



CallCopy[®]

Innovations in Call Recording
and Contact Center Solutions

cc: On-Demand Install and User Guide, Version 4.5 R2

March 2012

Reference Guide

www.callcopy.com

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Revision History			
Revision	Change Description	Author	Effective Date
0	Updated page formatting and content for version 4.5.	JThomas	8 August 2011
1	Added note to On-Demand Settings section explaining that clients have to be restarted for the changes to User field settings to take effect.	JThomas	4 October 2011
2	Add sections on Schedules, Permissions, and troubleshooting.	JThomas	27 March 2012

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Introduction

cc: On-Demand is a client/server application that allows users to control the recording of their calls from a desktop application. It also allows manual input of data into the call record stored in the database so additional information regarding the recording can be added by the user.

Before using this guide, you should have

- Completed the tasks in the *cc: Discover Installation Guide*.
- Created Agent accounts and configured the accounts' On-Demand settings in cc: Discover. The accounts' System Usernames and System Domain settings must match those used by agents to login to Windows. See the *cc: Discover Administration Manual* for information on agent accounts.

cc: On-Demand Server

Service Installation

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

Register Service

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

```
cc_OnDemandServer.exe -svcinstall -autostart
```

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

INI configuration

The service has an INI file that **must** be configured for the proper operation of the module. The INI file used by the service is located in the base folder the cc: Discover software was installed to, at **Recorder\cc_OnDemandServer.ini**

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

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

Web Portal Configuration

Perform these tasks in the cc: Discover Web Portal.

Service Loader

To add the service to the Loader configuration, follow the listed steps.

1. Click on the **Administration** tab
2. From the navigation menu on the left, select the **Tools** section.
3. Click the **Service Loader** link from the menu.
4. On the Loader Applications page click the **Add** button at the top right.
5. A new line will be displayed on the page. Enter the following information:
 - **Site Name:** Select the Server Node that the service will run from
 - **App Name:** Enter **cc_OnDemandServer.exe**
 - **Restart:** Check the box to have the service restarted automatically if it is stopped.
6. Click the Save icon () to save the listing.

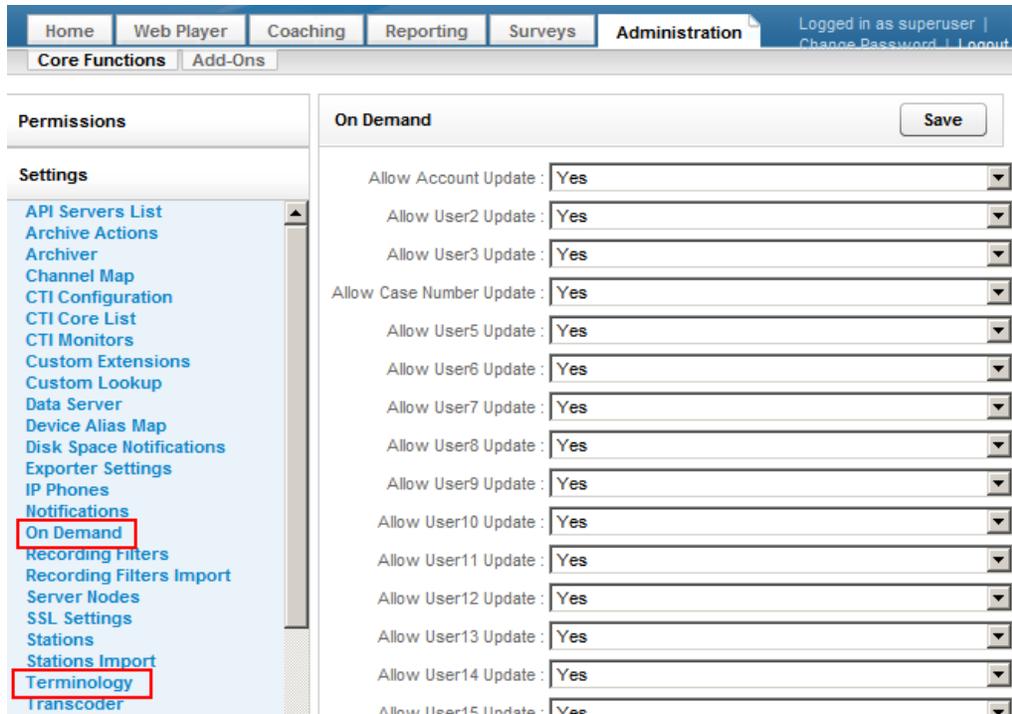
On-Demand Settings

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

1. Click on the **Administration** tab
2. From the navigation menu on the left, select the **Settings** section.
3. Click the **On-Demand** link from the menu.
4. To prevent users from updating a field, select **No** from the drop-down menu. Select **Yes** if they should be able to update a field.
5. Click Save to record the changes.

