



CallCopy®

Innovations in Call Recording  
and Contact Center Solutions

# cc: Discover Administration Manual, v5.2 R3

August 2013

Reference Guide

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# Table of Contents

<b>Introduction</b> .....	<b>10</b>
<b>Permissions</b> .....	<b>11</b>
Roles.....	13
Create a Role .....	13
Delete a Role.....	13
Copy a Role.....	14
Permissions Definitions.....	14
General Administration .....	14
System Permissions .....	14
Coaching Permissions .....	14
Reporting Permissions.....	15
Player Permissions .....	15
Survey Permissions (with Optional cc: Survey product installed) .....	16
Analytics Permissions (with Optional cc: Analytics product installed) .....	16
On-Demand Permissions .....	16
Insight Dashboard Permissions.....	17
Insight Permissions (with Optional cc: Insight product installed) .....	17
cc: Clarity Permissions.....	18
User Edit Field Permissions .....	20
Assign Access to CallCopy Groups.....	20
Assign Access to an ACD Group or Gate/Queue.....	20
Assign a Role to Multiple Users .....	21
Users.....	21
Add a User .....	22
Edit a User.....	24
Lock a User Account.....	24
Deactivate a User .....	24
Delete a User .....	25
Import Users.....	25

Export Users.....	26
Set Up an Agent to Be Recorded .....	26
<b>Groups .....</b>	<b>27</b>
Create a CallCopy Group.....	27
Delete a CallCopy Group .....	28
Add/Remove Agents in a CallCopy Group.....	28
<b>Scheduling .....</b>	<b>29</b>
Scheduling Process Flow.....	29
Relate Schedules to a Core .....	30
Create Agent Schedules – Time-Based .....	30
Create Agent Schedules – Number-of-Calls Based .....	31
Create Custom Schedules .....	32
General Settings.....	32
Schedule Types.....	33
Schedule Priority .....	34
Call Parameters.....	35
Retention Rules .....	35
Capture Options .....	35
Schedule Requirements: Simple Business Rules .....	36
Schedule Expression: Advanced Business Rules.....	37
Copy, Edit, Delete Schedules.....	39
Find a Schedule.....	39
Schedule List.....	39
Timed Schedules.....	40
Licensing .....	40
Timed Schedule List .....	40
Create a Timed Schedule .....	41
Edit and Delete Timed Schedules .....	42
<b>Recorder Settings.....</b>	<b>43</b>
CTI Cores.....	43
Buddy Cores.....	43

Types of Configurations .....	43
Applicable Integrations.....	44
Configure a Buddy Core .....	44
Configure Buddy Core for "Warm Standby" (If Necessary) .....	45
Configure Settings .....	45
Set Cores to Automatically Restart.....	45
<b>Custom Lookup .....</b>	<b>46</b>
<b>IP Phones.....</b>	<b>47</b>
Add Phones.....	47
Edit/Delete Phone.....	47
Import IP Phones via a CSV File.....	48
<b>On-Demand.....</b>	<b>48</b>
<b>Transcoder .....</b>	<b>48</b>
Configure Transcoder Settings.....	49
Transcoder Settings.....	49
Configure Payload .....	52
Transcoder Configuration.....	53
Transcoder Troubleshooting .....	53
<b>Voice Boards.....</b>	<b>55</b>
Voice Boards List.....	55
Channel Configuration .....	55
<b>System Settings .....</b>	<b>57</b>
<b>API Servers List.....</b>	<b>57</b>
API Server Settings .....	58
Web Server Settings.....	59
TCP Settings .....	59
<b>Archive Actions.....</b>	<b>60</b>
Configure Archive Actions.....	61
Archive Action Settings .....	62
<b>Archiver.....</b>	<b>65</b>
General Settings.....	66

System Purge Action .....	66
Removable Media Settings .....	66
MSSQL Database Backup Settings.....	67
Custom Extensions.....	69
Disk Space Notifications .....	69
Logging Settings.....	69
Mail Settings.....	70
Notifications.....	70
Audible Alert Settings.....	71
Disk Logging Settings .....	71
E-Mail Notification Settings .....	72
E-Mail Subscriptions .....	72
SNMP Notification Settings.....	73
SNMP Subscriptions.....	73
Test Alerts .....	73
Subscription Types .....	74
Server Nodes .....	75
Web Server Settings.....	76
Settings.ini.....	77
<b>Web Portal Settings .....</b>	<b>78</b>
Comet Daemon .....	78
Security .....	79
Terminology.....	80
Web Portal.....	82
Home Tab Widgets .....	83
Web.config .....	86
<b>Tools .....</b>	<b>87</b>
Service Manager .....	87
Add/Edit/Remove a Server Node .....	88
Add a Service Application .....	88
Edit/Remove a Service Application .....	88

Manage a Service.....	89
Manage Multiple Services.....	89
Archiver Console .....	89
Archive Actions.....	90
Optical Drives .....	90
Output .....	90
<b>System Security .....</b>	<b>91</b>
Security Design .....	91
'Blackout' Sensitive Data.....	92
Purging Sensitive Data .....	93
Authentication and Passwords .....	93
Windows PC, Server, Database, and Application Accounts .....	93
Logging and Auditing.....	94
Web Portal Settings: Security Page .....	94
Site Settings .....	94
ForgotPassword Settings.....	94
Active Directory Settings.....	94
Login Settings.....	94
PCI Settings .....	95
Login Mode Configuration .....	96
Active Directory Settings.....	96
Login Settings.....	98
IIS Site Settings for Hybrid Mode and AD Authentication.....	99
Settings Changes for Former AD Auto-Login Environments .....	99
IIS Session Timeout.....	100
File Encryption.....	101
Generating Keys.....	101
Encryption Best Practices .....	102
Encryption Status Verification .....	102
Considerations.....	102
cc_crypt Utility Commands.....	103



Thales Encryption vs. Standard Key Management .....	104
<b>SSL and TLS (Transport Security) .....</b>	<b>105</b>
Enable Transport Security – Web Player and Live Monitoring.....	105
Enable Transport Security – Servers.....	106
Enable Transport Security – Client Modules.....	106
Enable Transport Security – Web Portal.....	107
Transport Security and PCI Compliance.....	107
HTTP/HTTPS Settings.....	108
<b>Best Practices .....</b>	<b>109</b>
<b>Disk Space Management.....</b>	<b>109</b>
Plan for Growth.....	109
Remove Patches and Installers.....	109
Setup cc: Discover Disk Space Management Features .....	109
Delete Temporary Files after Issues.....	110
Automatically Delete Temporary Files .....	110
Control Database Size.....	111
<b>Shut Down and Restart.....</b>	<b>113</b>
<b>Anti-Virus.....</b>	<b>114</b>
Exclusion Guidelines .....	114
Common File Types.....	115
Additional Considerations .....	116
Expired or Corrupt License File.....	116
<b>License Requests.....</b>	<b>117</b>
<b>About CallCopy .....</b>	<b>118</b>

# 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 Manual* 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.

cc: Discover includes

- One default role: DiscoverDefaultAgent. This role cannot be deleted, but its permissions can be edited.
- Roles migrated from earlier versions of cc: 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.

## Permissions

### **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 cc: 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 cc: 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 cc: 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

### General Administration

**Allow User Administration:** Allows the User to add, edit, and delete other system Users. This is an administrator-level permission.

**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.

### System Permissions

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

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

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

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

**Allow QA Form Administration:** Allows a user to alter the score or responses of any completed evaluation within any group to which that user has permission, including their own evaluations.

**Allow Performing QA Evaluations:** Allows a user to issue an evaluation upon an agent in any group to which that user has permission. Users with this permission may also serve as arbitrators for dispute resolution involving the agents they have access to evaluate.

**Allow Editing of QA Evaluations:** Allows a user to build and edit a QA form within any group to which that user has permission, including their own evaluations.

**Allow Content Library Management:** 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 Analytics Reports:** Allow the user to run survey reports (Only for systems that have the optional cc: Analytics product installed)

**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 Discover Ad Hoc Reporting:** Provides the ability to view the Ad Hoc Reporting menu, create ad hoc reports using the Report Builder page, view/edit any ad hoc report that has been saved. This permission does not provide access to any report data and does not change the ability to save report search criteria as public or private. These reporting category permissions control the data fields a user sees in the ad hoc report builder: **Allow viewing call reports, Allow viewing QA reports, Allow viewing survey reports, Allow viewing audit reports.** Example: In order to create/edit an ad hoc report on QA evaluations, a user needs **Allow Viewing QA Reports** and **All Ad Hoc Reporting**.

**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 Viewing Survey Reports:** Allow the user to run survey reports (Only for systems that have the optional cc: Survey 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 Recordings:** Allow the User to view all records in the system, regardless of Group and/or Gate settings.

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

## Permissions

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

**Allow Bookmarking:** 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).

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

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

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

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

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

## 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:** This setting will allow the agent to record using the physical device extension.

**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.

**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**.

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

**Allow Recording by Device Alias:** 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 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.

**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.

**Notify On Demand Recordings Only:** Notifications will only be displayed for recordings initiated through the On-Demand client.

