

UPTIVITY DESKTOP ANALYTICS ADMINISTRATION GUIDE, V5.4

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Reference Guide

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Introduction

This document is designed for application and system administrators, and assumes a basic level of familiarity with Discover, the PBX integration in use, the Windows OS, and the network in place at the customer site. It explains:

- System components
- System requirements
- How to install and configure the application

For information on creating scripts for Uptivity Desktop Analytics, contact your Uptivity representative and see the *Uptivity Desktop Analytics Scripts Guide*.

This installation can be performed two different ways: Desktop Analytics Server and Client, or Desktop Analytics Client only. The Server and Client setup uses a server-side service to distribute centrally stored script updates to clients when they log in, whereas a client-only version requires customers to deploy any script updates manually.

Notes

The Discover platform allows administrators to customize field names and terminology in the Web Portal to fit your unique environment. Therefore, screen examples and field names used in this manual may differ from those seen in your implementation.

Prior to v5.4 of the Discover Software Suite, Uptivity Desktop Analytics was known as cc: Fusion. Certain files and items in the user interface may still use this nomenclature.

Product Technical Overview

Uptivity Desktop Analytics is a desktop application that detects information in other applications and then performs actions based on that information. The actions performed are controlled by a script. Possible actions include:

- Adding the information as metadata to a call recording in progress.
- Starting or stopping call recording.
- Triggering recording blackouts for compliance.

This diagram illustrates the product's components, their interactions, and deployment scenarios.



Uptivity Desktop Analytics with Script

Component	Function
	Desktop application controlled by a script. Detects information in other desktop applications and performs actions specified in a script.
Analytics	The script is installed and managed locally, and can be updated at each login as needed from a central scripts folder if with Desktop Analytics Server. On startup, the script is updated, read, and compiled automatically.
Discover by Uptivity Server	Includes the Discover recorder that records the audio and creates the raw call audio files. Creates call record files in the database.
Desktop Applications	For information on the applications from which data can be captured, see <u>Requirements</u> .
Uptivity API Server/Script Server	Used to write information from the Desktop Analytics application to the database. If used, the Script Server service can be configured to run on the same system as the API server, or any other Discover server.
Discover Database	Stores call records associated with call audio WAV files. Data collected by the Desktop Analytics client can be written to the call records.

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Requirements

Requirements

These requirements are only for Uptivity Desktop Analytics. For additional information, see the Discover by Uptivity Requirements document. Final hardware specifications are determined by the Uptivity Sales Engineering team during the sales process.

Compatible Desktop Applications

Uptivity requires prospective customers to test whether Desktop Analytics is compatible with their applications. To test compatibility, the Desktop Analytics Test Tool must be used to try to capture information from an application.

Desktop Analytics has been compatible with applications written using versions of the items listed below:

- Win₃₂
- Microsoft Foundation Class (MFC)
- Visual Basic 6
- Windows WinForms
- Java •

Data has also been captured from within versions of :

- Terminal emulators (green screen emulators)
- Adobe Acrobat Reader

Desktop Analytics is currently not compatible with Google Chrome and Microsoft Excel.

Microsoft Outlook is not fully supported. If message windows (i.e., popup windows) are opened from Outlook, the Windows title number is not identified consistently. Outlook arbitrarily assigns numbers to popup windows (i.e., <wnd cls="_WwB" title="Document12"). For example, a message is opened, assigned Document1, and then closed. A second message is opened and assigned Document2. If the original message is reopened, it will be assigned the title Document3. Desktop Analytics cannot associate different captures from the original message.

Deployment and Redundancy Guidelines

Uptivity Sales Engineers consult with customers to determine the most effective deployment to meet performance, redundancy, and security needs. Some guidelines include:

- Desktop Analytics supports only one script per installation. In the typical installation, all users logging into a PC will automatically have the application running with that script.
- Bandwidth usage depends heavily on the number of users and the amount of data written to the database.
- Network layout (e.g., branches, firewalls) affects the application's ability to write data to the database.