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

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



User Settings and Permissions

In order to be recorded with On-Demand, users' Discover accounts must have these settings configured:

- System Username – The System Username would be the Network ID the Agent uses to login to the Windows Network. Not the fully qualified user name.
- 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.

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

Schedule

See the *cc: Discover Administration Manual* for more information.

An On-Demand schedule (i.e., Schedule Type is 'On-Demand') must be created. On-Demand schedules provide several options:

- The schedule usually should never expire.
- Set Target Percentage to 100%.
- Entering no schedule requirements can possibly make the schedule available for all users, depending on permissions, installation of the software client, and call direction.
- Schedule requirements can be used to limit the schedule to specific users, extensions/devices, ACD groups, or ADC gates.

cc: On-Demand Client

Preparing for Installation

Requirements

Hardware Requirements

Minimum Specifications:

- Pentium 1.5 GHz
- 1 GB RAM
- 50 MB hard drive space
- 1280 X 800 – minimum screen resolution

Recommended Specifications:

- Pentium 3Ghz or 1.6Ghz dual core
- 2 GB RAM
- 50 MB hard drive space
- 1280 X 1024 or higher screen resolution

Software Requirements

- **Operating Systems:** Windows XP, Windows Vista, Windows 7

Prerequisites

The following software packages are required for the operation of the client software and will be installed on the workstation prior to installation of the software.

- .NET Framework v3.5 SP1 or greater

Client Installation

Locating Client Installer

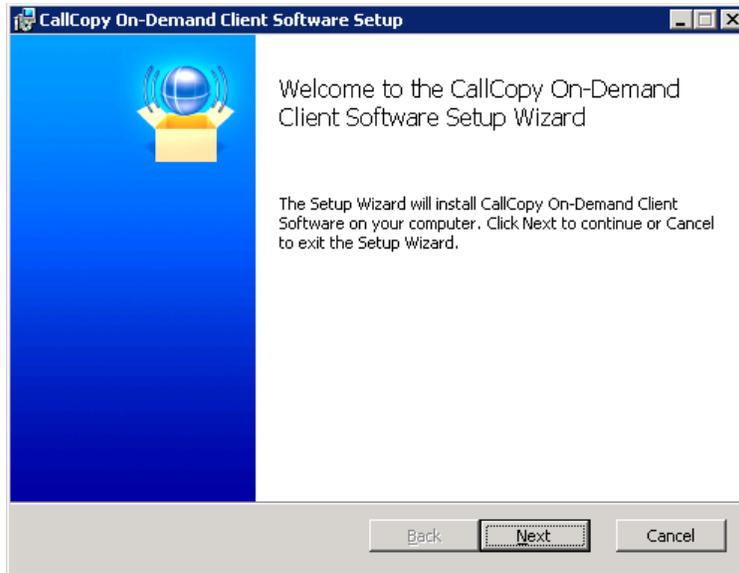
The client installer can be obtained from any cc: Discover server by browsing to the **C:\Program Files\CallCopy\Installers** folder.

