CLIENT*command*

User manual

10/14/2020

Product line *neo*, version 6.x

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

EVOIP*neo*

EVOLUTION*neo* / XXL / eco

INSPIRATION*neo*

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1 General information

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2 Introduction

This manual describes all functions and options of the application CLIENT*command*. It depends on the settings in the Applications module of the application System Configuration which of these functions and options are available for the user.

If an adjustment of these settings becomes necessary, contact the system administrator.

CLIENT*command* is an application which allows you to control and add further information to the recordings. The central point of control is the CLIENT*command* icon in the system tray. This icon allows the user to call up a menu with different functions, options and information

CLIENT*command* offers 3 different functions for recording control:

- Start or stop recording
- Keep or delete recording
- Mute or unmute recording

Additionally, CLIENT*command* offers the following functions:

- Add additional data to a call
- Start or stop coaching advisor sessions
- Display notifications
- Display conversation details

CLIENT*command* can only be employed by users who have been added as agent and have been assigned an extension in the application System Configuration. In addition, the usage of CLIENT*command* must have been enabled by the system administrator in the application System Configuration.

The configured scope of functions of the application CLIENT*command* is only available if the connection to the application server (app server) has been established. If no connection to the app server has been established, you can only call up and adjust the connection options (see chapter "Connection options", p. 11).

CLIENT*command* is a client application. It has to be installed on each client computer which is supposed to use it.

If the languages Chinese or Japanese are supposed to be available for this client application, it is a precondition that the operating system supports the respective language. If this is not the case, the Chinese and Japanese characters may be depicted incorrectly. Language support has to be activated manually in the operating system then.

3 System requirements

For basic information about the necessary hardware and software components refer to the installation manual *Installation requirements.*

4 Licenses

License name	Number
CLIENT*command* or System license CLIENT*command*	1 license per concurrent user or 1 license per system

Tab. 1: Licenses

5 Start application

The application CLIENT*command* can be started manually or automatically. During the installation you determined whether the application is supposed to be started manually or automatically.

For the manual start, a program group is created in the start menu of Windows and a program icon is placed on the desktop.

1. To start the application manually, click on the CLIENT*command* program icon.

Fig. 1: Program icon

If a login via SSO has been configured for the application, active authentication is omitted. Connection establishment is started directly.

Precondition for this function:

The function Single Sign On (SSO) has been activated by the administrator during the configuration of the system.

If an OAuth login has been configured for the application, a customer-specific authorization website opens in the default browser where users can log in.

Precondition for this function:

The OAuth2 parameter has been configured during the installation of CLIENT*command* and the procedure has been activated in the application System Configuration by the system provider.

2. If you do not log in via SSO, enter your user name and password.

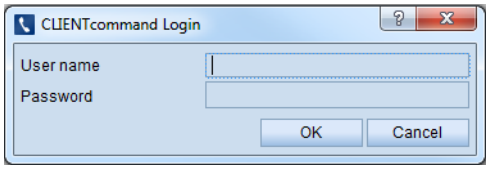


Fig. 2: Login window

3. Click on the button *OK*.
   - ⇨ The application is started.
   - ⇨ The connection to the app server is established.
   - ⇨ You will receive a message whether you have logged in successfully.
     Upon logging in successfully, the icon *(Client is connected)* appears in the Windows system tray.
     If no connection to the app server could be established, the icon *(Client is not connected)* appears in the Windows system tray.
4. If no connection to the app server could be established, you can check and adjust the connection options. To do so, right-click on the icon *(Client is not connected)* and open the menu item *Options*.
5. Check the settings in the tab *Connection Options*.
6. Adjust the settings if required.
7. Click on the button *OK* to save the changes.
   - ⇨ CLIENT*command* will reattempt automatically to establish a connection to the app server.

If all automatic attempts of establishing a connection to the server have failed, you can start additional connection attempts manually, see chapter "Start connection attempt manually", p. 9.