- FoxPro
- WPF
- Flash Silverlight
- Internet Explorer
- FireFox

Requirements

Security

Desktop Analytics relies on the security and auditing measures of Discover, the Windows server hosting the applications, and the Windows PCs on which the desktop application is installed.

These points also must be considered:

• Access to script files should be restricted to administrators. If scripts are installed on PCs, users should not have Administrator permissions to the machines.

For the Desktop Analytics application on the PC to log events, the user must have access to the Desktop Analytics log file's location. For details, see <u>Desktop Analytics Log File</u>.

For installation permissions information, see Install and Configure Desktop Analytics Client.

No specific Discover user permission settings are required to enable Uptivity Desktop Analytics.

For information on system auditing, see the Discover by Uptivity Administration Manual.

Install and Configure Desktop Analytics Script Server

Important The following steps are only for installing the Desktop Analytics Script Server. For a standalone, client-only setup, skip to <u>Install and Configure Desktop Analytics Client</u>.

The Desktop Analytics Script Server service can be run on any existing Discover servers and functions as a link between the Desktop Analytics client and the scripts directory. The Desktop Analytics Script Server stores scripts in a central location from which the client can check for and retrieve updated scripts each time a Desktop Analytics client user logs into their computer, requiring that new scripts only need to be deployed to one directory instead of being pushed to several separate systems. Development is responsible for providing and updating scripts used by the Desktop Analytics client.

In environments with multiple API servers communicating with Desktop Analytics, Desktop Analytics Clients can be assigned to specific API servers using Subnets or Locations. Subnets can group clients together using a range of IP addresses. Locations can group clients by assigning them to numbered groups regardless of network location.

Register Service

To register the Desktop Analytics Script Server, open a Command Prompt window on the server that will run the service. Change to the Recorder directory and run the following command:

FusionServer\cc_fusionScriptServer.exe -svcinst -autostart

If successful, the Command Prompt will display the message "Service Installed." You will be returned to the working directory prompt.

Note If upgrading to a newer version of the service, the existing service must be stopped from the Windows Services Manager (services.msc) and uninstalled using the same command as above, but using only the – **svcuninst** parameter.

Configure Server INIs

The Desktop Analytics Script Server's settings are stored in the Discover database and in two separate INI files. Open the location **\CallCopy\Recorder\FusionServer** and locate the files **CC_FusionScriptServer.ini.dist** and **Fusion.ini.dist**. Remove the .dist from the end and apply the appropriate configuration changes below.

Desktop Analytics Script Server INI

This is an example **CC_FusionScriptServer.ini** configuration file, with important settings detailed in the table to the right:

[database]	
DBType=mssql	Discover database type. Should always be MSSQL.
host=xx.xx.xx	IP address or server name of the system hosting the Discover database.
password=	Password to access the Discover database.
Database=	Name of the Discover database.
[fusionserver]	
listening_port=	Port configured to listen for requests from the Desktop Analytics client.
<pre>fusion_client_script_folder=C:\Program Files\CallCopy\Content\fusionscripts</pre>	Path to the directory (local or UNC path) containing the Desktop Analytics scripts, no quotes required.
fusion_client_ini_file=Fusion.ini	Path to the INI file for the Desktop Analytics client. If stored in the "\CallCopy\Recorder\FusionServer" directory (common), only the filename is required.
Api_server_filter_type=#	Used in multiple API server environments to set which Desktop Analytics Clients communicate with which API. The value corresponds to configured subnets or locations in the server-side Fusion.ini (see next section). Acceptable values are: • 0 = none • 1 = subnet • 2 = location

Server-Side Desktop Analytics INI

This is an example server-side **Fusion.ini** configuration file, with important settings detailed in the table to the right:

[CallCopy]	
Host=xx.xx.xx	Default API server host IP address.
Port=5620	Default API server host port number.
LoadImmediately=true	If set to 'true', the application connects to the API server when it starts. If set to 'false', the application does not connect until the first time the Desktop Analytics script detects content that should be blacked out or recorded.
Heartbeat=3000	Frequency in milliseconds (ms) that the application sends a 'heartbeat' message to the API server to test the connection.
ReadTimeout=3000	Time in milliseconds (ms) that the application waits for a read response from the API server. If this time is exceeded, the application throws an exception.
SendTimeout=3000	Time in milliseconds (ms) that the application waits for a send response from the API server. If this time is exceeded, the application throws an exception.
[Logging]	
Location=%appdata%\FusionLog_ \${shortdate}.log	Uptivity strongly recommends not changing this location. The default entry creates a different log for each day, which is useful for troubleshooting. It also is accessible for both PC and terminal server uses. Changing the entry may cause logs not to be written for all users. To change this value, set the value in the NLog.config file and then update this setting.
ClearOnStartup=true	Clear the log file on application startup.
LogPerformance=false	Log script execution metrics to the log file.
[System]	

MinPollTime = 500	Forces a minimum polling interval for checking the user's screen for content to block or record, overriding the script setting. Time in milliseconds (ms).
HideTrayIcon=true	Hides/displays the Desktop Analytics icon in the system tray.
HideBalloonTips=true	Prevents/enable balloon tips from popping up.
RunInTerminalServer=false	Only needed for users running terminals.
MaxRamAllow=150000000	Maximum bytes of RAM Desktop Analytics can use.
[Subnet01]	Optional. This section is only required in multiple API environments using the Subnet filter type (refer to the setting Api_server_filter_type= in CC_FusionScriptServer.ini). The total number of subnets may vary depending on the customer's environment. If there is only one API server, omit this section.
Subnet=xx.xx.xx/24	Desktop Analytics Clients within this range of IPs will communicate with this particular API. This can be useful for assigning certain agents to a specific API server.
Host=xx.xx.xx	IP address of API server for this subnet.
Port=5620	Port of API server for this subnet.
[Location01]	Optional. This section is only required in multiple API environments using the Location filter type (refer to the setting Api_server_filter_type= in CC_FusionScriptServer.ini). The total number of locations may vary depending on the customer's environment. If there is only one API server, omit this section.
Location=	Location number corresponds to the ClientLocation = value specified in the client-side Fusion.ini . The total number of locations may vary depending on the customer's environment.
Host=xx.xx.xx	IP address of API server for this location.
Port=5620	Port of API server for this location.

Add the Application to the Service Manager

To add the service to the Service Manager:

- 1. Click the Administration tab and expand Tools in the left navigation menu.
- 2. Click Service Manager.
- 3. Expand the server node running the Desktop Recording service.
- 4. Click Add Application.
- 5. In the **Application** field of the new line, enter **cc_fusionScriptServer.exe.** This is the service name that was registered. Include a space and the instance number after the service name if applicable.
- 6. Select Yes from the drop-down list under Auto-Restart.
- 7. Click Save.

Web Portal Settings

In the Discover Web Portal, navigate to Administration tab > Web Portal Settings > Web Portal. Enter the path to the directory containing the Desktop Analytics scripts. This will be the same path used for the **fusion_client_script_folder=** value in the **cc_FusionScriptServer.ini** above.

Install and Configure Desktop Analytics Client

This section explains how to install and configure the Desktop Analytics client. Once it is installed on an end user's PC, the application can be used by any user that logs into the PC. The same installer is used regardless of whether the target machine is 32- or 64-bit. Desktop Analytics installs and runs as a 32-bit application, even on 64-bit machines.

Permissions Needed for Installation

The installer must have Administrator permissions on the client PC.

The Administrator must have permission to modify or access these registry settings:

- HKEY_LOCAL_MACHINE\SOFTWARE
- HKEY_LOCAL_MACHINE\SOFTWARE\Classes\CLSID\
- HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows\CurrentVersion\Run
- HKEY_LOCAL_MACHINE\SOFTWARE\JavaSoft\Java Runtime Environment The installer does not modify any value under this setting. It accesses it for reading java version and java_home value.

Desktop Analytics Log File

The location of the Desktop Analytics log file (FusionLog_yyyy_mm_dd.log) is configured during installation. The user being recorded must have access to the directory where the file is located in order for logging to occur.

