

VR Manager[™]

User Manual

MaxACD 7.0

March 2016

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Installing VR Manager

VR Manager 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.

Note the following limitations:

- VR Manager supports FTP uploads only.
- File sharing is not supported.
- VR Manager uses WMA 16kbps file format, and no other compression (G.723, GSM) is supported.

Requirements

In general, we recommend that you install VR Manager on a separate, dedicated system. Some considerations when installing VR Manager:

- Install VR Manager on a *different system* than the one on which the MaxACD server is installed.
- install VR Manager on a *different system* than the one on which MS SQL Server 2008 Express is installed.

VR Manager requires the following:

- A VR Manager license must be installed at the MaxACD system. (You can verify the licenses when you run MaxAdmin by selecting **License** from the menu)
- Access to the MaxACD 7.0 server

The following Windows operating systems are supported for the VR Manager server:

- Windows Server 2012 R2 SP1

Minimum system requirements for the VR Manager server:

- 2GHz Quad-Core CPU
- Installation requires 10GB of available hard drive disk space. More space is required for file storage.
- 3GB RAM

The following Windows operating systems are supported for the VR Manager client:

- Windows 10 or Windows 8.1 64-bit

Minimum system requirements for the VR Manager client:

- Intel 2GHz Pentium 4 or equivalent
- 40GB available hard drive disk space
- 2GB RAM

Installing the VR Manager Service

The installation program installs JService Loader on your system automatically.

1. From the MaxACD 7.0 installation media, run the *Setup* program in the subfolder **VRM** and follow the instructions.

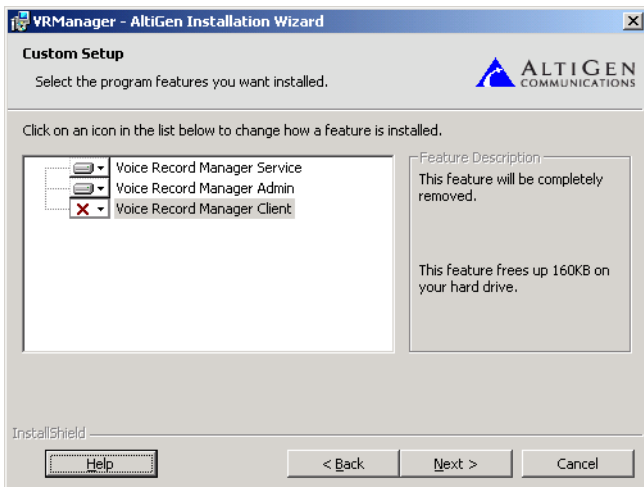


Figure 1. The VR Manager Installation wizard

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

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

Installing VR Manager for Clients

To install VR Manager for a client system:

1. From the MaxACD installation media, run the *Setup* program in the subfolder **VRM** and follow the instructions as they appear on the screen.
2. In the *Custom Setup* screen, choose **Voice Record Manager Client**.
If you install VR Admin on a client system, some **Browse** buttons will not appear.

After installation, you can run VR Manager Client from **Start > Programs > All Programs > VRManager > VRM Admin (or VRM Client)**.

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

Setting Access Privileges

The directory of centralized records in the MaxACD server must be shared fully with the VR Manager user. This user requires privileges to read/write to the shared folder, and also to read/write to the local folder.

The destination of the backup location must be accessible in the local computer or remote computer. The user must have full privilege to read/write to the shared and local folders.

Using VR Manager Admin

To run VR Manager Admin:

1. Choose **Start > Programs > VRManager > VRM Admin**.

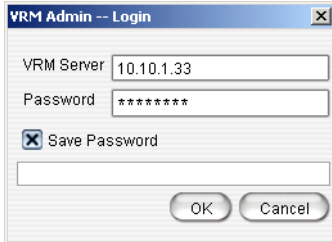


Figure 2. The VR Manager Admin Login window

2. Enter the **VRM Server** IP address or server name and **Password**. (The default password is 22222.)
3. Check the **Save Password** checkbox if you want VR Manager Admin to remember the password.

