## **IPFX Voice Capture Solo Client**



Product version 4.3 SP4

## **About This Guide**

The purpose of this document is to provide the user with information on how to use this IPFX product.

## **Related documentation**

The following IPFX manuals contain additional information about IPFX Voice Capture Solo Client:

IPFX Administrator Manual Assigning monitorable/recordable extensions to Supervisors/Administrators.

## **See Also**

**About This Guide** 

**Typographical Conventions** 

## **Typographical Conventions**

Before you start using this guide, it is important to understand the terms and typographical conventions used in the documentation.

The following kinds of formatting in the text identify special information.

| Formatting convention | Type of Information  |
|-----------------------|--|
| Triangular Bullet(Ø)  | Step-by-step procedures. You can follow these instructions to complete a specific task.                                      |
| Special Bold          | Items you must select, such as menu options, command buttons, or items in a list.  |
| Emphasis              | Use to emphasize the importance of a point or for variable expressions such as parameters.                                   |
| CAPITALS              | Names of keys on the keyboard. for example, SHIFT, CTRL, or ALT.   |
| KEY+KEY               | Key combinations for which the user must press and hold down one key and then press another, for example, CTRL+P, or ALT+F4. |
| DIR<br>✓              | Information that applies to the IPFX Director platform only.   |
| ©CM<br>✓              | Information that applies to the IPFX for CallManager platform only.  |
| NEC V                 | Information that applies to the IPFX for NEC platform only.  |

## See Also

**About This Guide** 

**Related documentation** 

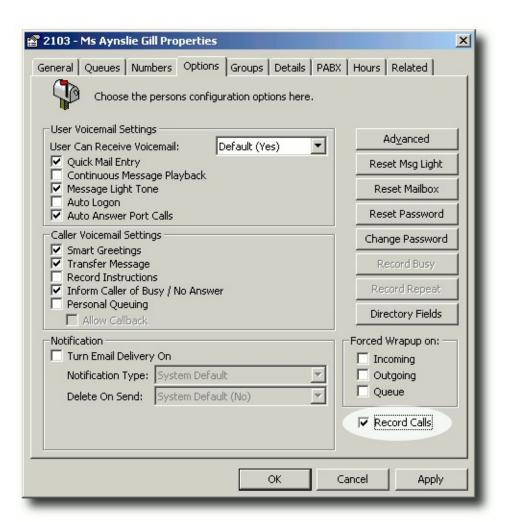
## **What is Voice Capture Solo Client?**

Voice Capture Solo Client is a client application which allows administrators and supervisors to transparently monitor and dynamically record calls to (or from) any agent on the network with Voice Capture User Licence installed. Voice Capture Solo Client also allows the administrator or supervisor to record up to 10 of these calls simultaneously to their hard drive.

The application itself is installed on and operated via the administrator's/supervisor's PC. It allows the administrator/supervisor to create groups of extensions and queues which can be monitored quickly and easily via the Solo Client interface.

A Voice Capture *User License* does not need to be installed on the administrator's/supervisor's PC, but must be installed on any monitored PCs.

IMPORTANT NOTE: Every extension to be monitored or recorded must have the Record Calls checkbox selected in the Options tab of the Extension properties dialog. Extensions that do not have the Record Calls checkbox selected cannot be recorded/monitored.



## **PC Requirements**

Voice Capture Solo Client requires that the administrator's/supervisor's PC has multimedia capabilities in order to stream the monitored calls to their PC speakers, or to monitor the selected call. To run Voice Capture Solo Client you will require:

- A PC running Windows 98 or later
- A Soundcard
- PC Speakers (ensure speakers are always switched on)
- A headset or microphone

## See Also

What is Voice Capture Solo Client?

**Network requirements** 

## **Network requirements**

Voice Capture Solo Client requires open ports between the Supervisor's PC and all client PCs. A firewall may block these ports, resulting in an impaired ability to monitor and/or record calls.

If you need to use Voice Capture Solo Client in a firewalled environment, IPFX recommends manually setting Voice Capture Solo Client's <u>port range</u>, and opening this port range on the firewall.