5.1 Start connection attempt manually

You have 2 options to start a connection attempt to the app server manually:

1. In the message about the failed connection attempts, click on *Retry*.

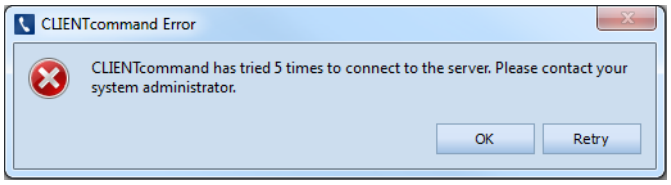


Fig. 3: Message Connection error

2. Open the context menu of the icon and select the menu item *Retry Connection*.

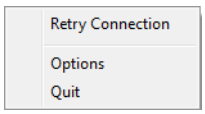


Fig. 4: Context menu in case of a connection error

5.2 Repeat login attempt in OAuth login

If OAuth has been configured for CLIENT*command*, a failed login attempt can be repeated in the context menu of CLIENT*command*, e. g. if the OAuth authorization website configured in the application System Configuration has been closed inadvertently before the user could be logged in to CLIENT*command*.

1. Open the context menu of the icon and select the menu item *Retry Login*.

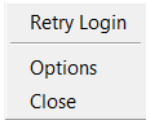


Fig. 5: Context menu in case of failed login

⇨ The customer-specific OAuth authorization website opens and the user can log in once again.

6 Usage

After the successful authentication, a CLIENT*command* program icon appears in the Windows system tray which displays the current status (see chapter "Icons in the system tray", p. 10).

By right-clicking on the program icon, you can open the corresponding context menu. The content of the context menu depends on different factors.

6.1 Icons in the system tray

	Client tries to connect	The client computer attempts to establish the connection to the app server.
	<logged-in user> *Client is connected*	The client computer has been connected to the app server. Additionally, the name of the logged-in user is displayed.
	Client is not connected	The client computer has not been connected to the app server.
	New call for a client	The running call is not recorded.
	Recording is muted	The running call is being recorded, but the recording is muted at the moment.
	Recording is kept	The running call is being recorded and will be saved.
	Recording will be deleted	The running call is being recorded and will be deleted afterwards.
	Wrap-up time	If a profile with a wrap-up time has been activated in the Recording Planner (see administration manual *Recording Planner*), the agent can use this period to add comments or additional data and to decide whether the call is supposed to be kept or deleted (*Keep/Delete*). The wrap-up time ends when the agent accepts a new call, when he manually sets his agent status to *ready* or at the latest when the timeout configured in the Recording Planner has been reached. If screen recording has been activated in the recording profile, the wrap-up time is treated as part of the call and thus appears in the database; if only audio is recorded, then the recording ends before the wrap-up time.

6.2 Context menu

By right-clicking on the program icon CLIENT*command* in the system tray, you can open the corresponding context menu.

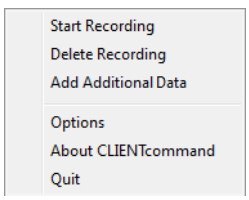


Fig. 6: Context menu (example)

The following menu items are always available:

- *Options*

  Opens a window in which you can display and adjust different options if required.

- *About CLIENTcommand*

  Opens a window with information about the version of the software, the IP address of the server, and the last login.

- *Exit*

  Closes the application.

All further entries in the context menu depend on following points:

- Connection Status
- Conversation status
- Configuration of the recording control in the application System Configuration

6.2.1 Options

You can adjust the following options:

- Connection options, see chapter "Connection options", p. 11.
- General options, see chapter "General options", p. 12.
- Hot key options, see chapter "Hotkey options", p. 14.