**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.

**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**.

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

## Insight Dashboard Permissions

**Allow Widget Administration:** Provides the ability to configure widgets or perform restricted tasks in widgets. This permission is not for granting users access to data. For example, users must have this permission to post items to the News widget. This permission is only for Discover.

**Allow View Forecast Actual Data:** This permission allows a user to view in cc: Discover forecasted call volume data and actual call volume data created and maintained through cc: Clarity. This permission is only for cc: Discover.

**Allow View Service Level Data:** This permission allows a user to view in cc: Discover Service Level data created and managed through cc: Clarity. This is permission is only for cc: Discover.

**Allow View Snapshot Data:** This permission allows a user to view in cc: Discover call data (i.e., Queued, Active) and agent status (i.e., Available, On Call, etc.) created and maintained through cc: Clarity. This permission is only for cc: Discover.

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

**Allow Access Through Desktop:** Allows the agent to load and access the Agent Desktop application. This permission requires that cc: Insight server is installed.

## cc: Clarity Permissions

These appear when cc: Clarity is installed along with cc: Discover. Refer to the "Roles, Permissions, and Accounts" section of the *cc: Clarity Administration Manual* for more information on managing permissions for users and roles.

### *cc: Clarity Home Tab Permissions*

**Allow Change Password:** Allows the user to change his/her password in cc: Clarity. Users do not have to have this permission to change their password using the Forgot Password feature.

**Edit News Widget:** Allows a user to add, update, and remove items from the Home page's News widget.

**Home Page Widgets:** Allows a user to add/remove/view widgets from the Home page.

### *Employee Tab Permissions*

**Employee Create:** Allows a user to create user accounts for cc: Clarity and cc: Discover.

**Employee Profile All View:** Allows a user to view all of his/her employee profile information. Allows user to view profile of any user.

**Employee Profile Team View:** Allows a user to view profile information of employees who are members of a team for which he is a supervisor. Also causes those employees to be visible on Schedule Search screen.

**Employee Schedule All Edit:** Allows a user to edit any employee's schedule.

**Employee Schedule All View:** Allows a user to view any employee's schedule.

**Employee Schedule Team Edit:** Allows a user to edit the schedules of employees who are members of a team for which he is a supervisor.

**Employee Schedule Team View:** Allows a user to edit the schedules of employees who are members of a team for which she is a supervisor.

**Employee Search:** Allows a user to search for any employee and see those search results. Search results can include Name, Labor Unit, Location, Title, and Team memberships.

**Employee Section:** Allows a user to access the Employee tab but not do anything on it. This permission is required in order to have other Employee tab permissions.

**Employee Self Edit:** Allows a user to edit his/her profile's email account and change the cc: Clarity/cc: Discover password.

### *Forecast Tab Permissions*

**Forecast Acquire:** Allows a user to load call history data to create a forecast data set.

**Forecast Predict:** Allows user to generate a forecast.

**Forecast Section:** Allows a user to access the Forecast tab but not do anything on it. This permission is required in order to have other Forecast permissions.

**Forecast Trend:** Allows a user to create an historical trend line when creating a forecast.

### *Reports Tab Permissions*

**Allow Clarity Ad Hoc Reporting:** Provides the ability to view the Ad Hoc Reporting button, create ad hoc reports using the Report Builder page, view/edit any ad hoc report that has been saved, and save ad hoc report search criteria as public or private. This permission provides access to all report data. A user must have permission to the following in order to allow ad hoc reporting permissions: **Reports Section, Reports Real Time, Reports Historical, Reports Processes.**

**Historical Widgets:** Allows a user to add and view historical reporting widgets.

**Leave Request Approval All:** Allows a user to approve leave requests for any employee.

**Leave Request Approval Team:** Allows a user to approve leave requests for employees who are members of a team the user supervises.

**Real Time Widgets:** Allows a user to add and view real-time reporting widgets.

**Reports Historical:** Allows a user to access the Historical Reports page but not add or see the historical widgets.

**Reports Processes:** Allows a user to access the Processes Reports page but not add or see the historical widgets.

**Reports Real Time:** Allows a user to access the Real-time Reports page but not add or see the historical widgets.

**Reports Section:** Allows a user to access the Reports tab but not do anything on it. This permission is required to have other Reports permissions.

**Roster All:** Allows a user to view roster for any Labor Unit or Skill group.

**Roster Team:** Allows a user to view the real-time roster of any team of a team for which the user is a supervisor.

**Swap Request Approval All:** Allows a user to approve shift swap request for any employee.

**Swap Request Approval Team:** Allows users to approve shift swap requests for employees who are members of teams they supervise.

### *Schedule Tab Permissions*

**Schedule Create:** Allows a user to create a schedule from loaded

**Schedule Load:** Allows a user to load a forecast data to create a schedule.

**Schedule Publish:** Allows a user to publish a schedule.

**Schedule Section:** Allows a user to access the Schedule tab but not do anything on it.

## *Administrator/Configuration Tab Permissions*

**Allow User Admin:** Allows a user to change settings on user accounts.

**Can Be Supervisor:** Allows a user to be assigned as the Supervisor for a team. Additional permissions are needed to perform tasks such as approving swaps. Removing this permission causes the user to be removed as a supervisor from all teams immediately.

**Configuration Section:** Allows a user to do all tasks on the Configuration tab.

## 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.) If no groups are specified, agents with this role will be able to view all ACD Groups; if groups are specified here, the groups will still appear in the Call List Quick Filter Menu, but only calls for the specified groups will be available. This behavior is consistent with how CallCopy Group and Agent quick filters work in the Web Player.

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 "[Add 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@calicopy.com	5445	11/28/2011 4:16 PM
CallCopy Administrator	lvaughn@calicopy.com		12/2/2011 1:53 PM
Second User	suser@calicopy.com	5043,5099	11/28/2011 4:16 PM
New User	tsame@test.com	5096	11/28/2011 4:16 PM
Matt Field	mfield@calicopy.com	5684	11/30/2011 1:45 PM
Leroy Vaughn	lvaughn@calicopy.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).

Specifically for Cisco UCCE and UCCX integrations, cc: Discover's Agent Sync Module has the ability to import agent information from the UCC database and synchronize it with CallCopy user accounts by checking for changes since the last time synchronization occurred. For more information on this feature, please refer to CallCopy's *Cisco UCCE Integration Guide* or the *Cisco UCCX Integration Guide*, whichever is appropriate for the customer's environment.

## 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 "[Set Up an Agent to Be Recorded](#)."

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

- Creating the user in cc: Clarity will also create them in cc: Discover; this is the preferred method.
- Creating the user in cc: Discover will require using the Mass Update Incomplete Users function in cc: Clarity to import the user; see the *cc: Clarity Administration Manual* 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 Page > 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 cc: 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.

**Note** For reporting, an agent is Active if the Agent option has been enabled in the agent profile. An agent is inactive if the Agent option was selected at one point and that option is now cleared. Please see the *cc: Discover Reporting Manual* for more information on agent reports.

9. Enter values in the Additional Information fields as needed:
  - **System Username:** Mainly used for screen capture. This is the Windows username (i.e., Network ID) that the agent uses to log into the network. This field is required for screen capture, as the recorder uses this to locate an agent's desktop via the Screen Capture Client. This username can also be used for recording standard desktops, if all of the agents are required to log into their PC. This value must be unique for these features to work.
  - **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 screen capture the desktop activity on that specific domain. This field may be left blank.
  - **Active Directory Username:** Required if using Active Directory login method. This field will be auto-populated when using "Auto Create User on Login" or importing users, provided all information is supplied in the import file.
  - **Active Directory Domain:** Required if using Active Directory login method. Supply the domain that the agent logs into. This works independently of the System Domain field above, which is primarily required for screen capture. This field will be auto-populated when using "Auto Create User on Login" or importing users, provided all information is supplied in the import file.
  - **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, cc: 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. cc: 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 cc: 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.

## Permissions

**Note** A phone number can be assigned to only one agent. If an admin attempts to assign a number that is already assigned to another agent, an error message appears beside the Phones box.



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.

## Lock a User Account

By default, users can login to cc: 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.

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:

1. Double-click the account in the User List.
2. Select the Account Locked option. Clear this option to unlock the account.

## Deactivate a User

Deactivating a user/agent is slightly more involved than simply locking the account, but not as permanent as deleting a user altogether. Locking an account would suit someone who has changed positions or is on extended leave. Deactivating would be more for a user who has left the company altogether or whose extension has been reassigned, but the user still needs to appear in reports and the portal user list.

To deactivate a user:

1. Double-click the account from the user list in the Web Portal.



2. Check the box for **Account Locked**.
3. Clear the check box for **Agent** status.
4. Remove the assigned phone extension under Phones.

**Note** The extension cannot be reassigned if it still appears attached to a user. If you clear the check box for Agent status and attempt to save changes without removing the extension(s), you will receive an error message.

5. Click **Save**.

## Delete a User

Users can be deleted from the Web Portal. The account information and call data is retained in the cc: Discover database but cannot be seen in the portal.

