

# System Configuration

## Configuration WEBcommand



## Administration manual for tenants

8/19/2020

### 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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## 2 Introduction

This manual describes the configuration of the application WEBcommand.

The application WEBcommand is a browser-based software integrated into POWERplay Web.

In the WEBcommand module, users have access to the following functions:

- *Recording control (starting and stopping the recording)*
- *Displaying the current status of the deployed extensions*
- *Replay of the latest conversations*
- *Adding additional data*

### 3 Licenses

License name	Number	Description
POWER <del>play</del> Web	1 per concurrent user	License for the usage of POW-ER <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:

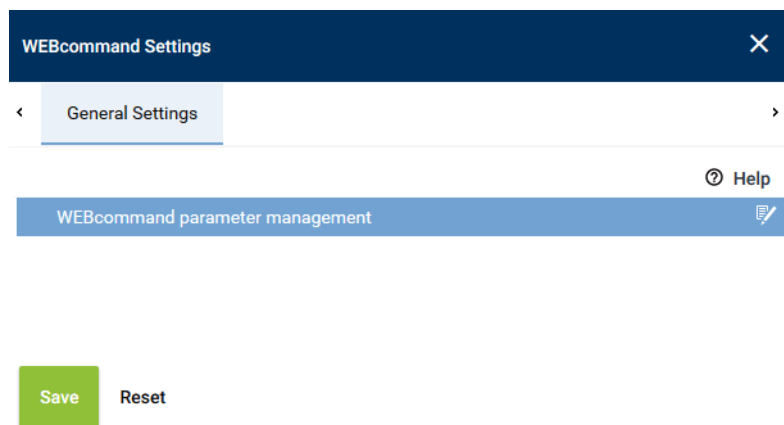



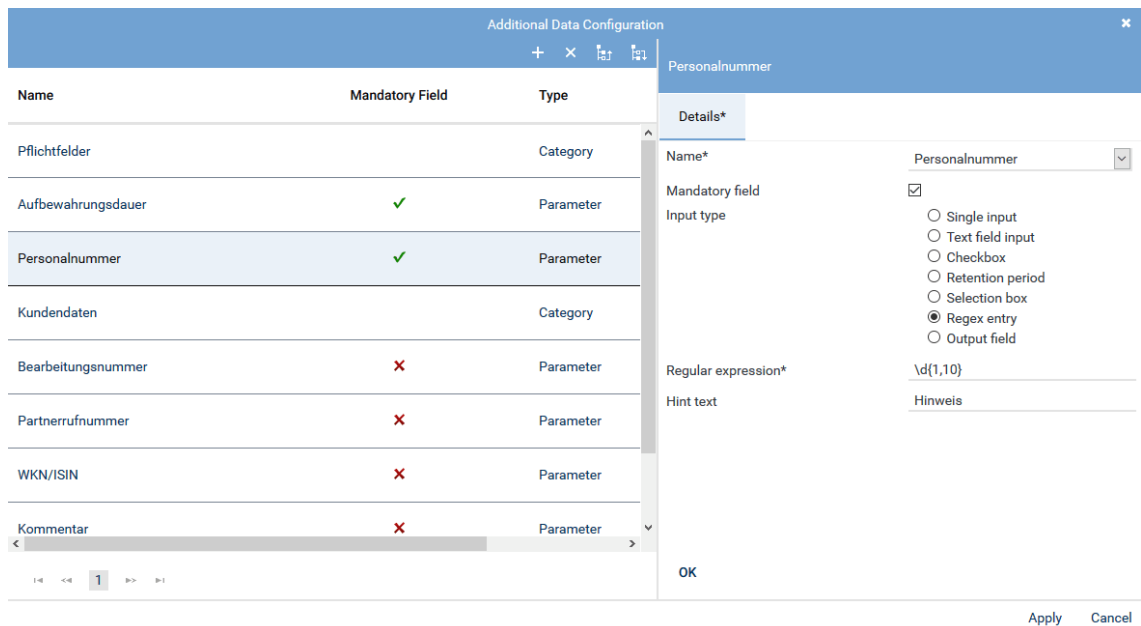
Fig. 1: Clients module - detail view WEBcommand Settings

#### 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\*

Mandatory field ☒

Input type

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





Regular expression\*






Hint text

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*.

