

EPIC Integration



Administration manual for system providers

6/3/2022

Product line Neo, version 7.x

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

EVOIP^{neo}

EVOLUTION^{neo} / XXL / eco

EVO^{flex} (country-specific)

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2 Introduction

This manual describes the configuration of the Neo software in connection with the EPIC application.

Several customers from the healthcare sector use the EPIC health software for managing patients and processing credit card information. This requires being able to mute and unmute the recording.

Recording control of the Neo software allows muting and unmuting the recording of conversations.

This recording solution can only be used in combination with a PBX.

The function *Free Seating* is not available with this recording solution.

3 Licenses

The following application license must be installed.

License name	Number
PHONE ^{app} universal for recording control per system	1 per recording system
PHONE ^{app} unregistered	1 per concurrent recording

Tab. 1: Licenses of ASC

4 Preconditions for configuration:

4 Preconditions for configuration:

The following preliminary steps are required:

- *The Neo recording software must have been installed.*
- *The licenses must have been installed.*
- *The EPIC application must have been installed and configured.*

5 Overview install and configure product



The following configuration has to be carried out as system administrator.

1. Copy WAR files from the directory
ISO-Image\files\EPIC
save them in the following path so that they are deployed on Glassfish
C:\Program Files (x86)\ASC\ASC Product
Suite\glassfish5\glassfish\domains\enterprisecore\autodeploy
2. Configure Neo recording software
3. Servers > Usage > Recording Control / Activate monitoring
4. Configure PBX > activate PHONEapp configuration, enter PBX identifier
5. PHONEapp module > activate PHONEapp and enter URL
6. Configure integration



The following configuration has to be carried out as the administrator of the tenant.

7. Employees module > Create agent for the extension
8. Recording Planner > Compliance > activate API control

6 Deploy WAR files


6 Deploy WAR files

1. Copy the WAR files from directory
ISO-Image\files\EPIC
to the following path so that they are deployed on Glassfish
C:\Program Files (x86)\ASC\ASC Product
Suite\glassfish5\glassfish\domains\enterprisecore\autodeploy

7

Create recording architecture

Create a recording architecture of the type *All-in-one Basic Recording*.

1. To create a new recording architecture, click on the icon  (*Create*) in the toolbar of the main view.

⇒ The window *New Recording Architecture* appears.

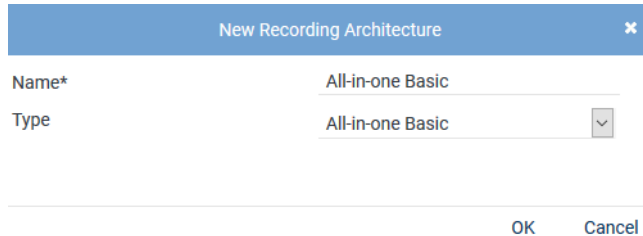



Fig. 1: Create recording architecture - All-in-one Basic Recording

2. Enter a name for the recording architecture type.
3. From the drop-down list *Type*, select the recording architecture type *All-in-one Basic Recording*.
NOTICE! Only the supported recording architecture types are displayed in the drop-down list.
4. Click on the button *OK*.
⇒ The entries now appear in the detail view.





7.1

Add integration type

1. Click on the icon  (*Add*) in the toolbar of the list *Integration Type*.
2. From the list of available integration types, select the integration type *Universal passive* and click on the button *Add*.
⇒ The name of the integration type appears in the list of the detail view.

7.2

Assign server

1. Click on the tab *Server Assignment* to assign a recording server to the recording architecture.
2. Click on the button  next to the entry field *Server*.
3. Select the respective server.
4. Click on the button *Add*.
⇒ The name of the server appears in the detail view.
5. Activate the check boxes in front of the recording variants that you would like to use this server for.
6. Click on the button *Save*.
7. Select the recording architecture in the main view so that the icon  (*Activate*) in the toolbar becomes active.
8. Click on the icon  (*Activate*) to activate the recording architecture.
⇒ In the column *Active*, the icon  (*Active*) appears.



