

# cc: Discover Administration Manual, v5.0 R4

October 2012

Reference Guide

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Revision History			
Revision	Change Description	Author	Effective Date
0	Initial release for v5.0.	JThomas	2012-04-01
1	Changes due to fixes: <ul style="list-style-type: none"><li>Specified that users must be an agent in order to have a Phone ID.</li><li>Specified that users must have a Phone ID in order to be a member of a group.</li><li>Clarified that a user/agent can be recorded for audio or desktop.</li><li>Import users – active_agent field added to csv file and use of header row option.</li><li>Best practices section explaining possible signs of expired or corrupt license file.</li><li>Updated Security section's AD integration configuration instructions with additional detail and Server 2008 instructions.</li><li>Added On-Demand Web permission.</li><li>Added explanation for transcoder Delay setting related to Screen Capture and Fusion.</li></ul>	JThomas	2012-05-30
	Added "Set Up an Agent To Be Recorded" section	MBuckingham	2012-05-30
2	Added reference to Install Guide for SQL DB Backup location. Integrated Security File Encryption Brief information. Added initial Buddy Core content. Explained user creation between Discover/Clarity. Added note about special characters in User 1 - 15 fields. Created System Security chapter. Updated Security section information. Updated Login Settings and Session Timeout	MBuckingham	2012-08-28

	<p>sections.</p> <p>Added details on encryption and TLS/SSL.</p> <p>Removed content related to auto-login using Windows credentials.</p> <p>Added info on resolving Manual Override blanking fields in Web Server Settings if toggled on then off.</p> <p>Noted customer's responsibility to provide SSL certificate.</p> <p>Noted that On-Demand permissions will not take effect until next login.</p>		
3	<p>Added details to Web Portal Site Settings URLs section (http req and URL validator).</p> <p>Transcoder scripts updated to support 260 character file names.</p> <p>Added steps to verify whether files are encrypted.</p> <p>Explained Switch Over Delay setting for buddy cores.</p>	MBuckingham	2012-10-04
4	<p>Updated Comet Daemon configuration to include both single and multi-server setups.</p> <p>Added LDAP login troubleshooting specifics.</p> <p>Updated password requirements, expiration, and settings.</p> <p>Detailed purpose of Agent checkbox in user profile.</p>	MBuckingham	2012-10-23

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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.

This manual is for System Administrators and managers who will be performing the tasks outlined in the table of contents.

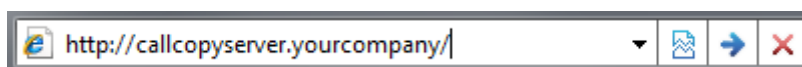
This manual assumes that the system administrator is familiar with:

- 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.

Administrators should also be familiar with information in cc: Discover's guides for installation, reporting, and integration. The cc: Discover Web Player Guide covers basic tasks such as navigation and logging into the system.

Most administration tasks are performed in the cc: Discover Web Portal. This portal is deployed during the installation process and can be accessed using either Internet Explorer or Firefox.

A hostname or IP address for the server will be established so that you may access the cc: Discover Web portal. If multiple Web Portals are installed in a network, each will have a unique hostname and IP address.



cc: Discover has a default account with system administrator level privileges. The CallCopy Installation team will provide you with the account a Username and Password. It is recommended you change your password from the default provided as soon as possible. To login using this account, the portal must use either Database or Hybrid Mode authentication.

The version number for your cc: Discover software is displayed in the upper-right corner of the login page. It also appears if you place the cursor over the CallCopy icon. This version number can be useful for locating correct documentation for your software and when obtaining support for your system.



# Permissions

To locate the Permissions menu, click the Administration tab. Expand the Permissions menu located on the left side of the page.

Permissions define what users can do in the system and are organized by users, groups, and roles.

**Users** are individuals who have access to cc: Discover and can perform tasks. Users include agents, supervisors, system administrators, and others. Users can be specified as **Agents** by selecting a setting on their account profile. Users have to be agents in order to be recorded and appear in many reports.

**Groups** are collections of users. CallCopy groups are often used to mirror the labor/hunt/skill groups on your ACD/PBX. Groups can also reflect a company's organizational structure or geographic locations. 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. Several quality assurance reports are based on group assignments.

A user 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.

**Roles** are attached to users and specify the tasks users are permitted to perform. These are key facts about roles:

- A role can be assigned to multiple users.
- A user can be assigned multiple roles.
- Role permissions are cumulative. For example, Role A has Permission 1, and Role B does not have Permission 1. If a user is assigned both Role A and Role B, that user will have Permission 1.
- cc: Discover permissions do not conflict. Permissions allow users to do things. A few On-Demand product permissions prevent a user from doing something. (See the On-Demand permissions.)
- An unlimited number of roles can be created. Having more roles allows security to be more granular and targeted to the needs of specific users. But more roles can be confusing to administer, and users may not know what roles they need when they request access.

Discover includes

- One default role: DiscoveryDefaultAgent. This role cannot be deleted, but its permissions can be edited.
- Roles migrated from earlier versions of Discover.
- A Superuser account with all permissions. A user can be assigned Superuser access. This account and access level is not considered a role.

Before creating users, develop a single plan that governs the use of groups and roles. Below are two generic plans.

### Plan 1: Small Team

In this scenario, a company has one location, and 30 agents are divided evenly to work three eight-hour shifts. Each shift has a supervisor that reviews call records and performs quality evaluations. The company owner and another employee administer the network and cc: Discover. All calls are for the company's products.

The company could create:

- An Agent role and an Agent group – All agents are placed in the group, and the role allows them to review their own calls and evaluations.
- A Supervisor role and a Supervisor group – All supervisors are placed in the group, and the role allows them to review any agents' calls, perform evaluations, and live monitor agents.
- A system administrator role assigned to the company owner and administrator. These users can create users, change system settings, and perform tasks that supervisor's do.

### Plan 2: Multiple Teams

In this scenario, the company now has three locations, and 120 agents who work a variety of shifts. All agents answer calls for the company's products. Some agents answer calls for a new Product X. Another group answers Spanish callers.

- An Agent role and an Agent group – All agents are placed in the group, and the role allows them to review their own calls and evaluations.
- A Supervisor role and a Supervisor group – All supervisors are placed in the group, and the role allows them to review any agents' calls, perform evaluations, and live monitor agents.
- Spanish Agent role and Spanish Agent group – Only certain agents are placed in this group. The role is assigned only to this group.
- Spanish Supervisor role and Spanish Supervisor group that evaluates Spanish-speaking agents.
- Product X role and Product X group. – Any supervisor can evaluate these calls, so the Supervisor group is given permission to this group. Having the group allows calls for this product to be searched for and reported on in Discover.
- A system administrator role assigned to the company owner and administrators. These users can create users, change system settings, and perform tasks that supervisor's do.

Roles can also be created for Discover applications such as On-Demand and Insight. Some agents may use these applications while other agents do not. In this situation, creating an On-Demand or Insight agent role and assigning it to a few agents maintains the base agent role and allows the flexibility to assign the application-specific role. Similarly, some supervisors will need access to certain reports but not others. Creating one or more supervisor reports roles addresses this need for granularity.

## Roles

The Role list shows the existing role and when they were last modified. The system automatically generates the Role ID.

Id	Name	Description	Last Modified
9	Test Role 2	Test	12/1/2011 11:01 AM
7	Test Role	Testing Role creation	11/30/2011 5:41 PM
1	DiscoveryDefaultAgent	This role contains the basic permissions normally available to all users. The role may be edited but may not be deleted.	11/23/2011 2:35 PM

## Create a Role

Follow these steps to create a role:

1. Click Administration tab > Permissions > Roles.
2. Click Add Role.
3. Enter the required basic Information:
  - Role Name
  - Description
  - Created By/Modified By – The system automatically adds this information to the role.
4. Select the permissions needed for the role. (See the permission definitions later in this chapter.)
5. Click Save.

If a role needs changed, double-click it in the Roles list. On the Edit page, make the necessary changes and click Save. The Role Name can be changed. The system uses the Role ID, which cannot be changed, to track the role.

## Delete a Role

Deleting roles removes the permissions from the users to which the role was attached. Users are not deleted by deleting roles.

1. On the Roles page, click Delete Roles.
2. Select one or more of the Available Roles.
3. Click the right arrow.
4. Click Delete.
5. Click Back.

## Copy a Role

Copying a role assures consistent permissions assignment. For example, you have one role for a group and want to create a group that will perform the same actions in Discover but handle a different type of

call. Copying the role and giving it a different name assures that the agents have the exact same permissions.

1. On the Roles page, click the role to be copied.
2. Click Copy Role.
3. Enter a name for the Role. Click Save. The role appears in the list.

## Permissions Definitions

### System 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 an administrator-level permission.

**Allow Agent Administration:** This permission has been deprecated.

**Allow Group Administration:** Allows the User to create and edit CallCopy Groups.

**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 API Authentication:** This permission is not used.

### Coaching Permissions

**Allow View QA Evaluations:** Allows a user to view evaluations on any group to which that user has permission. Selecting this option automatically selects the other Coaching permissions. If those permissions are not appropriate for a role, they must be cleared.

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

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

## Permissions

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

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

## Reporting Permissions

**Allow Viewing Call Reports:** Allow the user to run reports based on call detail data.

**Allow Viewing QA Reports:** Allow the user to run reports based on QA data.

**Allow Viewing Audit Reports:** Allow the user to run audit reports to monitor actions taken by other users in the system.

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

**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.

**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)

## Player Permissions

**Allow Viewing of User's Own Records:** Allow the User to view calls recorded from his/her associated user account.

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

**Allow Overriding Blackouts:** 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. Overriding blackouts will not work if Blackout on Disk is enabled, which makes blackouts permanent as soon as they are transcoded.

**Allow Downloading of Export:** Allow the user to export records from the Web Player directly to their workstation.

**Allow Emailing of Export:** Allow the user to export records from the Web Player and be sent to an e-mail address directly from the system.

**Allow Commenting:** 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 Viewing of Video:** Allow the user to view video screen capture associated with call records including Live Monitoring video and video for timed schedules (i.e., desktop only).

**Allow Live Monitoring of Calls:** Allows the user to listen to audio of contacts in "real-time."



## Survey Permissions (with Optional cc: Survey product installed)

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

**Allow Editing Surveys:** Allows the user to create, delete, and manage Survey forms.

**Allow Deleting Surveys:** This permission is not used.

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

## Analytics Permissions (with Optional cc: Analytics product installed)

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

**Allow Analytics Administration:** Allows the user to manage Analytics configuration.

## On-Demand Permissions

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

**Note** If permissions are changed while a user is logged into On-Demand, the changes will not take effect until the next time the user logs into the On-Demand client.

**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**.

## Permissions

**Prompt for Device at Login:** 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.

**Allow Blackout Start and Stop:** This setting allows users to start/stop blackouts of audio recordings from a desktop client.

**Allow Web On Demand:** This setting is not used.

## Insight Settings (with Optional cc: Insight product installed)

**Allow Access through Desktop:** Allows the agent to load and access the Agent Desktop application.

## User Edit Field Permissions

Selected fields can have their labels changed on the Web Portal Settings' Terminology page. (See the *Terminology* section for additional information.)

## Assign Access to CallCopy Groups

Group permissions give a user access to call records and other items created by members of a CallCopy group. A user also may need Player Permissions such as Allow Viewing of Video. (These permissions do not make a user with the role a member of the group. See the *Groups* section.)

A User assigned this role has access to calls for the Groups that are listed in the **Attached CallCopy Group** list.

- 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.

## Assign Access to an ACD Group or Gate/Queue

ACD Group and Gate/Queue permissions give a user access to call records and other items created by members of those groups. A user also may need Player Permissions such as Allow Viewing of Video. (These permissions do not make a user with the role a member of the group or gate. Those memberships have to be assigned on the PBX.)

Follow these steps to provide a role access to an ACD Group or Gate/Queue calls:

1. Go to the ACD and identify the Labor/Hunt/Skill Groups or Gates the user will access.
2. Enter them in the text field below the appropriate ACD Group or Gate list.
3. 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.

## Assign a Role to Multiple Users

Users can be assigned roles from the Assign Users to Roles page or from the user's account page. (See the *Create a User* section.) The former is helpful if you are trying to duplicate another user's roles for a new user.

1. On the Roles page, click Assign Users to Roles.
2. Click a role. The Available and Attached Users appear and currently have the role assigned to them.
3. To assign the role, click one or more available users and click the right arrow. The selected users move to the Attached Users box.
4. To remove the role, click one or more attached users and click the left arrow. The selected users move to the Available Users box.
5. Click Save.

## Users

Users must have a user account in order to login to cc: Discover and be recorded. Roles control what they can do.

The CallCopy User List shows all cc: Discover users.

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

Full Name	Email Address	Phones	Last Modified
Third User	tuser@callcopy.com	5445	11/28/2011 4:16 PM
CallCopy Administrator	lvaughn@callcopy.com		12/2/2011 1:53 PM
Second User	suser@callcopy.com	5043,5099	11/28/2011 4:16 PM
New User	tsame@test.com	5098	11/28/2011 4:16 PM
Matt Field	mfield@callcopy.com	5884	11/30/2011 1:45 PM
Leroy Vaughn	lvaughn@callcopy.com	5019,5020	11/16/2011 3:55 PM
George Barsa	gbarsa@gbarsa.com	7548,807548	12/1/2011 9:23 AM

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

The View Status drop-down lists specify whether to view Users, Agents (i.e., users who have the Agent option selected on their accounts), or All (i.e., both).

## Add a User

Users must have a Username, Password, First Name, Last Name, and Email Address.