- For most versions of Windows, the file is stored in the user's application data directory (%appdata%).
- For Windows XP, the file is stored here: C:\Documents and Settings\[CURRENT_USER]\Application Data

If you do not want users to have access to the %appdata% or Application Data directories, log files can be written to another location. However, Uptivity does *not* recommend this option because of possible inconsistency in configuring multiple PCs and the resulting problems that can occur in recording and software maintenance.

- 1. Create the alternate directory.
- 2. Assign the user Full Control to this directory.
- 3. After Desktop Analytics is installed, confirm that NLog.config has the correct path to the directory. Example: filename=D:path_name.

- 4. Confirm that the Fusion.ini file's Logging > Location setting has the directory path. Refer to the INI configuration section relevant to the installation type:
 - <u>Client-Only Desktop Analytics INI</u>
 - <u>Script Server Desktop Analytics INI</u>

The NLog.config and Fusion.ini files will be located in the directory where you install Desktop Analytics.

Uninstall the Application

Before installing a new version of the application, older versions must be uninstalled. You can do this through the Windows Add/Remove Programs functionality in the Control Panel. The software will be labeled "CallCopy Fusion Software".

Run the Client Installation Package

Notes

If a new version of the application is installed on a machine with an older version, the existing scripts must be tested and probably edited to work with the new application.

Uninstall older versions of the application before installing a newer version.

Follow these steps for manually installing the Desktop Analytics application.

- 1. Logon to the PC using an account with Administrator privileges.
- 2. Access the FusionSetup.msi file and double-click it. The MSI file can be located on the PC or a remote location.
- 3. On the Welcome step, click Next.
- 4. Accept the Licensing Agreement. Click **Next**.
- 5. Do not change any settings on the Custom Setup step. Click Next.
- 6. Configure the <u>Server Setup Settings</u>. Click Next.
- 7. Click Install.
- 8. If Windows prompts to allow the installer to run, click Yes.
- 9. Click Finish.

By default, the installer creates application files in the directory C:\Program Files (x86)\CallCopy\Fusion.

Note Windows Installer Error 160 – This is a general error code that indicates a problem occurred during the installation. During Desktop Analytics installation, this error may occur if the installer does not have adequate permissions, especially for the registry. To better troubleshoot this general error code, enable Windows Installer logging, which will allow you to view a log of all attempts and failures related to an installation. You can disable it after the installation is complete.

Server Setup Settings

Available settings differ for client-only and script server installations. Unless otherwise specified, use the default settings indicated in the screenshots in this section.

Client-Only Settings

🖁 CallCopy Fusion Software Setup			
Server Setup Please specify Fusion setting information			
<u>A</u> PI setting:			
Host IP Address: 0.0.0.0	Port#:	5620	
Load Immediately			
Heartbeat (ms): 30000	Timeout (ms):	3000	
Logging:			
Log file location: %appdata%\FusionLog_\${shortdate}.log			
🔽 Clear on Startup	Log Performa	ance	
<u>S</u> ystem:			
Min Poll Time (ms): 500	🔲 Run in termir	nal server	
🔽 Hide Tray Icon	V Hide Balloon	Tips	
[<u>B</u> ack	Vext Cancel	

For definitions of the API server and client settings, see Configure Client INIs.

Uptivity strongly recommends *not* changing the log file location location. For details, see <u>Desktop Analytics Log</u> <u>File</u>.

If you choose not to check **Hide Balloon Tips**, users can set this option by right-clicking the Desktop Analytics icon in the system tray and selecting **Hide Balloon Popups**.

Script Server Client

🔁 CallCopy Fusion Software Setup		
Server Setup Please specify Fusion setting information		
Fusion Server <u>H</u> ost#:	127.0.0.1	
Fusion Server <u>P</u> ort#:	5634	
Fusion Client Location:	01	
☑ Use Cached Scripts If No Connection		
# Of Failed Connections:	10	43
Back Next Cancel		

- Fusion Server Host: IP of the server hosting the Desktop Analytics Server service.
- **Fusion Server Port:** Communication port of the server hosting the Desktop Analytics Server service.
- Fusion Client Location: Optional, only used with script server configured to use Location-based API servers. This value is the same as the Location= value in the <u>Server-Side Desktop Analytics</u> <u>INI</u>. This will set the ClientLocation= value in the client-side Fusion.ini file. If using only one API server or if it is subnet-based, this field should be left blank.