The recording architecture must have been activated so that the integration can be configured.

8

Configure server

Each server in your network on which the Neo software has been installed is recognized automatically as a server of the recording system and displayed in the Servers module. In the Servers module, you can configure the purpose of the servers of your recording system.

1. Select the menu item *Setup > Servers* in the navigation bar.

⇒ The following window appears:

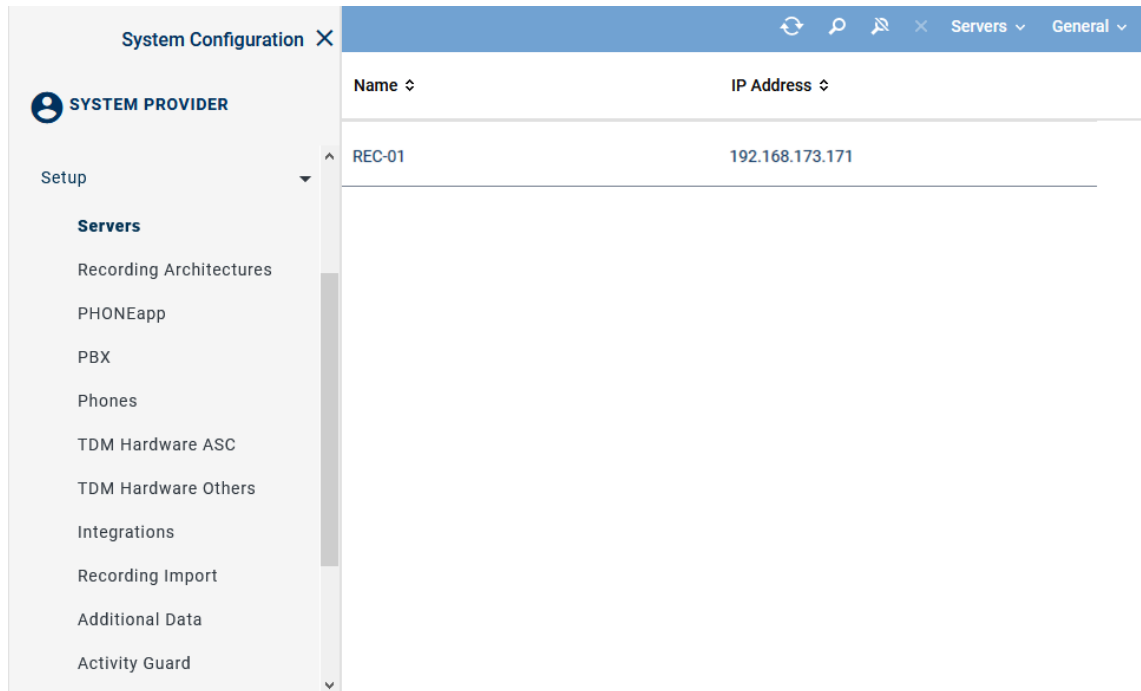


Fig. 2: Servers - main view

2. Select the respective server in the main view.
3. Click on the tab *Usage*.

Group field API Server

1. Open the group field *API Server*.

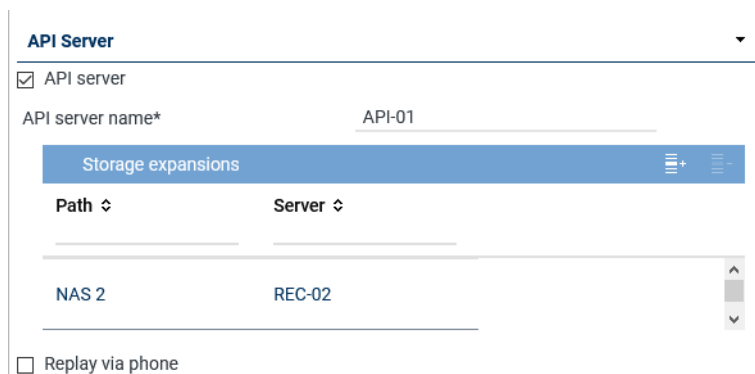


Fig. 3: Group field API Server

The ASC API Server offers the interface for the client applications to communicate with the Neo system.

