VRManager™

Manual

12/2009 4510-0003-6.5 Update1

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CHAPTER 1

Installing VRManager

VRManager performs recorded file management — indexing, converting, tracking, playback, reporting, and other critical functions for call center customers who would like to keep recorded files for administrative, legal, or quality assurance purposes.

Requirements

Install VRManager on a *different system* than the one on which the MAXCS ACC/ACM server is installed.

If you are upgrading, you can upgrade from VRManager 5.2 and above only.

VRManager requires the following:

- VRManager License installed at the MAXCS ACC/ACM system. (You can verify the licenses when you run MaxAdministrator by selecting **License > License Information**.)
- MAX Communication Server (MAXCS) ACC/ACM (6.5 Update1or higher)
- Pentium IV 2 GHz (minimum) CPU
- 40 GB available hard drive disk space
- 1 GB RAM
- IDE RAID 0-1 (minimum) hard drive
- NIC
- Microsoft Windows 2003 SP2
- Java 2 Runtime Environment (SE v1.4.2) (VRManager installation program will install this)
- MDAC (Microsoft Data Access Components) 2.8 or higher version
- Microsoft Internet Explorer 6.0 or later. A minimum installation is sufficient, and Internet Explorer does not have to be the default browser.

Pre-Setup Required for MSDE 2000

The MSDE 2000 database is installed with the VRManager **Setup** program. MSDE 2000 requires certain settings in order to install successfully. Before running **Setup**, please ensure the following.

- File and print sharing must be active on your operating system. To verify:
  1. In Control Panel, double-click **Network Connections**.
  2. On the Advanced menu, click **Advanced Settings**.
  3. On the **Adaptors and Bindings** page, ensure that **File and Print Sharing for Microsoft Networks** is selected.
- Make sure that **Silently succeed** is selected in the local security options named below.
  1. In Control Panel, double-click **Administrative Tools**.
  2. Double-click **Local Security Policy**.
  3. Expand **Local Policies**.
  4. Select **Security Options**.
  5. Ensure that the following option in the right pane is set to **Silently succeed** before installing:
     - On Windows 2003: **Devices: Unsigned driver installation behavior**.
- Problems can occur if you use a Terminal Services or Remote Desktop connection to attempt to install a new instance of MSDE 2000. If problems are encountered, restart the VRManager **Setup** program from the local computer without using Terminal Services or Remote Desktop.

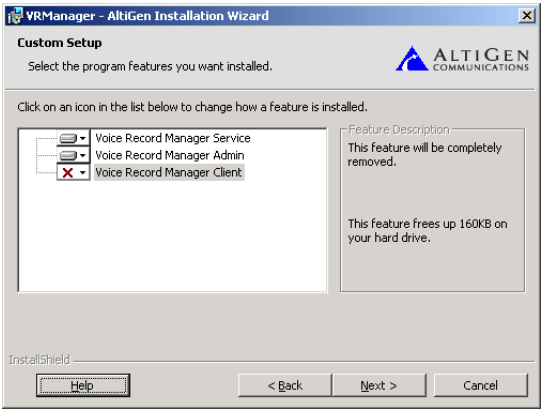
Installing VRManager Service

To install VRManager service, you will use one of two methods: **Fresh install** and **Upgrade from previous version**.

Fresh Install

If you do a fresh install, the installation program installs MSDE 2000 and Jservice Loader on your PC automatically.

1. Run the **Setup** program and follow the installation instructions as they appear on the screen.



2. In the **Custom Setup** screen, choose to install **Voice Record Manager Service** and **Voice Record Manager Admin**. If you plan to use VRM Client at this system, also select **Voice Record Manager Client**. Then click **Next**.

After installation, you can run VRManager Admin from **Start > Programs > VRManager > VRM Admin**.

