

# System Configuration

## Configuration WEBcommand



## Administration manual for tenants

3/17/2020

### Product line neo, version 6.x

The described functions can be used with the following ASC products:

EVOIPneo

EVOLUTIONneo / XXL / eco

EVOflex (country-specific)

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## 1 General information

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## 2 Introduction

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### 2 Introduction

This manual describes the configuration of the application WEBcommand.

The application WEBcommand is a browser-based software to control the recording (start/stop recording) of currently running conversations. Users can view the current status of the deployed extension, replay the latest conversations, and add additional data from any computer with an installed browser and a LAN/WLAN connection to the replay server.

### 3 Licenses

License name	Number	Description
POWER <del>play</del> Web	1 per concurrent user	License for the usage of POWER <del>play</del> Web.
WEB <del>command</del>	1 per concurrent user	License for the usage of WEB <del>command</del> .

Tab. 1: Licenses of ASC

License name	Number	Description
FIGER	1 per server	Licenses for project-specific Fiducia version of WEB <del>com-</del> <del>mand</del> . The license is required for free seating, too, among others.

Tab. 2: Optional license of ASC

## 4 Configure application



Basic information about using the application System Configuration can be found in the user manual for administrators *System Configuration - General information*.

1. Start the application System Configuration.

## 4.1 Clients module

1. Open the Clients module by clicking on the menu item *Clients* in the navigation bar.
2. In the main view, select the entry *WEBcommand Settings*.
  - ⇒ The following detail view appears:

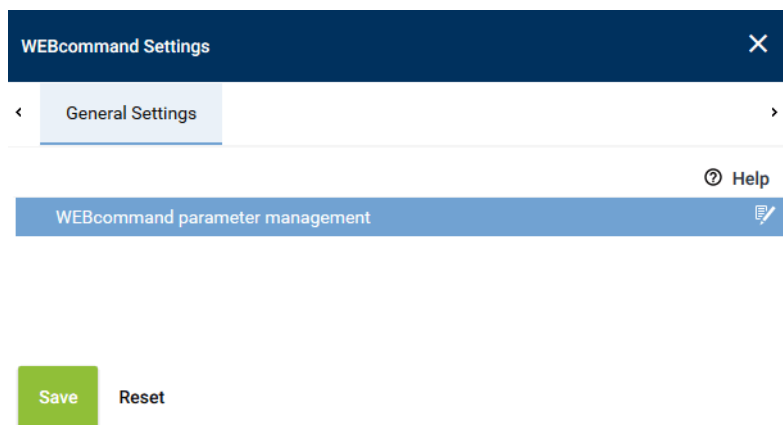



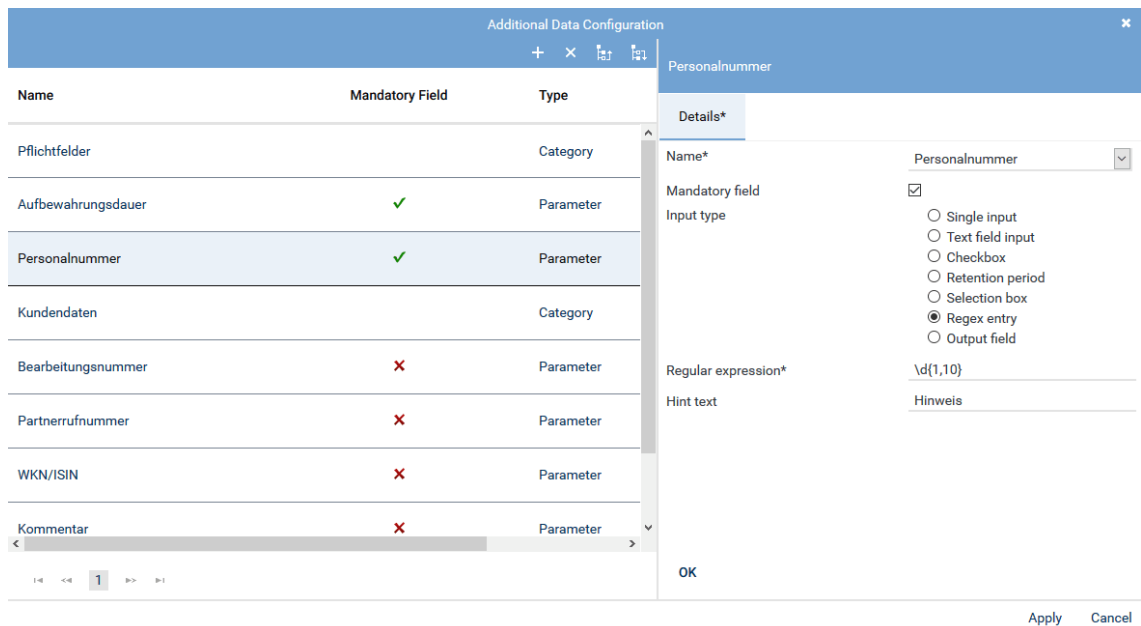
Fig. 1: Clients module - detail view WEBcommand Settings