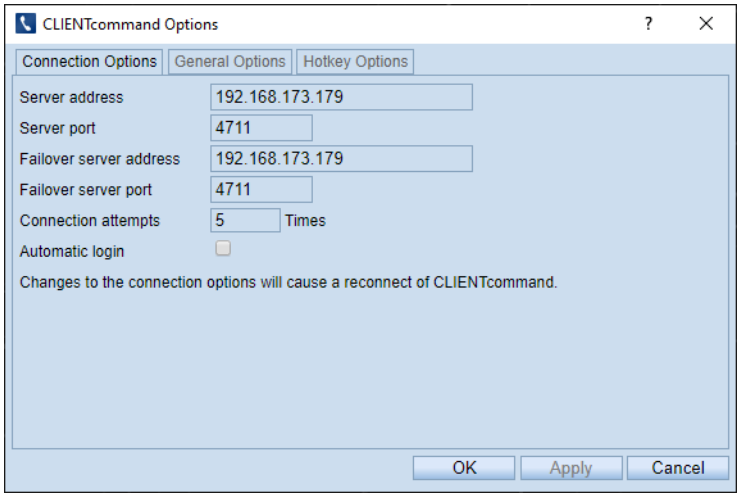


Fig. 7: Options dialog (example)

OK	Saves the changed settings and closes the Options window.
Apply	Saves the changed settings. The Options window is not closed.
Cancel	Discards the settings you have made and closes the Options window.

You can change tabs without buffering. The settings are not lost.

6.2.1.1 Connection options

Here, you can display the current connection options and adjust them if required.

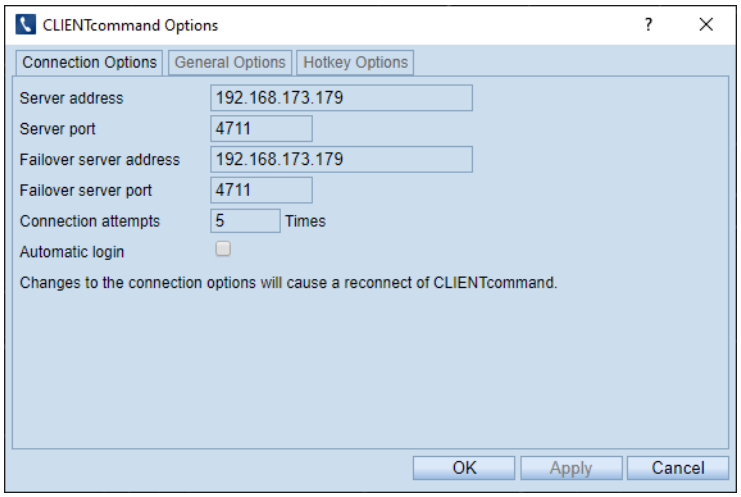


Fig. 8: Connection options

Server address	IP address of the primary application server (app server).
Server port	IP port which is supposed to communicate with the primary app server.
Failover server address	IP address of the server which has been set up as standby application server. The application CLIENT*command* connects to the standby server if the primary server fails. If there is no standby server, leave the entry field empty.
Failover server port	IP port of the standby server. This port allows communicating with the standby server if the primary server fails. If there is no standby server, leave the entry field empty.
Connection attempts	Maximum number of connection attempts before an error message will be issued and no further automatic connection attempts will be made. Enter the value *0* if you would like to prompt automatic connection attempts without restrictions until the connection could be established.
Automatic login	Select whether the user is supposed to be logged in to the application CLIENT*command* again automatically if the connection to the app server was lost during the previous session. ☑ = Function has been activated. The user is logged in again automatically in case the connection was lost. ☐ = Function has not been activated. The user is not logged in again automatically in case the connection was lost.

6.2.1.2 General options

Here, you can display and edit general options.