Upgrade from Previous Version

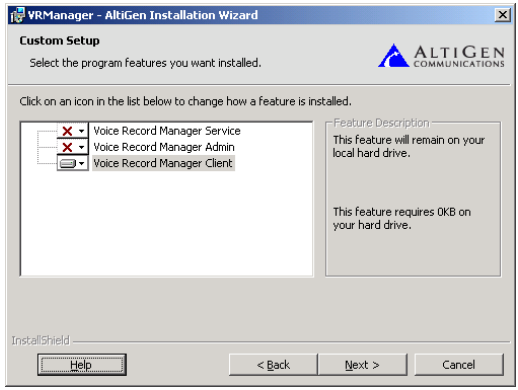
To upgrade from VRManager 5.2 or above:

1. Stop the VRM service.
2. Run the **Setup** program.
3. Follow the installation instructions as they appear on the screen.
   In the Custom Setup screen, choose to install **Voice Record Manager Service** and **Voice Record Manager Admin**. If you plan to use VRManager Client at this system, also select **Voice Record Manager Client**.

Installing VRManager for a Client

To install VRManager for a client system:

1. Run the **Setup** program and follow the installation instructions as they appear on the screen.



2. In the **Custom Setup** screen, choose to install **Voice Record Manager Client** or **Voice Record Manager Admin.**

   If you install VR Admin on a client system, some **Browse** buttons will not appear.

After installation, you can run VRManager Client from **Start > Programs > VRManager > VRM Admin or VRM Client**.

Note: If VRManager is run behind a firewall, open TCP port 10040. (VRManager may not work behind NAT.)

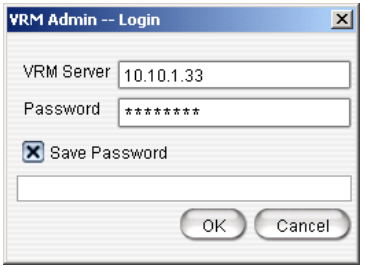
Setting Access Privileges

- The directory of centralized records in the MAXCS ACC/ACM server must be shared fully with the VRManager user. This user not only requires privilege to read/write to the shared folder, but also read/write to the local folder.
- The destination of the backup location must be valid and accessible in the local computer or remote computer. The user must have full privilege to read/write to the shared and local folders.
- In Windows 2003 Server, the default setting of the OS security is very robust, so caution should be used when setting users' access privileges.

Using VRManager Admin

To run VRManager Admin:

1. Choose **Start > Programs > VRManager > VRM Admin**. The VRM Admin Login dialog box opens.



2. Enter the **VRM Server** IP address or server name and **Password**. (Default password is 22222.)
3. Check the **Save Password** checkbox if you want VRM Admin to remember the password the next time the program is run.
4. Click **OK**.

Note: Each Windows user has his own VRM Admin login setting.

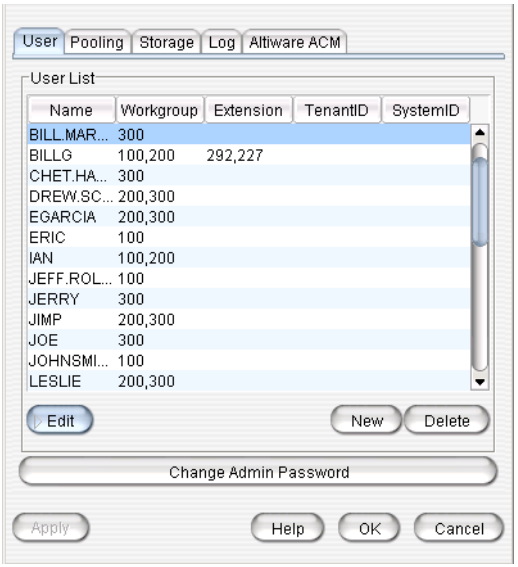
VRM Admin Window

VRM Admin has five configuration pages:

- User
- Pooling
- Storage
- Log
- AltiWare ACC/ACM

User Page

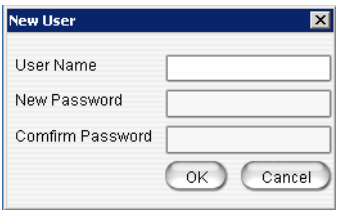
The VRM **User** page displays the **User List** for VRManager clients and shows the workgroups, extensions, and systems that the user can query. From this page, an administrator can add, edit, and delete users; limit their queries to certain workgroups, extensions, and systems; change user passwords; and change the VRM Admin password.