Furthermore, the ASC API Server is responsible for replay by means of the web applications. Not until the ASC API Server has started, can the replay server be activated and the corresponding ASC API Server assigned for replay in the web applications.

2. Configure the following parameters:

Parameter	Value/Description
<i>API server</i>	Activate the check box to start the ASC API Server.
<i>API server name</i>	Enter the name with which the server is supposed to be displayed in the system. The display name can be selected arbitrarily and serves as alias only.

Group field Recording Control/Key Management

1. Open the group field *Recording Control/Key Management*.

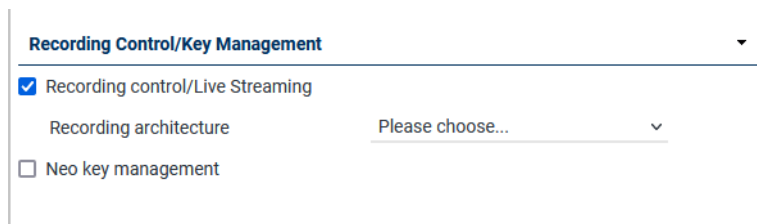


Fig. 4: Group field Recording Control/Key Management

2. Configure the following parameters:

Parameter	Value/Description
<i>Recording control/Monitoring</i>	<p>Activate the check box for recording control via the API interface of the Neo recording software in combination with the EPIC application. The function is only available if a recording architecture has been configured and activated.</p> <ul style="list-style-type: none"> • Recording architecture From the drop-down list, select the recording architecture via which you would like to control the recording. The recording architecture is only displayed when it has been activated.

Tab. 2: Configure recording control/key management

3. Click on the button *Save* in the detail view to apply the entries.

9 Configure PBX module

In the PBX module, you must configure the following settings:

- *Configure PBX*
 - *Activate PHONEapp* configuration
1. Select the menu item *Setup > PBX* in the navigation bar.
 - ⇒ The following window appears:

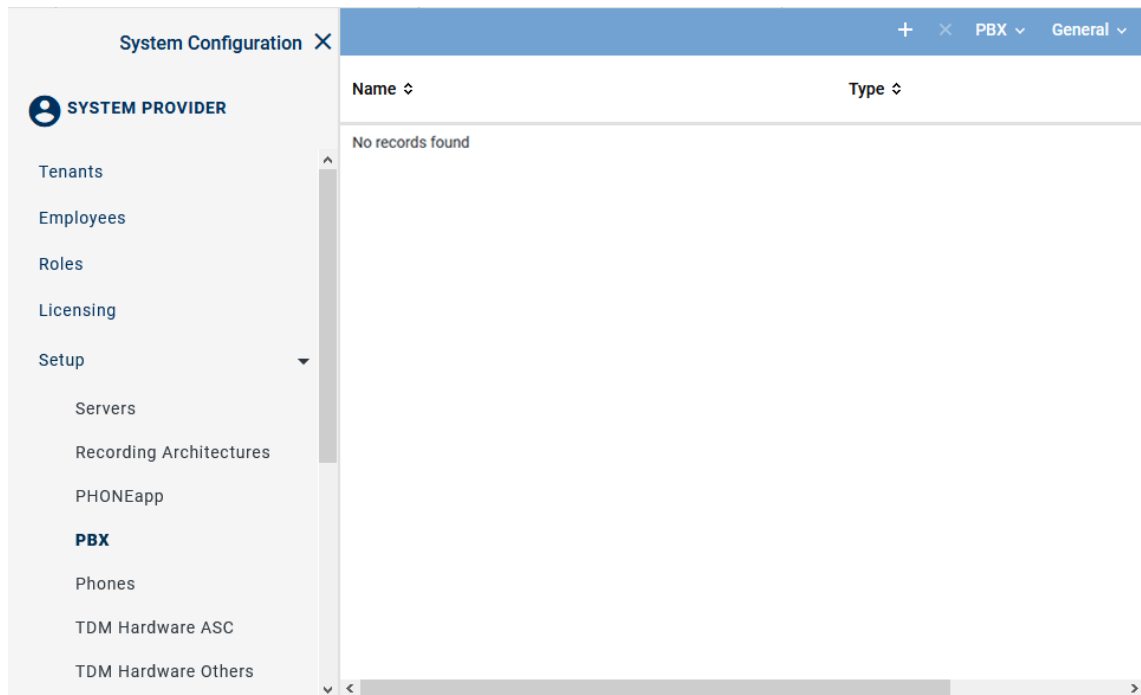



Fig. 5: PBX module - main view

9.1 Create new PBX

1. Click on the icon  (*Create*) in the toolbar of the main view of the PBX module.
 - ⇒ In the detail view, the tab *Details* appears.

×

< Details* PHONEapp Configuration Web Service >

Name* Universal

PBX type* Universal VoIP v

Maximum length of extensions 4 v

Country code
☒ Select from list
United States (1) v
☐ Enter manually

Area code* 6021

Net code* 5963

Non Phone IPs

No records found

Add Delete

IPs to be Ignored

No records found

Add Delete

MACs to be Ignored

No records found

Add Delete

Save

Reset

Fig. 6: Create new PBX - tab Details

2. Enter the following parameters in the detail view:

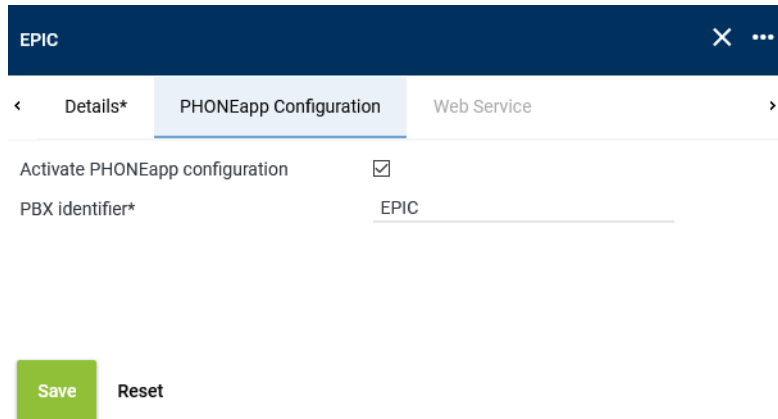
Parameter	Value/Description
<i>Name</i>	Enter the name for the PBX.
<i>PBX type</i>	Select the PBX type <i>Universal VoIP</i> from the drop-down list.
<i>Maximum length of the extensions</i>	Enter the number of digits of the extensions, e. g. 4.
<i>Country code</i>	Select the option to select the country code: <ul style="list-style-type: none"> <i>Select from list</i> Select the country identifier with the corresponding country code from the drop-down list. <i>Enter manually</i> If the corresponding country code is not available in the drop-down list, enter it manually displayed in 3 digits, e. g. for Sri Lanka <i>094</i>.
<i>Area code</i>	Enter the area code without the preceding 0, e. g. 6021.
<i>Net code</i>	Enter the net code, e. g. 495484. Do not enter an extension here.

Tab. 3: Create PBX

3. To save the settings, click on the button *Save*.
To discard the settings, click on the button *Reset*.

9.2 Tab PHONEapp Configuration

1. Click on the tab PHONEapp Configuration.



EPIC

< Details* **PHONEapp Configuration** Web Service >

Activate PHONEapp configuration ☒

PBX identifier* EPIC

Save Reset

Fig. 7: Activate PHONEapp configuration

2. Enter the following parameters:

<i>Activate PHONE<u>app</u> configuration</i>	Tick the check box to activate the PHONE <u>app</u> . Not until the PHONE <u>app</u> has been activated here, can you carry out the following configuration in the PHONEapp module and in the Phones module.
<i>PBX identifier</i>	Enter the name <i>EPIC</i> as identifier.

3. To save the settings, click on the button *Save*.
To discard the settings, click on the button *Reset*.

10 Configure PHONEapp

In the PHONEapp module, you can configure the default settings for phone applications and configure phone types.