**Note** Several tasks must be performed in order for an agent's audio to be recorded. See the section *Setup an Agent to Be Recorded*.

**Note** If both Discover and Clarity are being used...

- Creating the user in Clarity will also create them in Discover; this is the preferred method.
- Creating the user in Discover will require using the Mass Update Incomplete Users function in Clarity to import the user; see the *cc Clarity Administration Guide* for more information.

Follow these steps to add a user:

1. Click Administration tab > Permissions > Users.
2. Click Add User at the top of the User List.
3. 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 integrates with Active Directory (AD), AD might have restrictions.

4. Enter a password for the new User. There are no default restrictions for passwords. (See the section *Web Portal Settings > Security > PCI Settings* in this document for all password restriction options.)
5. Enter the unique email address for this specific employee. This is used to automatically email completed Quality Assurance forms directly to an agent.
6. The Grant Super User Access option gives the user full administrative permissions to add, delete, or change any information in the system. This option should be selected very rarely. Most system administrators will not need this level of access.
7. If you do not want the user to be able to login to Discover, select Lock Account. (See *Lock a User Account* for more information.)
8. Select the Agent option if the user will be recorded (either or both audio and desktop) and should be tracked as an agent in reporting. Clearing this option will allow the user to log into cc: Discover, but will not record their calls or include them in reporting. Existing calls can still be evaluated for users whose agent status has been deactivated.
9. Enter values in the Additional Information fields as needed:
  - 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.
  - 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.
  - 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 3<sup>rd</sup>-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.
  - Quota: For legacy cc: Discover installations (i.e. ones that do not use the Core recording technology), 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.
10. By default, Discover displays time by the time zone of the server on which the system is installed. Select Shift Times to User's Time zone if you want time to be displayed using each user's time zone. Use of this setting should be communicated to users in different time zones. Example: An agent works in the Eastern US zone. Discover is installed on a server in the Central US zone. The agent's manager works in the Pacific US zone. The Shift Time option is set on the agent's and manager's accounts. The agent records a call at 8 AM Eastern time, and it appears in the Discover to him as 8 AM. The call record appears to his manager as if the agent took the call at 5 AM.
  11. Select a time display format.
  12. The Phones field shows the logins and/or extensions associated with a user/agent. Enter the extension in the lower field and click the green button. To remove an extension, select it in the list and click the red X. If an extension is entered, the Agent option is automatically selected.
  13. To attach a role, select one or more items in the Unattached Roles and click the right arrow. To remove a role, select it in the Attached Roles list and click the left arrow.
  14. Click Save.

## Edit a User

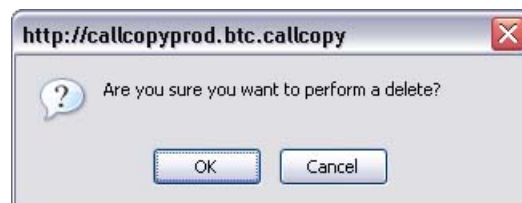
To edit a user's properties, double-click the user record on the User page.

Make the necessary changes and click Save. You will be returned to the User page.

## Delete a User

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, double-click the account on the User list. 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

By default, users can login to Discover and view the Home tab and the Coaching tab's Content Library. In the library, they can only see documents that have been assigned to them.

## Permissions

Locking a user account prevents the user from logging into cc: Discover. All other functionality is unaffected, including recording and 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. If an account is locked, the extensions/logins can be removed from the account and assigned to another user.

To lock a user account, double-click the account 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.

## Import Users

Users 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: username, password, locked, first\_name, last\_name, email, active\_agent, system\_username, system\_domain, employee\_id, site\_id, phone1;phone2;phone3;, role1;role2;role3;

The locked value is 'Y' or empty. Roles are optional.

Follow these steps to import users:

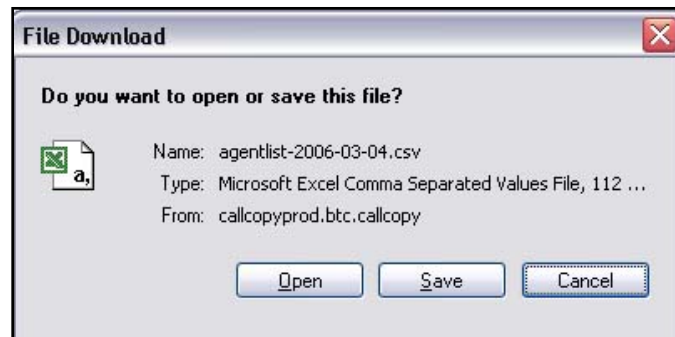
1. Create the CSV file and store it on a local or network drive.
2. Click Import on the Users list.
3. Click Select.
4. Browse to locate and open the file.
5. If the csv file has a header row with column labels, select Import file has a header.
6. Click Upload File.
7. cc: Discover verifies that the 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** User data can be added or extracted via the CallCopy API. Please refer to the CallCopy API Manual for more information.

## Export Users

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

## Set Up an Agent to Be Recorded

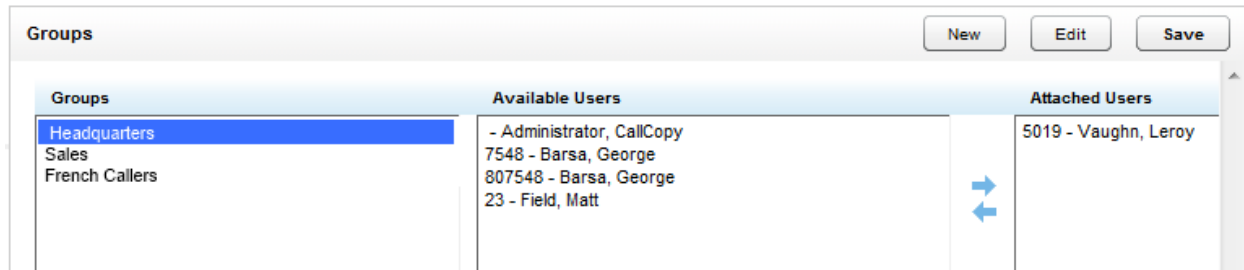
Several tasks must be performed in order for an agent's audio to be recorded. The specifics of those tasks vary greatly depending on the customer's telephony system and workforce organization. The tasks below assume that Discover has been installed correctly and is ready to record call audio. They do not cover screen capture and live monitoring. Unless otherwise indicated, instructions for the following tasks appear in the Discover Administration Manual.

1. Create a user account for the agent in Discover. Select the Agent option. Specify a telephone extension for assigned-seating environments or an agent number/login for free-seating environments.
2. Make the user account a member of a group if the user will be evaluated and monitored.
3. A schedule must exist for users to be recorded. If schedules are created for specific users, a new schedule must be created. If an existing schedule is used to record multiple agents (i.e., those in a group or a range of ANIs), review the business rules for the schedule. The new user's extension, ANI, agent number, or other information may need added to the schedule's rules.
4. Some telephony systems require that the user's phone be configured to forward call audio or perform in other ways. Review the PBX-specific CallCopy integration guide for the phone configuration requirements.
5. Some telephony systems require that the user's extension or device ID be added to a Discover voice board's channel settings. Review the PBX-specific CallCopy integration guide for voice board channel settings.
6. Some telephony systems require that the user's extension or device ID be added to a Discover Core's CTI module. Review the PBX-specific CallCopy integration guide for CTI module settings.
7. Occasionally, the Discover script will not be able to register user phones in environments using passive VoIP recording. As a last resort, administrators may have to add the user's extension to Discover's IP Phones list.

## Groups

CallCopy groups affect only data in cc: Discover. They can be based on ACD groups, gates, and queues, but they are not those groups. Users have to be in groups in order to be evaluated. Users must have a Phone Extension registered on their user profile in order to be added to a group.

The Group page displays a list of current groups, available users, and users attached to a group. Click any group to see attached users



### Create a CallCopy Group

1. Click Administration tab > Permissions > Groups.
2. On the Group page, click New.
3. Type in a new group name. Click Save.

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 users 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

Users must have the Agent property selected on their accounts and a Phone ID specified in order to be added to a group.

1. On the Group page, click a group.



2. From the Available Users box, choose the users you wish to add to the group. You can use the Control or Shift keys to select more than one user at a time.
3. Click the  button to attach the user the group.
4. If you need to remove agents from the group, then click the user in the Attached Users box and click on the  button.
5. Click **Save** to save the changes.

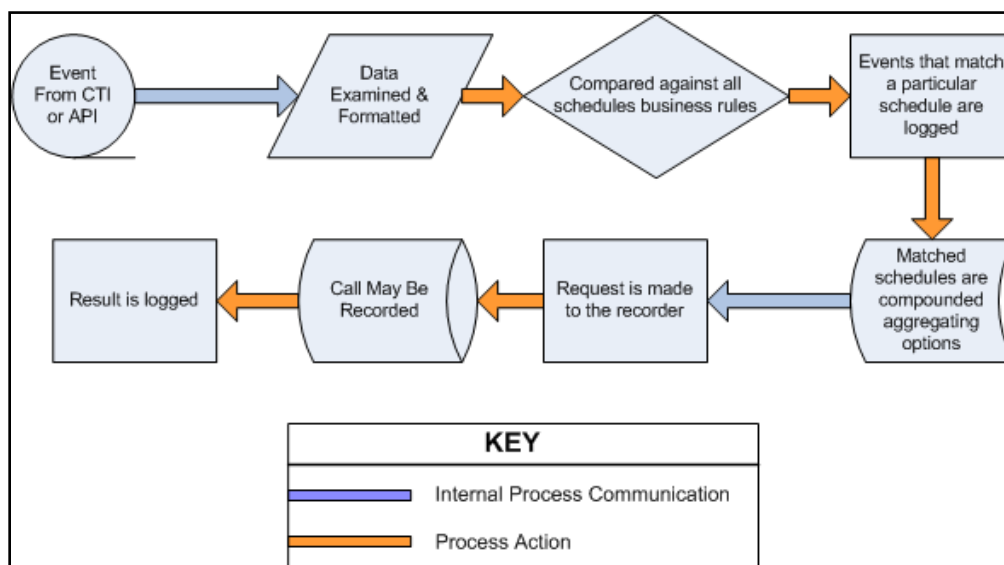
# Scheduling

**Note** Typically, archive actions should be created before schedules are created.

Schedules control which calls are recorded. Administrators create schedules based on business rules. 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.

## 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.

## Relate 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.

## Create 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. See the Edit Schedules section to learn how to change these settings.

1. Click the Administration tab > Scheduling > Create Schedule.
2. Click the option **Record All Calls For An Agent During A Time Range**.
3. 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.

The screenshot shows a web form titled "Schedule Wizard - Record All Calls For An Agent During A Time Range". The form has a "Save" button in the top right corner. The fields are as follows:

- Name: [Text Input]
- Description: [Text Input]
- Agent (Agent Number): [Text Input]
- Never Expire:
- Start Date: 5/22/2011 [Calendar Icon]
- End Date: 5/22/2011 [Calendar Icon]

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

## Create 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. See the Edit Schedules section to learn how to change these settings.

1. Click the Administration tab > Scheduling > Create Schedule.
2. Click the option **Record the Next *n* Calls for an Agent**.

The screenshot shows a web form titled "Schedule Wizard - Record The Next 'N' Calls For An Agent". The form has a "Save" button in the top right corner. It contains the following fields and controls:

- Name :
- Description :
- Agent (Agent Number) :
- Number of calls :
- Never Expire :
- Start Date : 5/22/2011
- End Date : 5/22/2011

3. 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.
  - **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.
4. Click Save. The schedule begins recordings on the entered start date.

## Create Custom Schedules

A Custom schedule enables you to create diverse sets of schedules to meet your business needs.

1. Click the Administration tab > Scheduling > Create Schedule.
2. Click the **Create a Custom Schedule (Advanced)** option.
3. Enter the necessary settings. See descriptions below.
4. Click Save Schedule. The schedule begins recordings on the entered start date.

**New Schedule**
Save Schedule

---

Name :

Owner : Administrator A

Never Expire :

Start Date and Time :

Description :

End Date and Time :

---

Type : Percentage

Direction : both

Min Record Length (Sec) : 10

Max Record Length (Sec) : 6000

Screen capture wrap length (Sec) : 0

Audio Capture : Yes

Speech Analytics : Yes

Disk Location : C:\Recordings

Target Percent :

Random Probability :

Priority : 50

Max Record Silence(Sec) : 600

Retention Days : 365

Archive Action : Purge

Screen Capture : No

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:** Select the person who should be contacted if a schedule needs changes. Select Administrator if no specific owner exists.

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

**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.

**API Initiated:** This schedule type will only be run if the call delivered was triggered by a 3<sup>rd</sup> 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.

**On-Demand:** This schedule type will only be run if a delivered call was triggered via the CallCopy On-Demand Client.

#### Options

- Target Percent: This value is ignored. The call start/stop from the On-Demand client determines recording.
- 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. This setting is ignored if the *cc: Screen* software was not licensed.

**Speech Analytics:** If set to **Yes**, the audio recording will be processed by the CallCopy Speech Analytics application. This setting is ignored if the *cc: Analytics* software was not licensed.

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



## Schedule Requirements: 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. 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. If no schedule requirements are entered and the Comparison is AND or OR, the schedule can apply to all calls depending on other factors.

The Value Type variables include:

- Extension/Voice Port/DeviceID (physical device)
- Agent Number (agent or phone number)
- ACD 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.

## Schedule Expression: 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. If Comparison is set to Expression, an expression must be entered in order for any calls to be recorded.

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:** three-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)
- **!~=** Does not match a Regular Expression (Perl Formatted)
- **'** Both single and double quotes can be used to signify strings in expressions
- **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.