Adding Users

To add a new VRManager Client user:

1. Click the **New** button.



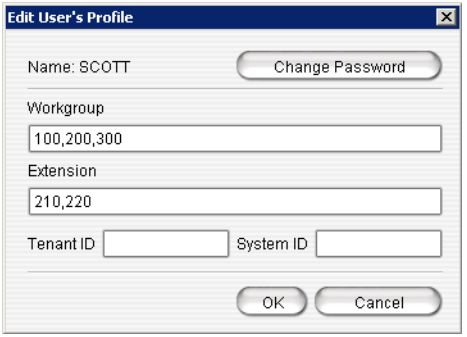
In the New User dialog box, enter a **User Name**, **Password** and **Password Confirmation**. (The account name is NOT case-sensitive. For example, VRManager does not differentiate between the name “John” and “john” in a user account name.)

2. Click **OK**.
   The new user is displayed in the **User List** field.
3. To limit this user’s queries to certain workgroups, extensions, and systems, select the new user and click the **Edit** button. Enter the workgroup numbers in the **Workgroup** text box, the extension numbers in the **Extension** text box, and system IDs in the **System ID** text box. Separate entries with a comma. (To allow the user to query *all* workgroups or all extensions, leave those text boxes empty.)

Editing a User

To edit a user:

1. Select the user on the User page and click the **Edit** button.



2. Make your changes, and click **OK**.

Changing the Admin Password

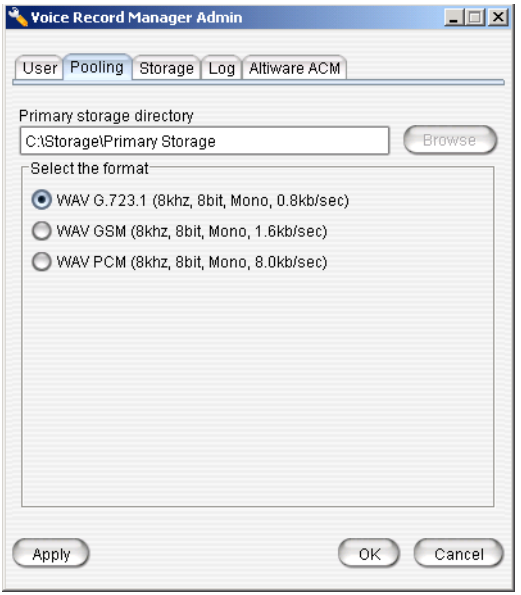
To change the VRM Admin password:

1. Click the **Change Admin Password** button. The Change Admin Password dialog box opens.

2. Enter the information in the **Old Password**, **New Password** and **Confirm Password** fields.
3. Click **OK**.

Pooling Page

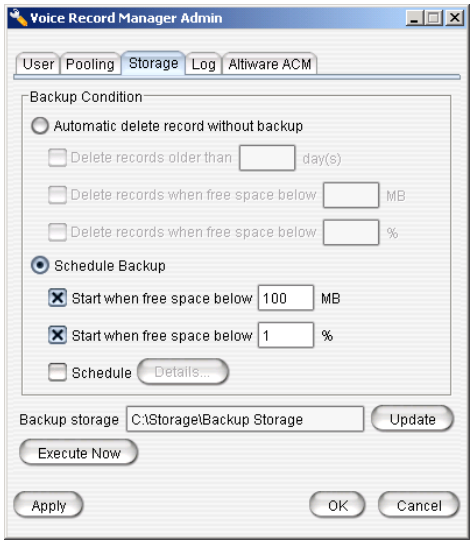
The pooling page lets you set the location of the primary storage directory. Use the **Browse** button to select the location. VRM Admin pools the newly recorded files from the MAXCS server, and saves them into the primary storage directory in the .wav format you select here (G.723.1, GSM, PCM).



Note: The **Browse** button is not available if VRM Admin is running on a different server than VRM Service.

Storage Page

On the **Storage** page you can set backup conditions for the storage of voice records.