## See Also

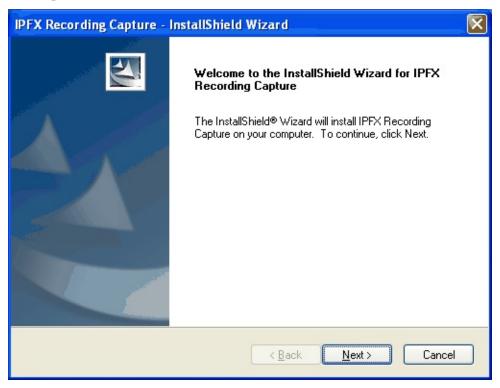
What is Voice Capture Solo Client?

**PC Requirements** 

## **How to Install Voice Capture User Licence**

The Voice Capture User License software must be installed on the PC of each monitored extension.

## **Step One: Welcome Screen**



The Welcome screen outlines the title of the software to be installed and is your starting point for the installation wizard.

Click 'Next' to move onto the next screen...

## See Also

How to Install Voice Capture User Licence

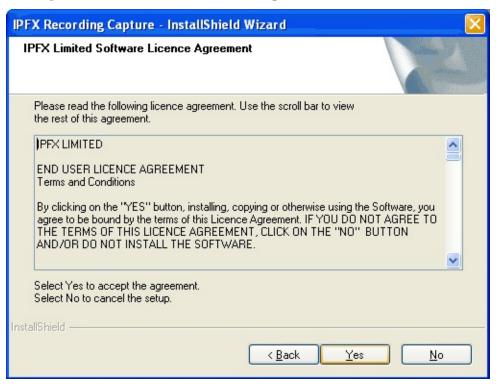
**Step Two: Licence Agreement** 

**Step Three: Destination Location** 

**Step Four: Server Connection Details** 

**Step Five: Begin Installation** 

## **Step Two: Licence Agreement**



In order to proceed with the installation, you must first read through and agree to the end user license. If you agree to abide by the terms of the license, then click 'Yes' to continue, otherwise click 'No' to cancel the installation.

If you agree to the terms and click 'Yes', you will then be able to proceed to the next screen.

## See Also

How to Install Voice Capture User Licence

Step One: Welcome Screen

**Step Three: Destination Location** 

**Step Four: Server Connection Details** 

**Step Five: Begin Installation** 

## **Step Three: Destination Location**



Next select the directory you wish to install the software into by clicking the "Browse" button.

The installation program will automatically default to "C:\Program Files\Performance Solutions\" unless you specify the directory you wish to install the software into.

Once you have selected the appropriate directory click 'Next' to continue on to the Server Connection Details screen.

## See Also

How to Install Voice Capture User Licence

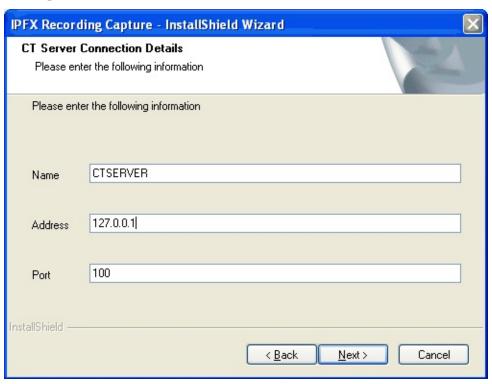
Step One: Welcome Screen

Step Two: Licence Agreement

**Step Four: Server Connection Details** 

Step Five: Begin Installation

## **Step Four: Server Connection Details**



This screen is where you will enter the details of the IPFX CT Server you wish to connect to. The name, IP address and the port number of the IPFX CT Server all default to the following values:

- Name: CTSERVER
- Address: 127.0.0.1 (Please note that this must be changed to the correct IP Address of the IPFX Message Server)
- Port: 100 The port number would typically be port 100 which the installation program will automatically use as a default.

Once you are satisfied that you have set the values correctly click 'Next' to continue.

## See Also

How to Install Voice Capture User Licence

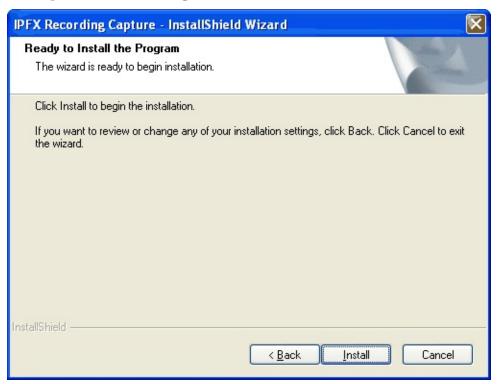
Step One: Welcome Screen

Step Two: Licence Agreement

**Step Three: Destination Location** 

Step Five: Begin Installation

## **Step Five: Begin Installation**



Once all the details have been entered correctly the installation wizard will stop you at the "Ready to Install" screen. It is at this point that any changes to the installation details should be made. Click the "Back" button to return sequentially through the previous screens to make any necessary changes or click 'Install' to begin the installation.