To delete a user:

1. Double-click the account on the User list.
2. Click the **Delete** button on the top-right corner of the form.
3. You will be presented with a confirmation button. If you wish to delete the User, click **OK**.



## 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, roleId(role name);roleId(role name);roleId(role name) [optional], ActiveDirectoryDomain (for AD/Hybrid auth), ActiveDirectoryUsername (for AD/Hybrid auth)

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**.

## Permissions

7. cc: Discover verifies that the data is in the correct format and that the CSV data does not duplicate existing agent names, phone IDs, or AD usernames on the same domain if using Hybrid or AD authentication. 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: Discover 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 cc: 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 *cc: Discover Administration Manual*.

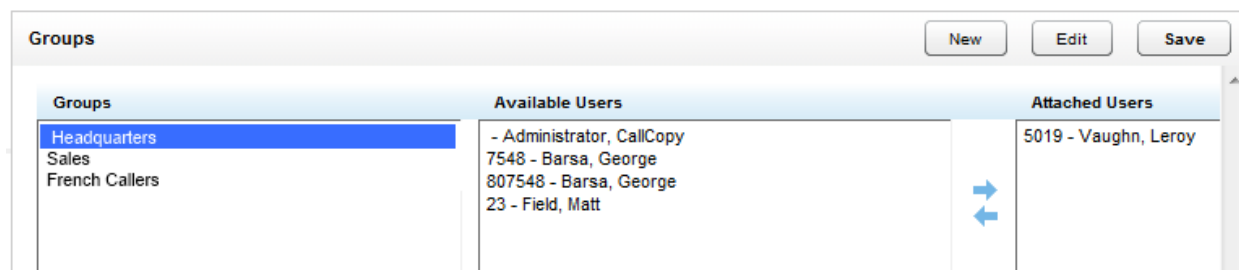
1. Create a user account for the agent in cc: Discover. Select the Agent option. Specify a telephone extension for assigned-seating environments or an agent number/login for free-seating environments.
2. Make the user account a member of a group if the user will be evaluated and monitored.
3. A schedule 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 cc: 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 cc: Discover Core's CTI module. Review the PBX-specific CallCopy integration guide for CTI module settings.
7. Occasionally, the cc: 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 cc: 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**.

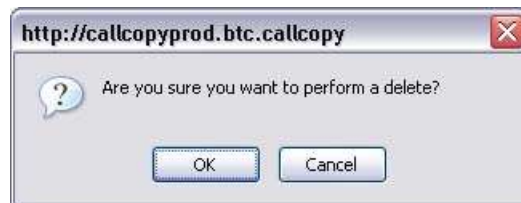
Group names must be unique. If a Group already exists with the name you have chosen, the following error will be generated: "That group name already exists! Change the group name and try again."

## 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.

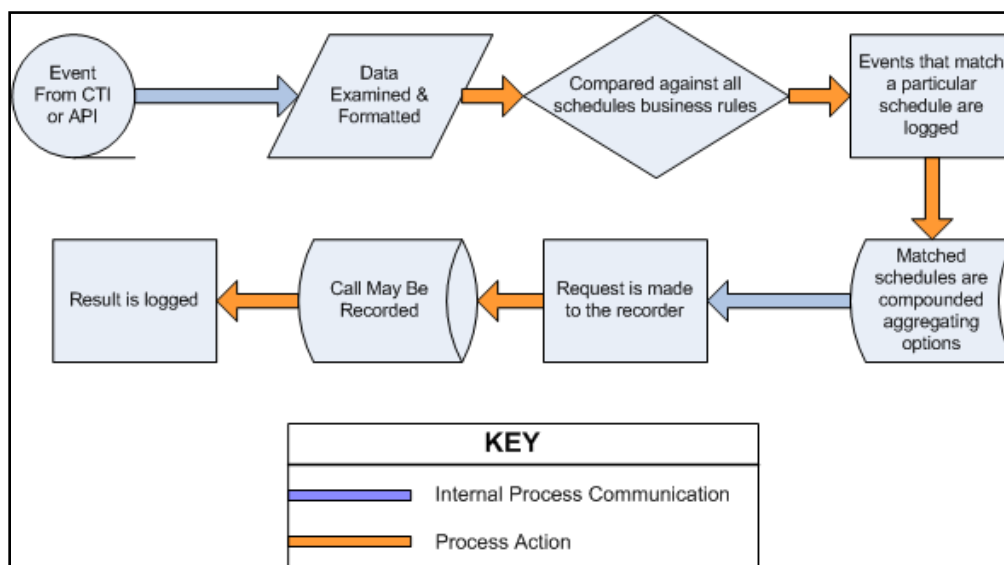
# Scheduling

**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: "Name:" with an empty text box, "Description:" with an empty text box, "Agent (Agent Number):" with an empty text box, "Never Expire:" with an unchecked checkbox, "Start Date:" with a text box containing "5/22/2011" and a calendar icon, and "End Date:" with a text box containing "5/22/2011" and a 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 contains the following fields and controls:

- Name :** A text input field.
- Description :** A text input field.
- Agent (Agent Number) :** A text input field.
- Number of calls :** A text input field.
- Never Expire :** A checkbox.
- Start Date :** A date input field with the value "5/22/2011" and a calendar icon.
- End Date :** A date input field with the value "5/22/2011" and a calendar icon.
- Save :** A button in the top right corner.

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 :

Never Expire :

Start Date and Time :

Description :

End Date and Time :

---

Type :

Direction :

Min Record Length (Sec) :

Max Record Length (Sec) :

Screen capture wrap length (Sec) :

Stop screen capture wrap on call start :

Audio Capture :

Speech Analytics :

Disk Location :

Target Percent :

Random Probability :

Priority :

Max Record Silence(Sec) :

Retention Days :

Archive Action :

Screen Capture :

Comparison :

---

**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"/>

## 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.

## Scheduling

**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.

**Stop Screen Capture Wrap on Call Start:** Determines whether screen capture for agents in wrap time stops when a new call is detected to begin recording, or the Screen Capture Wrap Length time has been reached. If set to Yes, a new call or chat will trigger the end of the current capture and initiate a new one, even if the wrap time limit has not yet been reached.

## 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, see the "[Archive Actions](#)" section of 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. When entering data in the Schedule Expression field, put single quotes around the time values. For example, for time between 6 A.M. and 7 P.M., the expression would read: **time > '06:00' || time < '19:00'**
- Note** If copying/pasting from Microsoft Office or other word processing software that uses Smart (a.k.a., "curly") Quotes, you **must** replace the Smart Quotes with standard quotes in the Schedule Expression field or it will generate an error when saving the schedule.
- **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.

## Scheduling

The available Operators to be used against the variables:

<b>==</b>	Equal to
<b>!=</b>	Not equal to
<b>&gt;</b>	Greater than
<b>&lt;</b>	Less than
<b>&gt;=</b>	Greater than or equal to
<b>&lt;=</b>	Less than or equal to
<b>=~</b>	Match a Regular Expression (Perl Formatted)
<b>!~=</b>	Does not match a Regular Expression (Perl Formatted)
<b>'</b>	Both single and double quotes can be used to signify strings in expressions.
<b>c'</b>	Prefixing quotes with a c indicates case-insensitive matching. This applies to normal string comparisons, <b>IN</b> , <b>!IN</b> , <b>=~</b> and <b>!~=</b> operators.
<b>IN</b>	Test if an identifier is in a bar separated list of values.
<b>!IN</b>	Test if an identifier is not in a bar separated list of values.
<b>&amp;&amp;</b>	Boolean AND operator.
<b>  </b>	Boolean OR operator.
<b>()</b>	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.

## Scheduling

- **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.





**Note** This feature will not work properly if the Station List is utilized. Unique usernames are required.

## 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						<a href="#">New Schedule</a>
	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.



## 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, see the "[Archive Actions](#)" section of 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.

**Note** If core settings changes are required, only open one core at a time for editing. Do not open multiple cores in separate browser tabs or, when saving one core, another core's settings may be overwritten.

## Buddy Cores

Buddy Core is a method of high availability and redundancy where only one core is recording at a given time. This is opposed to a system where a redundant recorder is always recording. Since only one core is recording at a time, it can save space and resources. For instance, in Avaya TSAPI/DMCC only one set of DMCC stations is required and the buddy cores will share these DMCC stations. Buddy Cores should always run on different machines (including VM clusters) to avoid having a single point of failure.

## Types of Configurations

There are two ways to configure buddy cores: Primary/Secondary and Active/Inactive. The main difference is in how the secondary core behaves.

- In Primary/Secondary, the secondary core will not record unless instructed to by the primary.
- In Active/Inactive, the secondary will record unless instructed *not* to by the primary.

### *Primary/Secondary*

When the primary core starts up, it will wait a configurable amount of time for the secondary core to start up. If a timeout occurs then the primary core will start recording. When a connection is made with the secondary core, the secondary core will inform the primary core of its recording state (Recording, NotRecording, or Deciding). If the secondary core's state is NotRecording or Deciding, then the primary core will start recording. If the status is Recording, then the primary core will go into warm standby. All modules configured for warm standby will be started, but no recording will take place. If the secondary core drops off while the primary core is in standby, the primary core will start recording.