Select one of the following conditions:

- **Automatic delete record without backup** - if selected, VRM Admin will delete records without backing them up. To set additional automatic delete parameters, select any of the following options:

  — Delete records older than x day(s)

  — Delete records when free space below x MB

  — Delete records when free space below x %

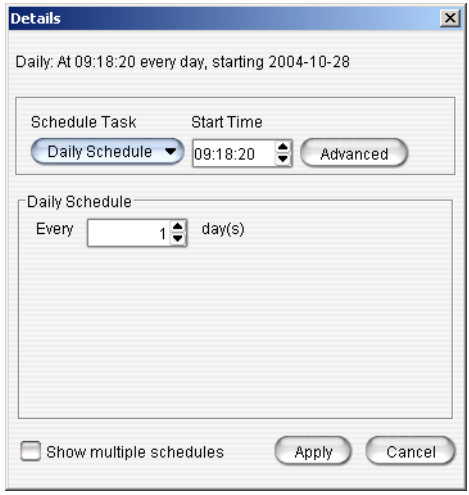
- **Schedule Backup** - if selected, VRM Admin will automatically back up, then delete records. To specify backup parameters, select any of the following options:

  — Start when free space below x MB

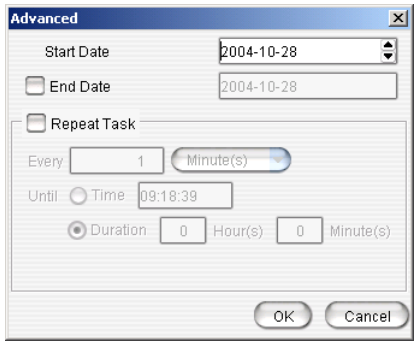
  — Start when free space below x %

  Schedule - for detailed settings, click the **Details** button. In the Details dialog box, use the drop-down list to select the **Schedule Task** (Daily/Weekly/Monthly), use the up/down arrows to select the **Start Time** and to define the **Daily Schedule** (every x days),

Weekly Schedule (any day in every x weeks), or **Monthly Schedule** (any date in every month), then click **Apply**.

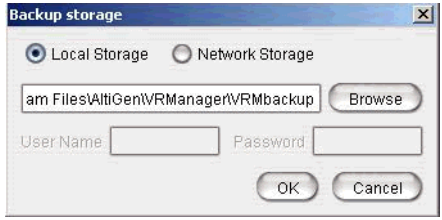


Use the **Advanced** button to set a **Start Date** and **End Date**; or check the **Repeat Task** checkbox to set up parameters for a continuous schedule, then click **OK**.



Check the **Show multiple schedules** checkbox to display and set up more than one schedule. You can add new multiple schedules, then modify them.

- **Backup Storage** - enter the location for the backup storage, or use the Update button to select a new location. If you click the **Update** button, the following dialog box opens:



You can enter a local path or network path. The destination of the backup location must be valid and accessible in the local computer or remote computer. The user must have full privilege to read/write to the shared and local folders. Also, VRManager supports backup to DVD/RW; simply enter the path for the DVD/RW location.

Note: The **Browse** button is not available if VRM Admin is running on a different server than VRM Service.

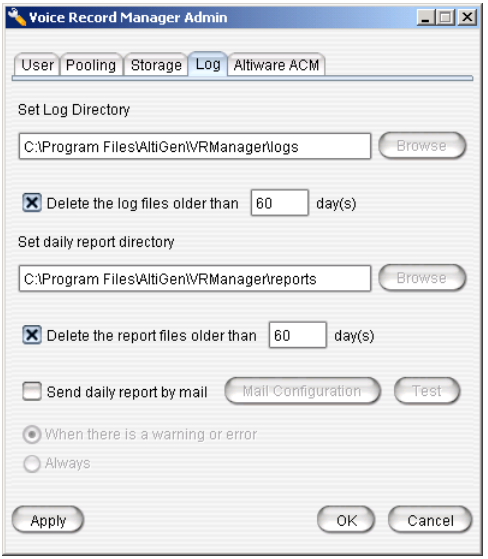
- **Execute Now button** - clicking this button will begin backup of records.

When you have finished setting backup parameters, click **Apply** or **OK**.

Log Page

A log file for the VRM server is created each day named “yyyymmdd.log” (for example, 20040404.log). A daily report for the VRM server is also created “yyymmdd.rpt” (for example, 20040404.rpt). The Log window allows an administrator to set the directory paths for VRM log and report.

Note: The **Browse** buttons are not available if VRM Admin is running on a different server than VRM Service.