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

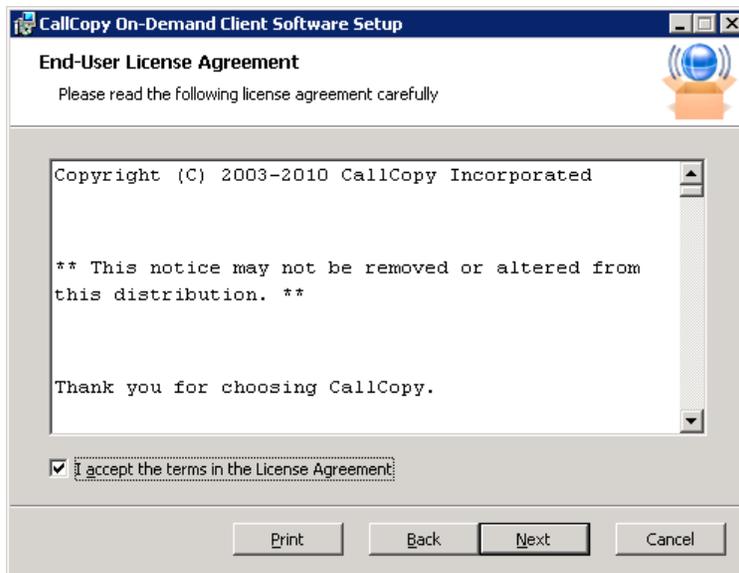
cc: On-Demand Client

Installing the Client

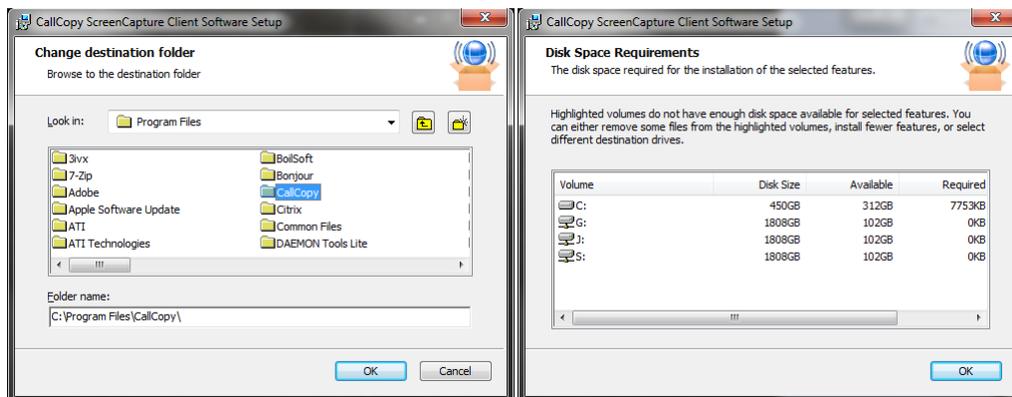
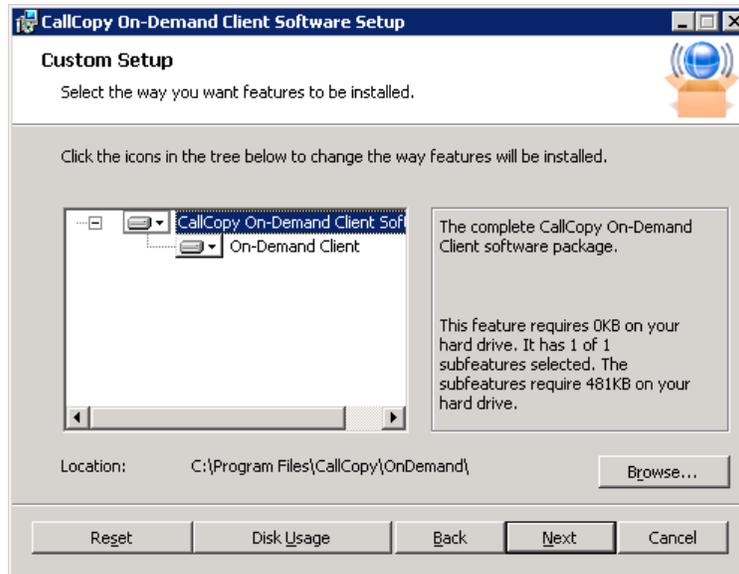
To begin the installation process, double click the installation MSI file. The Setup Wizard will open to the following screen.



Click **Next** to continue.