### Administrate MiFID parameters



The available additional data are created and configured in the Additional Data module by the system provider. See administration manual for system providers *System Configuration - Additional Data module*.

1. To configure additional data for **MiFID**, click on the icon  (*Open MiFID Parameter Management*).
  - ⇒ The window *Additional Data Configuration* appears.



Name	Mandatory Field	Type
Pflichtfelder		Category
Aufbewahrungsdauer	✓	Parameter
Personalnummer	✓	Parameter
Kundendaten		Category
Bearbeitungsnummer	✗	Parameter
Partnerrufnummer	✗	Parameter
WKN/ISIN	✗	Parameter
Kommentar	✗	Parameter

**Personalnummer**

**Details\***

Name\* Personalnummer

Mandatory field ☒

Input type

- ☐ Single input
- ☐ Text field input
- ☐ Checkbox
- ☐ Retention period
- ☐ Selection box
- ☒ Regex entry
- ☐ Output field





Regular expression\* \d{1,10}






Hint text Hinweis

OK

Apply Cancel

Fig. 2: Additional Data Configuration (example)

	<b>Create new</b>	Creates a category or a parameter. Create category = group headline This option allows you to structure how the additional data in the application <b>WEBcommand</b> is displayed. Create parameter = additional date
	<b>Delete</b>	Deletes the selected category or the selected parameter.
	<b>Move up</b>	Moves up the selected category or the selected parameter.
	<b>Move down</b>	Moves down the selected category or the selected parameter.

- To create a category (group headline), click on the icon  (**Create New**).
- Select the option **Create Category**.
- In the detail view in the entry field **Name**, enter a name for the category.
- To buffer the changes, click on the button **OK**.
- To create a parameter (additional date), click on the icon  (**Create New**).
- Select the option **Create Category**.
- In the detail view in the drop-down list **Name**, select a parameter from the available additional data.
- In the detail view, configure the additional data according to your requirements.  
Here, you can define whether the additional date is supposed to be a mandatory field which is obligatory to complete for the user of the application **WEBcommand**, and which input type the additional date will have, i. e. how it will be displayed in the GUI (e. g. as a check box).
- To buffer the changes, click on the button **OK**.
- To delete a selected category or a selected parameter, click on the respective name in the main view and then on the icon  (**Delete**).
- To move a selected category or the selected parameter, click on the respective name in the main view and then on the icon  (**Move up**) or  (**Move down**).  
The order corresponds to the layout in the application **WEBcommand**.



13. To save all changes and close the window *Additional Data Configuration*, click on the button *Apply*.  
To discard all changes and close the window *Additional Data Configuration*, click on the button *Cancel*.