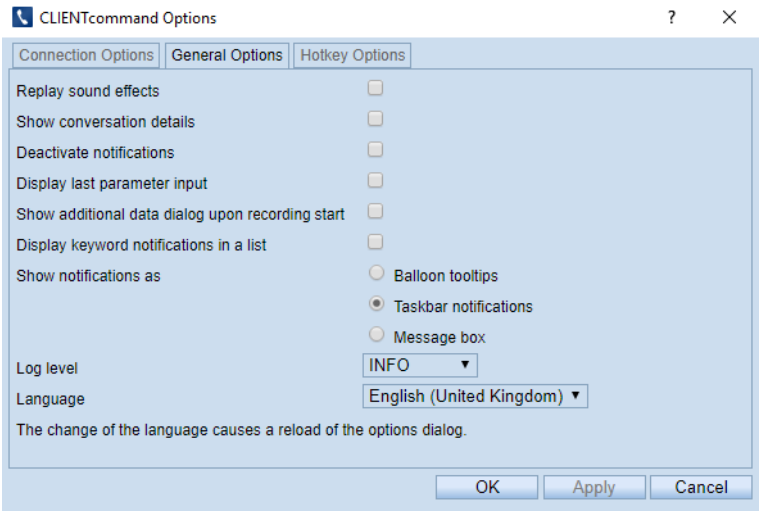
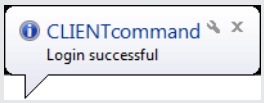
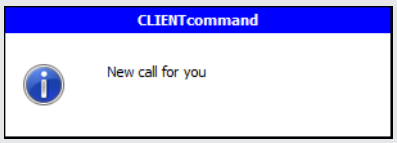
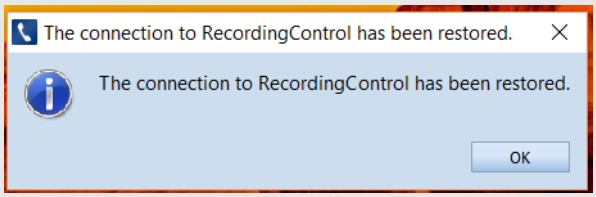


Fig. 9: General options

Replay sound effects	Here, you can configure whether new messages are supposed to be signaled by a sound effect. ☑ = Sound effect has been switched on. ☐ = Sound effect has been switched off.
Show conversation details	Select whether the function to display conversation details is supposed to be activated. ☑ = Function has been activated. During a call, the menu item *Display Conversation Details* is displayed in the context menu. ☐ = Function has not been activated.
Deactivate notifications	Select the whether system messages (e. g. success messages, messages about status changes) are supposed to be deactivated in general. ☑ = Function has been activated. No notifications are displayed. ☐ = Function has not been activated. Notifications are displayed in the selected layout.
Display last parameter input	Select whether the additional data entered for the previous conversation is supposed to be displayed in the additional data fields of the new conversation, too, upon opening the window to enter additional data. ☑ = Function has been activated. The previously entered additional data is displayed. ☐ = Function has not been activated. The previously entered additional data is not displayed. Additional data can be entered manually.
Show additional data dialog upon recording start	Select whether the window to enter additional data is supposed to open automatically when a recording starts. ☑ = Function has been activated. The window to add additional data opens automatically when a recording starts. ☐ = Function has not been activated. Additional data can be added by opening the additional data window by means of the context menu, see chapter "Add additional data", p. 16.
Display keyword notifications in a list	Select whether detected keywords are supposed to be displayed in a list instead of as individual notifications. ☑ = Function has been activated. Detected keywords are displayed in a list.

	□ = Function has not been activated. Individual notifications are displayed for detected keywords.
Show notifications as	Select the layout of the system messages. • *Balloon tooltips* New messages are displayed as balloon tooltips in the taskbar. Example:  • *Taskbar notifications* New messages are displayed in a pop-up window in the taskbar. Example:  • *Message box* New notifications are displayed in a pop-up window in the center of the screen. The window can be closed by clicking on the button *OK* or by pressing the [Enter] key. Example: 
Log level	Controls which events for troubleshooting are recorded in the log file. Enter the log level for the log file. • *DISABLED* Event logging has been switched off completely. • The log levels *ALWAYS*, *INFO*, *DEBUG*, *TRACE* in the aforementioned order represent an enhanced logging, while *ALWAYS* corresponds to a minimum logging and *TRACE* to the maximum logging possible. The log file is located in your Windows user directory under *\AppData \Roaming\ASC\CLIENTcommand*. In the log file, all events of the configured log level are logged.
Language	Here, you configure the language of the user interface.

6.2.1.3 Hotkey options

Here, you can see which hotkeys can be used and adjust the settings if required.