## Recorder Settings

The secondary core's function is different. When it starts up, it immediately goes into standby mode as described above. When a connection is established to the primary core and then fails, the secondary core starts recording. If no connection is ever made to the primary core the secondary core will wait indefinitely in standby mode.

### *Active/Inactive*

Both cores will function the way the primary core does as described in Primary/Secondary. If both cores start up at the same time and neither is recording (both are in the Deciding state), the core that would be considered the primary core (i.e., not the core configured with a broadcast receiver) from above will take precedence and start recording, and the other core goes into standby mode. If both cores start up and cannot connect to one another, then they will both start recording.

## Applicable Integrations

Sales Engineering can determine whether a Buddy Core configuration would be compatible with the customer's environment during the sales process.

## Configure a Buddy Core

You will 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 cc: 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.
- 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 (in milliseconds) 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)

Sometimes it is important for CTI modules to start up even though the buddy core is in standby mode. This is required if the module or script must track information required to record, and the module would be unaware of the information from a cold start. The only example of this that has come up is when Avaya TSAPI has "monitorfromhuntgroup" enabled – devices are monitored as agents log in to them, but TSAPI must see the log-in in order to monitor the device. Currently the only way to configure this is in the cc\_cticore.ini file.

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"

## Configure Settings

The settings that determine Primary/Secondary vs. Active/Inactive behavior as well as how long cores attempt to read each other's state when starting up must be configured for proper operation. Please refer to knowledge base article # 000001508 for information on these settings and their values.

## Set Cores to Automatically Restart

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.

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 cc: Discover Web Portal.
2. Go to Administration > Tools > Service Manager.
3. Ensure that **Auto-Restart** for both the primary and secondary cores is set to **Yes**.
4. Save any configuration changes.

If an event causes a core to stop and restart, it will go through the same determination process described at the beginning of this section to choose what it should do. 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		<input type="button" value="Import Lookup"/> <input type="button" value="Add New Lookup"/>	
Lookup Value	Match Value	Lookup Key	
1234	Customer X	Account	 
520123	Customer A	DNIS	 
7501	Special Customer	DNIS	 

Pages :  Go To Page :  of 1

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.



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 cc: 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	Configure Payloads	 

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 CallCopy 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.

## Recorder Settings

- **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.
- **Format:** Audio format for storing audio. The following formats are available:
  - **GSM610:** (~1.7KB/s) Compresses to smaller file sizes, but can have lower playback quality. Can be played in standard media player.
  - **VOX6K:** (~2.9KB/s) Higher quality audio format, but will produce audio files that are 1.8x larger than GSM.
  - **VOX8K:** (~4KB/s) Higher quality audio format, but will produce audio files that are 2.5x larger than GSM.
  - **CSA:** (~1KB/s) Creates smaller files than GSM610, but are the highest quality of all available formats. Requires CSA format license from CallCopy for use, files cannot be played in standard media players.
  - **CSASTEREO:** (~2KB/s) Stereo version of CSA format. Creates files comparable in size to GSM, but allows additional per-channel post-processing options (per channel volume level and VAD). Requires CSA format license from CallCopy for use, files cannot be played in standard media players.
- **Keep Days:** Value in days to keep original (raw) audio files after they have been transcoded. This setting will allow files to be recovered if there are errors in the transcoding process, but will add additional disk space usage to keep the original files available in storage. Entering a value of '-1' will prevent the original file from being automatically deleted.
- **Create Analytics:** If enabled, the system will create an additional very high quality stereo PCM .wav audio file for each recording. The audio files are used for speech analytics processing. Requires optional cc: Analytics module for processing.
- **Analytics Keep Days:** Value in days to keep stereo (analytics) audio files after they have been created. This setting will allow files to be stored for processing by a speech analytics engine, but will add additional disk space usage to keep the stereo files available in storage. Entering a value of '-1' will prevent the original file from being automatically deleted.
- **Normalize:** Enables audio normalization, equalizing volume levels between PBX/Customer side and extension/agent side of a recorded call. This setting should never be enabled when Ai-Logix cards are used for audio acquisition.

- **Sample 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, but leaving it disabled for a long period of time can cause the Transcoder table to grow significantly and impact the performance of the entire database. Unless troubleshooting, this should always be enabled.
- **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 or calls where agent/customer audio overlaps. 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."
- **Enable Silence/Cross-talk Detection:** If set to No, the other settings below are ignored and grayed out, and the Transcoder will not detect silence/cross-talk. This is set to Yes by default.
- **Cross-talk Threshold:** This is the gain level from 0.00 baseline that needs to be met on both channels to trigger the cross-talk detection. The default value is 0.01, with a valid range from 0.01 to 1.00.
- **Cross-talk Minimum Duration:** The minimum time (in ms) that the audio must stay above the threshold in order for the cross-talk period to be displayed during call playback. The default value is 1000, with a valid range from 1000 to 65535.
- **Silence Threshold:** This is the gain level from 0.00 baseline that the audio needs to stay below in order to trigger silence detection. The default value is 0.01, with a valid range from 0.01 to 1.00.

## Recorder Settings



















- **Silence Minimum Duration:** The minimum time (in ms) that the audio must stay below the threshold in order for the silence period to be displayed during call playback. The default value is 3000, with a valid range from 1000 to 65535.
- **Fragmentation Prevention:** This setting (in ms) will prevent momentary noise in the audio from fragmenting silence/cross-talk into multiple periods. If two periods are detected within the duration specified, they will be combined into a single period. The default value is 2000, with a valid range from 1000 to 65535.


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

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

## Transcoder Configuration

The preferred method of configuring the Transcoder is via command line. Please refer to the Transcoder configuration section of the *cc: Discover Installation Guide* for more information.

### Configure INI

Use of an INI file to configure the Transcoder should **only** be done when advised by a developer. The INI file used by the Transcoder is located at **Recorder\Transcoder\cc\_Transcoder.ini**. The INI filename should always match the name of the executable it configures. This is an example output of a configuration file, with important settings detailed in the table to the right:

[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 is in cc: Discover Web portal for a Transcoder.
external_process=0 (or 1)	Allows Transcoder to encapsulate conversion in external process. Should rarely be used.
reverse_channels=0 (or 1)	Allows Transcoder to swap inbound and outbound streams for analytic and CCP purposes. Do not activate unless told to by a CallCopy developer.
debugexcess=false	Set to True to enable. Logs out the most available information, useful for troubleshooting.

## Transcoder Troubleshooting

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

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

The report organizes call records by status:

- **Completed:** In the CallCopy 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 CallCopy 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 CallCopy 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.

## Recorder Settings

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.

#### Notes

- Any changes to these settings will require the recorder process to be restarted.
- 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 (not Active Directory credentials) in HTTP Basic Authentication format. If authentication is required, other cc: Discover components will not be able to authenticate to this server. For security purposes, it is possible to have an API server dedicated for Fusion/On-Demand with only Call Control permissions (it cannot export) and a second API service that is used for exporting (it has management permissions) . In this scenario, the second API service would have authentication enabled.

**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 5620 (the system is designed to receive all Port and Event Port messages on the same port).

**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. Be aware that if a call is auto archived and/or deleted from the server, the QA Evaluations performed on that call will remain on the database for historical searching and review. However, if a call is manually deleted from the server, the QA Evaluations performed on the call are deleted. If there are database entries for duplicate or missing files, the archiver will continue trying to archive these files unsuccessfully (and logging errors) until the invalid database entries are removed.

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.

### Notes

- 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.
- 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 [Scheduling](#) 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 [Scheduling](#) 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, or the path and/or file names can be customized using file masks. File masks are only available for Disk and SMB storage types. The available file masks are as follows.

%Y	Four-Digit Year	%A	Agent Number (ID)
%y	Two-Digit Year	%R	Record ID
%M	Two-Digit Month	%C	Counter
%m	Month Name (three-letter abbr. – Jan, Feb, May, Dec)	%F	Filename without path
%D	Two-Digit Day	%P	path minus root*
%d	Day Of Week (Name)	%P<-1>	path minus root remove 1 bottom directory
%H	Hour	%P<1>	path minus root remove 1 top directory
%N	Minute	%U<1> through %U<15>	user fields
%S	Second		

## System Settings

For example, for the path "C:\recordings\test\device10\10-100-100.wav" these are the variables that would be used and what they represent:

%P<-1>	test\device10
%P<1>	recordings\test
%P	recordings\test\device10
%F	10-100-100

If no mask is specified, it will default to "%P\F"; if only "C:\recordings\" or "C:\recordings" is entered, the archiver will default to "C:\recordings\%P\F".

\*If %P is not used in the file mask, the archiver will determine one on its own using the following process:

1. Archiver checks the core the file was recorded on. If it can find the right core, it gets the default file mask.
2. Archiver tries to match the filename of the file to the default file mask. If it matches, it will remove the rest of the path that does not match.
3. If it does not match, it will remove the drive letter only.
4. The path is put at the end of the archive location, forming the new path.

The file is then archived using the generated mask.

