

User Guide

# IPFX Monitoring Client

Version 9



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## Introduction

### Typographical Conventions

Before you start using this guide, it is important to understand the terms and typographical conventions used in the documentation.

For more information on specialized terms used in the documentation, see the Glossary at the end of this document.

The following kinds of formatting in the text identify special information.

Formatting convention	Type of Information
Triangular Bullet(➤)	Step-by-step procedures. You can follow these instructions to complete a specific task.
<b>Special Bold</b>	Items you must select, such as menu options, command buttons, or items in a list.
<i>Emphasis</i>	Use to emphasize the importance of a point or for variable expressions such as parameters.
CAPITALS	Names of keys on the keyboard. for example, SHIFT, CTRL, or ALT.
KEY+KEY	Key combinations for which the user must press and hold down one key and then press another, for example, CTRL+P, or ALT+F4.
<b>Keyword</b>	An IPFX platform, product or component.
	IPFX Module or product licensing required
	A specific User Level Feature is required
	IPFX Director Feature
	IPFX for Cisco Unified Communications Manager

The following lists terms used in this document.

Term	Description
<b>IPFX Clients</b>	Includes <b>IPFX Console, IPFX Explorer, IPFX for Outlook, IPFX Toolbar,</b>
<b>IPFX Electron/Web Clients</b>	<b>IPFX Contact Centre Client and IPFX Web Console</b>
<b>IPFX Product Suites</b>	 <b>IPFX Empower or IPFX Connect</b>
<b>CUCM</b>	Cisco Unified CallManager
<b>MSTeams</b>	Microsoft Teams (TM)

Images used in this document are based on a configuration enabled for all features, so may differ from what you see.

Items that are based on specific modules or User Level Features are highlighted as such.

Press **F1** within the **IPFX Client** for access to help or press the  **Help** icon.

## IPFX Recording Components

The IPFX Recording Suite comprises of the following components:

- ▶ **Voice Capture Service** - captures RTP streams and can be installed on user PCs, purpose built appliances or on the Call Recording Server, in addition to the IPFX Server.
- ▶ **Screen Capture Service** - captures active or all screens (configuration dependent) of a user with this flag set, who has their IPFX Client open and then takes a call (usually a queue call). Screens are only captured during the call.
- ▶ **Call Recording Server** - management component that retrieves the captured RTP streams, matches these recordings with the call records and stores them appropriately for later playback.
- ▶ **Screen Recording Server** - management component that retrieves captured video, associates it with a call record and possibly voice recording, then storing it for playback at another time.
- ▶ **Web Streamer** - streams the voice and video to the Recording Playback client.
- ▶ **Monitoring Client** - a client that allows a Supervisor or Administrator to record up to 10 agent calls and monitor an active call. These recordings are stored on the Supervisor/Administrator PC as .wav formatted files. Requires Voice Capture.
- ▶ **Recording Playback Client** - a web based client for playback of voice and video managed by the Call and Screen Recording Servers

## What is the Monitoring Client?

This client application allows an **IPFX Supervisor** or **IPFX Administrator** to transparently monitor and dynamically record calls to (or from) any agent on the network, where the IPFX Voice Capture Service (CR\_Capture) is installed and capturing the corresponding RTP traffic.

This client allows the recording of up to 10 of these calls simultaneously, storing them on the hard drive of the local PC.

## Monitoring Client Requirements

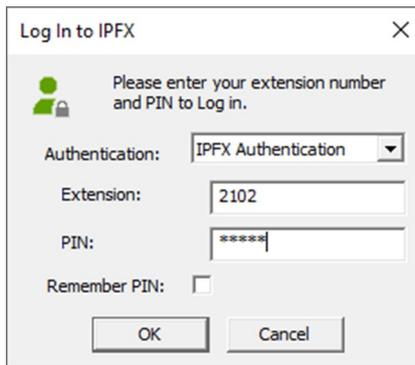
What is required:

- Monitoring Groups need to be setup for the **IPFX Supervisor** or **IPFX Administrator**, to control which extensions they are able to monitor and record.
- Voice Capture needs to be installed on the Supervisor/Administrator PC, via the **IPFX Remote Application** installer
- **IPFX Monitoring Client** needs to be selected as an option and installed via the **IPFX Clients** installer.
- The switch port for the IPFX Supervisor or IPFX Administrator must be configured to mirror the switch ports of all users they are to monitor, to capture the voice traffic.
- USB Headset for recording playback or monitoring of active calls