## Copy, Edit, Delete Schedules

### Find a Schedule

1. Click the Administration tab > Scheduling > Find Schedule.

2. (Optional) 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. To retrieve all schedules, do not select an owner.
3. Click **Search** to display the Schedules list.


### Schedule List

On The Schedule List, the following information is displayed:

- **ID:** The internal identifier for the schedule.
- **Name:** Schedule names do not have to be unique because the ID is always unique.
- **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. Schedules that do not expire are marked N/A.
- **Created:** The date the schedule was created.
- **Owner:** Informational field that can be set to schedule creator, administrator, or other.

	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

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

- **Edit:** To edit a schedule, click the () icon. Make the necessary changes and click Save Schedule. Search for the schedule again to confirm that the changes appear. 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. Edit as necessary and click Save Schedule.
- **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 by 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. For example, recording could be scheduled from 8 AM to 5 PM, and each record could last 15 minutes.

## 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		

The Timed Schedule List displays the following information for each schedule:

- **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.

Click a schedule to see additional information about it.

## Scheduling

### Create a Timed Schedule

1. 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	

2. 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.
  - **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.
3. 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.
4. To remove an Agent from the schedule, highlight the agent and click the left **Move** (⬅) icon.
5. Click Save.

## Edit and Delete Timed Schedules

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

- **Edit:** To edit a schedule, click the (  ) icon. Make the necessary changes and click Save. Changes made to the schedule do not affect data that has already been recorded.
- **Delete:** To delete a schedule, click the (  ) icon. Make sure that schedules are not in use before deleting them.

# Recorder Settings

The Recorder Settings control the actions of the cc: Discover Voice Recorder component.

## CTI Cores

The CTI Cores 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 Scheduling 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 customer's ACD/PBX. Integration guides 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.

To access the CTI Cores list in the Web Portal, click the Administration tab > Recorder Settings > CTI Cores.

## Buddy Cores

A Buddy Core is installed on a second machine, monitors the Primary Core, and takes over call recording in the event that the Primary core stops unexpectedly and does not recover within a specified amount of time.

You need the following information to get started:

- Settings of the Primary Core via Web Portal.
- List of CTI modules and settings for each in the Primary Core.
- IP address of the server that will be running the Buddy Core.

## Set Up Core and Voice Board

After installing Discover on the second machine using the standard install process, set up a dedicated CTI Core and Voice Board for the Buddy Core. Follow the instructions for **Voice Boards**, **CTI Core Configuration**, and **CTI Core Service** in the Integration Guide that corresponds to the customer's environment. Generally speaking, the Buddy Core's settings should mirror the Primary Core's.

Additionally, during core configuration:

- Relate the Buddy Core to the Primary Core, and vice versa.
- Add a **Broadcast Receiver** module to the Buddy Core and set it to **Cold Standby Mode**.
- Customize **Switch Over Delay** as needed. This determines how long the buddy core waits without receiving an update from the primary core before the buddy core takes over recording. The default value is 3000 (three seconds).

If you are working with a dual-AES configuration where one core is associated with an individual AES, within the TSAPI module, set the number of AES connection attempts to mirror the Primary Core's setting. This is the number of times it will try to reconnect before shutting down the Primary Core and activating the Buddy Core. Entering 0 disables the reconnection option. Core verifies AES connectivity every 10 seconds.



## Configure Buddy Core for "Warm Standby" (If Necessary)

Warm Standby is typically used in environments where the Buddy Core will need to monitor events (such as TSAPI logins and logouts). Use this configuration only if specific CTI modules (depending on customer's configuration/request) will be started when the core initially starts instead of waiting for Buddy. Modules not appearing on this list will be started when a Buddy condition happens. Open the `cc_cticore.ini` file for the Buddy Core and add the following:

[cticore]	
warmstandbymodules=	Names of CTI modules to start immediately, for example "cc_avayaTSAPIFx, cc_AvayaDMCC"

## Restart Cores after a Buddy Core Activation

If the cause of the Buddy Core activating is due to a power outage, network problem, or other server fault beyond just a core failure, that issue will need to be resolved first.

It is important to restart cores in the Web Portal Service Manager rather than from the Windows Service Manager/Service Loader. If you terminate the service through Windows, it will likely restart automatically at the next opportunity rather than following the necessary manual, ordered process explained below.

Once the server is back online, perform the following steps during a time that will not affect service, depending on the customer's configuration:

1. Log into Discover Web Portal.
2. Go to Administration > Tools > Service Manager.
3. If the Buddy Core service is running, click Stop to deactivate it.
4. Locate the Primary Core service. Click Start to restart it.
5. With the Primary Core service running, click Start to restart the Buddy Core service.

If the Buddy Core is on cold standby, it will resume monitoring the Primary Core. If the Buddy Core's `cc_cticore.ini` includes modules that are set to warm standby, those will resume as well.

## Custom Lookup

This feature provides the ability to add a value to a call record based on the record's ANI or DNIS. For example, if calls for one customer go to a 1-800/DNIS, this feature can add the customer name to every call record for that DNIS. This information can make it easier to search for and report for specific customer. This feature requires custom scripting. Once the script is in place, customers can edit the entries as needed. Please contact the CallCopy Support team for scripting assistance.

Follow these steps to add a custom lookup:

1. In the Web Portal's Administration tab, click Recorder Settings > Custom Lookup.
2. Click Add New Lookup.
3. In the Lookup Value field, enter the ANI or DNIS value for calls in question. Only one ANI/DNIS can be entered. The system will interpret 123,456 or 123 456 as single search values.
4. In the Match Value field, enter the replacement value to be added to the call record.
5. For the Lookup Key, select either DNIS or Account for ANI matches.
6. Click the save icon.

Editing or deleting the custom lookup does not affect existing call records.

Custom Lookup List			Import Lookup	Add New Lookup
Lookup Value	Match Value	Lookup Key		
1234	Customer X	Account		
520123	Customer A	DNIS		
7501	Special Customer	DNIS		

Pages : 1 Go To Page : 1 of 1 Go

Multiple custom lookup values can be imported at once using a comma separated values file (.csv). Each entry must be added to the file using this format: Lookup Value, Match Value, Lookup Key.





Follow these steps:

1. On the Custom Lookup page, click Import Lookup.
2. Browse to the CSV file and select it.
3. Click Upload File.
4. The entries appear on the page. The system checks that the entries are formatted correctly. An error message appears if any entries are not formatted correctly. Review them to confirm that they are correct.
5. Click Import Now to complete the task.

## IP Phones








The **IP Phones** settings allow an administrator to register an extension with an IP Address manually. 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 **Recorder 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				




## Add 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**.

## 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.

## Import IP Phones via a CSV File

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



IP Phones Import (CSV) Cancel

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

*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.

## On-Demand

These settings are available only if CallCopy's On-Demand module has been purchased. The On-Demand module is a client/server application that allows users to control the recording of their calls from a desktop button. It also enables users to add data into the recording's cc: Discover call record manually. See the *cc: On-Demand Administration Guide* for more information.

## Transcoder

A transcoder converts raw audio files recorded by the system into compressed audio files in WAV format optimized for storage and playback retrieval. There are three options for relating transcoders, voice boards, and Discover Cores:

- One transcoder for all Cores – This is the default setup.
- One transcoder per voice board – In this case, the Core's Transcode by Board option is set to 'True', and the transcoder's Look for Code field includes the voice board's number.
- One transcoder per one or more Cores – In this case, each Core's Transcode by Board option is set to 'True'. Each Core's cc\_cticore.ini file has to have a transcoderprefix value set, and this value has to be added to the transcoder's Look for Code field. The transcoderprefix can be any arbitrary number.



If both transcoder-per-voice-board and transcoder-per-Core are used, be careful to use transcoderprefix numbers that do not conflict with voice board numbers.

The best option depends on several factors including the number of calls, the duration of those calls, the size of the call files, and the distribution of calls during a day. If two Cores are on the same machine, using one transcoder is usually acceptable. Transcode per board or per Core(s) is useful for distributing work. If Cores are distributed over a network, pulling large, unprocessed call files over the network can be avoided by using the per-Core option with a transcoder on each network branch with a Core. A CallCopy engineer works with a customer during the initial install to determine the best option. As call volumes and networks change, users should be aware of which option they use and how it may affect transcoding.

**Note** The latest transcoder scripts support file names up to 260 characters (up from 255 previously), including the file extension.


## Configure Transcoder Settings

From the Recorder Settings menu, click Transcoder to see the ones currently configured in the system.

Transcoder List :		Add
Identity	Name	
1	QA2008x86	<a href="#">Configure Payloads</a>  

To add a Transcoder to the list, click the **Add** button to open a new Edit Transcoder page. When the settings have been configured as needed, click **Save**.

To view or change the settings, click the **Edit** () icon on the right side of the row.

To remove a transcoder, click the **Delete** () icon. Do NOT delete a transcoder if files are being processed and until a new transcoder is ready to process files.

## Transcoder Settings

Each Transcoder has these settings:

- **Identity:** An auto-generated 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. The number of attempts for a file is recorded in the Transcoder table of the recorder database. Increasing this value will not cause the transcoder to retry files that have already reached the maximum retries.
- **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. The final file is stored with the original CCA file.
- **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.
- **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. This value also may need increased to two to three minutes if Screen Capture and Fusion are used with call recording. The Screen Capture and Fusion must complete and update their files in order for the transcoder to process both the audio and video. If the transcoder starts processing the audio file before the video files are complete, video blackouts may not appear on the processed file.

**Edit Transcoder:** Cancel Save

Identity: 1

Name:

Max Retries:

Minutes Between Retries:

Number of Threads:

Priority:

Temp Directory:

Create CCP:

CCP Interval:

Store Original File Size in:

Delay (minutes):

Format:

Keep Days:

Create Analytics:

Analytics Keep Days:

Normalize:

Perform Blackouts:

Sample Rate:

Look for Code:

Perform Duplicate Packet Checks:

Purge Record from Transcoder Table After Completion:

VAD Packet Count Trigger:

Analytic Storage Path:

Minimum Hold Duration (milliseconds):

Check if Video is Valid:

Minimum Audio Duration (seconds):

- **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.

## Recorder Settings

- **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. A transcoder can also be dedicated to specific Cores. See the introduction to this section for how that configuration is done.
- **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. A lower setting may avoid choppy calls. Setting to 0 turns this off.
- **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 third party product or the destination storage system, not cc: Discover, will 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.
- **Check Video Valid:** If Yes is selected, the system will check to see if at least one valid video frame was recorded for a screen capture. If that one frame does not exist, the file is still transcoded, and a record for it is created. But when the user attempts to play the screen capture video, the Web player displays this message: "Unable to play call: The call does not have audio or video."
- **Minimum Audio Duration:** For audio recording files that are shorter than the minimum duration, the Web player displays this message: "Unable to play call: The call does not have audio or video."

## 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 RTP. 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: <span style="float: right;">Back Add</span>		
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.

## Transcoder INI File

This file must be configured for environments using multiple transcoders.

[app_settings]	
[value_storer]	If you need the possible values for this INI file, copy the key you need from below and paste under the [app_settings] section.
transcoder_ident=1	For configuring distributed transcoding environments, this ID needs to be configured in the corresponding Transcoder module INI file. Identity number in cc: Discover Web portal for a transcoder.
external_process=0	0 = 'No/Off'. Allows transcoder to encapsulate conversion in external process. This is a debugging setting mainly used to isolate memory leak issues that could be caused by corrupted/incorrect audio data.
reverse_channel=0	0 = 'No/Off'. Allows transcoder to swap inbound and outbound streams for analytic and CCP purposes.

## Transcoder Troubleshooting

The Transcoder Status report provides information needed to troubleshoot issues. See the *cc: Discover Reporting Guide* for additional information.

To access the report in Discover, go to Reporting tab > System Reports > Transcoder Status.

The report organizes call records by status:

- Completed – In the recorder database, the record has a Transcode Status of 2.
- In Progress -- The transcoder is aware of the audio file and may have made one or more attempts to transcode it. In the recorder database, the record has a Transcode Status of 1.
- Failed – The transcoder has unsuccessfully attempted to transcode the audio file the max retries values. In the recorder database, the record has a Transcode Status of 4. If files have a Failed status, contact CallCopy support to address the issue.

**Note** Records can have a status in the database of Processing (3) that does not appear on the report.

These issues may affect transcoding:

- No connection to SQL database – The transcoder has to access the database in order to determine if there are audio files to transcode. A connection failure (i.e., timeout) should be recorded in the SQL server logs.

- Inadequate permissions -- This situation can occur if the recorder and transcoder are located on different machines and the transcoder does not have read/write permissions to the directory where raw CCA and compressed files are located or the transcoder's temporary files are stored.
- Network latency – If the recorder and transcoder are on different machines and a network is slow to copy files to the transcoder's temp directory, the transcoder may timeout.
- Inadequate disk space.
- Large number of files awaiting transcoding – Increasing the number of threads used by the transcoder can reduce this number but also affects the performance of other processes. If there are periods during the day or week when CPU usage is lower, this number of threads can be increased and then lowered.

## Voice Boards





The voice boards provide configuration information specific to the PBX/ACD sending call data to cc: Discover.



Integration guides are available to detail the required voice board configuration for each supported PBX/ACD platform. If integration guides 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.

## Voice Boards List

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

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		

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.

**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**.

## 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 is in the specific PBX/ACD integration in use.

### *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 ACD 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 Extension:** Limits the channel to recording of a specific extension.

**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 Number Called 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. Examples include Account and Case Number.

**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.

**Unlicensed:** Unlicensed channels are not used.

# System Settings


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.

## 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*.


**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.


The module is configured on the **API Servers List** page. In the Web Portal, click Administration tab > System Settings > API Servers.