If the installation process is successful you will be presented with the completion screen.

It should only take a few seconds to complete the installation. During this time the Intel® Integrated Performance Primitives (Intel® IPP) runtime may be installed automatically. Intel® Integrated Performance Primitives (Intel® IPP) is a software library for application developers that increases performance from Intel's latest microprocessors. In the case of Voice Capture, it is used to enhance the audio compression performance of the Voice Capture system.

## See Also

How to Install Voice Capture User Licence

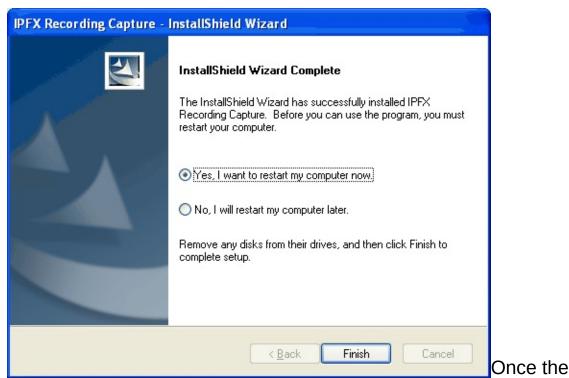
Step One: Welcome Screen

Step Two: Licence Agreement

**Step Three: Destination Location** 

Step Four: Server Connection Details

## **Step Six: Finish**



installation process is complete, you may need to restart your computer for the program to take effect. Save any information you have open in other applications then close those programs down.

Selecting "Yes, I want to restart my computer now" will automatically close all open applications and restart the computer.

Selecting "No, I will restart my computer later" will allow you to click "Finish" and keep working in any other applications you have open.

## See Also

How to Install Voice Capture User Licence

Step One: Welcome Screen

Step Two: Licence Agreement

**Step Three: Destination Location** 

Step Four: Server Connection Details

Step Five: Begin Installation

## **Installation of Voice Capture Solo Client**

Install the Voice Capture Solo Client software on a supervisor's or administrator's PC.

## **Step One - Welcome Screen**



The Welcome screen outlines the title of the software to be installed and is your starting point for the installation wizard.

Click **Next** to move onto the next screen...

# Installation of Voice Capture Solo Client Screen Two - Licence Agreement Step Three - Select Destination Step Four - Server Connection Details Step Five - Ready to Install Step Six - Finish

## **Screen Two - Licence Agreement**



In order to proceed with the installation, you must first read through and agree to the end user license. If you agree to abide by the terms of the license, then click 'Yes' to continue, otherwise click 'No' to cancel the installation.

If you agree to the terms and click 'Yes', you will then be able to proceed to the next screen.



## **Step Three - Select Destination**



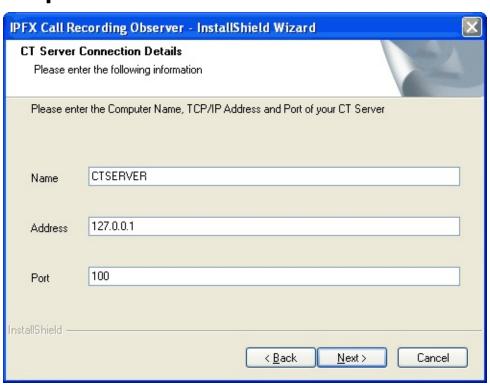
Next select the directory you wish to install the software into by clicking the "Browse" button.

The installation program will automatically default to "C:\Program Files\Performance Solutions\" unless you specify the directory you wish to install the software into.

Once you have selected the appropriate directory click 'Next' to continue on to the Server Connection Details screen.

# Installation of Voice Capture Solo Client Step One - Welcome Screen Screen Two - Licence Agreement Step Four - Server Connection Details Step Five - Ready to Install Step Six - Finish

## **Step Four - Server Connection Details**



This screen is where you will enter the details of the IPFX CT Server you wish to connect to. The name, IP address and the port number of the IPFX CT Server all default to the following values:

- Name: CTSERVER (Please check with your IT Administrator for the correct IPFX Server name and the IP for your specific network).
- Address: 127.0.0.1 (Please note that this must be changed to the correct IP Address of the IPFX CT Server)
- Port: 100 The port number would typically be port 100 which the installation program will automatically use as a default.