## Starting the IPFX Monitoring Client

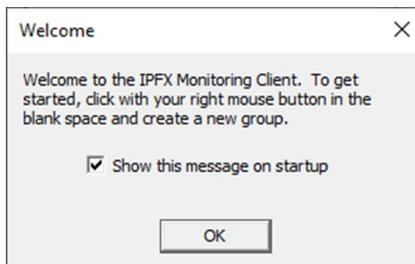
Click on the  **IPFX Monitoring Client** on your Windows Start menu.

You will be presented with 'Log in to IPFX' prompt.



You can opt to save your PIN, or if enabled you can use Windows Authentication.

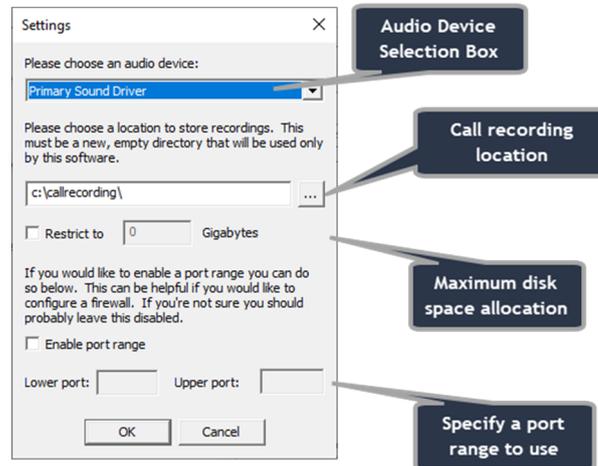
You will then be presented with a Welcome screen with instructions on what to do when you first run the IPFX Monitoring Client:



You can uncheck the 'Show this message on startup', to not have this display each time you login to the Monitoring client.

## Monitoring Client Settings

Accessed via the right mouse click, context menu in the Monitoring Client window, Settings:



Allows you to set the following:

<b>Audio Device Selection Box</b>	Allows you to select which device to use for monitoring and recording playback purposes.
<b>Recording Location</b>	Select the location to store the recordings captured via the IPFX Monitoring Client. The default location is C:\CallRecordings\
<b>Disk Space Allocation</b>	Checking this Restrict To checkbox and selecting a Gigabyte limit, will prevent the IPFX Monitoring Client from using more than this allocation for recording storage. You will be notified when this limit has been reached, so that you can archive or delete older recordings as required.
<b>Port Range Settings</b>	Defines a specific port range for the IPFX Monitoring client to use. This port range must lie within the 1025-65000 range and must span at least 20 ports. This is not enabled by default and should be discussed with your Network Administrator if you opt to set a range.

## Using the Monitoring Client

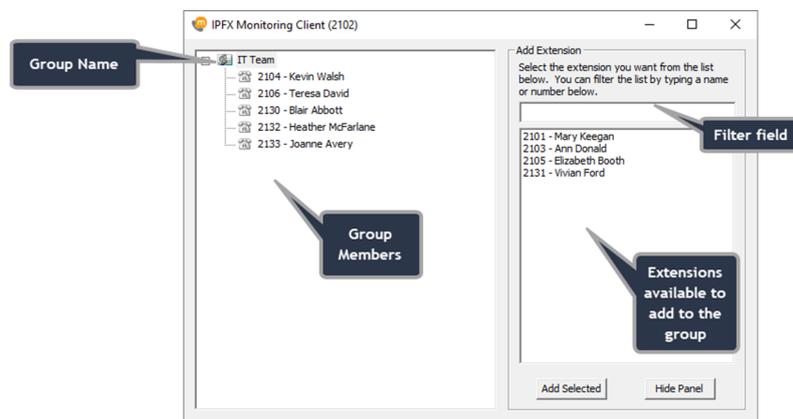
This section describes how to perform various tasks using the **IPFX Monitoring Client**.

You can resize the client to suit your own requirements.