By using the hotkeys you can control the most important functions for the recording control via the keyboard.

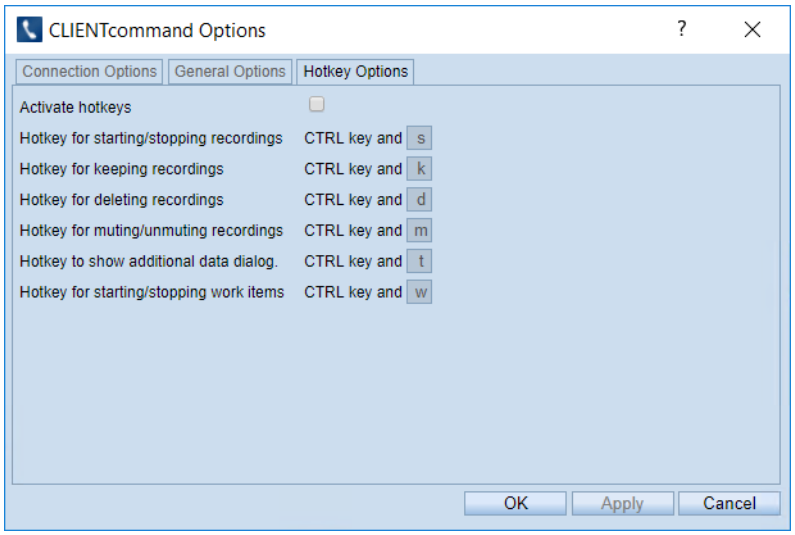


Fig. 10: Hotkey options

1. To activate the functions of the hotkeys, click on the check box next to *Activate hotkeys*.
   ☑ = Hotkeys are activated.
   ☐ = Hotkeys are deactivated.
2. To change the settings of the hotkeys, click on the corresponding entry field and enter the letter which is supposed to be used for the functions.

6.3 Notifications

CLIENT*command* offers the possibility to display notifications which have been generated by the recording system.

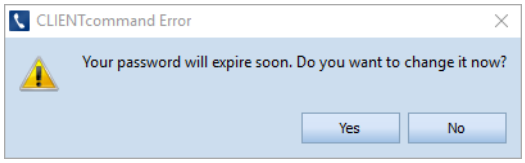


Fig. 11: Notification (example)

Depending on the type of notification, different buttons may be available which enable users to react to the displayed notification, e. g. by making a yes-no decision and thus closing the window.

Further notifications are available in the Portal.

To have notifications displayed, the administrator of the tenant has to activate the option *Notifications* in the allowed configurable settings of the client in the application System Configuration.

6.4 Recording control

CLIENT*command* offers 3 different functions for recording control:

- Start or stop recording
- Keep or delete recording
- Mute or unmute recording

These functions are only available during the running call.

You have 2 options to execute these functions:

1. Open the context menu of the current icon in system tray and select the respective menu item.

2. Enter the appropriate hotkey via the keyboard.

During the running call the following functions are also available:

- *Add Additional Data*, see chapter "Add additional data", p. 16
- *Start Coaching Advisor Sessions*, see chapter "Create coaching advisor session", p. 17

6.5 Add additional data

During the call you have the possibility to add additional data to the call. Depending on the configuration of the settings in the Recording Planner module, it is possible to open the window to add additional data for a certain period of time even after the call is over. Additionally, you can enter a comment for the call.

Which additional data can be selected depends on the additional data that has been made available to users by the system administrator or by the administrator of the tenant in the configuration of the application CLIENT*command*.

If configured accordingly in the CLIENT*command* settings and in the chapter "General options", p. 12, a window to enter additional data opens automatically when a call starts. Otherwise, you can open the window to add additional data by means of the context menu.

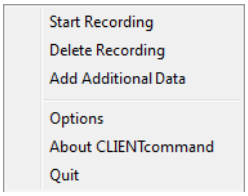


Fig. 12: Add additional data

1. To add additional data to a call, open the context menu by right-clicking on the program icon CLIENT*command* in the system tray.
2. Select the menu item *Add Additional Data*.
3. Enter your information into the entry field of the respective additional date.