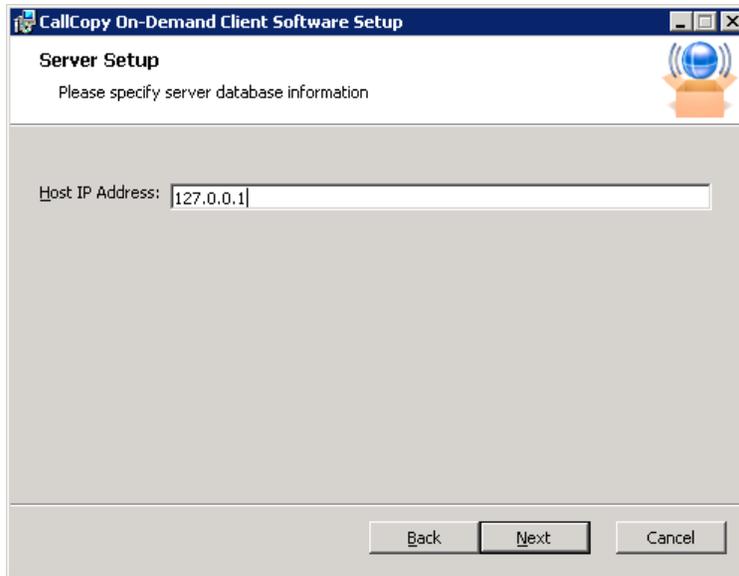
Check the box accepting the License Agreement and click **Next**.



On the Custom Setup page, you can set the directory the client software will be installed to by clicking the **Browse...** button and selecting a folder.

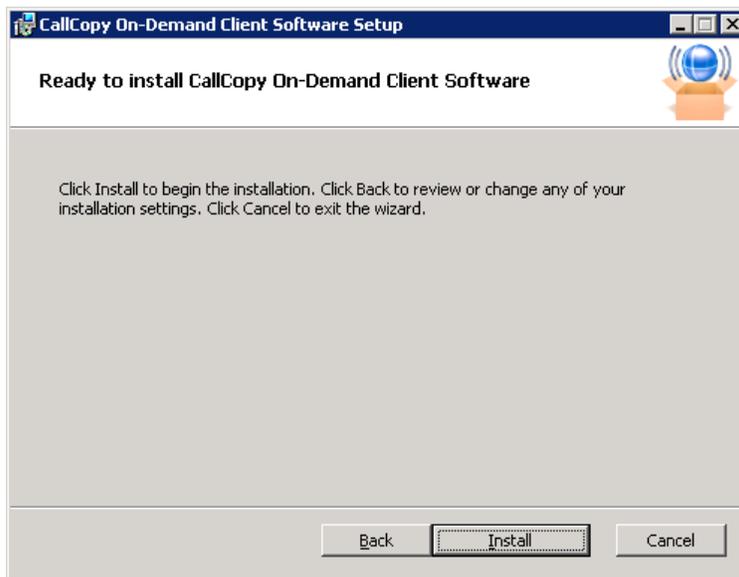
To verify the workstation has enough disk space to install the software, click the **Disk Usage** button.

When you have selected the desired options, click **Next** on the Custom Setup screen to continue.

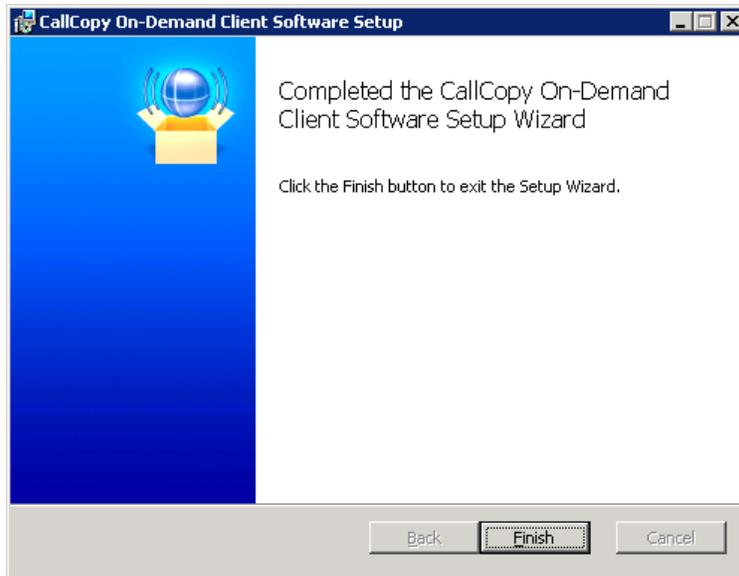


The Server Setup page opens. In the **Host IP Address:** field, enter the IP Address of the server running the cc: On-Demand Server module the client will connect to.