**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.

**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 cc: 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.

**Backup Filename:** The location of the backup file that will be used. The location of this file is determined during the cc: 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 :	<input type="text" value="127.0.0.1"/>	
Archiver server Port :	<input type="text" value="5639"/>	
Purge Limit :	<input type="text" value="0"/>	
Purge Interval (minutes) :	<input type="text" value="60"/>	
Archive Limit :	<input type="text" value="100"/>	
Archive Interval (seconds) :	<input type="text" value="60"/>	
Enable Settings Reload :	<input type="text" value="No"/>	
Settings Reload Interval (seconds) :	<input type="text" value="120"/>	
Hash Filename :	<input type="text" value="No"/>	
Enable Empty Directory Purge :	<input type="text" value="Yes"/>	
Enable Record Purge on No RTP :	<input type="text" value="Yes"/>	
<hr/>		
<b>System Purge Action</b>		
Use Schedule :	<input type="text" value="No"/>	
Start Time :	12 : 00 AM	
End Time :	12 : 00 AM	
<hr/>		
<b>Removable Media</b>		
Removable Media - Playback Temp File Location :	<input type="text" value="C:\RecordingsTemp\"/>	
Removable Media - Temp File Retention(days) :	<input type="text" value="30"/>	
Send Users Email Alert :	<input type="text" value="Yes"/>	
<hr/>		
<b>MSSQL Database Backup</b>		
Enable MSSQL Database Backup :	<input type="text" value="Yes"/>	
Database Name :	<input type="text"/>	
Backup Filename :	<input type="text"/>	
Database Backup Time :	12 : 00 AM	

## 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.

## System Settings

Follow these steps to configure logging:

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. Customers may opt to not log certain events. These settings configure which logged events are passed on to notifications (see the "[Notifications](#)" section of this document). Settings that specify which events are logged in the first place are configured for the Logger during initial installation. Please refer to the "Logger Service" section of the *cc: Discover Installation Guide* for more information on this configuration.
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.

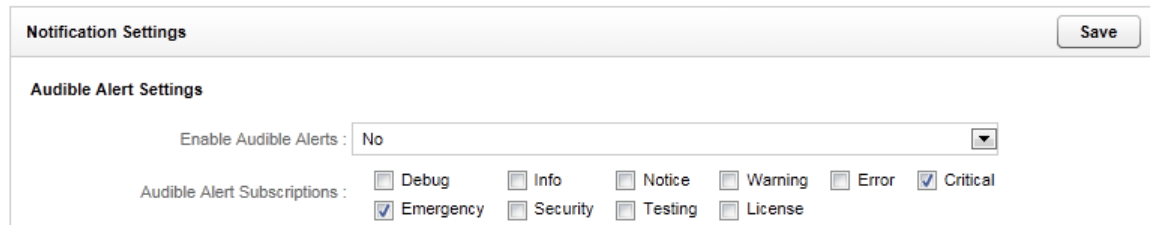
## Notifications

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.



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

- **Enable Audible Alerts:** Select Yes or No.
- **Audible Alert Subscriptions:** Check which alert type you wish the server to audibly notify. Definitions for the various subscription types are detailed at the end of this section.

## Disk Logging Settings

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



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

## 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: Yes

FloodWall - Number of Allowed Messages: 10

FloodWall - Number of Minutes: 1

Disk Space Notification Interval (minutes):

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

Email Address: support@mycompany.com X

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

Email Address: pager@mycompany.com X

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

- **Enable Floodwall:** Enabling will throttle e-mail alerts to prevent overloading the mail server.
- **Floodwall - Number of Allowed Messages:** This value specifies the number of email messages that the server will send per interval. Any further messages of the same type will be blocked until the interval expires.
- **Floodwall - Number of Minutes:** This defines the number of minutes per interval.
- **Disk Space Notification Interval:** The interval in minutes between sending low disk space e-mail alerts.

## E-Mail Subscriptions

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

- **Email Address:** Enter an e-mail address that will receive alerts. (Click the Delete ( X ) icon to delete an email subscription.)
- **Subscriptions:** Check the event types the email address will to be alerted on. Definitions for the various subscription types are detailed at the end of this section.



## SNMP Notification Settings

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

**SNMP Notifications Settings**

Enable SNMP Notifications :

SNMP Community :

SNMP Enterprise :

SNMP Gen Trap :

SNMP Version :

- **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. License events that are logged and generate notifications are:
  - License Expired
  - License Corrupted
  - License Invalid (no license for an accessed feature)
  - For Avaya: a recording does not occur because the number of Avaya licenses has been exceeded.
- **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.

## System Settings

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, cc: 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.
4. Click **Save**.

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 cc: 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.

## Settings.ini

This file stores settings for a wide range of software components, including survey configuration, software modules, archiving, and settings and credentials for accessing the CallCopy databases. If you are interested in encrypting the credentials stored in this file, please contact CallCopy Support and reference knowledge base article # 000001461. It is **strongly recommended** that customers **do not** attempt to modify the contents of this file. Doing so may cause components or even the entire system to stop working. If you suspect that your system is configured incorrectly or if your CallCopy system is not operating or performing as expected, please contact CallCopy Support to investigate the issue.

# 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 cc: 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](#)" section 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 **Save** when you have finished customizing the Terminology to reflect your operations.

#### Notes

- 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*.
- 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.
- Terminology page settings changes will not appear in the ad hoc reporting pages immediately. The cc: Discover application pool in IIS must be recycled in order for the changes to appear.

## 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, cc: Discover runs under the IUSR/IIS\_IUSRS 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.
- **Display data value when building ad hoc reports:** This setting controls whether preview data appears on the Report Builder page in ad hoc reporting for both cc: Discover and cc: Clarity (if only cc: Clarity is installed, this option is not available and is enabled by default). If set to **Yes**, data for a field appears or disappears on the Report Builder preview each time the user moves a field to/from the Structure area. The database is queried upon each of these changes, so if a timeout is encountered, this feature can be disabled, preventing data from being displayed in the report preview.

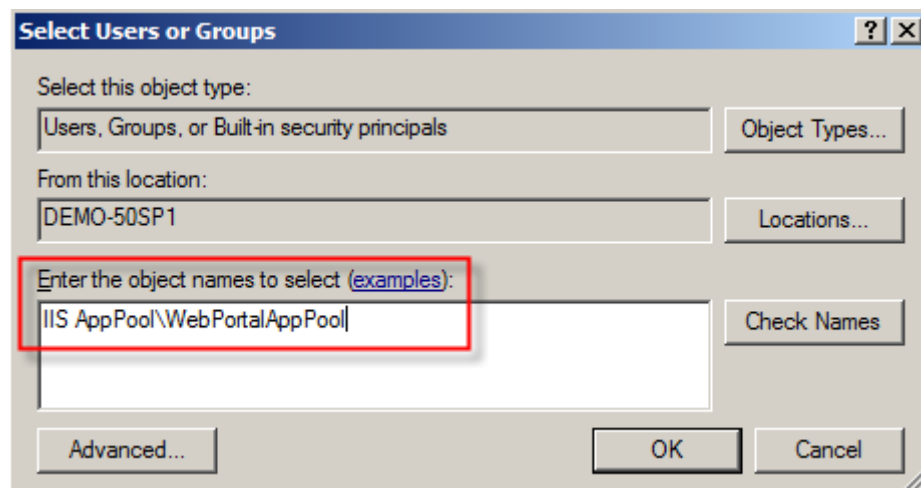
## Home Tab Widgets

This section allows you to upload and administer which widgets are available for dashboard configuration on the Home tab. This content only applies to Home tab widgets. For specific information on configuring dashboards and individual widgets, please refer to the *cc: Discover Widget Administration Guide*.

**Important** Adding or deleting a widget cycles the application pool in IIS, and will require a page refresh and new login to see changes. **This will force a logout for all connected users and should be performed outside of regular business hours.**

Widget DLLs are stored in "\\Program Files (x86)\CallCopy\WebPortal\bin." If managing widgets remotely, the web portal application pool in IIS will need Full Control permissions to this folder. To configure this:

1. Browse to and right-click on the **bin** folder on the server.
2. Click **Properties**.
3. Open the **Security** tab.
4. If the web portal application pool (typically named **WebPortalAppPool**) is not listed, click **Edit**. If it is already listed, skip to step 8.
5. Click **Add**.
6. Under "Enter the object name to select," enter "IIS AppPool\[web portal application pool name]."



7. Click **OK**.
8. With the application pool selected, check the box for **Full Control** and click **OK**.

## Manage Widgets

Possible interactions with Home tab widgets include:

- **Upload:** New widgets can be added by clicking the Upload button and selecting the corresponding widget DLL. The Date column shows when the widget was uploaded or last updated. New versions of existing widgets can be uploaded as well. If the file names are identical, the system will prompt for confirmation to overwrite the existing widget. Uploading a new version resets the widget's date to the current day.
- **Edit:** Allows the Title (25 character max) and Description (200 character max) of the widget to be modified. Changes take effect immediately, do not require clicking Save, and will not affect login status of connected users.
- **Delete:** Removes a widget from the system and removes the corresponding DLL from the server. Removing a widget from the system removes it from any user dashboards where it was displayed.