1. In the navigation bar, select the menu item *Setup > .PHONEapp*.
2. Select the category *Default settings* in the main view.
3. Configure the following parameters in the group field *General*:

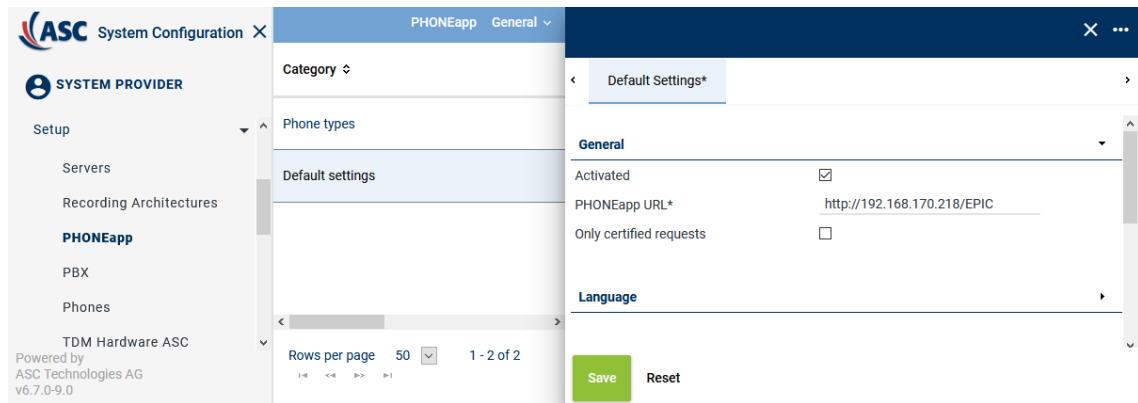


Fig. 8: PHONEapp module - Category Default settings - group field General

• <i>Activated</i>	Activate the check box to be able to use external control.
• <i>PHONEapp URL</i>	Enter the URL which allows calling up the <u>PHONEapp</u> , http://<Server-IP>/EPICPhoneappProxy-1.5.0/ws.
• <i>Only certified requests</i>	This function is not available for EPIC.

4. To save the settings, click on the button *Save*.
To discard the settings, click on the button *Reset*.

11 Activate basic http authentication

To activate "Basic http authentication" for access to the EPIC interface, you must create a configuration file.

1. To do so, change to the installation directory in the Windows Explorer:
%asc_install_path%\data\EnterpriseCore
2. Create a file with the Editor.
3. Enter the following content:

```
[EPICProxy]
requireAuthentication = true
```

4. Save the file under the name *EPICPhoneappProxy.configuration*.

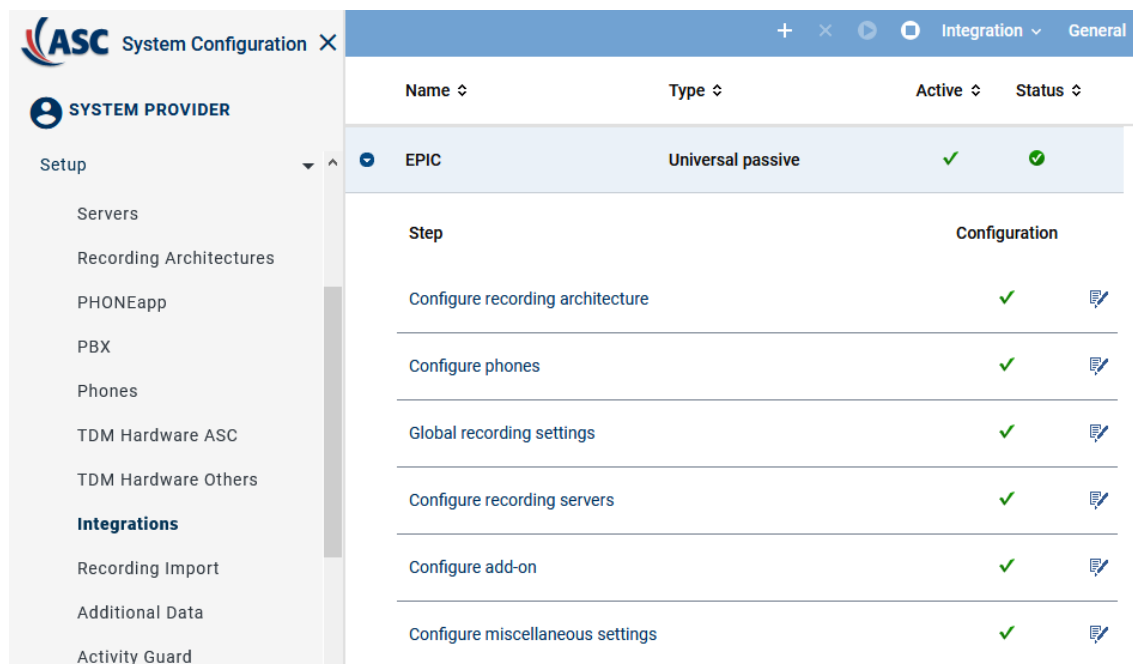
Access to the EPIC interface are authenticated by means of the user of the tenant's administrator.