Once you are satisfied that you have set the values correctly click 'Next' to continue.

## See Also

Installation of Voice Capture Solo Client

Step One - Welcome Screen

<u>Screen Two - Licence Agreement</u>

**Step Three - Select Destination** 

Step Five - Ready to Install
Step Six - Finish

## Step Five - Ready to Install



Once all the details have been entered correctly the installation wizard will stop you at the "Ready to Install" screen. It is at this point that any changes to the installation details should be made. Click the "Back" button to return sequentially through the previous screens to make any neccesary changes or click 'Install' to begin the installation.

It should only take a few seconds to complete the installation. If the installation process is successful you will be presented with the completion screen.

## Installation of Voice Capture Solo Client Step One - Welcome Screen Screen Two - Licence Agreement Step Three - Select Destination Step Four - Server Connection Details Step Six - Finish

## **Step Six - Finish**



Click Finish to exit the installer. Voice Capture Solo Client will now be available in the IPFX folder under the START menu.

Upon completion, you may be asked to reboot the machine. Do so if required.

## Installation of Voice Capture Solo Client Step One - Welcome Screen Screen Two - Licence Agreement

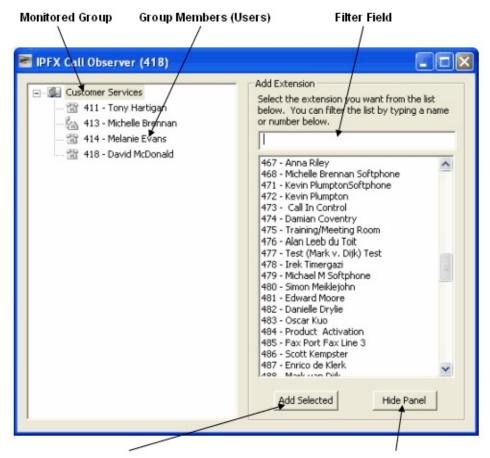
Step Three - Select Destination

Step Four - Server Connection Details

Step Five - Ready to Install

## **Using Voice Capture Solo Client**

## The Interface at a Glance



Adds the selected extension to the group list

Hides the extension panel

**Monitored Group:** The group is the primary means for organising your monitored users and queues into easily searchable categories

**Group Members (Agents):** This is the list of queues or users that have been added to the selected monitor group

**Filter Field:** Adding in part or all of the Extension, Queue or User name to this field will filter the list of available Queues and Groups for selection.

**Add Selected:** Adds the selecetd Queues and Users to the highlighted group.

Hide Panel: Hides the Add Extension and Add Queue panel.

## See Also

**Using Voice Capture Solo Client** 

Starting Voice Capture Solo Client

Right-Click Menu Options

Adding an Extension or Queue

Working with Your Group

Monitoring a Queue

**Settings Overview** 

**Status Indicators** 

Saving Groups and Closing Voice Capture Solo Client

## **Starting Voice Capture Solo Client**



Starting the Voice Capture Solo Client will require you to log in with your IPFX password (or PIN). When you open Voice Capture Solo Client for the first time, you will be presented with the blank Solo Client screen and a welcome message with some instructions on how to create a new group. The screen is initially blank since no monitor groups have been set up. Once you have created and saved your groups, Voice Capture Solo Client will remember your groups and populate your screen with these groups the next time you open the program.

To create a monitor group, simply right-click on the Solo Client screen and select "New Group". A dialogue box will appear asking you to input the name of the new group you wish to create.



Type in the name of the new group and click OK to create the group.

