UCENTRIK

CONNECT COMMUNICATE COLLABORATE

Collaborative Video Application

Installation & Setup Guide

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UCENTRIK WEB CALL CENTER SOLUTION BUILD INSTRUCTIONS

PREREQUISITES

Visual studio 2010, Microsoft SQL server 2008 R2, Microsoft Report Viewer 2010 Redistributable Package, Microsoft Windows Server 2003 (IIS6) or 2008 (IIS7), UCTX SDK, Ucentrik Conference Server (built separately).

STRUCTURE OF THE SOLUTION

1. **Database –** scripts to generate database
2. **Docs –** documentation and instructions related to a project
3. **Sources**

    UC_BLL – Data access business logic layer

    UC_DAL – Data access layer

    UC_DATASETS – Datasets code that is generated automatically according to database

    UC_WEB_Kiosk – kiosk code

    UC_WEB_Lib – common code that is being used both by kiosk and platform

    UC_WEB_Platform – web platform code

PRE-BUILD STEPS

1. Configure the database.
    a. Create a new empty database and run scripts "tables.sql", "proc.sql", "init_data.sql" in the database.

2. Change "connectionString" in the following config files:
    a. .. \UC_WEB_Kiosk\Web.config
    b. ..\UC_WEB_Platform\Web.config

BUILD

Open "UC_WEB.sln" solution and build UC_WEB_Kiosk, UC_WEB_Platform projects.

INSTALL AND POST-BUILD CONFIGURATION

1. Build and Publish projects UC_WEB_Kiosk and UC_WEB_Platform to some folders.
2. Install Ucentrik Web Platform and Ucentrik Kiosk to IIS on a server. Configure Platform and Kiosks as applications in some Application Pool. Make sure that this application pool is run with credentials that have read access to folders with published projects.

3. Place the UCTX cab file to a specific place on a webserver available to download. Make sure that <object> tag for ActiveX points to a place where it is located. By default ActiveX cab is in the /dirActiveX folder.
4. NOTE: If you're using the windows server 2003 and IIS6, you will need to edit web.config files for both Kiosk and Web Platform, as long as tag <system.webServer> is not supported. You need to specify modules in a tag <httpModules>:
    - **<add name="UcAuthenticationModule" type="UCENTRIK.HttpModules.UcAuthenticationModule, UCENTRIK.LIB"/>**
5. Configure reports on IIS7. In order to do that open **IIS7/Handler Mappings/Actions|Add managed handler…** and edit settings:
    - Request path: **Reserved.ReportViewerWebControl.axd**
    - Type: **Microsoft.Reporting.WebForms.HttpHandler, Microsoft.ReportViewer.WebForms, Version=9.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a**
    - Name: **Reserved-ReportViewerWebControl-axd**
6. Install Ucentrik Conference Server (see below).
7. Download and install GStreamer package from http://code.google.com/p/ossbuild/. Specify the path to \bin\gst-launch.exe utility in the Platform's web.config file.
8. Create an \AudioRecords folder in the Platform website root folder and give ApplicationPool's user full access to that folder.
9. Update Platform's web.config to specify correct email account for password retrieval (Teg <system.net>/ <mail settings>)
10. Log in to Ucentrik Web platform (UC_WEB_Platform) as administrator (admin/welcome) and open Administration->Settings to configure settings for Conference Server. Change "ServerHost", "ServerPort", "ServerPortSsl" parameters for Conference Server.
11. Make sure that specified ports are opened to TCP connections in a firewall on a server that hosts Conference Server.
12. Make sure you're logging in to Platform and Kiosk from the x86 version of Internet Explorer and you have the ucentrik.com digital signing certificate installed into trusted root certification authorities in IE on this PC.

FIRST STEPS

The default accounts are (all application default data is listed on page 11):

- Supervisor – super/welcome123
- Administrator – admin/welcome123
- Manager (Kiosk)– kiosk/welcome
- Agent1 – Agent1/welcome
- Agent2 - Agent2/welcome
- Agent3 - Agent3/welcome

1. Run UC_WEB_Kiosk and login with user (Name="kiosk", password="welcome"). Only users with "Manager" role can login to Kiosk.
2. Run UC_WEB_Platform and login with user (Name="agent1", password="welcome"). User should have "Agent" role.