## 4.2 Employees module

1. Open the Employees module by clicking on the menu item *Employees* in the navigation bar.

### Configure free seating login with PIN authentication

To configure free seating login with PIN authentication for an employee, proceed as follows:

1. Select the respective employee from the list in the main view.
2. In the detail view, click on the tab *Agent Data*.

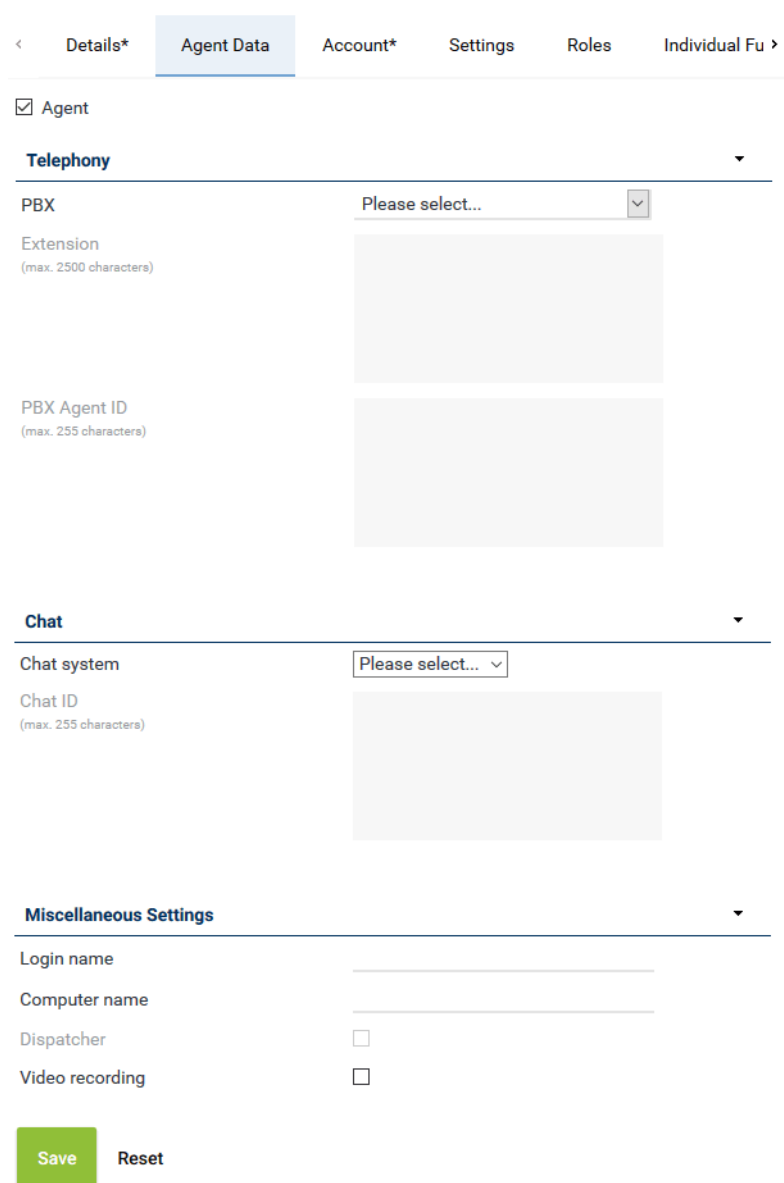
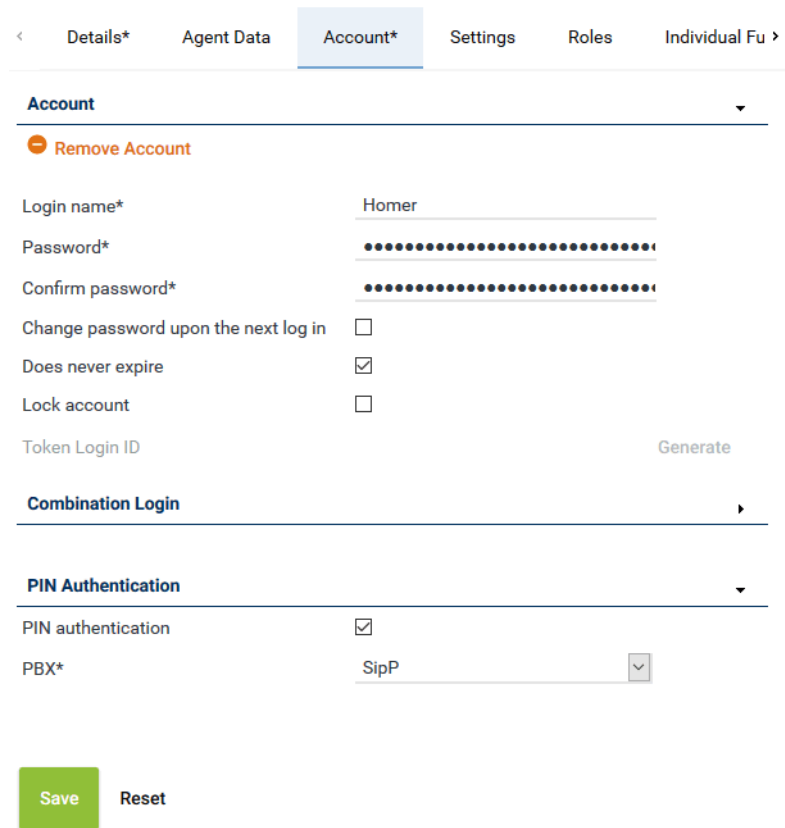