Once you have configured the settings, click **Next**.



The wizard now has the configuration information necessary for installation. Click the **Install** button to perform the software install.

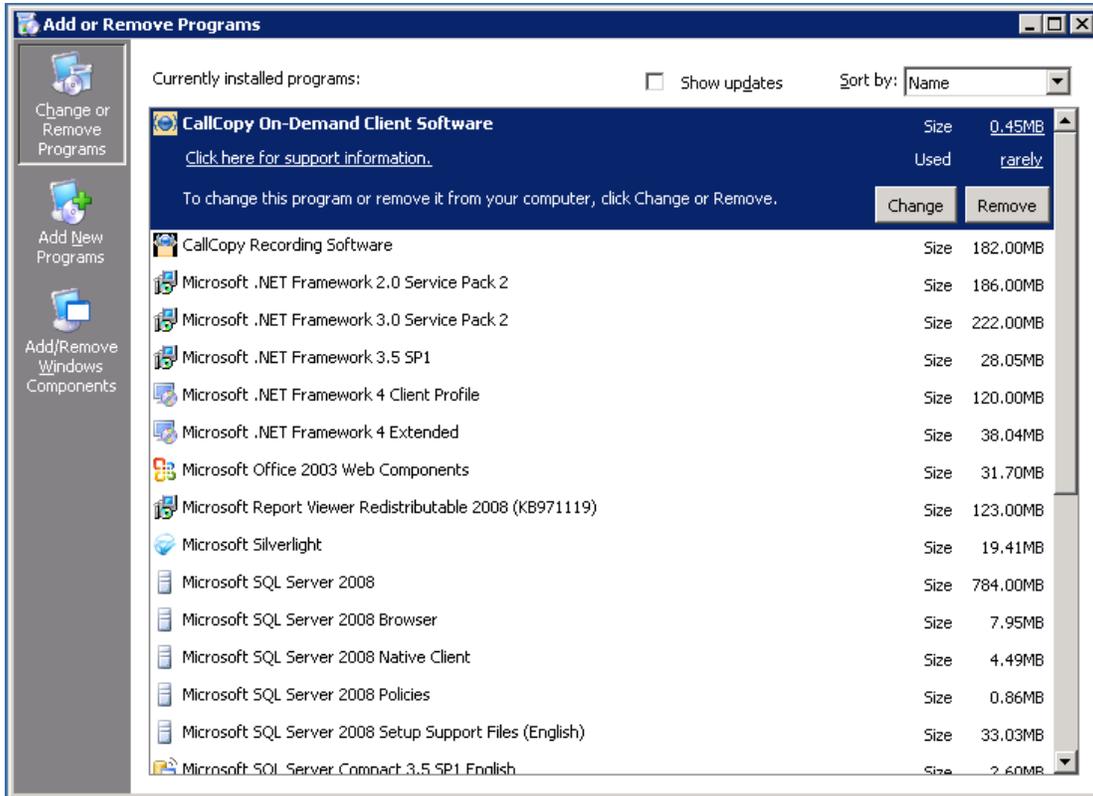


If the software install is successful, the Completed window will be displayed. Click **Finish** to close the Setup Wizard.

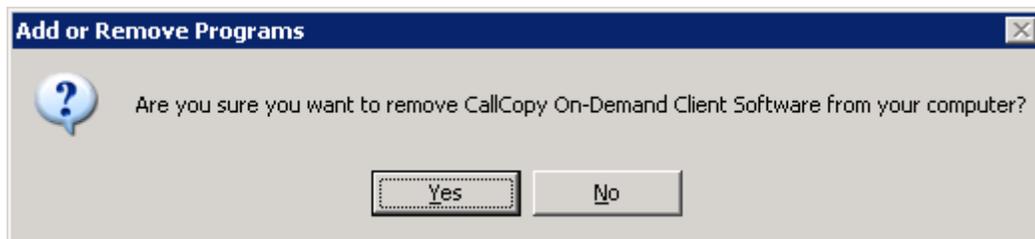
The cc: On-Demand Client is now installed. The software will run automatically during the next Windows startup.