3. Click “Turn on” button on UC_WEB_Platform and agent will be ready to receive calls from kiosk.
4. Select language on UC_WEB_Kiosk.
5. Click “Incidents-> Incident Queue” on UC_WEB_Platform and select calling request.
6. Test session using the text chat and send messages to kiosk and platform.

Setting up the Conference Server

Run CS service:

1. Configure CS.config.
2. Register service. Execute "..\Service Commands\reg.bat".
2. Start service. Execute "..\Service Commands\start.bat".

Settings of configuration file:
The following parameters must be set in the configuration file:

<CS_HostIP>detect</CS_HostIP> : CS detects IP interface. Admin can specify the appropriate IP address.
<CS_ThreadCount>detect</CS_ThreadCount> : CS detects ThreadCount depending upon the processors number.
Admin can set a value from 1 to 10.
<CS_Statistics_LogLevel>info</CS_Statistics_LogLevel> : Statistics log “Statistics.log”. Statistics are contain the following information: “active channels”, “avg cpu(%)”, “traffic(Kb/s)”, “packets(P/s)”, “memory/Private Bytes(Kb)”. Value can be “none”, “fatal”, “error”, “warn”, “info”, “debug”, “disable”.
`Port` : value >= 1 and <= 65536. Value can be “disable”.
`Port SSL` : value >= 1 and <= 65536. Value can be “disable”.
`Port HTTP` : value >= 1 and <= 65536. Value can be “disable”.
<IndexServer_Timer_Interval>2000</IndexServer_Timer_Interval> : Time interval(milliseconds) to update statistics to Index Server. Value can be >= 500.
`Log Level` : Common log “CS.log”. Value can be “none”, “fatal”, “error”, “warn”, “info”, “debug”.
<CS_DisplayName>CS</CS_DisplayName> : Conference Server display name.
<SSL_PrivateKey_Password>test</SSL_PrivateKey_Password> : Password that is used to encrypt private key.
<Conn_KeepAlive_Value>10000</Conn_KeepAlive_Value>: TCP connection keep alive time(milliseconds). Value can be >= 0. KeepAlive is disable if value is 0.
<CS_ServerKey>detect</CS_ServerKey> : CS is registered to Index Server and retrieves “ServerKey”. Value can be certain “ServerKey”.
<CS_ClientKey>test</CS_ClientKey> : CS receives key from client and validates it.

Audio Recordings

The audio recordings are currently accessible within the agent application in each call record (within the call history. Although the files are initially recorded and saved separately they have been merged to play back as a single MP3 file.

To integrate the audio recordings to your web portal, you can access the audio files from a predefined folder on the server (Right now, it is webdemo.ucentrik.com/AudioRecords/). The UC_LOG in the database contains values that indicate if audio records are present. The files have the same name as the conference ID, so they can find the files with the following link: http://webdemo.ucentrik.com/AudioRecords/[conf_id].mp3. There are files for Facility and Platform (agent) audio files.

There is also a stored procedure in the database that returns the URL for a given Conference ID that can be customized as necessary:

```
DECLARE @audio_link nvarchar(100)
EXECUTE [dbo].[usp_log_get_audio_link] 49,@audio_link OUTPUT
SELECT @audio_link
```

To change the email for automatic password retrieval:

Currently the email sent to users who require their user name or password is sent from ucentrik.noreply@gmail.com; this should be replaced with your own email address.

This is the section of code that must be changed to update the email address:

```
 <system.net>
   <mailSettings>
      <smtp from="ucentrik.noreply@gmail.com">
        <network host="smtp.gmail.com" port="587" userName="ucentrik.noreply@gmail.com"
password="ucentr1k" />
      </smtp>
   </mailSettings>
 </system.net>
```

Note that you will also need to specify the SMTP server, port and user credentials.