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 **Edit** (  ) icon on the right side of the row to configure it.

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

Click **Add API Server** to create a new API Server entry in the list. Edit the entry as necessary.



## 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.

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

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

**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. If authentication is required, other cc: Discover components will not be able to authenticate to this server.

**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.

## Archive Actions

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

- **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 calls.

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.

- **Archiver** – This software manages the storage of recordings and the backup of the cc: Discover SQL database based on the Archive Action specified for a call and its call record. The Archiver settings page controls the overall performance of the software.

**Note** Before the archiver can back up the SQL databases, an initial backup must be done manually through SQL Server Management Studio. See the *cc: Discover Installation Guide*.

- **Archive Console** – This tool provides information on archive actions and some manual control over them.

**Note** See the sections on Archiver and Schedules for more information.



## Configure Archive Actions

To create/view an Archive Action, browse to the **Administration** tab of the Web Portal. Under the **System 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.

Follow these steps to create a new Archive Action:

1. On the Archive Action List, click **Add**.
2. Configure the needed settings. (See the settings information below.)
3. Press **Save**. The action appears in the list.
4. After an archive action is created, it has to be attached to a schedule in order to be used. Refer to the section on Schedules for more information.

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

## Archive Action Settings

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

**Edit Archive Action - 1**
Cancel Save

Name :

Storage Type :

Location :

Archive Restriction :

Archive Type :

Status :

Next Archive Action :

Days Until Next Archive :

Use Schedule :

Start Time :  :  AM

End Time :  :  AM

Number of schedules that are set to use this archive action: 3

Number of recordings in archive queue with this archive action: 611

Name	Description	Owner	Date Created
QATesting	QA Team only	1	10/12/2011 11:38:30 AM
OnDemand	OnDemand QATeam	1	9/27/2011 4:30:39 PM
Avaya	avaya	1	9/20/2011 1:52:45 PM

**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 use the first one that has a blank disk in it.
    - **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.
- **XAM:**
  - **Retention Period (days):** Number of days that the Centera server will retain the archived files. This setting is used instead of the Next Archive Action setting.
  - **PEA File:** Required only if security authentication is needed to access Centera storage server. Full path name of the Pool Entry Authorization file for accessing the server.
  - **Server IP Address:** Centera server IP address, or multiple addresses, comma-separated.

**Location:** A direct file path can be entered here for the archive destination.

**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 (Active). This does not affect the operation of the action or how it is attached to any recording schedules.

## System Settings

**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 when the next 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.

**Note** This option is not available if DVDs are used.

**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.

**Note** This option is not available if DVDs are used.

## Archiver

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

**Note** Review the Archive Actions section for information on cc: Discover's archiving process before configuring the Archiver.

## 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.

**Enable 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 Database Backup Settings

**Enable MSSQL DB Backup:** Enabling this setting will have the Archiver initiate a daily backup of ONE of the Discover 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 (e.g., recorder).

**Backup Filename:** The location of the backup file that will be used. The location of this file is determined during the Discover installation. Please refer to the *cc: Discover Installation Guide*, section "Backup the SQL Database" for more information.

**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.

## 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 :  
 :  :

## 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 databases.) 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	 	
		 	

Follow these steps to add a drive entry to the list:

1. Click **Add** in the top-right of the page. A new entry will appear at the end of the list.
2. In the Drive column, enter the drive letter followed with a colon.
3. In the Notification Threshold field, enter the minimum free space (in megabytes) that needs to be available on the drive.
4. 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.

## Logging Settings

Event logging is configured in the CallCopy components' INI and configuration files and on the Web Portal's Logging Settings page. INI and configuration files specify the level of events that the application sends to the logger. The Logging Settings specify where logger writes the log files and the level of events that are recorded to those files. (Example: If an application is configured to send Debug and Info events, and the logger is configured to write only Critical and Emergency events, all Debug and Info events will not be written to the log files. Critical information may be lost due to this inconsistency.)

The number of days for retaining log files is configured on the Notifications page.

Follow these steps to configure logging:

## System Settings

1. Go to the Web Portal's Administration tab > System Settings > Logging Settings.
2. The default Log Directory path can be changed. If this setting is changed, make sure that the new directory has enough storage for the log file.
3. The logging levels correspond to the notification's subscription types. CallCopy recommends leaving all logging levels selected. (See Notifications.)
4. Click Save.

## Mail Settings

These settings are for a mail account used by all features, such as evaluations, to communicate to users. Configure these settings after creating an account in your email system.

Follow these steps to configure the mail account:

1. Go to the Web Portal's Administration tab > System Settings > Mail Settings.
2. Enter the Server Settings:
  - **Mail Server Host:** Enter the hostname or IP address of the SMTP mail server the CallCopy server will be using to export recordings via email.
  - **Mail Server Port:** Identify the SMTP port that will be used.
  - **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.
  - **Display Name:** This name appears on the emails sent from the account. This name does not have to match the email account username.
3. Enter the Secure Settings:
  - **Username:** Enter the Username for authentication onto the SMTP server.
  - **Password:** Enter the Password for authentication onto the SMTP server.
  - **Confirm Password:** Re-enter the Password.
4. Click Save to record the changes to the database.

## 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.

To configure the notifications, go to the Web Portal's Administration tab > System Settings > Notifications. Edit the settings as needed. Click Save to implement changes.



## Audible Alert Settings

These settings allow audible alerts to be played by the server machine's speaker.

**Notification Settings**
Save

---

**Audible Alert Settings**

Enable Audible Alerts:

Audible Alert Subscriptions:

<input type="checkbox"/> Debug	<input type="checkbox"/> Info	<input type="checkbox"/> Notice	<input type="checkbox"/> Warning	<input type="checkbox"/> Error	<input checked="" type="checkbox"/> Critical
<input checked="" type="checkbox"/> Emergency	<input type="checkbox"/> Security	<input type="checkbox"/> Testing	<input type="checkbox"/> 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.

**Disk Logging Settings**

Number Of Days To Save Log Files:

## 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.

**E-Mail Notifications Settings**

Enable FloodWall:

FloodWall - Number of Allowed Messages:

FloodWall - Number of Minutes:

Disk Space Notification Interval (minutes):

**E-Mail Subscription** Add E-Mail

Email Address:  ✘

Subscriptions:

<input type="checkbox"/> Debug	<input type="checkbox"/> Info	<input type="checkbox"/> Notice	<input type="checkbox"/> Warning	<input type="checkbox"/> Error	<input checked="" type="checkbox"/> Critical
<input checked="" type="checkbox"/> Emergency	<input type="checkbox"/> Security	<input type="checkbox"/> Testing	<input type="checkbox"/> License	<input type="checkbox"/> Archive	<input type="checkbox"/> Disk

Email Address:  ✘

Subscriptions:

<input type="checkbox"/> Debug	<input type="checkbox"/> Info	<input type="checkbox"/> Notice	<input type="checkbox"/> Warning	<input checked="" type="checkbox"/> Error	<input type="checkbox"/> Critical
<input type="checkbox"/> Emergency	<input checked="" type="checkbox"/> Security	<input type="checkbox"/> Testing	<input type="checkbox"/> License	<input type="checkbox"/> Archive	<input type="checkbox"/> Disk

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

## System Settings

- **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.



The screenshot shows a form titled "SNMP Notifications Settings" with the following fields:

- Enable SNMP Notifications: No (dropdown menu)
- SNMP Community: (text input field)
- SNMP Enterprise: 26393 (text input field)
- SNMP Gen Trap: (text input field)
- SNMP Version: SNMPv2 (dropdown menu)

- **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.

## Test Alerts

This feature sends a message to all users who have subscribed to any notifications. It enables users to confirm that they are receiving the correct notifications.

1. Click Save to record any changes.
2. Select a Subscription Type from the drop-down list.
3. Enter a message explaining that the message is a test and what type of notification is being tested.
4. Click Test.

Confirm with each user who was supposed to receive the test message.

## Subscription Types

CallCopy recommends that these alert types always be monitored:

- **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.

These alert types are useful in some specific situations:





- **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.

## Server Nodes

The Server Nodes page under the System Settings menu lists machines or virtual machines that are running cc: Discover software modules. A separate entry must be created for each machine running modules.

The central Service Manager tool uses this list to know where to look for cc: Discover modules. Adding, deleting, or editing a server node adds, deletes, and changes a corresponding Comet Daemon. If you change a node, you must check the setting of the daemon.

If services are being added or moved to new machines, 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				Add Node
Name	Server Address	Audio Path	Video Path	
Main Recorder	10.100.10.58			 
Screen Capture Server	10.100.5.50			 

Pages:  Go To Page:  of 1

Follow these steps to add a Server Node:

1. In the Web Portal, go to Administration tab > System Settings > Server Nodes.
2. Click **Add Node** on the Server Node Settings.

**New Server Node**
Cancel Save Node

Name :

Address :

Is Screen Capture Server :  ▼

Screen Capture Path :

Screen Capture User :

Screen Capture Password :

Re-enter Screen Capture Password :

Is Legacy Audio Node :  ▼

Audio Path :

Audio User :

Audio Password :



Re-enter Audio Password :

3. Enter a friendly name for the Server Node for reference.
4. Enter the hostname or IP address of the Server Node.
5. If the node will run a Screen Capture Server module, this setting must be enabled.
  - **Screen Capture Path:** The UNC path to the local directory to which Screen Capture files are written.

- **Screen Capture User:** The username for an account that has read/write access to the Screen Capture Path.
  - **Screen Capture Password/Re-enter Password:** The password for the Screen Capture User account.
6. The Is Legacy Audio Node setting is only enabled if the server is a Legacy distributed audio recorder.
- **Audio Path:** The UNC paths to the local directory to which audio files are written.
  - **Audio User:** The username for an account that has read/write access to the Audio Path.
  - **Audio Password/Re-enter Password:** The password for the Audio User account.
7. When the settings have been configured, click **Save Node** to commit the settings.

After creating a node, configure the corresponding Comet Daemon and Service Manager entry.

For existing nodes

- To change the settings for a Server Node, click the **Edit** (  ) icon on the right side of the row.
- To delete a node, click the **Delete** (  ) icon. Nodes should not be deleted if services are attached to them.

## Web Server Settings

These settings should be configured during the initial installation. Several CallCopy services utilize the Web Server services such as call playback. For example, when reviewing reports, users can click links in reports to play calls. cc: Discover detects the Web Server IP address and port during startup. When the CallCopy services are distributed on multiple machines and the machine hosting the Web Server has more than one network interface card, Discover may detect the wrong IP and port. In this case, the Reporting Server is provided the wrong information and not able to access the Web services. Users receive an access error message. Manually setting the Web Server settings avoids this problem.

Note the explanation on the page. These settings do not configure IIS. If the manual override is not used, the settings may be changed by other processes.

Follow these steps to enter the settings:

1. Go to Administration tab > System Settings > Web Server Settings.
2. Set Manual Override to 'Yes'.
3. Enter the values from the IIS server hosting the Web Server:
  - **Web Server Host:** IP address
  - **Web Server Port:** Port used to communicate.
  - **Requires Secure Connection (SSL):** Select 'Yes' if SSL has been setup on IIS.

## System Settings

4. Click Save.

**Web Server Settings** Save

**Web Server Settings**

Note that this page does not alter the web server host, port or security settings. Such changes must be made through IIS or other appropriate configuration tool. Rather, these settings are used to inform applications on how they should communicate with the web portal.

Web Server Host

Web Server Port

Requires Secure Connection (SSL)

When this value is set to, "No", all other settings on the page will not only be ignored, but will potentially be overwritten through an automatic process.

Manual Override

If Manual Override is disabled after having been enabled, the values in the Web Server Host and Web Server Port field will be blanked. If this happens, users will not be able to play back calls from links in reports until the values are restored. There are two ways to resolve this.

1. Open the web.config file, add a blank line at the beginning or end, save it, delete the blank line you just entered, save it again, reopen the site and it will recompile the web.config and re-insert the default automatic values for these fields. This method requires a bit more time/care but is less invasive than #2 because it only affects Discover.
2. Open IIS, restart the Application Pool for CCWeb, or restart the IIS service entirely. This method is perhaps easier, but if other sites at the company rely on IIS, restarting it as a whole could cause a brief interruption in service.

Once you apply your chosen fix, go back to Administration -> System Settings -> Web Server Settings and verify that the fields are now filled.

# Web Portal Settings

To access these settings, click the Administration tab in the Web Portal and then click Web Portal Settings.

## Comet Daemon

When a server node is created, a corresponding Comet Daemon is created in the Web Portal. The Comet Daemon manages connections to Discover's software modules. For example, the Service Manager is a module, and the Comet Daemon manages connections between it and the CallCopy services on the node. The Comet Daemon Settings page lists all daemons by server nodes and the nodes IP Address.