Uninstalling

If it is ever necessary, follow these steps to uninstall the software. Open the Add/Remove Programs applet in the Control Panel.



The software will be labeled “CallCopy On-Demand Client Software”. Highlight the item from the list and click **Remove**.



You will be prompted to remove the software. Click **Yes** on this window. The software will be automatically uninstalled, and the entry on the Programs list will be removed once the process is complete.

Silent Options

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

```

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

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

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

```

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

```
Msixec.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 will need to be modified afterwards, or the MSI package will need to be extracted, and the configuration file replaced.

Client Configuration

The client settings are stored and read from a configuration file that is stored in the client installation directory. The file is named **cc_OnDemandClient.ini**. This file contains the settings configured during installation.

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

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

Using the Client

When the On-Demand Client application launches, it tries to connect to the server that was configured during installation. A balloon tip will pop-up informing you of the current status of the connection.



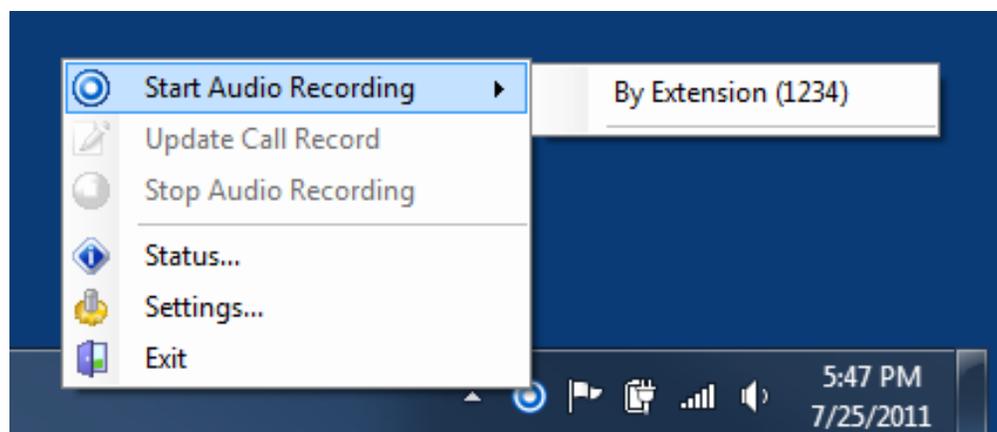
If the connection fails at start-up, or if there is a disruption in the server that causes a disconnection, the application will continue to try to reconnect every 30 seconds. After ten failed reconnect attempts, the Client will enter a standby mode, and the user will need to select “**Reconnect...**” from the menu to try again.

When connected, the Client application will send your local machine’s currently logged in username and domain (if any), as well as the machine’s name.

You and your machine must be properly configured by the administrator before you can use the Client application. If the application can’t find the user by the username, it will display a “Login Failed” message.

You can check and see if you are logged in as yourself by going to the Status menu or by watching the name that appears when you login. **Using the incorrect account can cause recordings to be mislabeled or not recorded at all!**

Recording Calls



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

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

Using the Client

- **“By Device ID”** which is also called **“By Extension”** or **“By Voice Port”** -- This method records a call using the actual physical device’s identifier and is available if the administrator has not selected to run in secure mode. Any calls made on that physical device will be recorded.