Kiosk Setup

Setting up Button Queuing

You must first setup the actual queues (groups) within the application before you can integrate the queuing into the kiosk application (as per application setup located further in this document). There is a kiosk launcher .net application that shows how to integrate the kiosk call in the desktop application. This application is available to download from the webpage http://webdemo.ucentrik.com ("kiosk launcher" link).

The following is an instruction code that demonstrates how to initiate an incident call from the webpage. In order to do that, you need to execute page “~/dirKiosk/default.aspx” with the following parameters:

skillID : id(skill_id) of skill that stores in database in table “uc_skill”.
langID : id(language_id) of language that stores in database in table “uc_language”.
groupID : index of group that stores in database. It depends on user(username and password) that log-in on kiosk.
kioskID : any text data. This is additional information about the kiosk. Data will save in table “uc_log” field “kiosk_id”.
kioskName : any text data. This is additional information about kiosk. Data will save in table “uc_log” field “kiosk_name”.
kioskLocation : any text data. This is additional information about kiosk. Data will save in table “uc_log” field “kiosk_location”.
userName : username of manager account in database. It’s the user from table “uc_user” with role “Manager”.
password : password of manager account in database. It’s the user from table “uc_user” with role “Manager”.

Example: integration.htm

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
   <title>Kiosk Integration</title>
   <script type="text/javascript">
      function PopupCenter(pageURL, title, w, h) {
         var left = (screen.width / 2) - (w / 2);
         var top = (screen.height / 2) - (h / 2);
         var targetWin = window.open(pageURL, title, 'toolbar=no, location=no, directories=no,
status=no, menubar=no, scrollbars=no, resizable=yes, copyhistory=no, width=' + w + ', height=' +
h + ', top=' + top + ', left=' + left);
      }
   </script>
```

```
</head>
<body>
   <input type="button"
          value="Execute Kiosk"