Note: Each Windows user has a unique VR Manager Admin login setting.

VR Manager Admin has five configuration tabs:

- User tab
- Pooling tab
- Storage tab
- Log tab
- MaxACD tab

The User Tab

The VR Manager User tab displays the user list for VR Manager clients and shows the workgroups and systems that each user can query.

From this tab, an administrator can add, edit, and delete users; limit their queries to certain workgroups and systems; change user passwords; and change the VR Manager Admin password.

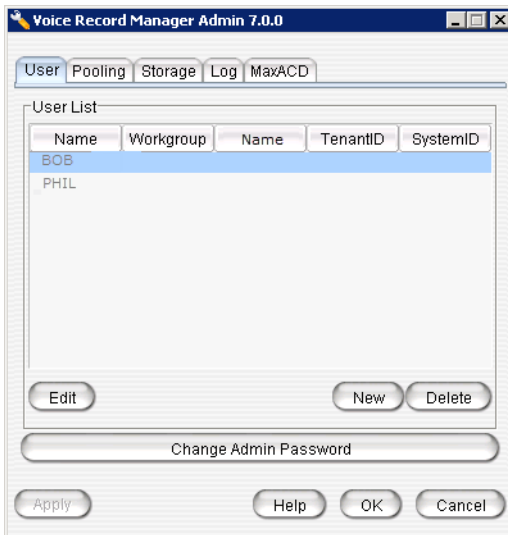


Figure 3. The VR Manager User tab

Adding Users

To add a new VR Manager client user:

1. Click **New**.

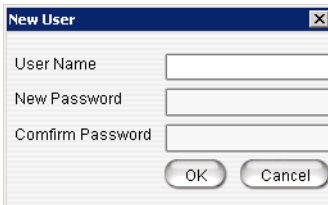


Figure 4. Adding VR Manager Users

2. Enter a **User Name**, **Password** and **Password Confirmation**. (The account name is NOT case-sensitive. For example, VR Manager does not differentiate between the name “John” and “john” in a user account name.)
3. Click **OK**. The new user appears in the User List field.
4. To limit this user’s queries to certain workgroups and systems, select the new user and click the **Edit** button. Enter the workgroup names in the **Workgroup** field, the agent names in the **Agent** field, and system

IDs in the **System ID** field. Separate entries with a comma. (To allow the user to query *all* workgroups or all extensions, leave those text boxes empty.)

Editing Users

To edit a user:

1. Select the user on the User tab and click the **Edit** button.
2. Make your changes, and click **OK**.

Changing the Admin Password

To change the VR Manager Admin password:

1. Click the **Change Admin Password** button.

A screenshot of a Windows-style dialog box titled "Change Admin Password". The dialog has a blue title bar with a close button (X) on the right. Inside, there are three text input fields stacked vertically, labeled "Old Password", "New Password", and "Confirm Password". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Figure 5. Changing the VR Manager Password

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

The Pooling Tab

The pooling tab lets you set the location of the primary storage directory. Use the **Browse** button to select the location. VR Manager pools the newly recorded files from the MaxACD server, and saves them into the primary storage directory in .WMA format.