Configure Client INIs

The application settings are read from a configuration file that is stored in the application installation directory (typically C:\Program Files (x86)\CallCopy\Fusion\). The file is named **Fusion.ini**. The contents of the file vary significantly depending on whether this is a standalone client-only installation or script server setup, so be sure to **ONLY** use the settings appropriate to the individual configuration.

Client-Only Desktop Analytics INI

[CallCopy]	
Host=0.0.0.0	API server host IP address.
Port=5620	API server host port number.
LoadImmediately=true	If set to 'true', the application connects to the API server when it starts. If set to 'false', the application does not connect until the first time the Desktop Analytics script detects content that should be blacked out or recorded.
Heartbeat=3000	Frequency in milliseconds (ms) that the application sends a 'heartbeat' message to the API server to test the connection.
ReadTimeout=3000	Time in milliseconds (ms) that the application waits for a read response from the API server. If this time is exceeded, the application throws an exception.
SendTimeout=3000	Time in milliseconds (ms) that the application waits for a send response from the API server. If this time is exceeded, the application throws an exception.
LoadScriptLocallyIfFailedToCo nnect=true	Causes the client to load and use the last available script if it is unable to contact the Desktop Analytics script server after 10 attempts. If set to false, nothing will be captured until such time as the client can successfully connect to the server.

[Logging]	
Location=%appdata%\FusionLog_ \${shortdate}.log	Uptivity strongly recommends not changing this location. The default entry creates a different log for each day, which is useful for troubleshooting. It also is accessible for both PC and terminal server uses. Changing the entry may cause logs not to be written for all users. To change this value, set the value in the NLog.config file and then update this setting.
ClearOnStartup=true	Clear the log file on application startup.
LogPerformance=false	Log script execution metrics to the log file.
[System]	
MinPollTime = 500	Forces a minimum polling interval for checking the user's screen for content to block or record, overriding the script setting. Time in milliseconds (ms).
HideTrayIcon=true	Hides/displays the Desktop Analytics icon in the system tray.
HideBalloonTips=true	Prevents/enables balloon tips from popping up.
RunInTerminalServer=false	Only needed for users running terminals.
MaxRamAllow=150000000	Maximum bytes of RAM Desktop Analytics can use.

Script Server Desktop Analytics INI

[FusionScriptServer]	
Host=xx.xx.xx	API server host IP address.
Port=5634	API server host port number.
ClientLocation=100	Optional. Only required if Location was configured in the server- side Fusion.ini, and is equivalent to Location # value there. Determines to which API server the client will connect. This value is set when the client installer runs and does not need to be set manually. The value can be modified to direct the client to communicate with a different API server as needed. This setting is ignored if using Subnet.

Install Java Support

Note These instructions are for 64-bit Windows PCs.

If Desktop Analytics will be used to capture any data from Java-based applications, Java Access Bridge (JAB) software must be enabled on the PC. JAB is a library that allows Microsoft-based applications to interact with Java-based applications. Desktop Analytics uses Screen Scraper Studio's ScreenScrapeJavaSupport executable to install JAB software for Java Runtime Environments (JREs).

More information is available by searching "Java SE Desktop Accessibility" at the Oracle website.

Find the JRE Path

Each Java application on a PC may use a different JRE. The path for each JRE used must be identified.

- 1. From the Start menu, run regedit.
- 2. Navigate to HKEY_LOCAL_MACHINE\SOFTWARE\JavaSoft\Java Runtime Environment.
- 3. Click the default JRE to display its properties. The JavaHome property shows the path needed to install JRE support.

