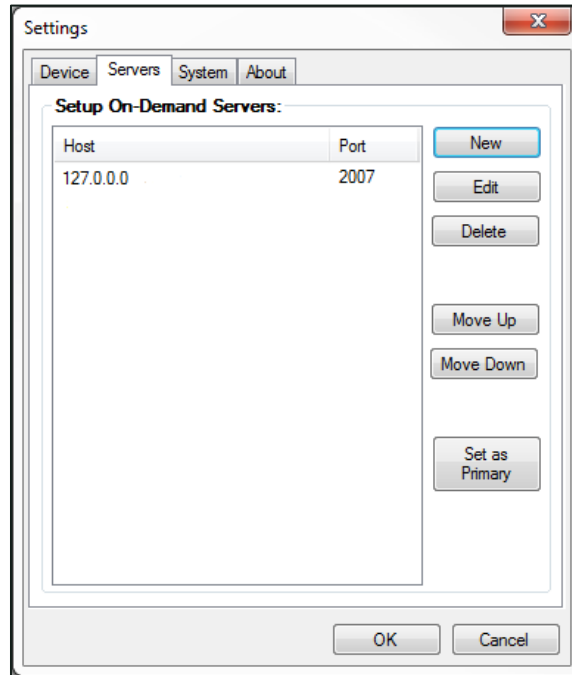

To configure the physical device associated with the On-Demand Client:

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

2. Click the **Device** tab.

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

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

Configure Servers Settings

Settings on the Servers tab allow you to add, delete, and prioritize the Uptivity WFO On-Demand Server(s) with which this client communicates.

To communicate properly, the server **Host** setting must be set to the IP address or hostname of the Uptivity WFO Server. The **Port** is provided for diagnostic purposes only and cannot be changed through this interface.

When the server host is changed, the client breaks any existing connection and tries to reconnect using the updated address.

To add other servers for the client to access:

1. Right-click the On-Demand Client icon in the system tray and select **Settings**.
2. Click the **Servers** tab and then click **New**.
3. In the **Host** field, type the IP address of an On-Demand Server and click **OK**.
4. Click **OK** again.

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

1. Right-click the On-Demand Client icon in the system tray and select **Settings**.
2. Click the **Servers** tab.
3. Click a **Host** IP address in the On-Demand Servers pane and then click either **Move Up** or **Move Down**.

4. Repeat for other servers if needed.

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

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

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

2. Click the **Servers** tab.

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

4. Click **OK**.

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

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

2. Click the **Servers** tab.

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

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

Configure System Settings

Settings on the System tab allow you to specify the level of logging for the On-Demand Client. The On-Demand Client logs store up to a week's worth of entries. These log files can be sent to Uptivity WFO Support to help resolve login issues, crashes, and other unexplained problems.

The level of detail the logs provide is determined by the **Logging Level**, with **ERROR** providing the least amount of detail and **DEBUG** providing the greatest. You can also turn **OFF** logging altogether. Unless instructed to do otherwise by your Uptivity WFO administrator or Uptivity WFO Support, do not change the logging level.

To configure system settings if necessary:

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

2. Click the **System** tab.

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

4. Click **OK**.

Close the Application

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

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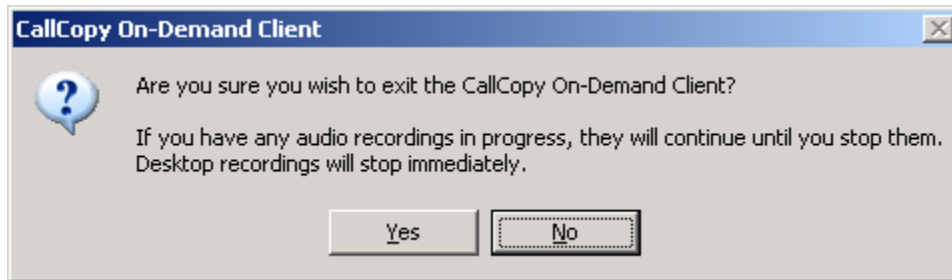
Obtain Client Logs for Uptivity WFO Support

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

- **Windows XP:** C:\Documents and Settings\All Users\Application Data\CallCopy

- **Windows Vista/7/8.1:** C:\Users\[username]\AppData\Roaming\CallCopy

The client log files are listed inside, with one log file listed for each date the On-Demand client was running. The log files follow a *'yyyy-mm-dd.log'* format (for example, 2010-09-01.log).

Document Revision History

Revision	Change Description	Effective Date
0	Initial version for this release	2015-09-01