12 Create integration

In the Integrations module, the PBX-related recording settings are configured.

You first have to create and activate a recording architecture to be able to create a integration and to assign it here.

1. In the navigation bar, select the menu item *Setup > Integrations*.
2. Create a new integration on basis of Universal passive.
3. Assign the created, activated recording architecture.
4. Carry out the displayed configuration steps.



The screenshot shows the ASC System Configuration window with the 'Integrations' module selected in the left sidebar. The main panel displays the configuration for the 'EPIC' integration, which is of type 'Universal passive'. The integration is active and has a status of 'OK'. Below this, a table lists the configuration steps and their status.

Name	Type	Active	Status
EPIC	Universal passive	✓	✓


Step	Configuration
Configure recording architecture	✓
Configure phones	✓
Global recording settings	✓
Configure recording servers	✓
Configure add-on	✓
Configure miscellaneous settings	✓

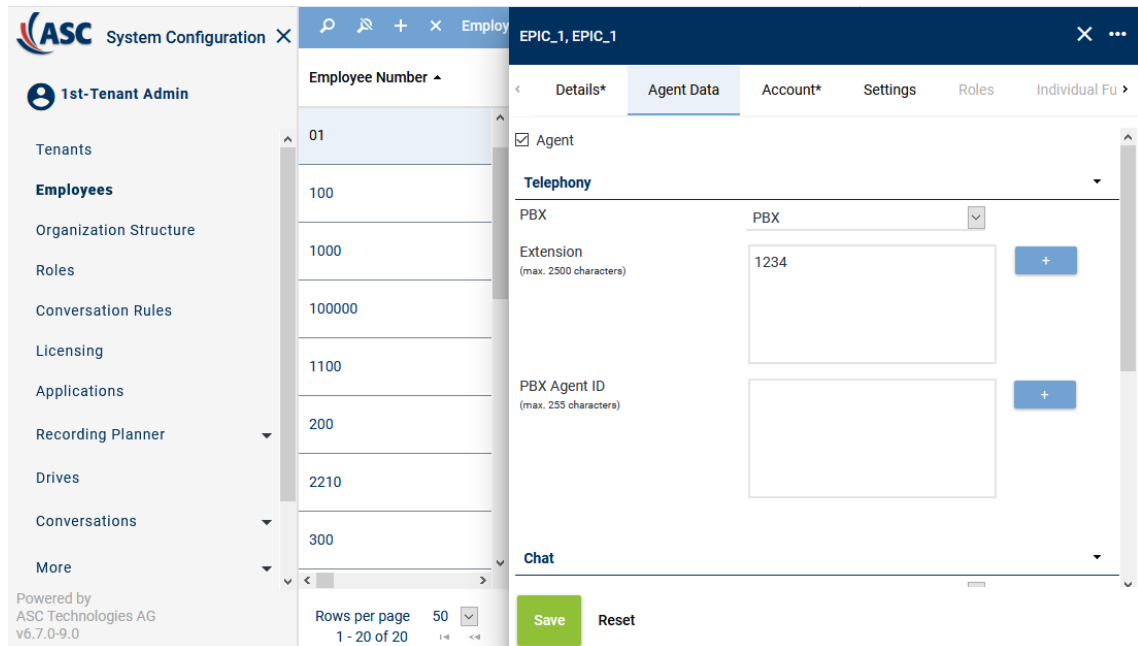
Fig. 9: Integrations module - Configure integration for EPIC