- **“By Device Alias”** which is also called **“By Agent Number”** – This method uses an agent identifier, rather than a device identifier, to determine what call is to be recorded. Typically, it requires the user to login 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)”** will be sufficient. Please see your administrator if you have any questions.

Once recording has started, it will continue until the call is completed or is explicitly stopped by you by selecting **“Stop Audio Recording”**.

Update Call Records

It is sometimes necessary to record information associated with a call, such as the CRM number or the account number of the caller. The administrator will have set up call record fields, and they can be accessed by right-clicking on the On-Demand Client icon in the system tray and choosing **“Update Call Record”**.

The screenshot shows a dialog box titled "Update Call Record". Inside the dialog, there is a message: "You may update information about this call record here:". Below this message, there are two columns of text input fields. The left column contains fields for "Account Number:", "CSN:", "User 3:", "User 4:", "User 5:", "User 6:", "User 7:", "User 8:", and "User 9:". The right column contains fields for "User 10:", "User 11:", "User 12:", "User 13:", "User 14:", and "User 15:". At the bottom right of the dialog, there are two buttons: "OK" and "Cancel".

Please note that the Update Call Record dialog only allows you to insert or replace information about a call, and does not allow you to view previous information.

If a call recording is already in progress, because of a previously created recording schedule, or because you already started a recording, the On-Demand Client application will update the call to the new information while simultaneously informing you that a call recording is already in progress.

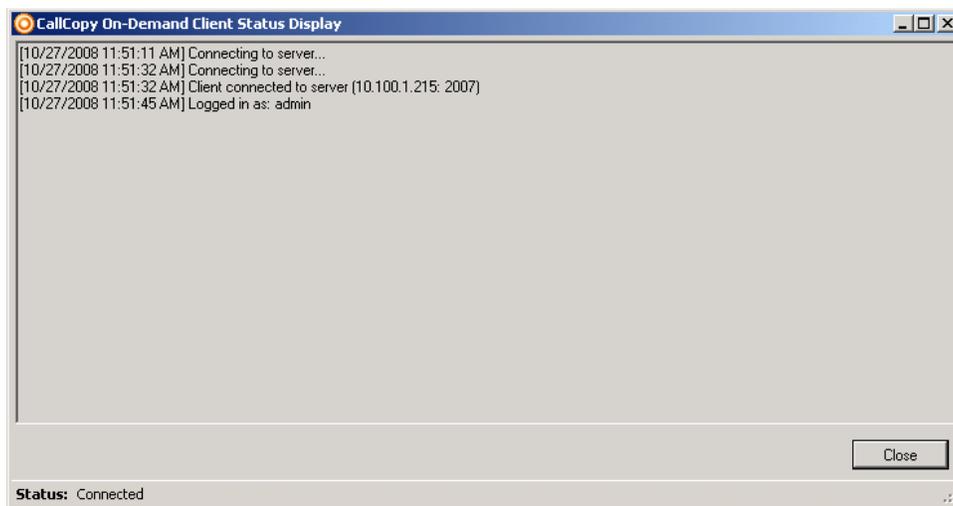
For example: The administrator sets up a schedule which records all calls on device 1321 with a single day’s retention and another schedule for agent initiated recordings which changes the retention to indefinite. When the agent selects **“By Agent Number (2123)”** the information about that call is updated

to reflect that device 1321 was recording agent 2123, the retention date is updated, and the agent is informed that a recording was already in progress and the information updated.

Checking the Status

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

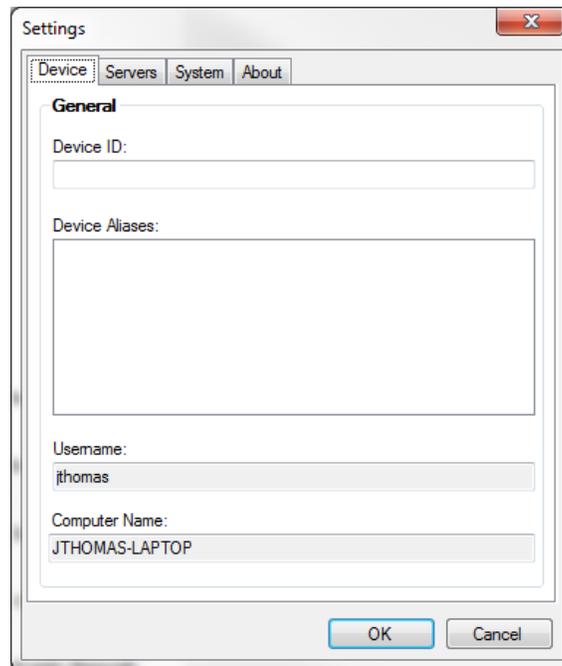
- Audio Recordings
- Desktop Recordings
- Connection Status
- Errors



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

Changing Settings

The On-Demand Client application has several user configurable settings, depending on how the Administrator has set up the system. To access these settings, right click on the system tray icon and click the “**Settings...**” menu option.