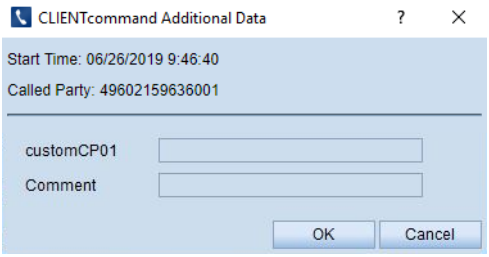


Fig. 13: Add additional data

4. To save the entries, click on the button *OK*.
   To discard the entries and cancel the process, click on the button *Cancel*.

You can add several additional data to a call.

Already existing additional data can be changed here. The former value will be overwritten and replaced with the new value which is then saved.

In the entry field *Comment*, you can enter a comment for the call.

During the configuration of the application CLIENT*command*, the system administrator decides which additional data is supposed to be available to users of CLIENT*command* later on. Depending on the settings in the additional data configuration for the application CLIENT*command*, different graphic elements such as text input fields, check boxes, selection boxes or categories to structure the additional data will be available. For more information about the configuration of the additional data refer to the administration manual for tenants *System Configuration - Configuration CLIENTcommand*.

See also

General options [▶ 12]

6.6 Create coaching advisor session

This function is only available for users who have the function right *Coaching Advisor*.

The following steps have to be implemented by a coaching advisor.

Coaching advisor sessions allow simulating call scenarios between 2 participants and recording them as exemplary sessions. These sessions are subsequently made available in the Coaching Advisor module of the application INSPIRATION*neo*.

For information about the Coaching Advisor module refer to the user manual *INSPIRATIONneo E-learning module*.

✓ One of the call participants is an agent and has the function right *Coaching Advisor*.

✓ The second call participant is neither agent nor coaching advisor.

✓ The phone connection between the call participants has already been established.

1. Open the context menu by right-clicking on the program icon CLIENT*command* in the system tray.
2. Select the menu item *Start Coaching Advisor Session*.

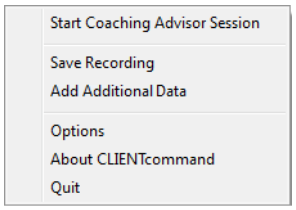


Fig. 14: Start Coaching Advisor Session

3. Make the call which is supposed to be recorded as coaching advisor session.
4. Open the context menu again at the end of the call.
5. Select the menu item *Stop Coaching Advisor Session*.

⇨ The recorded call is saved as coaching advisor session and can be made available as a coaching advisor session in INSPIRATION*neo*.

6.7 Show conversation details

During a conversation you have the possibility to show details of the conversation in a separate window.

1. Open the context menu by right-clicking on the program icon CLIENT*command* in the system tray.
2. Select the menu item *Show Conversation Details*.

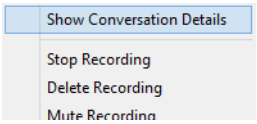


Fig. 15: Show conversation details

⇨ The window containing the conversation details appears.

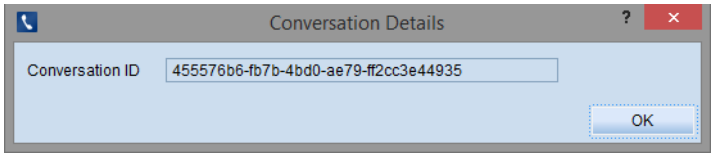


Fig. 16: Conversation Details

3. Click on the button *OK* to close the window.

ⓘ The menu item *Show Conversation Details* is only displayed if it has been activated in the options, see chapter "General options", p. 12.

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Glossary

App server

Application server or web server. In the system architectures: the server on which the Enterprise Core and the GlassFish software have been installed.

SSO

Single Sign On; Simplified login mode. After a one-off authentication at one workplace users will be able to use all services and applications that they have been authorized for from this workplace. They do not have to authenticate for the individual applications again.