## Using Voice Capture Solo Client The Interface at a Glance Right-Click Menu Options Adding an Extension or Queue

**Working with Your Group** 

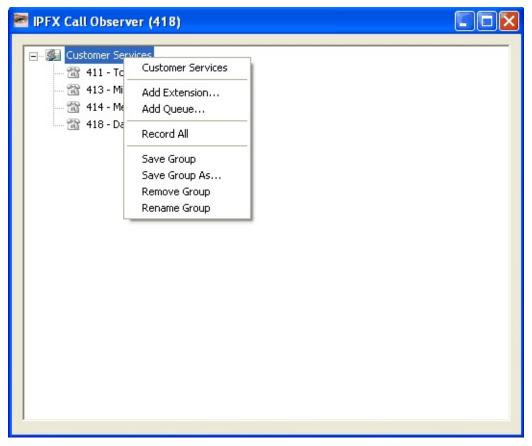
Monitoring a Queue

**Settings Overview** 

**Status Indicators** 

Saving Groups and Closing Voice Capture Solo Client

## **Right-Click Menu Options**



Right clicking on your new monitor group name will bring up a list of options with the name of your group at the top.

- Add Extension: Brings up the Add Extension side panel where desired extension can be selected and added to the group. (See "Adding an Extension or Queue").
- Add Queue: Brings up the Add Queue side panel where any existing queues can be selected and added to the group. (See "Adding an Extension or Queue").
- **Record All:** Clicking this option will set all of the extensions or queues in your group to Record status. Please note that only 10 calls at a time can be recorded to your hard drive.
- Save Group: Allows you to save any changes you have made to the current group.
- Save Group As: Saves a copy of the group profile under another profile name. You will be prompted to select a name for this new

group when you click this option.

- Remove Group: Removes the selected group from your list of available groups.
- Rename Group: Presents you with a dialogue box where the new name of the group can be entered.

To add a new extension, simply select the Add Extension option...

## **See Also**

**Using Voice Capture Solo Client** 

The Interface at a Glance

Starting Voice Capture Solo Client

Adding an Extension or Queue

**Working with Your Group** 

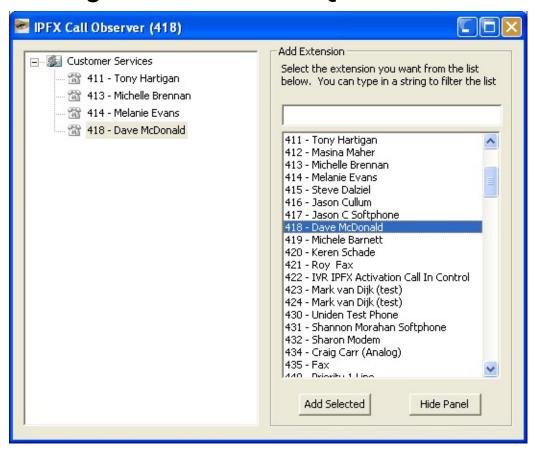
Monitoring a Queue

**Settings Overview** 

**Status Indicators** 

Saving Groups and Closing Voice Capture Solo Client

## **Adding an Extension or Queue**



Depending on your selection, the Add Extension or Add Queue menus will appear on the right hand side of the Solo Client interface with a list of available extensions and queues respectively. Select the desired extension or queue and click Add Selected to add the extension or queue to the group. Once you have placed all the desired extensions or queues in your group, simply click Hide Panel to hide the menu. See "Monitoring a Queue" to learn more about working with queues in your Solo Client groups.

Right clicking on the Add Extension or Add Queue screen will present you with a context menu which offers the options of refreshing the list of available Queues or swapping to the alternative selection screen.

**Note:** You can add multiple agents or queues at once by holding down CTRL and selecting the agents that you wish to add to your group from the list then clicking Add Selected.

## See Also

**Using Voice Capture Solo Client** 

The Interface at a Glance

Starting Voice Capture Solo Client

Right-Click Menu Options

**Working with Your Group** 

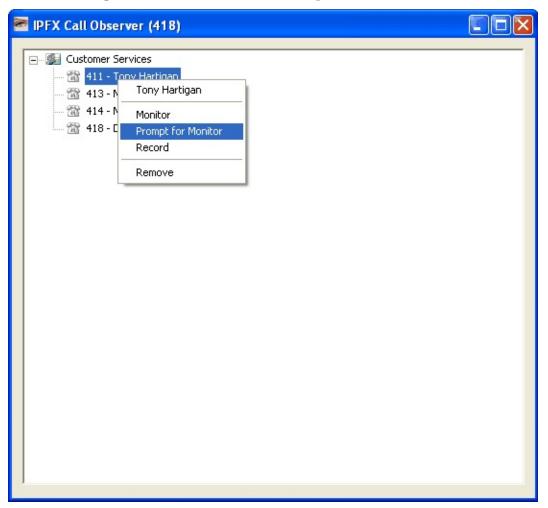
Monitoring a Queue

**Settings Overview** 

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Saving Groups and Closing Voice Capture Solo Client