Follow these steps to edit a Comet Daemon:

1. On the Web Portal's Administration tab, click Web Portal Settings > Comet Daemon.
2. Click the triangle for a server node/Comet Daemon to view the settings.
3. Edit the Comet Daemon Server Settings:
  - **HTTP Port:** This value should not be changed.
  - **HTTP Address:** If the server on which the Web Portal is installed is assigned multiple IP addresses, this field can be used to restrict access to only one of those addresses. Using 0.0.0.0 uses all of the addresses.
  - **HTTP Session Time Out Minutes:** If the daemon does not receive a message from the Service Manager within the specified minutes, it ends the session.
  - **Allowed Subnets Client:** (This subnet can use CIDR notation and be comma separated. Determines what IP ranges are valid.) IP ranges clients are allowed to communicate with Insight from.
  - **Allowed Subnets System:** (This subnet can use CIDR notation and be comma separated. Determines what IP ranges are valid.) Secure range where Service Manager can communicate with Insight server. For optimal security, this range should be limited so that only administrators can access the server. In multi-server configurations, on the Web Portal server node, set this to the subnet/IP of the server.
  - **Allowed Subnets Session:** Enter the IP address of the Web Portal used to access the node for this daemon. (This subnet can use CIDR notation and be comma separated. Determines what IP ranges are valid.) IP addresses where sessions can be initiated from. The client can start the session in one subnet range. Once the session is started, it will continue the session using the client subnet.
4. Edit the Service Manager Module Settings:
  - **Site IP:** Informational only. Cannot be changed.
  - **Status Timer Interval:** Time in milliseconds for "heart beat" polling with the Comet Daemon.
  - **Configuration Timer Interval:** Time in milliseconds for reloading the module's settings.
  - **Search Directory:** This is the CallCopy Install directory. The module knows what CallCopy services are available based on the directories contents. If the CallCopy software was installed to a different directory, this setting must be changed to that directory. This field is case sensitive.
5. Click Save.

## Security

The Security page controls login and password settings for the Web Portal. Other security features, such as recording file encryption, SSL, TLS, and IIS settings for session and login security are addressed by different settings. Refer to the *System Security* chapter of this document for information on all of these settings.

## 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 : ACD Group

ACD Gate : ACD Queue

Called Number (DNIS) : Number Called DNIS

CallerID (ANI) : CallerID ANI

Device/Port ID : Extension

Agent Number (Device Alias) : Agent Number

Group Name : CallCopy Group

User 1 : Account

User 2 : User2

User 3 : User3

User 4 : Case Number

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



**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 to which calls are delivered. This is commonly an Agent phone login or extension.

**Group Name:** CallCopy agent group: This group is configured in section *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.

**Note** Angle brackets (i.e., < >), some special characters, and symbols may cause interactions with User fields not to work. System administrators using these fields with the CallCopy API must thoroughly test any calls they make. On-Demand users should be trained to avoid use of these characters.

## 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 **Web Portal Settings** menu, and clicking the **Web Portal** link.

- **Content Management – Upload Directory:** The disk or UNC path where files uploaded to the Content Library are stored. For typical installations, Discover runs under the IUSR account, which will not have permissions to this default directory.
- **Fusion Script Settings – Upload Directory:** If the CallCopy Fusion application was purchased, the scripts used to manage Fusion clients are loaded into this directory. Make sure that the account under which the Fusion server runs has access to this directory.
- **Call List Quick Filters:** Select items to have them appear as filters on the Web Player tab for all users. The names of these items can be changed on the Terminology page.
- **Number of Items to Display:** This sets the number of rows to return per page on the site, except on Printable Reports and the Call List.

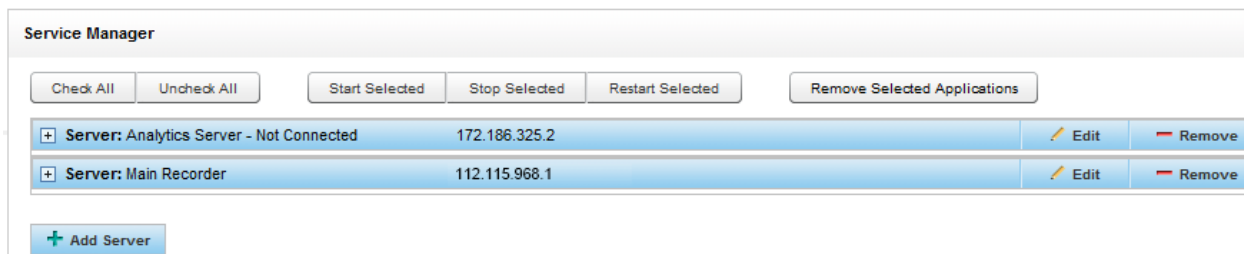
# Tools

## Service Manager

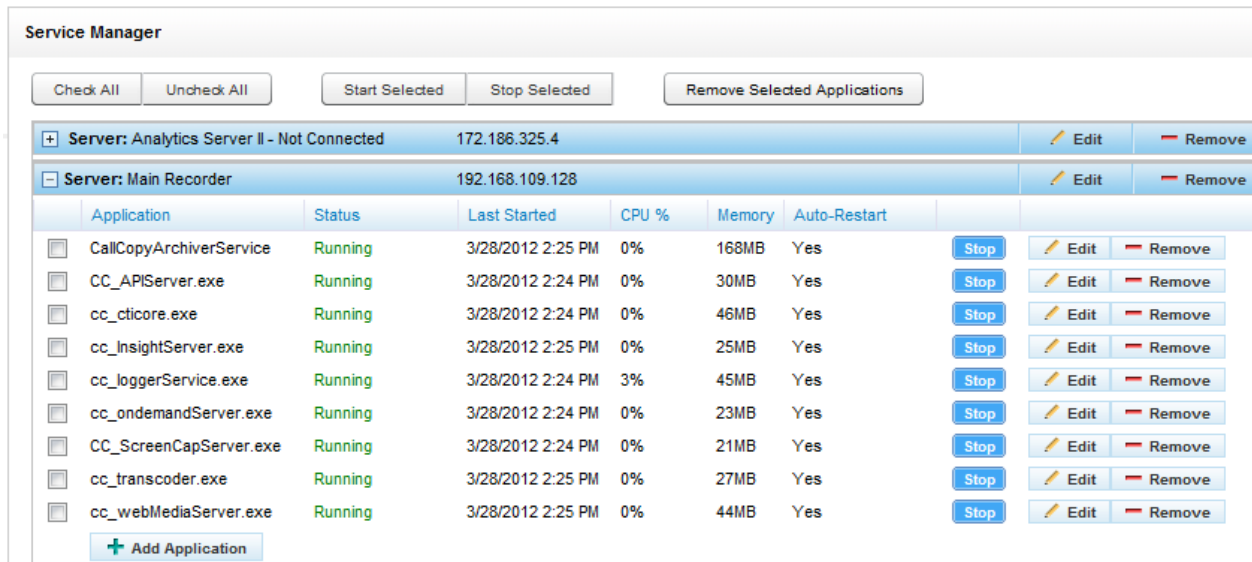
The Service Manager page is located under the **Tools** menu on the **Administration** Tab.

The Service Manager is used to centrally manage all cc: Discover application services located on different machines (i.e., server nodes). In order for the Service Manager to load and control application services, the **Comet Daemon** and **Service Manager** module must be installed, configured, and running on each machine.

If the daemon and module are not running properly, the Service Manager will show that it is not connected to a server node.



Otherwise, the Service Manager should display the server node name, IP address, all CallCopy application services on the node, and their current statuses.



The Manager displays the following data for each Service:

- **Application:** The name of the service installed. This value is case sensitive and must be the exact name of the.exe in Windows Explorer.
- **Status:** Displays if the service is **Running**, **Stopped**, or **Unknown**.
- **Last Started:** Time and date.
- **CPU %:** This information is useful to determine why a service or server is running slowly.
- **Memory:** Current usage of the local machines memory. Applications like the transcoder and archiver use more memory as they process files.
- **Auto-Restart:** If set to 'Yes', Service Manager will attempt to restart the application if it should stop on the host machine because of a non-critical error. The application cannot be stopped on the Windows machine if it is set to Auto-Restart. (If the host machine is rebooted, the application should restart because it was registered as a service during the installation process.)

### Add/Edit/Remove a Server Node

Server nodes can be added, edited, and deleted from the Service Manager. Editing and removing nodes will affect the ability to manage the services on those nodes and the services themselves. Carefully plan changes to IP address and removal of nodes.

- To add a server node, click **Add Server**. Enter a name and IP address and click **Save**. If the node hosts a screen capture or legacy server, additional information must be edited via the System Settings' Server Node page. The node's corresponding Comet Daemon must also be configured.
- To Edit a node, click **Edit**. Make the needed changes and click **Save**.
- To Remove a node, click **Remove**.

### Add a Service Application

1. Expand the server node and click Add Application.
2. Enter the name of the service. Typically, this will be the name of the EXE file. It must be entered exactly as the name EXE.
3. Specify if the Service Manager should automatically restart the application.
4. Enter any parameters that must be set for the application.
5. Click Save.

## Edit/Remove a Service Application

Applications can be added, edited, and deleted from a Service Manager server node. Editing applications will affect the ability to manage that service. Carefully plan changes to IP address and removal of nodes.

- To Edit a node, click Edit. Make the needed changes and click Save.
- To Remove a node, click Remove.

## Manage a Service

To stop a running service, click the **Stop** button next to the service you wish to shut down. The service status will switch to 'StopPending'. Once the Service is stopped, the service status will display as 'Stopped' and the **Start** button will be activated.

To start a stopped service, click the **Start** button on the right side of the service listing. The service status will switch to 'StartPending'. Once the Service is started, the service status will display as 'Running' and the **Stop** button will be activated.

## Manage Multiple Services

To start or stop multiple services at once, check all of the services you wish to control from the Service Manager list. You may also use the **Check All** or **Uncheck All** buttons to quickly select or de-select all services.

You can then click the **Start Selected**, **Stop Selected**, or **Remove Selected Applications** buttons to perform the specified action on all of the selected services.

## Archiver Console

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

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

Optical Drives					
		<a href="#">Load Archived Files</a>	<a href="#">Refresh Disk Status</a>	<a href="#">Update Drive Letter</a>	
Drive	Model	Erase Disk	Volume	Status	Media
D	VMware IDE CDR10	<a href="#">Erase Disk</a>		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 Letter:** 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.

# System Security

This section contains detailed settings needed to enable features like Hybrid and AD authentication, IIS session timeouts, transport security (SSL/TLS), file encryption, an overview of Thales encryption, and information on cc: Discover's PCI compliance status.

## Security Design

This section explains cc: Discover's high-level security design so that system administrators understand how different features work together. Additional details may be available in sections specific to a Discover feature.

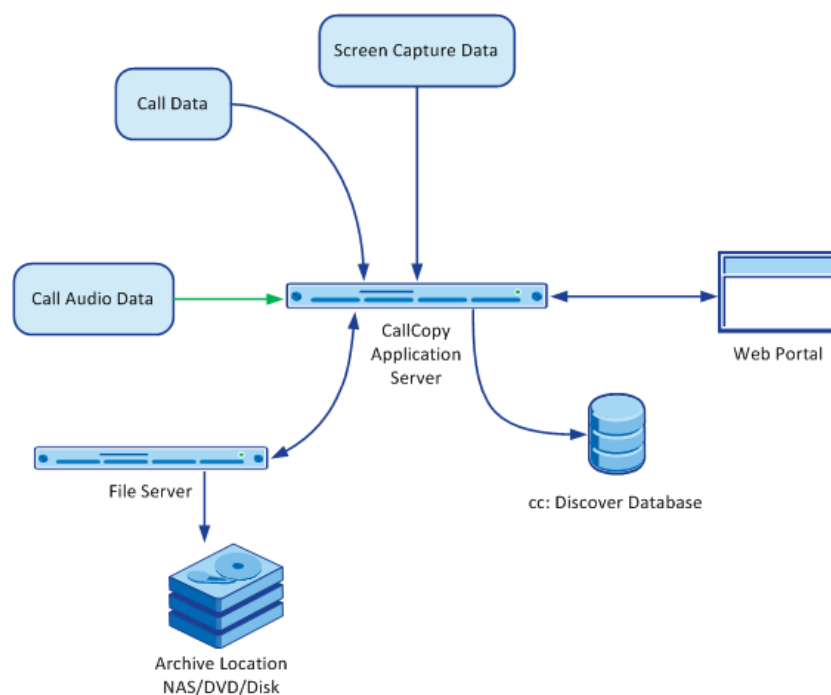
The general process for recording call audio, call data, and desktop data is as follows. Call audio comes from the PBX or agent telephone. Call data comes from the PBX. Desktop screen capture data is recorded from the agent's PC over the LAN/WAN.

The recorders encrypt and write the audio and screen data to files on the Windows File Server. (Files are not encrypted if the encryption keys are not created.) Files can initially be stored on the local server and later written to another server based on schedules and available bandwidth. The temporary local files are deleted. Records for each recording are created in the Discover database for file and quality management.

The audio and video files can be listened to and viewed from the file server by supervisors via the Web Portal's Web Player.

Recordings can be archived, if needed, to network attached storage, DVDs, ENC Centera XAM, or disks.

Records and archives can be configured with retention periods and automated purging.



Interactions between the cc: Discover suite components (e.g., servers, Web Portal), file servers, and archive devices can use SSL if that feature is enabled. If users are recorded from remote locations or access recordings from remote locations, a VPN must be established for PCI certification.

### 'Blackout' Sensitive Data

It is recommended that cc: Discover be configured via our API to be triggered to blank audio and screen recording when sensitive data is being referenced or collected by any system. This feature is referred to as a 'blackout.' In individual cases where this process fails and sensitive data is recorded to an audio or video file, these files must be securely removed from the server using cc: Discover and a tool such as sdelete or Eraser.

Blackouts can be triggered two ways:

- Manually using the "Start Blackout" and "Stop Blackout" options from the On-Demand client menu. Can be used by an agent to apply blackouts to a captured call.
- Automatically using cc: Fusion or a similar third-party application, which sends a scripted call to the API server, which in turn issues BLACKOUTSTART and BLACKOUTSTOP commands to the recording core.

Blackouts do not stop the recording; they just prevent reviewers from hearing/seeing the blacked out information. When the call and screen data is processed by the transcoder, these start/stop events tell it when to blank the screen and audio to protect sensitive information. There are two types of blackouts: disk and playback. For a disk blackout the transcoder deletes the recorded content and replaces it with blank audio or video. For a playback blackout the transcoder tags the content that should not be accessible. When users play the recordings, they hear or see blank audio or video. Users can be provided permission to override the playback blackout. Then they will hear and see that content.