Install Support for the JRE

- 1. On the client machine, open a command prompt.
- 2. Navigate to c:\Program Files(x86)\CallCopy\Fusion\ScraperLib\Java Support.
- 3. Run this command using the path located earlier:

ScreenScrapeJavaSupport.exe /install /jrepath "<path>"

4. If prompted by Windows to approve running the installation, click Yes.

Note If screen scrape support must be uninstalled, run this command:

ScreenScrapeJavaSupport.exe /uninstall /jrepath "<path>"

Test Java Support

After the tasks above are completed, the installation must be tested for each Java application from which data will be captured. Testing involves attempting to capture window information for an application. See the "Capture Window ID" section of the *Uptivity Desktop Analytics Scripts Guide* for instructions on capturing the necessary application information.

If no Window information is captured or only the Window frame/header information is captured:

- JAB support is not enabled for the JRE the application uses. In this case, repeat the tasks above to identify the JRE path and run the Screen Scrape executable.
- The application was created using an early Java version. In this case, Desktop Analytics may not be able to work with the application. Uptivity Development would need to investigate your application to determine a conclusive answer.
- The application may be a network application. Uptivity Development would need to investigate.

Security and PCI Compliance

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

Troubleshooting

This section provides troubleshooting guidance that can be used by both administrators and script programmers.

Screen/Application Flickers When Desktop Analytics Pulls Data

If users experience this issue, try to capture using the fulltext method instead of the native method. In some applications, the native setting may cause the application to repaint. This is the flicker that is sometimes visible.

When switching to fulltext, you may need to create a new capture identifier.

COM Class Error

If you see a COM class error, then the COM components didn't register properly. This is usually caused by the client application not being installed as a system administrator account.

Plan A: Run the COM Component Registration Fix Utility

To fix this automatically, run the application cc_FusionRegisterComComponents.exe with administrator privileges. To do this, right-click the executable and select "Run as administrator". Select "Yes" or "Allow" on any popup dialogs. After running the application, try running Desktop Analytics again.

cc_FusionRegisterComCom	none	nts.eve 6/17/2011.10-25.ΛΜ Δρ	pl
CheckFusionJavaBridgeInst		Open	þI
Fusion.ini	۲	Run as administrator	hf

Plan B: Register the COM Components Manually

You can also register the COM components manually. To do this, open a command prompt in privileged mode: Right-click on a command prompt shortcut and select Run as administrator.

TCaptureX.dll, TSelection.dll, UIElement.dll and SSSystemObj.dll will need to be registered. These will be located in the ScraperLib subfolder where Desktop Analytics is installed

Registration on 64-bit

%windir%\syswow64\regsvr32 <fusion path>\ScraperLib\TCaptureX.dll
%windir%\syswow64\regsvr32 <fusion path>\ScraperLib\UIElement.dll
%windir%\syswow64\regsvr32 <fusion path>\ScraperLib\TSelection.dll
%windir%\system32\regsvr32 <fusion path>\ScraperLib\TCaptureX_x64.dll
%windir%\system32\regsvr32 <fusion path>\ScraperLib\UIElement_x64.dll
%windir%\system32\regsvr32 <fusion path>\ScraperLib\TSelection_x64.dll

Registration on 32-bit (x86)

%windir%\system32\regsvr32 <fusion path>\ScraperLib\TCaptureX.dll
%windir%\system32\regsvr32 <fusion path>\ScraperLib\UIElement.dll
%windir%\system32\regsvr32 <fusion path>\ScraperLib\TSelection.dll
%windir%\system32\regsvr32 <fusion path>\ScraperLib\SSSystemObj.dll

About Uptivity

What boosts the bottom line for any company with a contact center? How about getting the best that every agent can deliver from their first day on the job and constantly optimizing contact center management and performance? Only Uptivity gives you the tools you need to continuously improve every aspect of each step of every agent's life cycle and enhance customer satisfaction. You get exactly what you need thanks to a modern, integrated, and easy-to-use suite of tools that offers a unified system for performance management, workforce management, speech analytics, and call recording. Unparalleled customer service and support from our in-house staff combine with a better bundle for a better value, and a lower total cost of ownership.

Headquartered in Columbus, Ohio, and on the Web at <u>www.uptivity.com</u>.