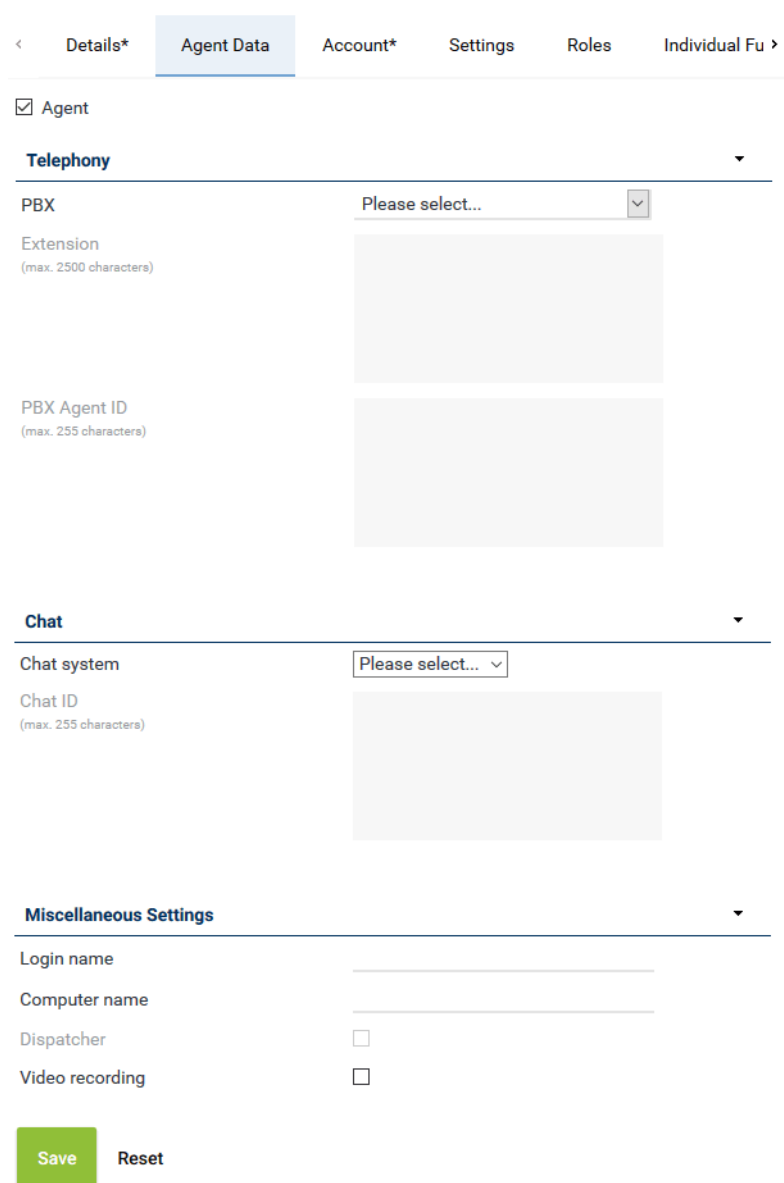


Fig. 3: Tab Agent Data

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*.

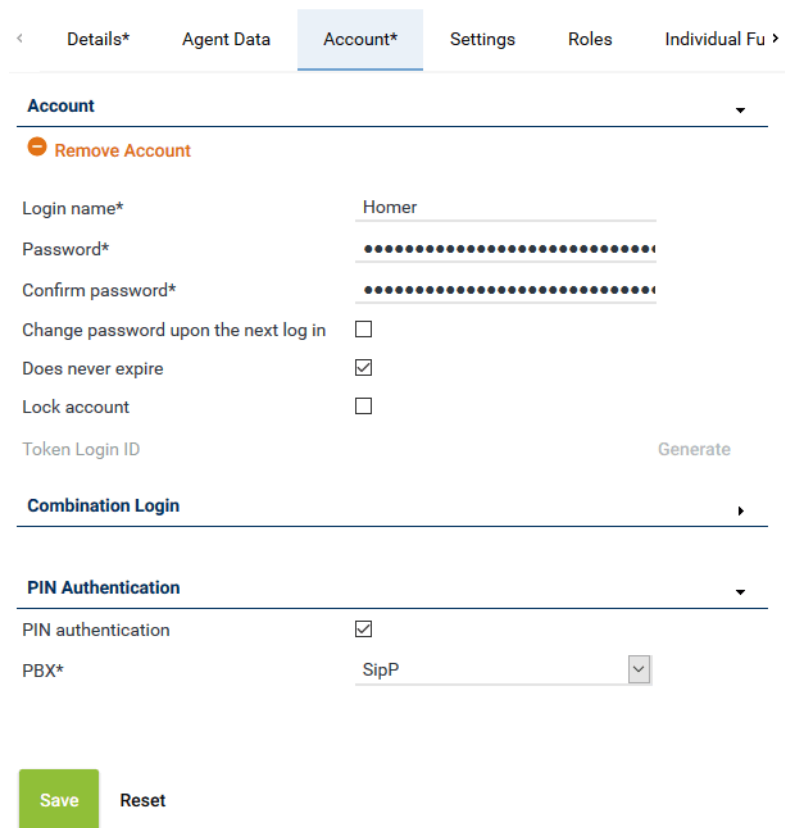


Fig. 4: Employees module - detail view, tab Account (example)

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