Closing is as simple as clicking the X in the top right hand corner.

## Monitoring Client Overview

The interface at a glance:



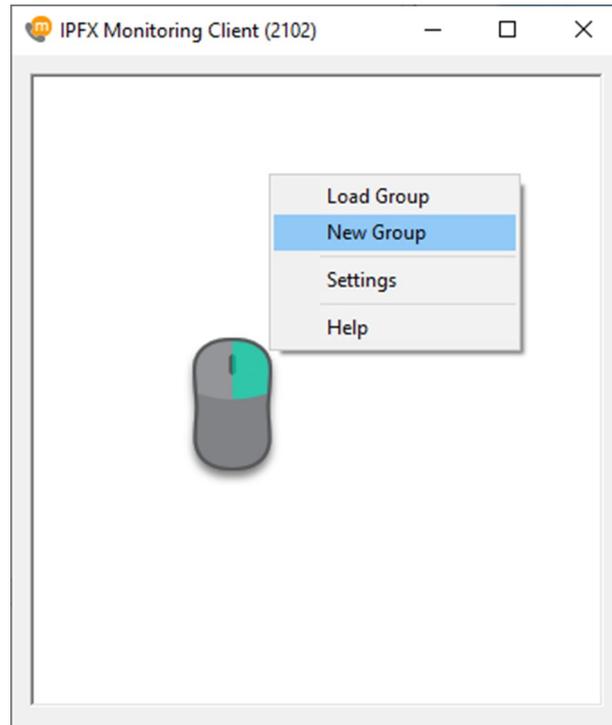
<b>Group Name</b>	An easily identifiable name. You can have multiple groups and you can save these for future use.
<b>Group Members</b>	The list of users that have been added to the selected group for monitoring purposes.
<b>Filter Field</b>	For larger lists, typing in this field will filter the selection to make it easier to add extensions to the group
<b>Add Selected</b>	Adds the selected users to the group. You can also double click to add.
<b>Hide Panel</b>	Once you have added your users, you can hide the Add Extension panel by clicking on this button

## Working with Groups

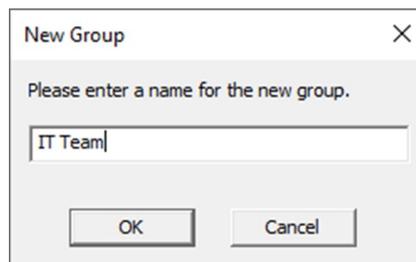
Groups provide a handy way of organising your monitored extensions.

### Creating a Group

To create a group, right mouse click in the IPFX Monitoring Client Window and select New Group.



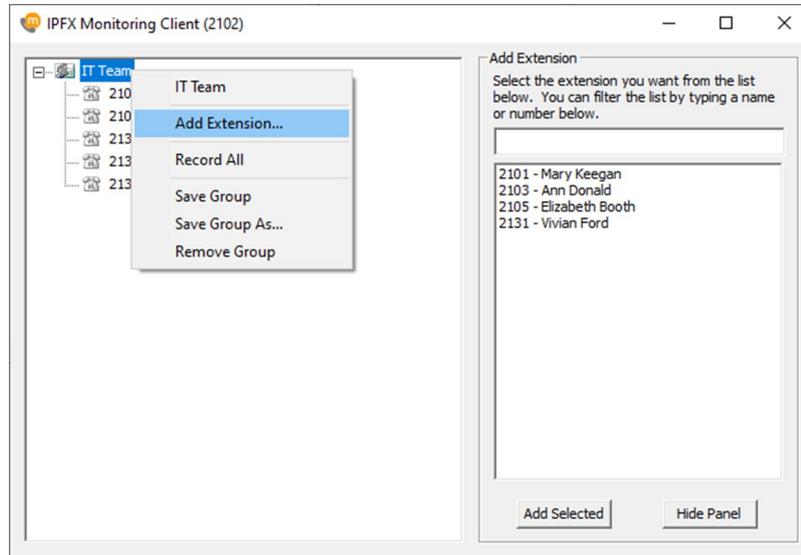
Enter an appropriate group name when prompted:



Click OK to save.

Select New Extensions from the right mouse click Context Menu of this new Group. This will present a list of all extensions you are enabled under Monitoring Groups to monitor or record.