**Note** It is advised that widget DLLs be backed up before deletion in case they are needed again later. The following are included by default:

- AssignmentInbox.dll
- ForecastVsActual.dll
- KPIPerformance.dll
- LiveSnapshot.dll
- NewsWidget.dll
- QaPerformance.dll
- ServiceLevel.dll

The maximum number of widgets that will be listed per page is determined by the **Number of Items to Display** setting, found above the Home Tab Widgets section of Web Portal Settings. If more widgets than that are uploaded, pagination will be used to view the rest.

### Home Tab Widgets

Upload

Title	File Name	Description	Date	Actions
News	NewsWidget	The News Widget allows for Administrative based Users to push quick, one line information to groups of agents and other users. bla bla bla	Feb 4 2013 7:02PM	<a href="#">Edit</a>   <a href="#">Delete</a>
Forecast vs. Actual	ForecastVsActual	The Forecasted vs. Actual Widget allows for Users to compare actual call volume against that of forecasted call volume.	Feb 4 2013 7:02PM	<a href="#">Edit</a>   <a href="#">Delete</a>
KPI Performance	KPIPerformance	The News Widget allows for Administrative based Users to push quick, one line information to groups of agents and other users.	Feb 4 2013 7:02PM	<a href="#">Edit</a>   <a href="#">Delete</a>
Live Snapshot	LiveSnapshot	The Live Snapshot widget allow for Users to view call data, staffing information and service levels.	Feb 4 2013 7:02PM	<a href="#">Edit</a>   <a href="#">Delete</a>
Service Level Snapshot	ServiceLevelSnapshot	The Service Level Snapshot Widget allows for Users to view Service Level percent for various Labor Units and CallCopy Groups.	Feb 4 2013 7:02PM	<a href="#">Edit</a>   <a href="#">Delete</a>
QA Performance	QaPerformance	The QA Performance Widget allows for Users to view and compare QA data.	Feb 4 2013 7:02PM	<a href="#">Edit</a>   <a href="#">Delete</a>
Assignment Inbox	AssignmentInbox	The Assignment Inbox widget allows Users to view items in their Assignment Inbox.	Feb 4 2013 7:02PM	<a href="#">Edit</a>   <a href="#">Delete</a>

## Manage Dashboards

Once this is configured, custom **dashboards** can be created and managed from the Home tab. The News dashboard/widget is displayed by default, but can be reconfigured or removed.

1. Under Dashboard on the left navigation menu, click **Manage Dashboards**.
2. Click **Add New Dashboard**.
3. Add a **Name** (must be unique, 25 characters max) and **Description** (200 characters max).
4. Check boxes next to the widgets to be displayed and click **Add**. The same widget can be displayed multiple times on the same dashboard. A maximum of 10 widgets can be displayed per dashboard (this is a browser performance constraint).
5. Choose whether to set this dashboard as the default.

**Note** In v5.2 the "last used dashboard" setting overrides the default dashboard. This behavior will be changed in the future so that the default dashboard is displayed upon login, but "last used" is displayed when switching tabs within an existing session.

6. Click **OK** to commit changes or **Cancel** to close without saving changes.

[Add New Dashboard](#)

Add New Dashboard

Name:

Description:

Add widget:

Select: All | None

- News
- Forecast vs. Actual
- KPI Performance
- Live Snapshot
- Service Level Snapshot
- QA Performance
- Assignment Inbox

Add >

< Remove



Select: All | None

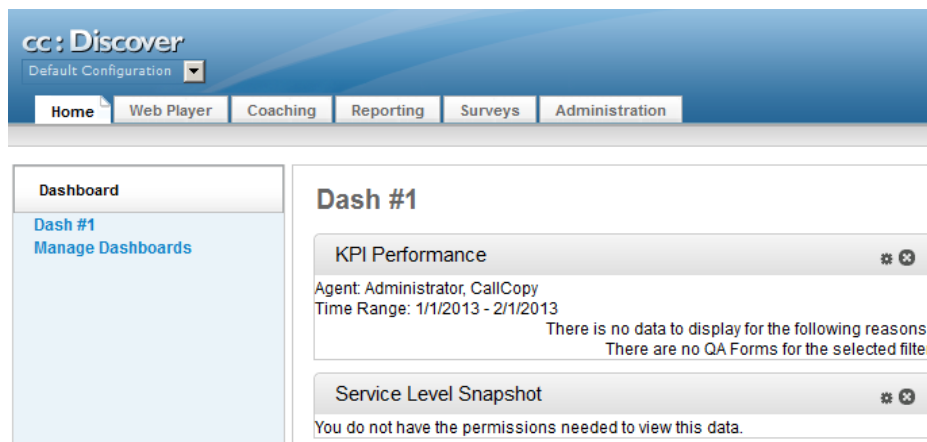
Set this as your default dashboard:  Yes  No

[OK](#) or [Cancel](#)

## Web Portal Settings

The name of the new dashboard will appear under Dashboard in the left navigation menu, sorted alphabetically with numbers first. Users can create an unlimited number of different dashboards. Click on the dashboard to view. From here, you can drag displayed widgets to rearrange as needed, and they will retain the specified order across subsequent logins. The last dashboard selected will persist when switching tabs.

Each widget can be configured by clicking on the **Gear** icon  on the widget title bar. Widgets can be removed by clicking the **Remove** icon . Additional dashboards can be configured by repeating this process, and will appear listed under Dashboards on the left navigation menu. Click a different dashboard to change between them. To edit or delete a dashboard, click **Manage Dashboards**, then click **Edit** or **Delete** under Actions for the corresponding dashboard.



Since widgets pull information from different products – some of which may not apply to your configuration – for information on configuring individual widgets and their settings and permissions, please refer to the *cc: Discover Widget Administration Manual*.

## Web.config

This file stores settings for a variety of aspects of a CallCopy web portal, including debugging, logging levels, connection information for Live Monitoring and Web Media servers, and configurations for SSL, SMTP, and reporting services. Also stored here are connection strings with credentials for accessing the CallCopy databases. If you are interested in encrypting the credentials stored in this file, please contact CallCopy Support and reference knowledge base article # 000001460.

It is **strongly recommended** that customers **do not** attempt to modify the contents of this file. Doing so may cause components or even the entire system to stop working.

If you suspect that your system is configured incorrectly or if your CallCopy system is not operating or performing as expected, please contact CallCopy Support to investigate the issue.

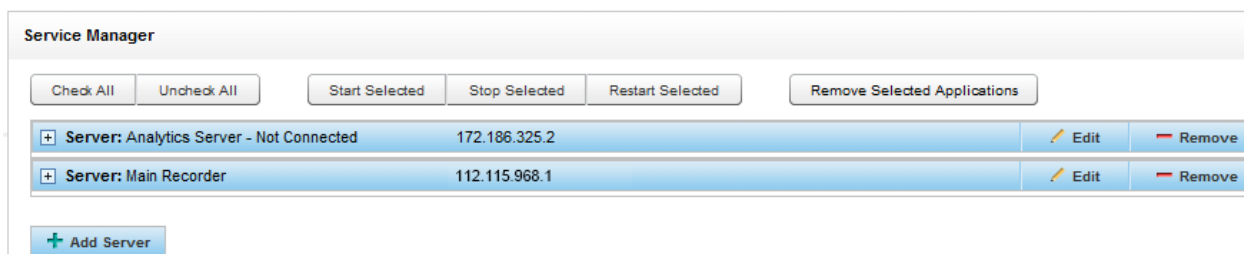
# Tools

## Service Manager

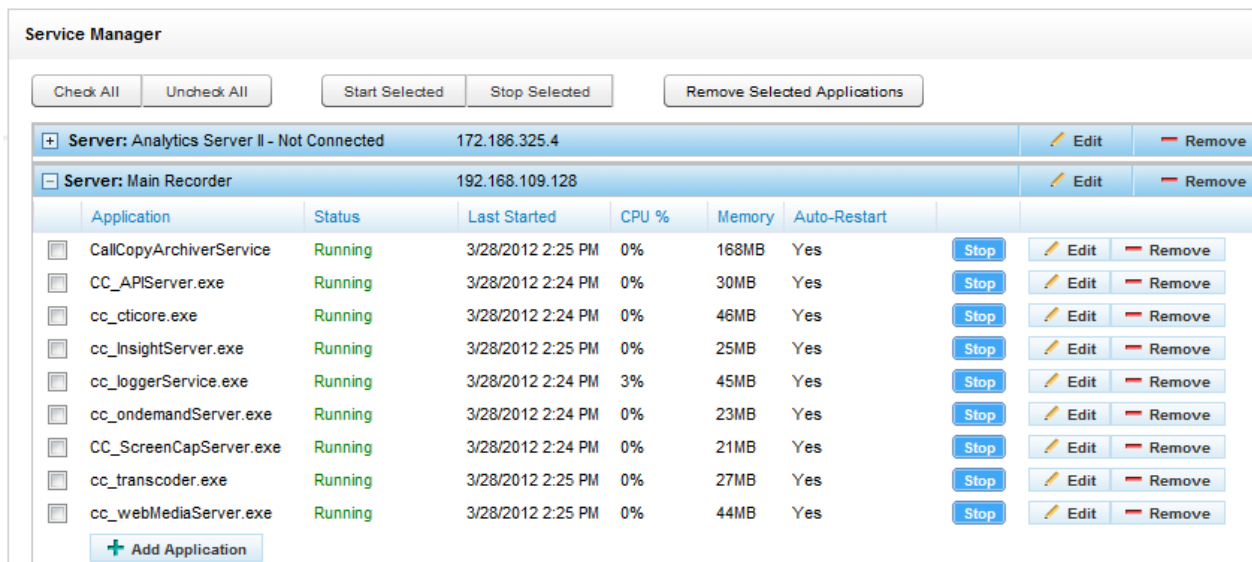
The Service Manager page is located under the **Tools** menu on the **Administration** Tab.