5. Activate the integration.



The following configuration has to be carried out as the administrator of the tenant.

1. Log in to the application System Configuration as system administrator of the tenant (e. g. *1st-tenant-admin*).
2. Select the menu item *Employees* in the navigation bar.
3. Click on the icon  (Create) in the toolbar.
4. Enter the personal data of the employee in the tab *Details*.
5. Click on the tab *Agent Data* to configure the extension.



The screenshot shows the ASC System Configuration interface. On the left is a navigation menu with options: Tenants, Employees (selected), Organization Structure, Roles, Conversation Rules, Licensing, Applications, Recording Planner, Drives, Conversations, and More. The main area displays the 'Agent Data' tab for 'EPIC_1, EPIC_1'. It includes a table of 'Employee Number' with values: 01, 100, 1000, 100000, 1100, 200, 2210, and 300. The 'Agent' checkbox is checked. Under the 'Telephony' section, there are fields for 'PBX' (set to PBX), 'Extension' (1234), and 'PBX Agent ID'. There are also 'Save' and 'Reset' buttons at the bottom right.

Fig. 10: Employees module - Tab Agent Data - Configure extension

6. Click on the button **Save** to save the entries.



The following configuration has to be carried out as the administrator of the tenant.

In the Recording Planner module, you can configure recording plans for automated recording or external recording control.