Select the extensions you want to add, by highlighting and clicking on the Add selected or double click each required extension.



Hide the select extensions pane once you have added all your members, by clicking the Hide Panel button.

You can now save your Group for future use.

### Saving a Group

Select Save Group or Save Group As from the right mouse click context menu. This will save as a .grp file in the location of your choice. This file can then be loaded the next time you open the **IPFX Monitoring Client**.

### Loading a Group

Once you have saved one or more groups, you can load these the next time you open the Monitoring client by selecting **Load Group** from the context menu in the group/member panel.

Note that if you close the **IPFX Monitoring Client**, with saved groups, the client will remember these and automatically load them the next time you start the client.

### Group context menu

The right mouse click context menu on your group, has a few available options:

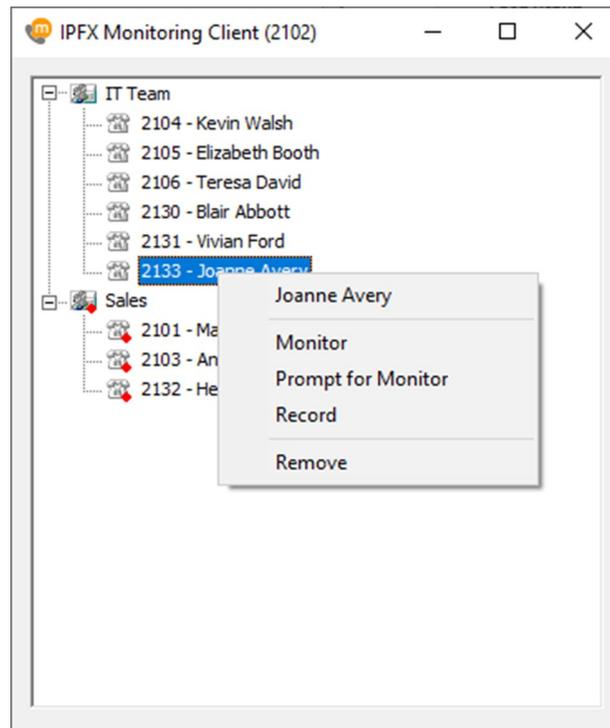
<b>Add Extension</b>	Opens the Add Extension panel to select extensions to be monitored.
<b>Record All / Stop Recording</b>	Selects all extensions in the group to record. Note that you can only select 10 extensions to record simultaneously.
<b>Save Group</b>	Save the group
<b>Save Group As ...</b>	Allows you to save the Group with a different name.
<b>Remove Group</b>	Removes the group from current monitoring.

When you close the IPFX Monitoring Client (clicking on the X in the top right hand corner) and you have not saved your Groups, you will be prompted to do so.

## Working with Extensions

You can modify the list of extensions in a group at any time by selecting the Add Extension option from the Group context menu.

Once your extensions have been added the right mouse click **context menu** of an extension will provide the following options.



<b>Monitor</b>	Select to listen to an active call on this extension.
<b>Prompt for Monitor / Silence</b>	Select Prompt to Monitor to alert you when this extension is on a call. This prompt provides Yes/No buttons as appropriate. To stop the prompting, select Silence.  Note that if this feature is enabled, you may get subsequent prompts if a call is transferred with consultation.
<b>Record / Stop Recording</b>	To record all calls on this extension select the record option to record the calls to your local PC. You can Stop Recording at any time by selecting this context menu option.
<b>Create Conference</b>	While monitoring a call, you can opt to conference into the call to provide assistance, by selecting this option. This will create a three party conference. This option is not available on IPFX Skype for Business Contact Centre implementations.

<b>Seize Call</b>	When you are actively monitoring a call, you have the option of taking over the call by selecting this option. This will transfer to call to your extension.
<b>Remove</b>	This option will remove the extension from the group list.

## Listening to Recordings

The recordings captured via the IPFX Monitoring client are located on the local hard drive. The default location for these recordings is C:\CallRecording\yyyy-mm-dd\ directory and the file format is hhmmss.wav.

The base folder for the location of these recordings can be changed via the Settings option of the right mouse click context menu on

Navigate to this location and play using your default media player.



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