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 cc: Discover feature.

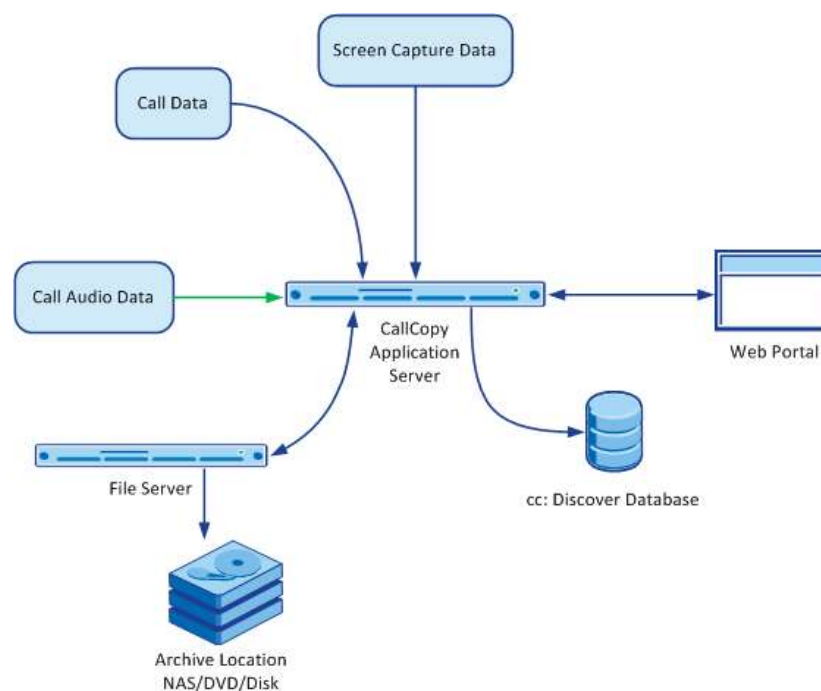
The general process for recording call audio, call data, and desktop data is as follows. Call audio comes from the PBX or agent telephone. Call data comes from the PBX. Desktop screen capture data is recorded from the agent's PC over the LAN/WAN.

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 cc: 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." Please refer to the *cc: Discover Installation Guide* for more information on configuring the API server to perform blackouts.

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. The Transcoder deletes the recorded content and replaces it with blank audio or video.

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 measures are configured in AD. If cc: 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 "[Server Nodes](#)" section of this document for more information) .

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 Manual*.

## 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 the "[Login Mode Configuration](#)" section for instructions on these settings.

### Login Settings

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 cc: 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

cc: 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 cc: 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** allows the creation of a user account in the CallCopy 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.

If AD Group Role Synchronizer is used (see the "[AD Group Synchronizer](#)" section for more information), roles and permissions will be assigned to the user account automatically at login based on their AD groups. If this feature is not used, the account will need to have roles/permissions assigned to it manually once created.

**If Using AD Group Role Synchronizer, Delete User's Roles That Do Not Match an AD Group on Login** is a setting that, when enabled, will automatically update each user's groups, roles, and permissions accordingly upon login. If not enabled, groups, roles, and permissions will only update when changed manually.



## Domains

- **Name:** Enter the name of the domain. Currently, cc: Discover supports only one 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.
- **Delete:** Click this button to remove the domain and LDAP information for this row.

## AD Group Role Synchron

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 the software. In this section you can add Active Directory group names to relate cc: Discover roles to them. This allows groups, roles, and permissions to be synchronized at each login, going so far as to remove any roles that are not linked to an AD group when a user logs in.

When users log in using AD authentication, the following events are logged:

- A message is sent from cc: Discover to AD.
- cc: Discover receives a response from AD – if authentication fails, a specific message identifying the cause is logged.
- cc: Discover fails to receive a response – in this case, a "Directory Entry Failed" error is logged, as AD could not be reached. There is no timeout associated with this; it either succeeds or fails. On the cc: Discover login screen, the following message is displayed: "Login failed. No response was received from Active Directory or Active Directory could not be contacted."

AD Group Role Synch is enabled simply by adding groups to the list here.

- **Add Group:** Click to add an AD group and associate cc: Discover roles to it. Group names are case sensitive.
- **Validate Groups:** Click to test validation of the group back to AD. It will return one of two results.
  - ✓ -- This indicates the group checks out as valid in Active Directory.
  - ✗ -- This indicates that the group could not be validated with Active Directory. If validation fails, verify the spelling and case of the group name, the LDAP string, and the presence of the group in AD.
- **Add/Edit Roles:** Allows you to modify the roles associated with an existing group/role combination.
- **Delete Group:** Removes the AD group and disassociates roles from it. Removing a 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 cc: 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 cc: 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 almost all audio and video data files (the exception are noted below). 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. If encryption is enabled on an existing system, enabling it only encrypts new files as they pass through the transcoder. Existing recording files can be encrypted using a tool available to CallCopy Support personnel. Please contact Support for more information.

While it is possible to encrypt existing recordings by reprocessing them with the transcoder after enabling encryption, it is not recommended because:

- All new calls to be transcoded would be queued up behind this work, meaning new calls cannot be reviewed or played back until the queue is cleared.
- A mass replace statement would need done to change the source type from CCA to WAV.
- A purge record in the transcoder database table would clear records, making it impossible to re-transcode any associated calls.

Encryption exceptions:

- 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.
- Stereo .wav files generated by the Transcoder for Analytics are not encrypted since the Analytics engine cannot read encrypted files. Once Analytics data has been captured, the calls can be encrypted when archived, or deleted during a file purge. If security of the stereo .wav files is a concern, they can be stored on an encrypted disk volume, though this will negatively impact performance of the Analytics engine when reading the files.
- 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

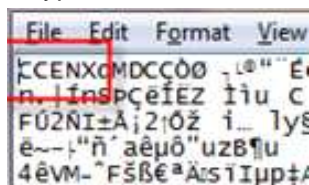
- Keys should only be set inactive when there are no active files using those keys (they have been removed due to archiving).
- Keys should **never** be deleted from the database.
- If a key is lost, any files encrypted with that key will be completely inaccessible.
- To guard against possible loss of 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

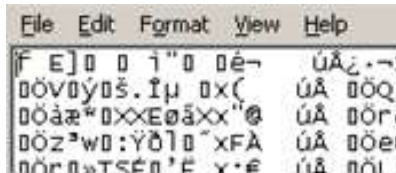
To determine whether a particular recording file is encrypted, use one of the following methods.

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

Take an arbitrary setting value and encrypt it	<code>cc_crypt.exe encryptsetting {value}</code>
--	--

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(s)**. For transport security to be effective, all starting and ending points of communication should be secured. Configuration details for each of these endpoints are explained in the next few sections. Bear in mind that SSL/TLS are all-or-nothing solutions – if they are enabled on the Screen Capture or Web Media Server but not on the client modules that rely on them, they will not be able to communicate.

If users are recorded from remote locations or access recordings from remote locations, a VPN must be established for PCI certification.

In short...

<u>Encryption</u>	<u>TLS</u>	<u>What is Encrypted</u>
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 cc: Discover's web.config file contains the following value:

```
<!--Silverlight Values-->
<add key="UseSilverlightSSL" value="1"/>
```

## Enable Transport Security – Servers

At present, **Screen Capture Server** and **Web Media Server** allow for TLS. Add the following values to the respective configuration INI on Screen Capture Server (C:\Program Files (x86)\CallCopy\Recorder\CC\_ScreenCapServer\CC\_ScreenCapServer.ini) and Web Media Server (C:\Program Files (x86)\CallCopy\Recorder\WebMediaServer\CC\_WebMediaServer.ini), and supply the appropriate values for the corresponding SSL Certificate:

[server]	
ssl_certificate_name=	SSL certificate file name (no path req'd)
ssl_certificate_pass=	SSL certificate password

Any common certificate file type should work (P12, PFX, CRT, etc.). If the certificate loads from the certificate store, only the name (with or without file extension) as it is listed in the store is needed in the INI file. If the certificate loads from the module directory, the file name and extension need to be in the INI file name.