Here are a few features of blackouts:

- A blackout is applied to an agent's entire call. If an agent's call has multiple instances, the blackout criteria apply to all instances of that call. For example, if an agent answers a call, puts the call on hold, calls a supervisor, ends the supervisor call, and returns to the original call, the blackout criteria are applied to the entire original customer call and the supervisor call. The blackouts are inserted by the transcoder once the entire call is completed, so the number of activities performed during the call does not impact this.
- Blackouts are effective during call 'wrap' periods. The amount of wrap time allocated after a call is determined by the associated schedule, which also tells cc: Screen to keep recording. API server calls for blackout starts/stops are still being recorded and are applied during transcoding.
- Blackouts can function with On-Demand recording.
- Timed Schedules (screen-only recording done based on time schedules rather than call events) cannot apply blackouts. Without call start/stop events from the device, it's difficult to associate blackout events. However, if timed and non-timed events happen concurrently, blackouts can still be applied to the non-timed events.



## Purging Sensitive Data

If a customer's business process requires recording and then deleting sensitive data after a period of time, this action can be done either manually or automatically.

Clients can have CallCopy Support move files and their corresponding database records to the cc: Discover Purge Queue. Files can then be purged by going to the Web Portal and going to Administration tab > Tools menu > Archiver and clicking the Run File Purge link.

Automatic purging of data is controlled by schedules and archive actions in cc: Discover.

Files can be written and archived to network attached storage devices and DVDs. cc: Discover cannot purge data from devices or disks that are not currently connected to the network.

## Authentication and Passwords

Users can authenticate via a cc: Discover user account and password or their Windows network/Active Directory credentials. If authentication is done via Active Directory, password length and other security measure are configured in AD. If Discover accounts are used, see the *Permissions* and *Web Portal Settings Security* sections of this document for additional information.

## Windows PC, Server, Database, and Application Accounts

Appropriate security measures must be utilized on any PCs, servers, applications, or databases included in recording and storage of recording files and data.

- Windows file servers – One or more server may be used for storing recording files with cardholder data.
- Any servers, network attached storage, or other devices used in archiving recording files with cardholder data.
- cc: Screen server – If video files are stored in a different location than audio files, you must specify a UNC path for the location and a user account and password with Write permission for the location. (See the *cc: Discover Administration Manual's Server Node* section)

These items do not store data, but for maximum security, the accounts and passwords used to manage them should comply with overall security measures:

- Windows/IIS Server – As a precaution, any account used to manage the Windows server and IIS server hosting cc: Discover should be secured in order to prevent anyone from tampering with cc: Discover's operations.
- SQL Server – CallCopy recommends using NT Authority\System for SQL Server Database Engine, NT Authority\Network Service for SQL Server Reporting Services, and NT Authority\Local Service for the SQL Server Browser. (See the *cc: Discover Installation Guide* for specific instructions.)
- cc: Discover database (SQL) – This database is used to store recording records (i.e., metadata about recording files), audit tables, and configurations.

## Logging and Auditing

See the *Logging Settings* section of this document. Additional logging information appears in the administration guides of each CallCopy application. Auditing information is discussed in the *cc: Discover Reporting Guide*.

## Web Portal Settings: Security Page



These settings are accessed at Administration tab > Web Portal Settings > Security.

### Site Settings

This section establishes the connection URLs for cc: Clarity and/or cc: Discover sites.

- **Clarity:** IP or hostname of the cc: Clarity server.
- **Discover:** IP or hostname of the cc: Discover server.

The IP should always work; the hostname has to resolve in DNS for the site to function properly. When in doubt, use the IP. Entries should be in the format "http://1.1.1.1." If the "http://" is left off, the URL validator will not receive a response from the supplied IP/port. You will see one of the following icons next to the field after you enter the IP or hostname.

-  indicates a valid IP or hostname
-  indicates an invalid IP or hostname

You will not be able to save changes to the page if the one of the URL fields contains an invalid value.

### ForgotPassword Settings

A user can click the "Forgot your password?" link on the login page to have a temporary password emailed to the address tied to his or her user account. This section of the Administration page allows you to determine length and complexity of the auto-generated temporary password, as well as the subject and body text of the email sent to notify the user of the change.

- **Password Max Length:** Total number of characters used when generating a password reset.
- **Password Special Characters Length:** Number of special characters used in a password reset.
- **Mail Subject:** Subject of the password reset notification email.
- **Mail Body:** Body text of the password reset notification email.

### Active Directory Settings – (See *Login Mode Configuration*.)

See the *Login Mode Configuration* section for instructions on these settings.

### Login Settings – (See *Login Mode Configuration*.)

See the *Login Mode Configuration* section for instructions on these settings.

## PCI Settings

**Note** These settings only apply to cc: Discover database user accounts. If you are using Active Directory or Hybrid authentication, the settings below will not govern AD accounts or their passwords, which should be managed through Active Directory/group policy.

PCI Settings control the password policy for cc: Discover user accounts. 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](https://www.pcisecuritystandards.org/security_standards/documents.php))

Passwords are automatically 'salted' by Discover, and password changes are tracked through both the Audit Log and the System Activity Summary Report.

These settings are optional:

- **Password Strength Enforcement:** When selected, forces all new passwords to be a minimum of eight characters in length and contain at least three of the following character types:
  - lower case letters
  - UPPER case letters
  - Numbers
  - Special characters
- **Prompt user to change password before expiration:** 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; this value cannot be zero. Use the second entry field to specify the number of days to prompt users to change their password before the password expires. This applies to all accounts, including the superuser account.
- **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 checked against the last x passwords OR use in a defined number of past days (e.g., the password x could not have been used in the last 180 days). When enabling this feature, passwords used prior to enabling it are not recorded, so the re-use look-back will not consider or compare them against new passwords.

**Note** Administrative users can manually change a user's password to anything that meets the complexity requirements in force, including previously used passwords. This look-back affects only users changing their own passwords.

- **Limit Failed Login Attempts:** If this setting is 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. This setting does not apply to the Superuser account unless the Lock out Superuser option is selected.

Changing the password security settings in the Web Portal does not automatically force users to change their passwords. The settings do not affect users until their passwords are changed, either by the user or an admin. If the customer wants to enforce the PCI settings, then users must be forced to change their passwords or have an admin do it for them.

## Login Mode Configuration

Discover supports three login modes:

- **Database Mode:** Utilizes cc: Discover's internal user database that has been populated from entered user accounts and passwords. This mode is used by default.
- **Active Directory Mode:** Uses Kerberos authentication to validate that an Active Directory user is logged in and a member of the proper AD group to access the CallCopy system.
- **Hybrid Mode:** Allows users to login using their cc: Discover user accounts or their Windows AD account. On the cc: Discover login page, user must select either Database or Active Directory mode.

The login mode is set during Discover installation. If hybrid mode was selected or if only AD is wanted, then the additional tasks for AD and hybrid mode in this section must be completed.

## Active Directory Settings

This section allows administrators to configure options related to Hybrid- and AD-authenticated logins.

### Auto Create User on Login

This setting allows the creation of a user account in the CallCopy central database the first time a user logs into the system using Windows credentials. The user account is populated with the AD account's login name, first name, last name, and email address. The account will need to have roles/permissions assigned to it manually once created.

### Domains

- **Name:** Enter the name of the domain.
- **LDAP:** Enter the LDAP string; the "LDAP://" portion must be capitalized.

**Note** Consider the following when configuring LDAP, particularly if logging in with AD credentials is not working properly:

- **Case Sensitivity** – If a user logs into Windows with Username but their AD account is all lowercase, the login attempt may not pass through LDAP.
  - **Idle States** – If a computer enters a state of sleep, standby, hibernation, or another idle state that turns off the network interface card based on power management settings, the system will stop receiving polling updates from group policy and will be relying on cached credentials when the system becomes active again rather than logging in through the network. This can cause intermittent problems logging into cc: Discover when using AD integration. To avoid this, make sure power management settings are set to keep the system and network card awake during work hours.
  - **Password Special Characters** – Certain special characters may not work properly when passing through LDAP based on how LDAP interprets them, resulting in a failed login attempt. Avoid requiring #@\*"&% but ()^\$! should be fine.
- **Secure Sockets:** Check to enable/require SSL.
  - **Signing:** Check to enable LDAP security; enabling it here and on Server 2008 encrypts the connection between them.

## Groups

To integrate cc: Discover and AD, Windows users must be placed in an AD group that has access to cc: Discover. Users can be in one or more AD groups that access cc: Discover. To add an AD group, follow these steps:

1. Find the group name in AD or create a new group and add the desired users into it.
2. In the cc: Discover Web Portal, click the Administration tab > Web Portal Settings > Security.
3. Under Active Directory Settings > Domains > Groups, click the plus (+) button.
4. In the empty field that appears, enter the name of the group. Group names are case sensitive.
5. You can optionally click the **Validate Groups** button to confirm that the group(s) resolves properly.
6. Click **Save**.
7. To remove a group, click the X (X) beside the group's name. Removing the group will remove that group members' access to cc: Discover.

## Login Settings

These settings should be reviewed and changed if necessary for a login mode.

- **Access Type:** Select the login mode used for this installation.
- **User Token Expire Time:** The user token monitors activity for a user ID within the site. It refreshes the timestamp and expiration of the user token every time a user clicks on something. Once the token expires, the next action a user takes will log them out and bring them back to the login screen. The default expiration is five minutes but can be set to whatever the customer requires.
- **Login Token Expire Time:** The login token is passed to the database when the user clicks the button to log into the site. Once the session is established, the token is expunged from the database. Since the token is removed almost as soon as it is created, the expiration time is used to clean up any tokens left behind when the process of establishing the session/connection is interrupted or encounters an error, causing the token to not be deleted normally. The timeout threshold should be set to only a few seconds.
- **Integration Token Expire Time:** The integration token works similar to the login token, but for transitions between cc: Discover and cc: Clarity. The token is created to move the session from one to the other. As soon as this transaction is complete, the token is removed from the database. If something interrupts the transaction or the process encounters an error, the token may be left behind, and this timeout triggers it to be automatically deleted. The timeout threshold should be set to only a few seconds.

## IIS Site Settings for Hybrid Mode and AD Authentication

This task must be completed for both Hybrid Mode and AD authentication. On the machine running Discover, perform the following tasks.

### Windows Server 2003/IIS 6

1. In IIS Manager, expand Web Sites > CallCopy web site.
2. Right-click the **CallCopy web site** and select Properties.
3. Click **Directory Security**.

4. Under the Authentication and access control area, click **Edit**.
5. Select **Enable anonymous access**.
6. Clear **Integrated Windows authentication**.
7. Click **OK**.

#### **Windows Server 2008/IIS 7.x**

1. In IIS Manager, expand Web Sites > CallCopy web site.
2. Click the **CallCopy web site** to see the site properties in the center panel.
3. Under the IIS section, double-click **Authentication**.
4. If **Anonymous Authentication** is not enabled, right-click it and select **Enable**.

## Settings Changes for Former AD Auto-Login Environments

If the customer is upgrading from a previous version of cc: Discover that allowed automatic login (i.e., single sign-on) with AD authentication, for security reasons, and **provided such changes do not conflict with the operation of other existing customer applications**, modify the following settings as needed.

#### **Windows Server 2003/IIS 6 Win Login Settings**

1. In IIS Manager, expand Web Sites > CallCopy web site.
2. Right-click **WinLogin** and select **Properties**.
3. Click **Directory Security**.
4. Under the Authentication and access control area, click **Edit**.
5. Clear the check box for **Integrated Windows Authentication**.
6. Check the box to **Enable Anonymous Access**. Supply credentials for the IUSR or other account as needed.
7. Click **OK**.

#### **Windows Server 2008/IIS 7.x Win Login Settings**

1. In IIS Manager, expand Web Sites > CallCopy web site.
2. In the Features View pane, open **Authentication**.
3. Right-click **Windows Authentication** and choose **Disable**.
4. Right-click **Anonymous Authentication** and choose **Enable**.
5. Right-click **Anonymous Authentication** again and choose **Edit**.
6. Configure to use a specific user account or application pool identity according to customer's environment.

#### **Internet Explorer Settings – Must Be Changed for Each User**

1. In Internet Explorer, open **Tools > Internet Options** and click the **Security** tab.
2. Click **Local Intranet > Custom Level**.
3. In the Settings list, scroll to **User Authentication**. Set this to the mode required by the customer.
4. On the Advanced tab's Settings list, scroll to the **Security** section. If not required by any other customer applications, uncheck the box for **Enable Integrated Windows Authentication**.
5. Click **OK**. Restart Internet Explorer for the settings to take effect.

Other than having to now log in manually to cc: Discover/cc: Clarity, there should be no change to the agent-side experience of using the software.

## IIS Session Timeout

For Windows servers, session timeout is affected by several processes. cc: Discover allows for an approximate session time setting via the IIS server and the Web Portal configuration file. Changing it in one location automatically updates it in the other.

### Windows Server 2003/IIS 6

1. On the server hosting cc: Discover, open **IIS Manager**.
2. Expand the cc: Discover installation. Right-click the **Web Sites** directory and select **Properties**.
3. On the Home Directory tab, in the Application settings area, click **Configuration**.
4. In the Application Configuration dialog box, click the **Options** tab.
5. Select Enable session state and set the Session timeout to 15 minutes. Click **OK** to save the changes.