onclick="javascript:PopupCenter('http://localhost/UC_WEB_Kiosk_VS/dirKiosk/default.aspx?skil
lID=1&langID=1&groupID=1&kioskID=33&kioskName=Central&kioskLocation=Ukraine&userNa
me=kiosk&password=welcome', 'Title', 500, 500)" />
</body>
</html>
```

Kiosk Monitor (this is used to make proactive calls)

The proactive call functionality is demonstrated in the Facility page in the agent interface; once an agent logged is to a the platform he can review all kiosks that are available online, do a remote screen view to a kiosk or initiate a call from that kiosk if he decides that that kiosk requires assistance. Note that the kiosk must be logged into the monitor application to post statuses and be available for agent to make proactive calls.

The code that demonstrates how to embed proactive call capability into your custom application is the KioskLauncher project written as a desktop application in C#. Some key points of the implementation:

- You need to update the dictionary of parameters that are being passed as a part of the call so they reflect the current state of kiosk
- In order to launch application you need to set the path to /entry.asmx page on your server

Application Setup

The application has different types of user accounts with different levels of permissions:

- **Agent** accounts can take and wrap-up calls and edit their own personal details (email address, change their password etc.)
- **Supervisor** accounts can create agent and caller accounts; manage skills, languages and groups to setup queuing, basically setting up the accounts required to make and receive calls; the supervisor can also run reports
- **Administrator** accounts have full access to all application settings (e.g. conference server) and can create any type of user account (including administrator and supervisor accounts) and enter settings
- There is overlap of the permissions of the supervisor and administrator accounts, you could do all the application setup with administrator account, but the supervisor level account is available in case you want to assign someone like a customer service/call center manager the creation of accounts, and setting up queuing but do not want to give them access to the application settings or enable them to create additional supervisor or admin accounts - it is really just a safeguard to ensure that nothing integral to the operation of the application and service could be mistakenly changed
- **Manager & User** - these are caller accounts; neither of these type of accounts will login to the online application (the manager accounts must be created to setup a kiosk account)

Default Data (Accounts, Skills, Languages and Groups)

Users	Type	User Name	First Name	Last Name	Password	Time Zone	Skills	Languages	Groups	Email	Phone
Kiosk	Manager	Kiosk	Demo	Kiosk	welcome	EST - default	n/a	n/a	Support, Training & Demo	Blank	Blank
Agent1	User	Agent1	Agent	One	welcome	EST - default	Support	English, French, Spanish	Support	Blank	Blank
Agent2	User	Agent2	Agent	Two	welcome	EST - default	Training	English, French, Spanish	Training	Blank	Blank
Agent3	User	Agent3	Agent	Three	welcome	EST - default	Demo	English, French, Spanish	Demo	Blank	Blank
Supervisor	Supervisor	Super	Supervisor	One	Welcome123	EST - default	n/a	n/a n/a	n/a	Blank	Blank
Administrator	Administrator	Admin	Administrator	One	Welcome123	EST - default	n/a		n/a	Blank	Blank

Groups		
Support	Training	Demo

Skills		
Support	Training	Demo

Languages		
English	French	Spanish

Administrator Functionality

Overview

The administrator's account is intended to setup the service by specifying the conference server settings; the admin account is essentially the master account as it can create all types of other user accounts.

Logging in to the Platform

To open and login to the platform:

1. Navigate to the video application platform website.
2. Enter your User Name.
3. Enter your Password.
4. Click the 'LOGIN' button.

Once you're logged in, you will see the User panel - with the list of all system accounts - by default (the Home link). To view other panels, click on any of the links to move to a different panel. The list of users can be filtered by the All drop-down button and selecting Agent/Manager or User. Accounts can be directly added, edited and deleted from this panel.

Note: there is a Log Off link beside your user name at the top right.

Retrieving a Forgotten User Name or Password

To retrieve your user name or password while logging in:

1. Navigate to the video application platform website.
2. Click the Forgot your username or password links.
3. Enter the email address associated with your account.
4. Click the 'RETRIEVE PASSWORD' button.
5. Your username and password will be sent to you via email.

Editing the Account Details and Password

To Change the Admin Password:

1. Click on the Account >My Account links.
2. Enter a new password in the Password field, and then enter the same password in the Confirm Password field.
3. Click SAVE.

You can also adjust your time zone in My Account if necessary; it is set to Eastern Standard Time by default.

Adjusting Server Settings in the Application

Note: only the Administrator has access to these settings.

CS (Conference Server) Tab

- DifFrameCount - this is a codec-specific parameter that specifies number of key frames (1/XXX) for remote screensharing; leave settings as they are
- **Server - enter Conference server info (IP:port:port)**
- TimerSpan – Period in ms to acquire screen picture for remote screensharing. Leave it as-is.
- UrlIndex - This is reserved for future use; not utilized right now

Platform Tab

- **Change the AudioUploadTargetPageURL, so it points to your appropriate URL**
- All other parameters can stay as is

Kiosk Tab

- Leave all settings as they are

Supervisor Functionality

Overview

The supervisor's account is intended to manage the service by setting up the agent and kiosk accounts and viewing usage reports.

Logging in to the Platform

To open and login to the platform:

1. Navigate to the video application platform website.
2. Enter your User Name.