The settings INI needs to be present in the directory in which the module EXE resides. The certificate can be stored in the local certificate store and/or in the directory with the module. 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

The Screen Capture Client INI file is configured when building the MSI package before deployment to agent computers. If the software is already in place prior to this configuration change, the INI files can be mass updated by the customer, or a new updated Screen Capture Client package can be built by CallCopy that will mass uninstall the existing client and settings, then mass reinstall using the new settings.

## Enable Transport Security – Web Portal

Configuring SSL for the Web Portal is handled through the settings in IIS. With the customer-provided SSL certificate required for this process, 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 cc: 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, cc: 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 cc: 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.

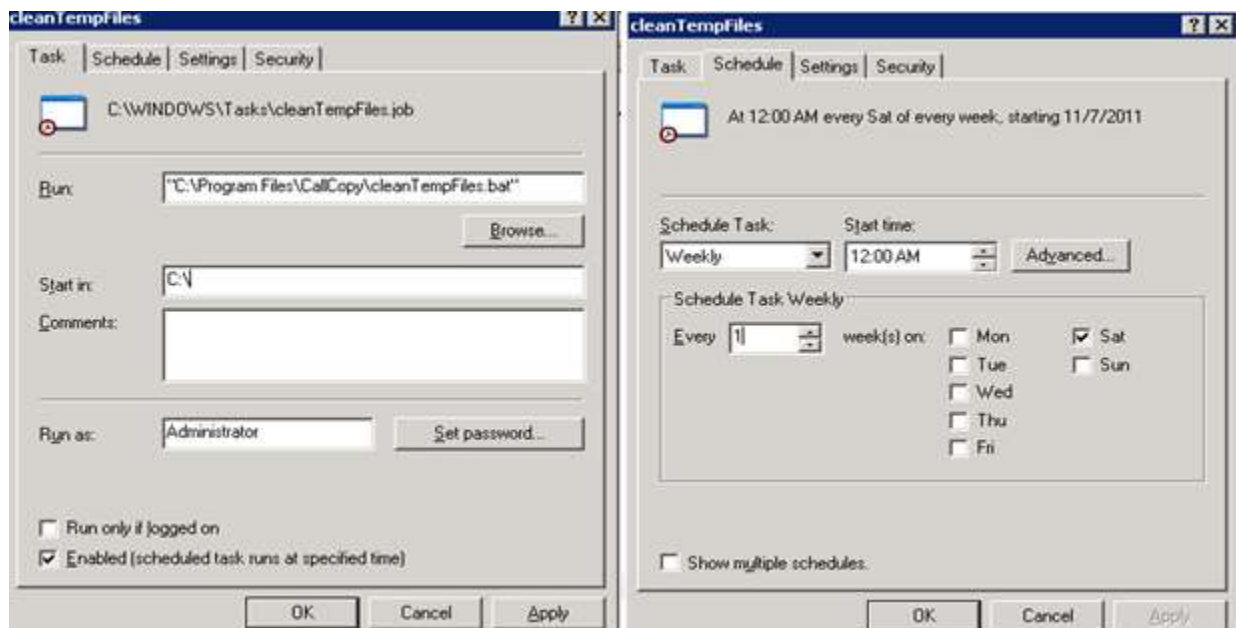
```
@echo off
del /f /s /q "%windir%\Temp\*.*"
del /f /s /q "%userprofile%\local settings\temp\*.*"
del /f /s /q "%userprofile%\local settings\temporary internet files\*.*"
Forfiles -p %systemroot%\system32\LogFiles\W3SVC1 -s -m *.log -d -14 -c "Cmd /C
DEL @File"
```

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 cc: 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 cc: 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. (These instructions use SQL Server 2008.)

### *Task: Database Recovery Model*

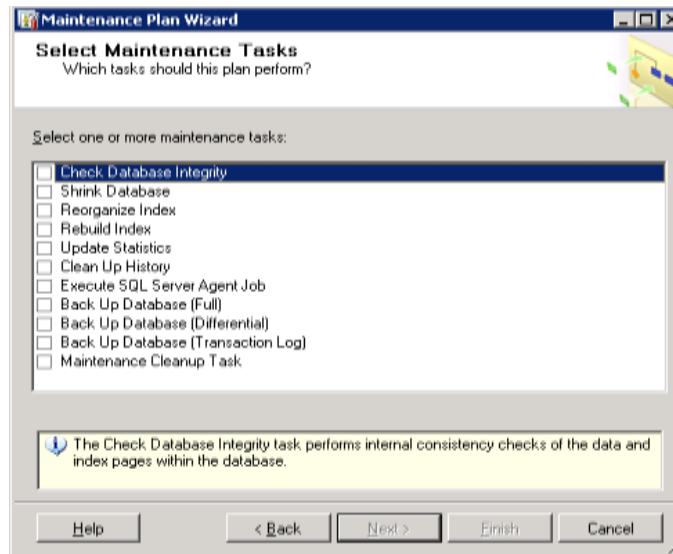
Set a database's recovery model to Simple in order to prevent oversized transaction logs:

1. In SQL Server Management Studio, expand Databases.
2. Right-click the CallCopy 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

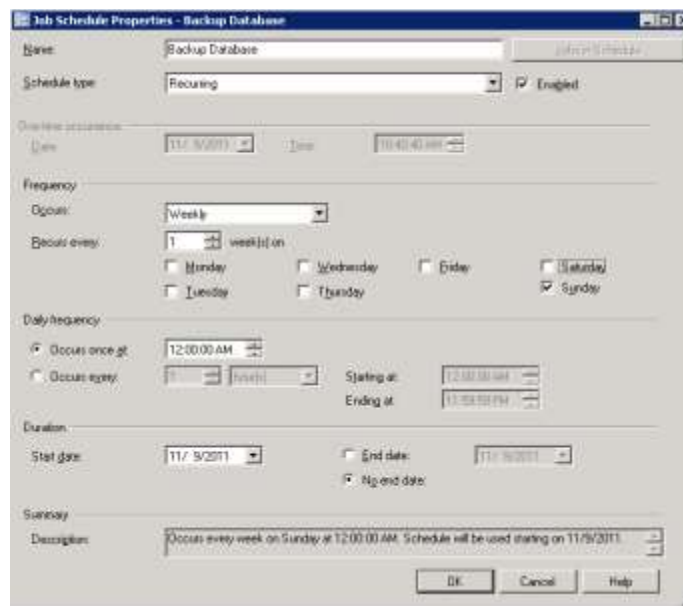
Maintenance plans can be used to automate the cleaning of unnecessary indexes and removal of multiple backup files.

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).



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**.





## 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 cc: 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 cc: 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\

## Common File Types

Below are identifications of many of the common file types associated with cc: Discover.

File Type	Description
<b>.cav</b>	CallCopy proprietary combined audio/video format generated only when a file is exported. Requires a special player to view.
<b>.cca</b>	CallCopy raw audio pre-transcode, typically deleted after transcoding and compressed into .wav.
<b>.ccp</b>	Waveform that accompanies playback in the web player. Does NOT contain bookmarks – those are inserted at time of playback via stored database records. Blackouts are represented in the waveform as flat segments with no audio present.
<b>.csa</b>	CallCopy stereo audio, typically deleted after transcoding and compressed into G729 .wav format.
<b>.idx</b>	Phonetic index of the recorded call created and used by the analytics engine. This is an Aurix proprietary format.
<b>.log</b>	Log files where system activities and errors are recorded. Useful in troubleshooting system issues.
<b>.vid</b>	Screen capture data for playback.
<b>.vox</b>	Compressed audio format for playback. Higher quality than .wav, but also larger file size. Mostly a legacy format now.
<b>.vox8</b>	Compressed audio format for playback. Higher quality than .wav, but also larger file size. Mostly a legacy format now.
<b>.wav</b>	Compressed audio format for playback.
<b>.xml</b>	Used to store call metadata or API responses to clients.

## 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 cc: 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 cc: Discover services and modules. This situation can be viewed in Windows Task Manager.

In this situation, contact CallCopy Support to investigate.

# License Requests

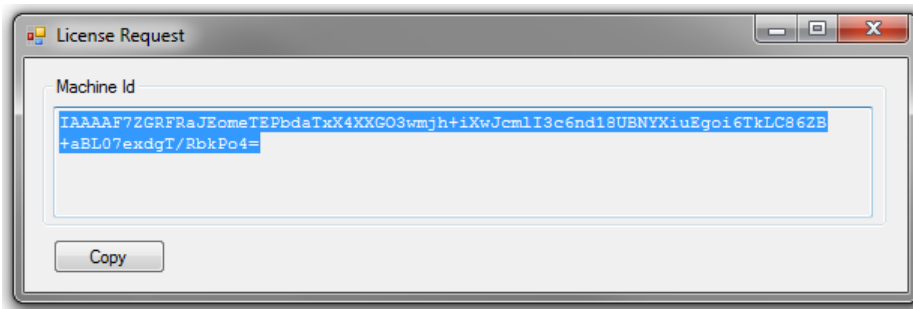
Making major changes to your cc: Discover system (e.g., such as changing the Windows machine name, changing a motherboard, etc.) will cause your system to become unlicensed. The server will not function until a new license is created and applied to the system.

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).