### Windows Server 2008/IIS 7.x

1. On the server hosting cc: Discover, open **IIS Manager**.
2. Click on **Application Pools**. Right-click the application pool for the Discover site, then **Advanced Settings**.
3. Expand **Process Model** and update "Idle Time-out (minutes)" to 15 minutes.

### Web Portal Configuration

To edit the Web Portal configuration file, follow these steps:

1. On the server hosting cc: Discover, open Windows Explorer and navigate to C:\Program Files\CallCopy\WebPortal.
2. Open the Web.config file.
3. Find <sessionState timeout="60"/>. Change the value to 15.
4. Save changes.

**Note** If you set the recycling interval on the site's application pool to a lower threshold than the timeout threshold, the site will recycle every 60 minutes, causing user sessions to time out unexpectedly and possible data loss. This is a bug with IIS. It is best to set the recycling interval greater than or equal to the session timeout threshold.

## File Encryption

The cc: Discover application supports file level encryption for all audio and video data files. To enable encryption, a system administrator must generate encryption keys. Files are encrypted as they are written out to disk using AES-256-bit encryption. This provides full end-to-end protection, as files are never left on disk in an unencrypted format. The encryption is based on a unique key generated for each individual system.

ShoreTel TAPI/wav recording generates unencrypted .wav files; since we are relying on a third-party library to generate these files, we cannot encrypt them while they are writing. However, the transcoder converts these to an encrypted format if/when they are transcoded.

The .xml files we generate as companions for the audio files that contain call metadata are **not** encrypted. However, the option exists to turn off .xml file generation. The XML file generation toggle is on the CTI Cores setting page under Administration > Recorder Settings > CTI Cores.

## Generating Keys

Key generation activates encryption in cc: Discover, and the databases have tables to store keys by default. Keys can be generated and managed using the `cc_crypt.exe` that is installed in the recorder directory. This is a command line tool that accepts various parameters to generate, list, deactivate and reactivate keys. Many commands will require you to type the database password to complete the operation.

Any module that uses the encryption libraries will need to be able to query the database for the keys to encrypt/decrypt the files. If there are active keys in the database, the modules supporting encryption should automatically load and use them on startup. Modules will also periodically reload the keys to check for changes once every 15 minutes.

## Encryption Best Practices

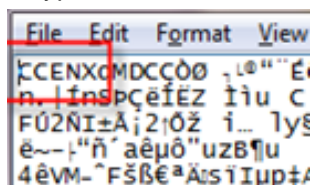
- Keys should only be set inactive when there are no active files using those keys (they have been removed due to archiving).
- Keys should **never** be deleted from the database.
- If a key is lost, any files encrypted with that key will be completely inaccessible.
- To guard against possible loss of data, whenever a new key is generated, it should be exported using the `cc_crypt.exe` utility and the exported file should be kept in a secure location that is backed up regularly.

## Encryption Status Verification

To determine whether a particular recording file is encrypted, use one of the following methods.

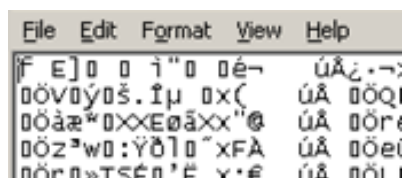
### Check the File Header

Open the file in Notepad. If the file is encrypted, the letters "CCENX" will appear right at the beginning.





If the file is not encrypted, those characters will be missing.



### Validate Using cc\_crypt's Master Key Command

Run the following command against the file(s) in question: `cc_crypt masterkey [filename]`

- If the file is encrypted, the output will read "Master key: [key ID]"
- If the file is not encrypted, the output will read " Command failed: Header doesn't match - file may not be encrypted."

Refer to the *cc\_crypt Utility Commands* section for more information on how to use these functions.

### Considerations

- If keys are lost, data is completely unrecoverable. It is important to keep secured backups of all encryption keys in case the primary copy is lost or damaged.
- If the database becomes unavailable while a Core service is running, encryption will remain operating. However, a Core service utilizing encryption cannot be started or restarted without a connection to the database. For security reasons, encryption keys cannot be stored locally to allow for this.

### cc\_crypt Utility Commands

The `cc_crypt` utility can be used to execute the listed commands. It is executed from a command prompt on any system configured with the `cc: Discover` software. To display more details and optional parameters for an individual command, use the command `cc_crypt.exe help {command}`.

<u>Function</u>	<u>Command</u>
Get help (list commands)	<code>cc_crypt.exe help</code>
Get help with a command	<code>cc_crypt.exe help [command]</code>
Generate a key	<code>cc_crypt.exe genkey</code>
List active keys	<code>cc_crypt.exe list</code>
List active and inactive keys	<code>cc_crypt.exe list -inactive</code>
Deactivate a key	<code>cc_crypt.exe deactivate {fingerprint}</code>

Reactivate a key	cc_crypt.exe activate {fingerprint}
Export keys to a password protected file	cc_crypt.exe export {keyfile}
Include inactive keys	cc_crypt.exe export {keyfile} -inactive
Import keys from a password protected file	cc_crypt.exe import {keyfile}
Encrypt a file using the current master key	cc_crypt.exe encrypt {filename} {encrypted_filename}
Decrypt a file (must have appropriate master key in database)	cc_crypt.exe decrypt {encrypted_filename} {filename}
Decrypt a file using a master key from an export file (database is not available)	cc_crypt.exe decrypt {encrypted_filename} {filename} -keyfile={keyfile}
Encrypt a file with a password (anyone who wants to decrypt it will need to know the password)	cc_crypt.exe pencrypt {filename} {encrypted_filename}
Decrypt a file that was encrypted with a password	cc_crypt.exe pdecrypt {encrypted_filename} {filename}
Show the master key fingerprint that was used to encrypt a file	cc_crypt.exe masterkey {encrypted_filename}
Take an arbitrary setting value and encrypt it	cc_crypt.exe encryptsetting {value}

For commands that accept passwords on the command line, the encryptsetting option can be used to generate an encrypted equivalent. For example, instead of using **cc\_crypt.exe list -dbpassword=secret**, you can encrypt secret using the encryptsetting tag and then use the encrypted value instead:

Example: cc\_crypt.exe list -dbpassword=E[hXk7v3zjuQCghVzVFoCORA==]

## Thales Encryption vs. Standard Key Management

Thales Encryption Key Management is a system that provides similar functionality to cc: Discover's key management. For a more detailed explanation on the hardware, software, and configuration of the Thales platform's functionality, please see the *cc Discover Thales Encryption Technical Brief*.

When determining whether to use Thales or the built-in functionality of cc Discover, consider the structure of the encryption system:

- The Primary Key stored in either a DLL (cc: Discover), data store attached to a Thales box, or ASCII text file (cc: Discover). This key is used to decrypt...
- The Database Key(s), stored in the cc: Discover database, used to decrypt...

- The File Key, stored in the header of the encrypted file.

If the Primary Key becomes corrupt or lost, it can be easily replaced or changed if in the Thales or ASCII text file format. If the key is stored as a DLL, the file will have to be decompiled, updated, recompiled, and replaced in the system. Thales or the ASCII text file option offered in cc: Discover offer a similar level of flexibility. The main difference is the extra hardware, cost, and configuration required when integrating Thales into the cc: Discover environment.

## SSL and TLS (Transport Security)

Interactions between the cc: Discover suite components (e.g., servers, Web Portal), file servers, and archive devices can use SSL (Secure Socket Layer) and TLS (Transport Layer Security) for data in transit; it is the customer's responsibility to obtain their own SSL certificate. If users are recorded from remote locations or access recordings from remote locations, a VPN must be established for PCI certification.

In short...

Encryption	TLS	What is Encrypted
ON	ON	<b>All</b> supported file formats on disk. <b>All</b> Web Player and Live Monitoring communications.
ON	OFF	<b>All</b> supported file formats encrypted on disk. <b>No</b> Web Player or Live Monitoring communications.
OFF	ON	<b>No</b> supported file formats on disk. <b>All</b> Web Player and Live Monitoring communications.
OFF	OFF	<b>No</b> supported file formats on disk. <b>No</b> Web Player or Live Monitoring communications.

### Enable Transport Security – Web Player and Live Monitoring

To enable secure communications in Silverlight (which encompasses both Web Player and Live Monitoring), verify that Discover's web.config file contains the following value:

```
<!--Silverlight Values-->
<add key="UseSilverlightSSL" value="0" />
```

## Enable Transport Security – Servers

At present, only **Screen Capture Server** and **Web Media Server** allow for TLS. Add the following values to the settings.ini on Screen Capture Server and Web Media Server, and supply the appropriate values for the corresponding SSL Certificate:

[server]	
ssl_certificate_name=	SSL certificate file name
ssl_certificate_pass=	SSL certificate password

The SSL certificate and settings.ini need to be present in the directory in which the module .exe resides. For example, for the Screen Capture Server module, these would go in C:\Program Files (x86)\CallCopy\Recorder\CC\_ScreenCapServer.

## Enable Transport Security – Client Modules

The next step is to configure the client modules so that they will connect via a TLS method. Core and Screen Capture Client can be enabled by configuring their respective ini files. The setting for this is:

[setting]	
use-TLS=1	Tells the module whether to use TLS (0 for no, 1 for yes).

Sample paths for these files

C:\Program Files (x86)\CallCopy\Recorder\CtiCore\cc\_cticore.ini

C:\Program Files (x86)\CallCopy\ScreenCaptureClient\CC\_ScreenCapClient.ini

## Enable Transport Security – Web Portal

Configuring SSL for the Web Portal is handled through the settings in IIS. It is the customer's responsibility to provide the SSL certificate required for this process. Once you have that, complete the steps below.

### Configure Windows Server 2003/IIS 6

1. Open IIS. Right-click on the **CCWeb** site, and click **Properties**.
2. Under the **Directory Security** tab, under **Secure Communications**, click **Server Certificate**.
3. Follow the wizard, choosing "Import a certificate from a .pfx file". Import the SSL certificate.
4. Under the **Directory Security** tab, under **Secure Communications**, click **Edit**.
5. Check the box to **Require Secure Channel (SSL)**. Under **Client Certificates**, choose to Ignore, Accept, or Require client certificates based on the client's needs. Click **OK**. Go to the Web Site tab, and under **Web Site Identification**, click **Advanced**.

6. Under "Multiple SSL identities for this Web site," click **Add** and set up 443 as an SSL port. Click **OK**.)

### Configure Windows Server 2008/IIS 7.x

1. Open IIS. On the main page, open the **Server Certificates** section.
2. Import the SSL certificate.
3. Right-click **CCWeb** and click **Edit Bindings**. Select "**https**" and leave the other settings at default unless they create a conflict.
4. Under SSL Certificate, choose the SSL certificate. Click **OK**.
5. Back on the IIS page for the site, open **SSL Settings**. Check the option to require SSL and choose to Ignore, Accept, or Require client certificates based on the client's needs. Click **Apply**.

## Transport Security and PCI Compliance

Interactions between the cc: Discover suite components (e.g., servers, Web Portal), file servers, and archive devices can use SSL and TLS for data in transit.

On-Demand, API Server, and Fusion are considered secure regardless of encryption usage. When sensitive information is communicated, cc: Fusion triggers the API Server to stop recording, ensuring that no such data is recorded or flowing through the application or network. Payment data is not at risk because it is not communicated over networks via Discover, but rather through the merchant's payment application. On-Demand is not affected either way by encryption being on or off; it triggers call recording, and as long as that component is encrypted, then the activity is secured.

Coalfire Systems, a Payment Application Qualified Security Assessor (PA-QSA) company, has determined that the application is not "payment aware" at any time. When properly implemented following best practices as outlined in the product documentation, Discover will not negatively impact a merchant's PCI DSS compliance status.

Analysis of network transmissions and examination of the hard drive of the system running Discover using industry-standard forensic tools/techniques confirmed that no cardholder data was accessible. Blackout techniques within the software render cardholder data inaccessible through call/screen recordings.

## HTTP/HTTPS Settings

If an environment uses HTTPS, select the "Force the site to use HTTPS" option under Administration > Web Portal Settings > Security > HTTP/HTTPS Settings. In compliance with PCI guidelines, this setting also secures Web browser cookies (ASP.NET\_SessionID) by setting the 'secure' flag, which prevents cookies from being sent across non-https connections.

This setting affects only cc: Discover. Other CallCopy applications, such as cc: Insight, communicate with cc: Discover, and they must also be configured separately to use SSL. (See each application's installation and administration guide for details.)

# Best Practices

## Disk Space Management

If servers running cc: Discover do not have adequate disk space, call recording and other functions will stop. This section explains common disk space management issues and how system administrators can address them.

### Plan for Growth

During the sales and installation processes, CallCopy engineers use data from customers to estimate the amount of disk space needed. Estimating future growth and changes is difficult. These common changes alter the need for disk space:

- Adding voice channels
- Adding screen capture service
- Changing desktop resolution
- Increasing call volumes

If your company will be experiencing any of these or other changes, contact CallCopy so that the needed disk space can be recalculated.

### Remove Patches and Installers

Files used during install and maintenance may not need to remain on the server. Examples include CallCopy software patches, downloaders, and installers. CallCopy Install and Support engineers attempt to remove all unnecessary CallCopy files. Customer system administrators also need to remove any unnecessary software if they do maintenance work, such as changes to the server operating system.

### Setup cc: Discover Disk Space Management Features

Disk space management is affected by settings on several cc: Discover features. The default settings are adequate for most environments, but changes or specific situations may require setting adjustments. If disk space is a recurring issue, review these settings to confirm that they manage disk space usage efficiently:

- Disk Space Notification
- Logging Settings – Make sure that the system is not logging excessively.
- Notifications > Number of Days to Save Log Files
- Archiver and Archive Actions – Confirm that files are being purged after they are no longer needed.
- Schedules – Confirm that schedules do not have excessive retention days and are tied to archive actions or purging.
- Transcoder – If you configured the transcoder to retain files (Keep Days), lowering this setting can free disk space.