Device Settings

You can permanently set or change the Device ID / Extension / Voice port by entering the physical device's identifier in the appropriate box.

If you change the Device ID / Extension / Voice port, a dialog box will appear warning you that they will need to restore the Device ID to its previous value to stop recordings on that Device ID.

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

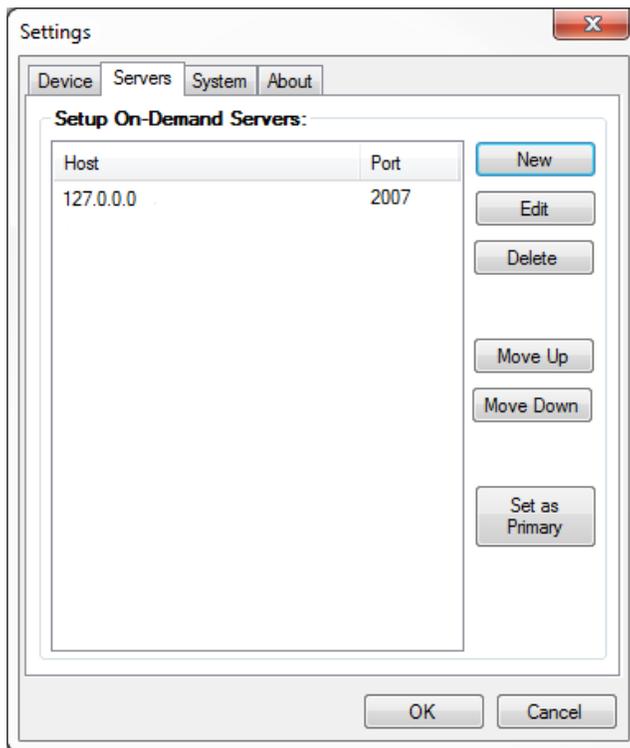
The Device Aliases field displays any agent identifier such as phone login that is currently used for recording.

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

The settings listed in the Device Settings tab can be made user-configurable or read-only through the **Permissions → Agent** menu in the Admin Portal.

Servers Settings

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



Multiple On-Demand Servers can be installed in the network for redundancy. Click **New** to add other servers for the client to access if another one is not available. When the server host is changed, the Client will break any existing connection and try to reconnect using the updated address.

The client will attempt to connect to the servers in the order in which they appear in the panel. To change this order, click the server IP address and use the **Move Up/Move Down** buttons. To designate one server as the main server to use, click the server IP address and click **Set as Primary**.

System Settings

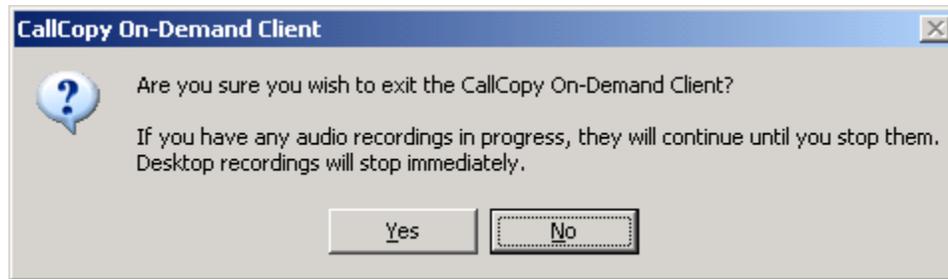
To better assist you when you are having technical problems, the On-Demand Client application contains a logging system that stores up to a week's worth of log entries. These log files can be sent to CallCopy support to help resolve login issues, crashes, and other unexplained problems.

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

Closing the Application

Exiting the application requires that the user right-click on the On-Demand Client system tray icon and select “**Exit**”.

A confirmation box will appear warning the user that quitting the application will not cancel any current audio recordings, but will cancel desktop recordings.



Choose the appropriate action.

Troubleshooting

Obtaining Client Logs

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

- `%APPDATA%\CallCopy\OnDemand\`
- `\Users\User\AppData\Roaming\CallCopy\OnDemand for Windows 7`

The client log files are listed inside, with one log file listed for each date the cc: On-Demand client was running. The log files follow an `'yyyy-mm-dd.log'` format (e.g. 2010-09-01.log). Copy these log files so they may be forwarded on to CallCopy Support for analysis.

Core Settings

On-Demand uses the API server to communicate with the Discover Core:

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

Scripts

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

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.