1. Select the menu item *Recording Planner > Compliance*.

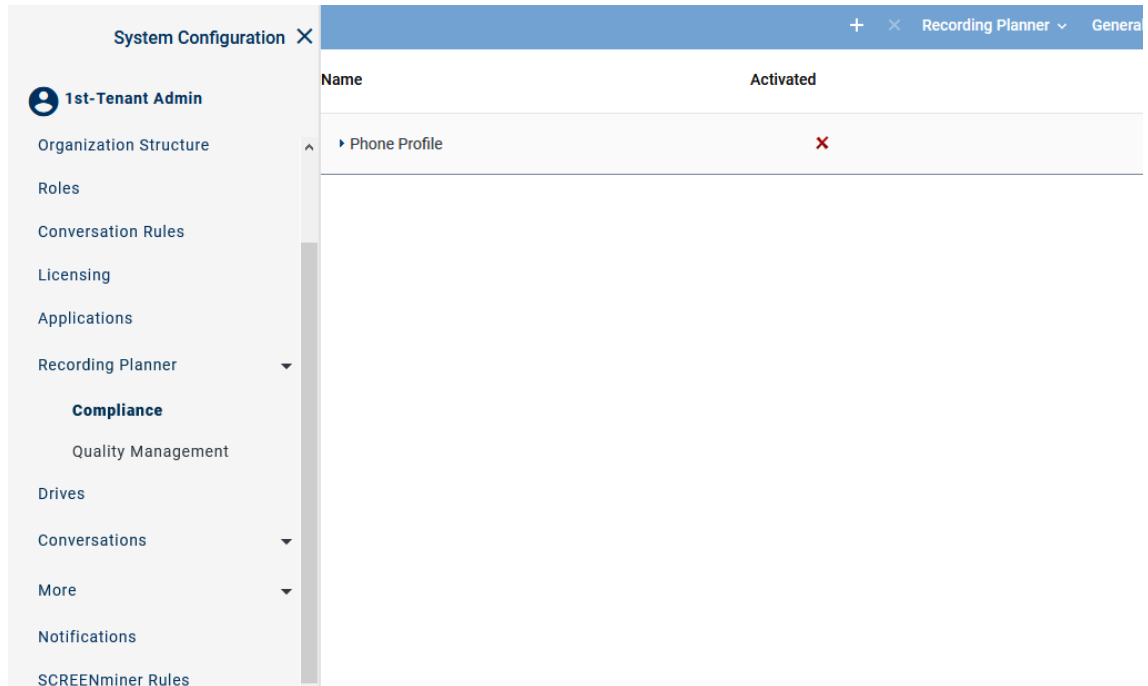


Fig. 11: Recording Planner - main view

2. By default, one phone profile has been preconfigured and activated.
3. Deactivate the profile to be able to edit it.
4. Edit the default action node and configure the required parameters.
5. Select the menu item *Recording Planner > Create/Edit Action Node Configuration > Record > Default*.
 - ⇒ The detail view displays the parameters for the action node which is used for all new profiles.

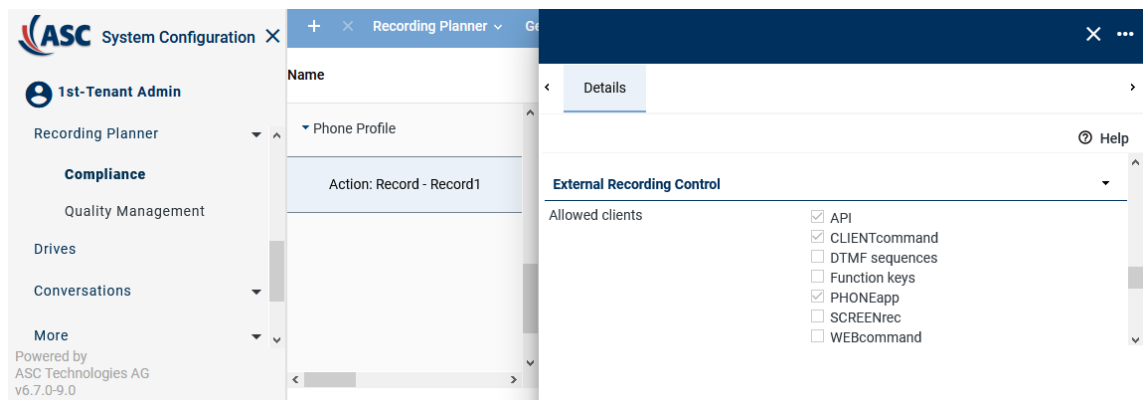


Fig. 12: Enter parameters for action node

Group field External Recording Control

1. Open the group field *External Recording Control*.

- In the group field *Allowed clients*, activate at least the parameters:

<i>Allowed clients:</i>	Activate the options:
	<ul style="list-style-type: none"> • <i>API</i> • <i>PHONEapp</i>

Group field Allowed Actions

- All recording options are supported; select the respective options.

<i>Start recordings</i>	Allows manually starting the recording for all clients activated under <i>External Recording Control</i> .
<i>Stop recordings</i>	Allows manually stopping the recording for all clients activated under <i>External Recording Control</i> .
<i>Stopped recordings</i>	Select the option that is meant to be executed if no external decision is made regarding stopped recordings. <input checked="" type="radio"/> <i>Keep, if not externally deleted</i>
<i>Keep recordings</i>	Allows keeping recording for all clients activated under <i>External Recording Control</i> . Deletion can be prevented by means of external recording control by making the explicit decision to keep the recording.
<i>Delete recordings</i>	With external recording control, it is always the last decision that counts: If agents send a keep command by means of external recording control, they can change their decision by sending a delete command.
<i>Suppress recordings</i>	Allows suppressing the audio recording of a running conversations without having to stop it.
<i>Unsuppress recordings</i>	Allows undoing the suppression of the audio recording of a running conversations without having to stop it.

- Click on the button *Save*.
- In the detail view, activate the check box *Activated* so that the profile is used for recording.



Before activating the new default action node, assign it to every profile that is supposed to be used for external recording control.



For information about the Recording Planner module refer to the administration manual for tenants *Recording Planner*.

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