## **Working with Your Group**



When a user in one of your groups is on the phone, the icon next to the user's name will change to reflect the type of call they are currently on. Right clicking on the user in your monitor group will bring up a menu with which you can choose to either listen to any calls that user is currently on, or to record that user's call to your hard drive. You have to actively switch on or switch off the listen or record features to start or stop your involvement with the user's call. The remove option will remove the selected user from your monitor group. Alternatively, double-clicking on an extension in one of your groups will present you with a pop-up asking if you would like to remove that extension from the group. If you select No the pop-up will close and you can proceed as normal, if you select Yes the extension will be removed from your group and placed back in the list of available extensions.

If a user is currently speaking on the phone, the icon will change to show the "off hook" state. To begin listening to an extension you simply right click on that extension and select listen. If the extension is off hook when you do this you will immediately begin hearing that conversation on your PC speaker. If the extension is on hook you will not hear anything until the extension is in use. You can set Prompt for Listen on a particular user which presents a pop-up when the user receives a call. You can then choose to listen to the call or dismiss the pop up and decline to listen to the call. You can record extensions in a similar fashion by selecting record from the context menu. Similarly you can record entire queues or groups, though you should keep in mind that long conversations will use up a fair amount of disk space or quickly consume your allocated disk space for recording. Please note that while you can only listen to one extension at a time, you can record up to 10 conversations at once. Recorded phone conversations will end up in your C:\ directory.

The following naming convention will be used: <extension>.<dmy>. <hms>.wav

- <extension> is the extension that has been recorded.
- <dmy> is the date (day, month, and year) that the conversation began.
- <hms> is the time (hour, minute, and second) that the conversation began.

**Note:** The maximum number of users that can be recorded at any one time is 10. If you attempt to select more than 10 users, Voice Capture Solo Client will pop-up an error message telling you that the selection will exceed the maximum number of 'records', and will not let you make the new selection until another selection is cancelled.

## See Also

**Using Voice Capture Solo Client** 

The Interface at a Glance

Starting Voice Capture Solo Client

Right-Click Menu Options

Adding an Extension or Queue

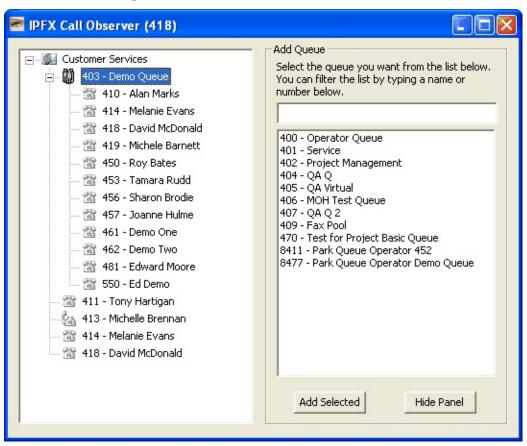
Monitoring a Queue

**Settings Overview** 

**Status Indicators** 

Saving Groups and Closing Voice Capture Solo Client

## **Monitoring a Queue**



While adding a queue to your groups is the same as adding an extension, the way you look after that queue is slightly different. When you add a queue to a Solo Client group, the extension number and name of that queue is added to the group along with a sub-group which contains all of the Agents in that queue. The Queue name in the group has a small menu control box next to it (the + or -) which will expand or contract the sub-group to display the Agents in that queue. These agents can then be monitored like a normal extension. Double-clicking a queue will not remove it from a group as it does an extension. Double-clicking on a group will respectively expand or close the list of agents in the queue. To remove a group you must right-click and select Remove to remove the selected queue from the group. A pop-up verification box will appear for confirmation that you wish to remove the selected queue.

Right clicking on the Add Queue screen will present you with a context menu which offers the options of refreshing the list of available Queues or swapping to the Add Extensions screen.