## Delete Temporary Files after Issues

During service issues, log files grow significantly. After an issue is resolved, clear disk space by manually deleting or editing files that are no longer needed. If an application was configured for excessive or debug logging, reset it to the normal logging level.

## Automatically Delete Temporary Files

Windows and IIS generate many temporary files that are retained indefinitely. These log files are mainly for troubleshooting and reviewing security. If neither of those issues is of immediate interest to you, the files can be deleted periodically. This section explains how to use a batch file and scheduled task to delete automatically IIS files that are more than 14 days old.

Get the cleanTempFiles.bat file from CallCopy support or save this code as a batch file.

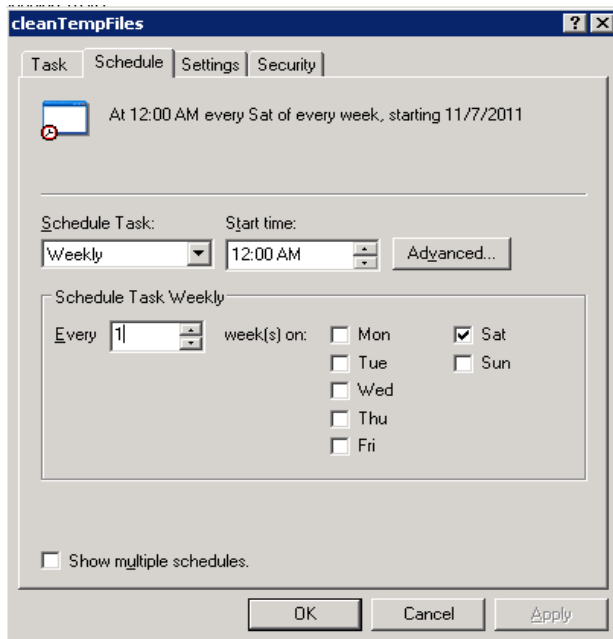
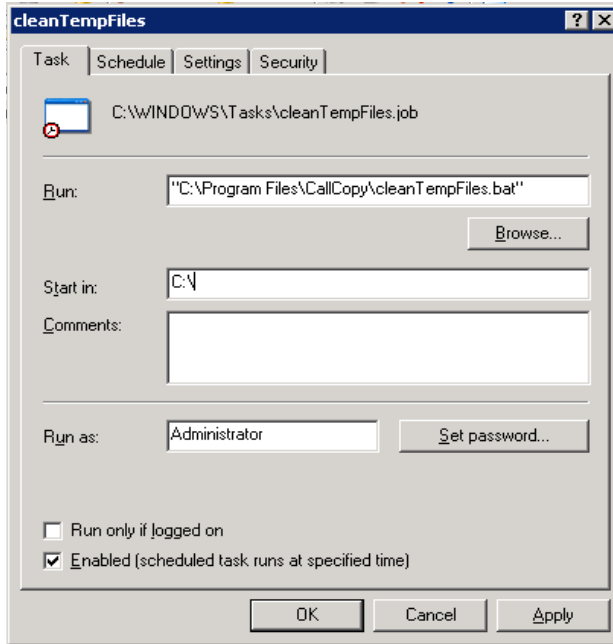
```
@echo off
del /f /s /q "%windir%\Temp\*.*"
del /f /s /q "%userprofile%\local settings\temp\*.*"
del /f /s /q "%userprofile%\local settings\temporary internet files\*.*"
Forfiles -p %systemroot%\system32\LogFiles\W3SVC1 -s -m *.log -d -14 -c "Cmd /C
DEL @File"
```

W3SVC1 is the default IIS log file directory. The directory may need edited. To check the directory your Windows 2003 IIS server uses, follow these steps:

1. In IIS Manager, expand Web Sites.
2. Right-click your site and select Properties.
3. Beside the Active Log Format list, click Properties.
4. The log file directory and name appear at the bottom of the Logging Properties dialog box.

Follow these steps on the server running the Discover Web Portal:

1. Copy the batch file to this directory: c:\Program Files\CallCopy
2. Click Start > Settings > Control Panel.
3. Double-click Scheduled Tasks.
4. Double-click Add Scheduled Task to start the wizard.
5. Click Next on the opening screen.
6. Click Browse. Navigate to the batch file location and select it.
7. Select Weekly and click Next.
8. Specify a Start Time when few users are in Discover, such as 12:00 AM.
9. Select a day to run the deletion.
10. Enter the name and password of the account that will run the deletion.
11. Select the option to Open advanced properties. Click Finish.
12. Review the settings and click OK.





## Control Database Size

This section explains two tasks for controlling database size. Perform them on both the central and recorder database. (These instructions use SQL Server 2008.)

### Task: Database Recovery Model

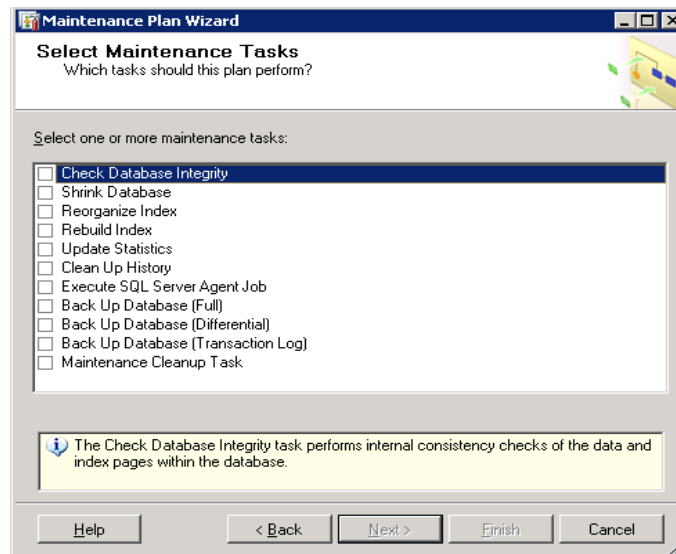
Set a database's recovery model to Simple in order to prevent oversized transaction logs:

1. In SQL Server Management Studio, expand Databases.
2. Right-click the Discover central or recorder database and select Properties.
3. In the Database Properties dialog box, click Options.
4. In the Recovery Model setting, select Simple.

### Task: Schedule Maintenance Plans

Maintenance plans can be used to automate the cleaning of unnecessary indexes and removal of multiple backup files.

1. In SQL Server Management Studio, expand the Management folder.
2. Right-click Maintenance Plans and select Maintenance Plan Wizard.
3. Select these tasks: Reorganize Index, Rebuild Index, and Backup Database (Full).



## Best Practices

### 4. Configure each task as recurring, once-weekly job.

Jobs can be accessed in Management Studio > SQL Server Agent > Jobs. Right-click the appropriate job and select Properties. Click Schedule.

The screenshot shows the 'Job Schedule Properties - Backup Database' dialog box. The 'Name' field is 'Backup Database'. The 'Schedule type' is set to 'Recurring' and is 'Enabled'. The 'One-time occurrence' section shows a date of '11/ 9/2011' and a time of '10:40:40 AM'. The 'Frequency' section is set to 'Weekly', occurring every '1' week(s) on 'Sunday'. The 'Daily frequency' section has 'Occurs once at' set to '12:00:00 AM'. The 'Duration' section shows a 'Start date' of '11/ 9/2011' and 'No end date' selected. The 'Summary' section contains a description: 'Occurs every week on Sunday at 12:00:00 AM. Schedule will be used starting on 11/9/2011.' Buttons for 'OK', 'Cancel', and 'Help' are at the bottom.

## Shut Down and Restart

This information applies to planned shutdowns/restarts and unplanned Windows server outages.

Microsoft server updates (patches, hot fixes, etc.) typically do not affect cc: Discover. However, there is no guarantee that this statement is always true.

Points to consider:

- The standard install instructions call for registering Discover's applications as Windows services that auto-start when the server starts. Archiver does not auto-start; it can be started from the Service Manager. cc: Survey is not registered as a service. How it starts depends on how it was configured.
- If calls are being recorded when the system is shut down, those calls are lost. A file of the recorded audio is retained, but no call record is created, and the audio file is not transcoded.
- The system does not restart recording calls. (If the admin is doing server patches, this probably will not be an issue unless the call is particularly long.)
- If the transcoder is processing a call when the system is shut down, the transcoder will reprocess that call after the restart unless the maximum number of attempts has been reached.
- If a call is being analyzed, the analytics engine will reprocess that call. (Analytics is installed on a different server from other CallCopy applications, so this system should not be affected by work on another server except for being able to get calls to process.)
- If users are doing evaluations or creating evaluation or survey forms, all changes that were not saved are lost.
- Scheduled processes (e.g., archiving, report generation) can be affected by shutdowns. Admins need to be aware of when these processes occur and may want to schedule the shutdown accordingly or reschedule the processes.

- The sequence in which CallCopy applications are started/stopped does not matter.

Procedure:

1. In the Discover Web Portal, go to Administration tab > Tools > Service Manager.
2. Check all of the applications and click Stop Selected. The stop/start sequence does not matter for CallCopy applications.
3. If any CallCopy applications were not run as services or not managed from the Service Manager, log onto the Windows server and use the Task Manager to stop them.
4. Perform the necessary changes specified by Microsoft or other software and hardware vendors.
5. If the server is restarted, the CallCopy applications should restart and functioning normally.
6. If the server is not restarted, open a command line prompt and start the CallCopy applications that were not configured to be managed from the Service Manager.
7. In the cc: Discover Web Portal, open the Service Manager page.
8. Confirm that all the applications are running. Start those that are not running.
9. Confirm that call recording and all other functions are operating normally.

## Anti-Virus

Anti-virus exclusions are recommended to be configured in any system where anti-virus scanning is installed. The guidelines below are provided to assist with ensuring the reliability and performance of the CallCopy system, while still providing for a secure environment. A lack of exclusions can cause system performance issues and possibly contribute to service outages.

These guidelines apply to both memory resident and on-demand scanning.

## Exclusion Guidelines

The table below lists the recommended exclusions for each service or application. Any paths or ports shown in this document are the installation defaults only. Actual paths or ports may vary depending on configuration options set during installation.

Service/Application	Process	File, Extension, or TCP/IP Port	Default Folder
<b>Logger Service</b>	cc_loggerservice.exe	*.log	C:\Program Files\CallCopy\Logs\
<b>CTI Core</b>	cc_cticore.exe	*.cca, *.wav, *.vox, *.vox8, *.xml	C:\default_rec
<b>Transcoder</b>	cc_transcoder.exe	*.cca, *.vid, *.wav, *.vox, *.vox8, *.csa, *.ccp	C:\temp\transcoder-temp
<b>Analytics</b>	cc_analytics.exe	*.wav, *.idx	
<b>Screen Capture</b>	cc_screencapserver.exe	*.vid	C:\temp\

## Additional Considerations

The exclusion guidelines listed above are product specific. For other applications (not listed above), it is often necessary to determine exclusions on a case-by-case basis. The section below provides some guidance in this area.

Files should typically be excluded based on the following criteria:

- **Locked Files** - The files are permanently locked open by a legitimate server process. Examples of these are databases such as DHCP and SQL Server, as well as files such as the Windows Pagefile.
- **Large Files** - The files are manipulated often by a legitimate server process and are typically large in size. Examples of these are copying CD/DVD images (.iso) and Virtual Machine Files (.vhd). In addition operations may also include the likes of offline maintenance on Virtual Machine Files and Exchange Server databases.
- **Temporary Files** - A large number of temporary files are written to disk by a legitimate server process.

## Expired or Corrupt License File

Call recording will not work if the CallCopy software license file has expired or is corrupt. The license status can be viewed on the License Info system report. (In the Discover web portal, click Reporting > System Reports.)

A license file may be expired, corrupt, or missing if call recording and other functions are not working and the Windows server is repeatedly attempting to start the Discover services and modules. This situation can be viewed in Windows Task Manager.

In this situation, contact CallCopy Support to investigate.

## License Requests

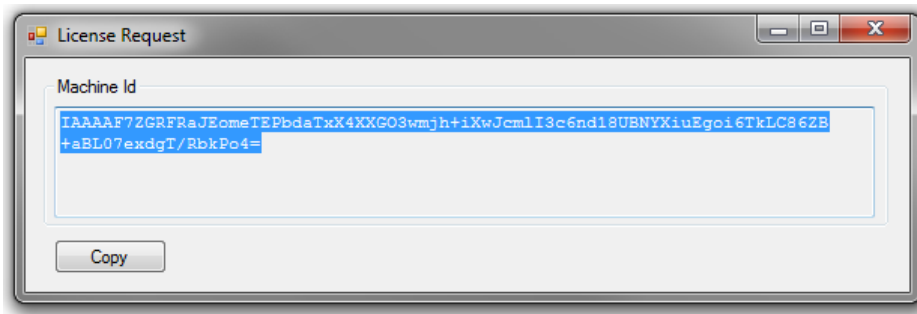
Making major changes to your cc: Discover system (e.g., such as changing the Windows machine name, changing a motherboard, etc.) will cause your system to become unlicensed. The server will not function until a new license is created and applied to the system.

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.

Follow these steps to generate a new Machine ID:

1. Open the Recorder directory on your cc: Discover server.
2. Run the "LicenseRequest.exe" application. The application will open the License Request window. Inside the window will be a Machine ID that will be used to create the license file.



3. Click Copy.
4. Open a new email and paste the Machine ID into it.
5. Send the email to the CallCopy Support team. The team will reply with a new license file.

# 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](http://www.callcopy.com).