- **Set Log Directory** - use the **Browse** button or enter a path in the field to specify where you want log files to be saved; check the **Delete the log files older than x days** checkbox to delete archived log files.
- **Set Daily Report Directory** - use the **Browse** button or enter a path in the field to specify where you want daily report files to be saved; check the **Delete the log files older than x days** checkbox to delete archived daily report files.
- **Send daily report by mail** - if you check this option, VRM will send a report **When there is a warning or error** or **Always**. Use the **Mail Configuration** button to configure the recipient’s email address. Use the **Test** button to send a test email.

Click **Apply** or **OK** when finished.

AltiWare ACC or ACM Page

The **AltiWare ACC** or **ACM** page displays the MAXCS ACC or ACM servers and centralized recording directories that VRManager will access. Here, administrators can add or delete MAXCS ACC/ACM servers, and specify the centralized recording directory for the specified MAXCS ACC/ACM server.

Adding Servers

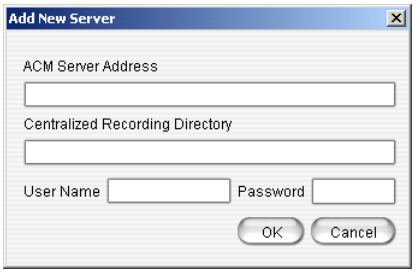
To add a new MAXCS ACC/ACM server, do the following:

At the AltiServ system

1. Make sure the Centralized Storage directory is located on the local drive on the AltiServ system.
2. Share the storage directory with Full Control to a domain user or local administrator.

At the VRM Server

1. In the **AltiWare ACC** or **ACM** page of VRM Admin, click the **New** button.The Add New Server dialog box appears.



2. Enter the **MAXCS ACC** or **ACM Server IP Address**, **Centralized Recording Directory** (the Share name of the centralized recording folder) , **User Name** and **Password**. Then click **OK**. If the user account belongs to an NT domain, you must enter "NTDOMAIN;username" in the User Name edit box. If the account is local Administrator, just enter administrator.

After adding a new server, VRM Service immediately checks the MAXCS server for the **VRManager License**.

The newly added server is displayed in the **MAXCS ACC** or **ACM Server List** field.

Note: VRManager starts converting all voice recording data as soon as the MAXCS ACC/ACM Server information is added to the MAXCS ACC or ACM Server List.

Changing the Centralized Recording Directory

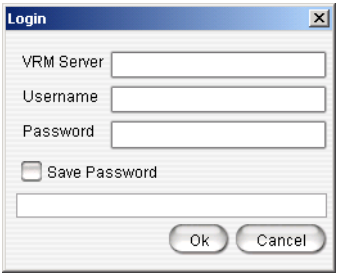
To edit a MAXCS ACC/ACM server's location for the centralized recording directory, highlight the MAXCS ACC/ACM server in the server list, then input the new location in the **Centralized Recording Directory** field.

Using VRManager Client

To run VRManager Client:

1. Choose **Start > Programs > VRManager > VRM Client**. A Login dialog box opens

.

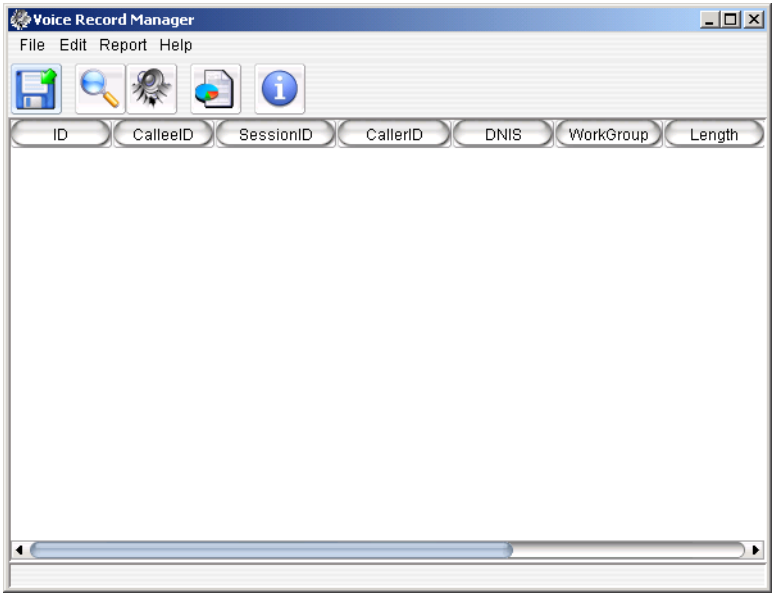


2. Enter the **VRM Server** IP address or server name, **User name** and **Password**.
3. Check the **Save Password** checkbox to have VRM Client remember the password the next time the program is run.
4. Click **OK**.