## See Also

**Using Voice Capture Solo Client** 

The Interface at a Glance

Starting Voice Capture Solo Client

Right-Click Menu Options

Adding an Extension or Queue

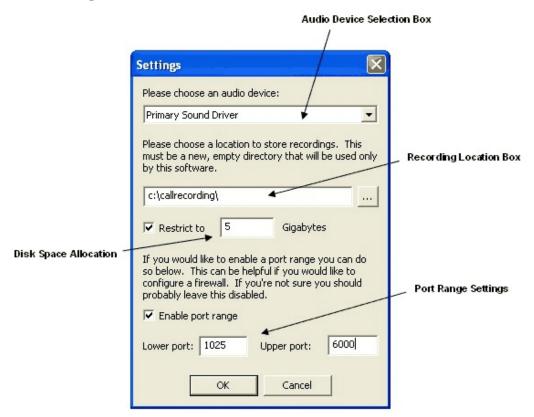
Working with Your Group

**Settings Overview** 

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Saving Groups and Closing Voice Capture Solo Client

## **Settings Overview**



**Audio Device Selection Box:** Allows the administrator to select which audio device Solo Client will use to play the multimedia files.

**Recording Location Box:** Selects and sets the location that any recorded files will be saved to on the administrator's hard drive.

**Disk Space Allocation:** Checking the "Restrict to" box and setting a Gigabyte limit will prevent Solo Client from going over that limit and occupying valuable hard drive space. A notification pop-up will appear if the disk space specified is greater than that of the physical space available on the hard drive.

Port Range Settings: Defines a specific port range that Solo Client will use when monitoring or recording. The port range must lie between 1025 and 65000, and must span at least 20 ports. As the port settings for most network systems may differ, it is highly recommended that the administrator wishing to enable a port range in this fashion must speak with their network administrator first to confirm that using ports within this range is both feasible and acceptable.

## See Also

**Using Voice Capture Solo Client** 

The Interface at a Glance

Starting Voice Capture Solo Client

**Right-Click Menu Options** 

Adding an Extension or Queue

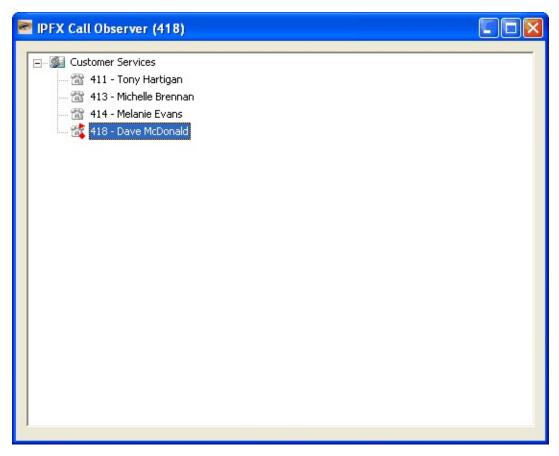
**Working with Your Group** 

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## **Status Indicators**



When a user is being recorded or if you are currently listening to the user's conversation, icons will appear on the user's name to indicate which type of monitoring you are performing on that user.

Listening: A red arrow will appear at the top of the user's phone icon

**Recording:** A red dot will appear at the bottom of the user's phone icon

## **See Also**

**Using Voice Capture Solo Client** 

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Right-Click Menu Options

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Saving Groups and Closing Voice Capture Solo Client

## **Saving Groups and Closing Voice Capture Solo Client**

Once you have finished creating your groups you can re-size the window to reduce the amount of screen space taken up by the Solo Client interface, or minimize the window onto your toolbar. When you have finished with the Voice Capture Solo Client, use the close icon in the top right corner of the window to close it down.

Each group is saved as a GRP file to the administrators hard drive. A dialogue box will pop up when the "Save" option is selected, which will prompt you to save the group profile to the desired directory. It will alert you if you are closing it without saving your group. When you start Voice Capture Solo Client again it will remember which groups were previously loaded and automatically load them for you.

## See Also

**Using Voice Capture Solo Client** 

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## **Glossary**

### **Administrators**

Any supervisor or manager who has administration rights with IPFX Director that will be monitoring agents or queues via Voice Capture User Licence.

## **Agents**

Users who are logged into a Queue and have an IPFX Client Agent Licence which allows them to perform as a Call Centre Agent.

### **Users**

The individuals running Voice Capture User Licence who will be monitored by administrators using Voice Capture Solo Client.

### **Extensions**

The actual phone extension numbers allocated to the agents or queues.

## **Queues**

A queue is an extension on the PABX which directs incoming calls to the queue agent in an IPFX contact centre environment. Call centres using the IPFX System will have the ability to add selected agents to call queues. These call queues can also be monitored with Voice Capture Solo Client.