Fig. 3: Tab Agent Data

3. Activate the check box *Agent*.
4. Make sure that in the group field *Telephony* no *PBX* has been selected.
5. Make sure that in the group field *Chat* no chat system has been selected.

6. In the detail view, click on the tab *Account*.
7. Open the group field *PIN Authentication*.
8. Activate the check box *PIN authentication*.



< Details\* Agent Data **Account\*** Settings Roles Individual Fu >

**Account** ▼

➔ Remove Account

Login name\* Homer

Password\* .....

Confirm password\* .....

Change password upon the next log in ☐

Does never expire ☒

Lock account ☐

Token Login ID Generate

**Combination Login** ▶

**PIN Authentication** ▼

PIN authentication ☒

PBX\* SipP ▼

Save Reset

Fig. 4: Employees module - detail view, tab Account (example)

9. In the drop-down list *PBX* select the PBX.
10. Click on the button *Save*.

### Assign function rights for **WEBcommand**

To assign an employee function rights for **WEBcommand**, proceed as follows:

1. Select the respective employee from the list in the main view.
2. IN the detail view, click on the tab *Individual Function Rights*.
3. Open the group field *POWERplay Web*.
4. Open the details for **WEBcommand** by clicking on the icon “+” in the row **WEBcommand**.  
⇒ All function rights for this section are displayed.

Details\*
Agent Data
Account\*
Settings
Roles
Individual Fu

INSPIRATIONneo

System Configuration

POWERplay Web

☐ All function rights for POWERplay Web

Conversations

Participant View

Recording view

WEBcommand

Name	Type	Role
<input type="checkbox"/> All function rights to the WEBcommand module		
<input type="checkbox"/> Can see WEBcommand module		
<input type="checkbox"/> Can edit additional data		

POWERplay Pro

POWERplay Instant

INSIGHTneo

Additional data

Player function rights

System Monitoring

Save

Reset

Fig. 5: Employees module - detail view, tab Individual Function Rights

- To assign a function right for **WEBcommand**, activate the respective check box.  
The following function rights are available:
  - All function rights to the WEBcommand module
  - Can see WEBcommand module
  - Can edit additional data
- Click on the button **Save**.



The individual function rights can also be assigned to a role by means of an organization structure. For more information refer to the administration manual for tenants *System Configuration - User management (for tenants)*.

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### Glossary

#### **MiFID II**

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Markets in Financial Instruments Directive; directive for the harmonized regulation for investment services across the member states of the European Economic Area.

#### **PBX**

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Private Branch Exchange