Note: Each Windows user has his own VRM Client login setting.

VRM Client Main Window

When you start VRM Client, the first window you see is the VRM Client main window.



At the top is a menu bar, and below is a quick-access toolbar. At the bottom is a scroll bar for viewing the display columns.

Note: Each Windows user has his own VRM Client display column in the main window.

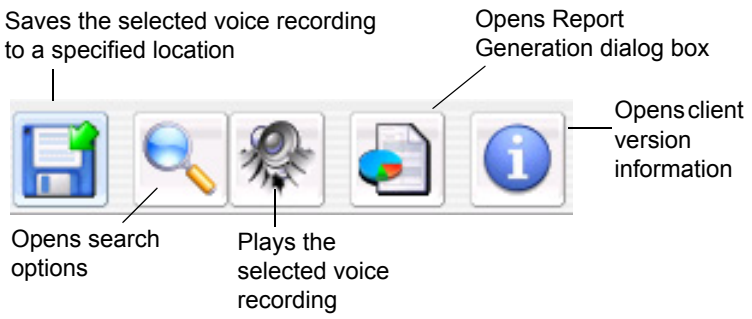
Menu Bar

Using the menus, you can perform the following functions:

- **File** – Save As, Export to File, Change Password, Exit
- **Edit** – Search, Play, Display Column, Option
- **Report** – Generate report
- **Help** – VRM Client version information

Quick Access Toolbar

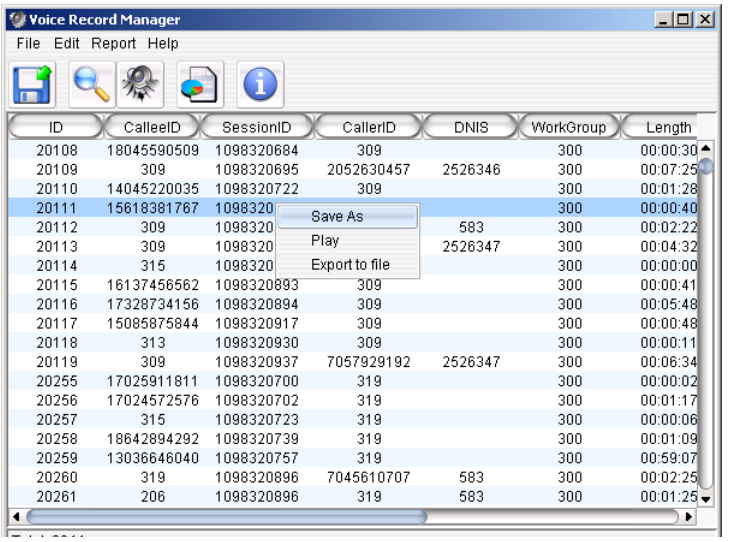
The toolbar contains buttons that are menu shortcuts:



File Menu

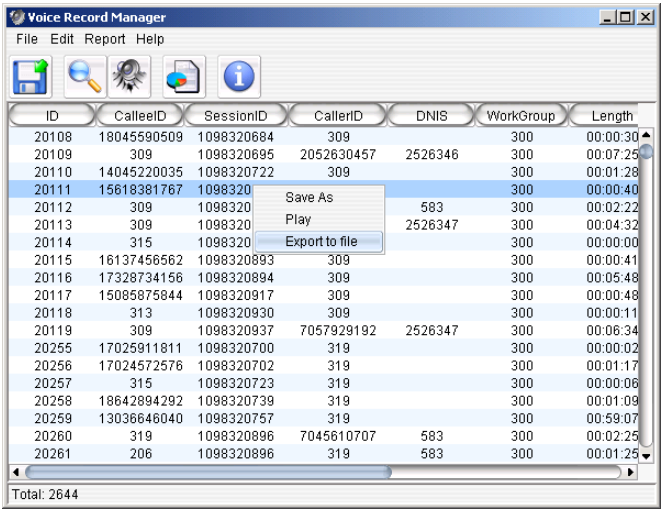
Saving Files

To save a file, click on a voice record in the main window to highlight it, and click the **Save As** button. OR, right-click on a voice record, and select **Save As**. OR, click on a voice record to highlight it, and choose **File > Save As** from the main menu.