3. Enter your Password.
4. Click the 'LOGIN' button.

Once you're logged in, you will see the User panel - with the list of all system accounts - by default (the Home link). To view other panels, click on any of the links to move to a different panel. The list of users can be filtered by the All drop-down button and selecting Agent/Manager or User. Accounts can be directly added, edited and deleted from this panel.

Retrieving a Forgotten User Name or Password

To retrieve your user name or password while logging in:

1. Navigate to the video application platform website.
2. Click the Forgot your username or password links.
3. Enter the email address associated with your account.
4. Click the 'RETRIEVE PASSWORD' button.
5. Your username and password will be sent to you via email.

Editing the Account Details and Password

To Change Your Password:

1. Click on the My Account link.
2. Enter a new password in the Password field, and then enter the same password in the Confirm Password field.
3. Click SAVE.

You can also adjust your time zone in My Account if necessary; it is set to Eastern Standard Time by default.

Changing other Account Details:

You can edit your first name, last name, email address and phone number in the in My Profile page by editing the information directly in the fields and clicking SAVE.

Agent and Queue Setup - Overview

Agents are the only type of platform account that can take calls; both CSR's and Auditors will require agent accounts. After creating an agent's account you must assign the agent skills and languages and then place them in the appropriate group (queue) for them to take calls.

Kiosk records are created as facilities, and they must also be place in the appropriate groups to enable calls.

Note: you will have to add the relevant groups, skills, languages to the application before you can add those groups, skills and languages to the agent and kiosk records.

Creating Agent Accounts

1. Login as the supervisor (user name: super; password: welcome)
2. Click the Users link (under User Setup).
3. Click the 'Add' button.
4. Enter the required fields:
    - Username
    - Role (select Agent)
    - First name
    - Last name
    - Password
    - TimeZone (will default to EST)
5. Click the 'SAVE' button.

Adding "Skills" to the Application and to Agents

1. Login as the supervisor (user name: super; password: welcome)
2. Click the Skills link (under User Setup).
3. Click the 'Add' button.
4. Enter the Skill name.
5. Click the 'SAVE' button.
6. You can add agents at this point, by clicking the Click here to manage agents link.
7. Click Add beside the name of any agent(s) that you'd like to add to that skillset.
8. Click the 'BACK' button.
9. Click the 'SAVE' button.

Adding "Languages" to the Application and to Agents

1. Login as the supervisor (user name: super; password: welcome)

2. Click the Languages link (under User Setup).
3. Click the 'Add' button.
4. Enter the Language name.
5. Click the 'SAVE' button.
6. You can add agents at this point, by clicking the Click here to manage agents link.
7. Click Add beside the name of any agent(s) that you'd like to add to that language.
8. Click the 'BACK' button.
9. Click the 'SAVE' button.

Adding a new Kiosk (Facility)

Adding new kiosks is a two-step process; first you must add the user (a manager) for the facility and then the facility itself.

1. Login as the supervisor (user name: super; password: welcome).
2. Click the Users link (under User Setup).
3. Click the 'Add' button.
4. Enter the required fields:
   - Username (for example: Manager1)
   - Role (select Manager)
   - First name
   - Last name
   - Password
   - TimeZone (will default to EST)
5. Click the 'SAVE' button.
6. Click the Facilities link (under User Setup).
7. Click the 'Add' button.
8. Enter the required fields:
   - Username (for example: Unit123)
   - Address
   - Phone
   - User (select kiosk)
   - Password
9. Click the 'SAVE' button.

Creating Groups (for queuing)

1. Login as the supervisor (user name: super; password: welcome)
2. Click the Groups link (under User Setup).
3. Click the 'Add' button.
4. Enter the Group name.
5. Click the 'SAVE' button.
6. You can add agents at this point, by clicking the Click here to manage agents link.

7. Click Add beside the name of any agent(s) that you'd like to add to that group.
8. Click the 'BACK' button.
9. Click Add beside the name of any kiosk/facilities(s) that you'd like to add to that group.
10. Click the 'BACK' button.
11. Click the 'SAVE' button.

Notes: you can add multiple skills and languages to each agent and assign them to multiple groups. Once you've created a skill, language or group, you can add and remove agents at any time.

You can do this in the Skills/Languages/Groups windows by clicking the Edit link and then add/remove links accordingly.

You can also edit agent accounts - including adding skills, languages and assigning them to groups - in the Agents window (the Agents link), although in that case you're working with one agent account at a time so if you want to manage the setup of multiple agents at one time, it's faster to use the skills, languages and groups windows, but if you're just editing one agent's record then it's faster to access everything through that agent's record.

Viewing Calls and Reports

The management section enables the supervisor to view the list of all calls (note that you can also view contacts, surveys and questions, but those are not applicable for you).

You can sort calls by Status (e.g. in-progress, closed) and by Agent with the drop-down menus and you can sort by kiosk (facility), group, agent, User ID etc.

You can also see the list of calls by running the Call Details report.

The report can be grouped by:

- Agent
- Group
- Facility (Kiosk)
- Status
- Date

And set for a specific time period. Once you've generated the report (through View Report), you can navigate through the pages, adjust the view percentage, search for specific criteria, print the report and export the report to MS Word, Excel or as a PDF.