Export to File

To export search results to a tab-separated text file (.txt), choose **File > Export To File** from the main menu, OR right-click the search results list and choose **Export To File**.



Change Password

To change your password:

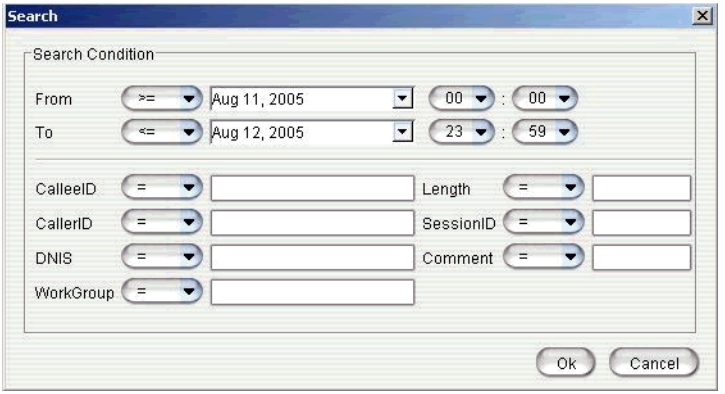
1. Choose **File > Change Password** from the main menu.
2. In the **Change User Password** dialog box, enter the necessary information in the **Old Password**, **New Password** and **Confirm Password** fields, then click **OK**.

The new password applies at the next log in.

Edit Menu

Searching Voice Records

To search voice records, choose **Edit > Search** or click the **Search** button in the toolbar. In the Search dialog box, you can search based on the following conditions:



The relational symbols for each condition include:

= (equal)
< (greater than)
> (less than)
>= (less than or equal to)
<= (greater than or equal to)
<> (not equal)
like (look for sub-string)
btwn (between)
in—searches the results in sets; for example, CallerID “In” “101 AND 102” means CallerID equals 101 or CallerID equals 102.

Notes

- The date/time format is the same as the system format of the operating system.
- Typing “OR” in upper case in the edit box means “or.”
- Typing “AND” in upper case in the edit box means “and.”
- To leave out a condition, leave the edit box empty.

- Only the **Comment** column will be editable directly from the main view window.

Searching for *All* an Extension's Voice Records

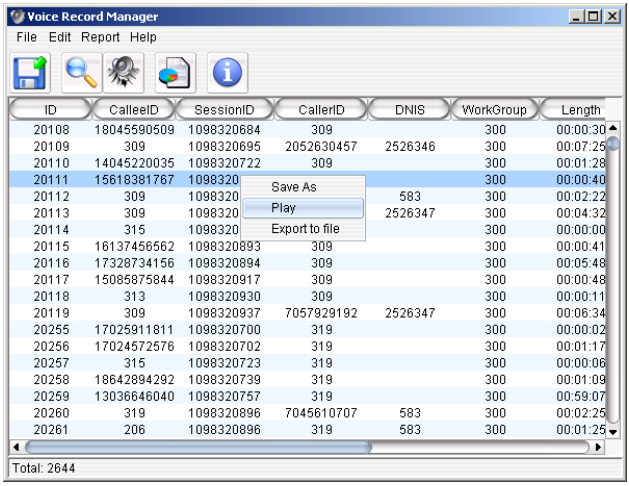
If you query a specified extension's voice records and in that query you also specify a workgroup, the query results show only the extension's voice records related to the workgroup. The results do not show non-workgroup voice records.

If you want the query results to display *all* voice records for that extension, leave the **WorkGroup** field blank.

Playing Voice Records

To play a voice record:

Click on a voice record in the main window to highlight it, and click the **Play** button. OR, right click on a voice record and select **Play**. OR, click on a voice record to highlight it, and choose **Edit > Play** from the main menu.



Note: Deleted voice files are not played.

Displaying Columns

You can select which columns you want displayed in the main view window. These are the column headers you can select from:

- ID

- Callee ID
- Session ID
- Caller ID
- DNIS
- Workgroup
- Length
- Date
- State—there are three states that a record file can be in:
  - — *Delete* - if in this state, a record cannot be played or saved.
  - — *Backup* - if in this state, you must manually put the right backup media in the path if you back up the record and remove it.
  - — *Normal* - if in this state, the file can be played or saved.
- Comment

To select columns for display:

1. Choose **Edit > Select Column**.
   The Select Column dialog box opens. The fields in the **Visible** list are displayed as columns under the VRM toolbar.

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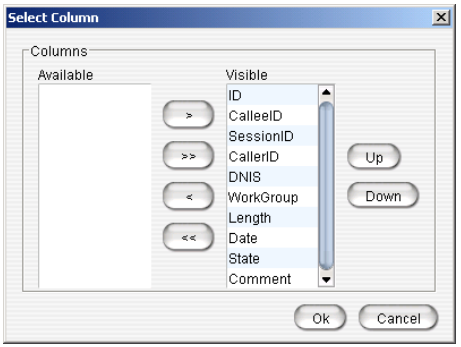


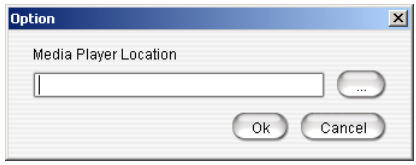
2. Use the arrow keys (< or >) to move a field from one list to the other. You can use the << or >> buttons to move the entire group of fields from one list to the other.
3. Click **OK** when finished.

Sorting

In the main view window, you can click on a specific column heading to sort records in ascending or descending order on that field. You can use the scroll bar at the bottom of the window to view all the displayed columns.

Media Player Option

VRM client plays the selected file using a media player defined by the user. If the media player is not defined, VRManager does not play the file, and instead opens the Media Player Location dialog box so you can assign a media player. You can also select the media player by going to **Edit > Option**. In the **Option** dialog box, select the Media Player Location by typing the path in the field or using the browse button (**...**), then click **OK**.

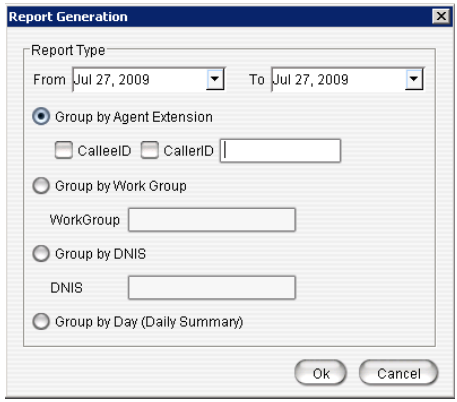


Report Menu

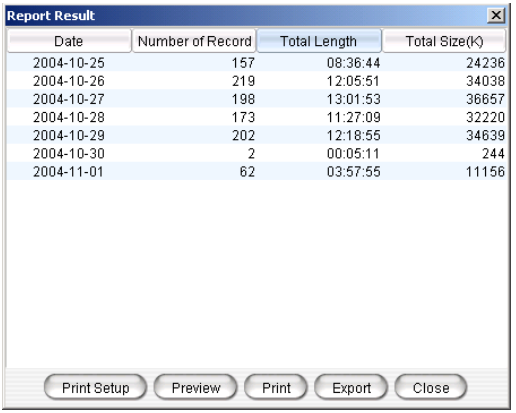
You can generate reports based on agent, workgroup, DNIS or date.

To generate a report:

1. Choose **Report** from the main menu or click the **Report** button. The Report Generation dialog box opens.



2. In the Report Generation dialog box, click the Down arrow to select From and To dates from a calendar.
3. Select one of the following format options:
   - **Group by Agent Extension**—select Callee ID or Caller ID, or both, and enter the agent's extension in the field.
   - **Group by Workgroup**—enter the workgroup number in the Workgroup field.
   - **Group by DNIS**—enter the DNIS number in the DNIS field.
   - **Group by Day** (Daily Summary)—formats report based on date period summary for each day.
4. Click **OK**.
5. VRM Client generates a separate **Report** window displaying the selected report parameters. From there, you can select **Print Setup**, **Preview**, **Print**, or **Export** (as a tab-separated text file).



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