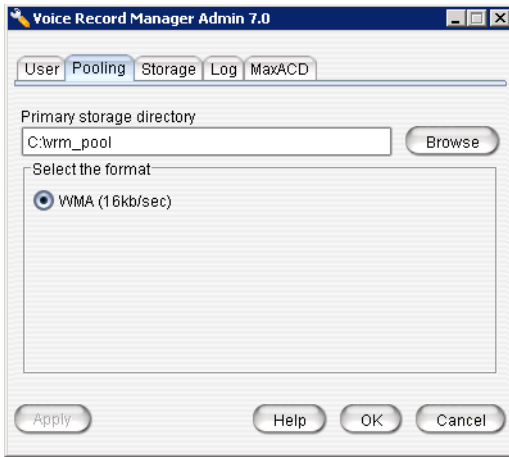


Figure 6. The VR Manager Pooling tab

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

The Storage Tab

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

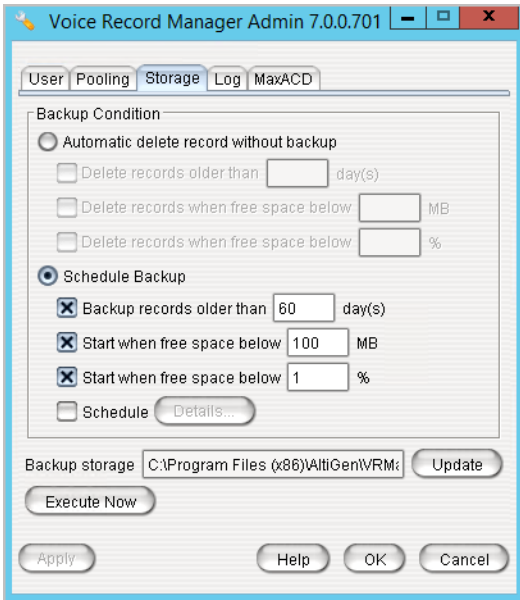


Figure 7. The VR Manager Storage tab

Select one of the following conditions:

- **Automatic delete record without backup** – VR Manager will delete records without backing them up. To set additional automatic delete parameters, select any of the following options:
 - Delete records older than x days
 - Delete records when free space below x MB
 - Delete records when free space below x %
- **Schedule Backup** – VR Manager will automatically back up, then delete records. To specify backup parameters, select any of the following options:
 - Backup records older than x days
 - Start when free space below x MB
 - Start when free space below x %

- **Schedule** – For detailed settings, click the **Details** button. In the 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), and then click **Apply**.



Figure 8. Scheduling VR Manager Backups, Details

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**.

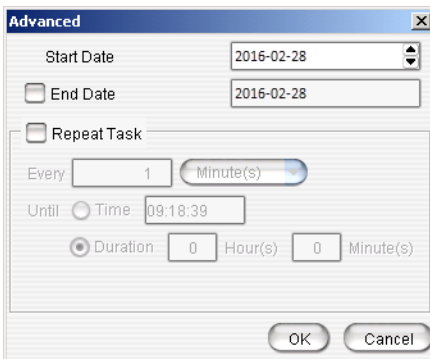


Figure 9. Scheduling VR Manager Backups, Advanced

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.

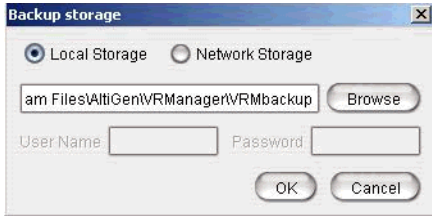


Figure 10. Setting the VR Manager Backup location

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, VR Manager supports backup to DVD/RW; simply enter the path for the DVD/RW location.

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

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

The Log Tab

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

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

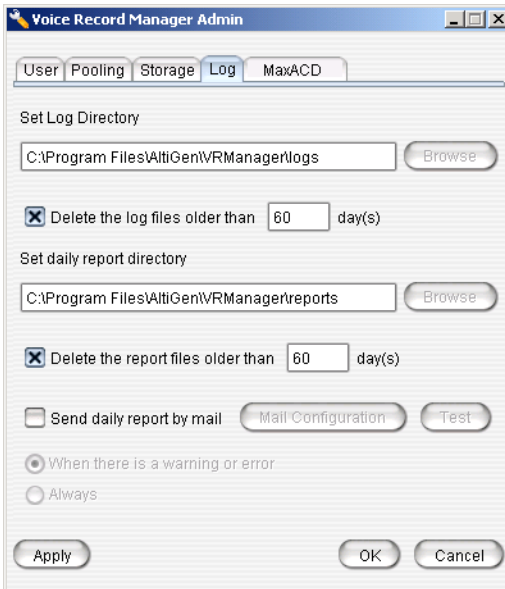


Figure 11. The VR Manager Log tab

- **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** – VR Manager 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.

The MaxACD Tab

The **MaxACD** tab displays the MaxACD servers and centralized recording directories that VR Manager will access. Here, administrators can add or delete MaxACD servers and specify the FTP Server directory.

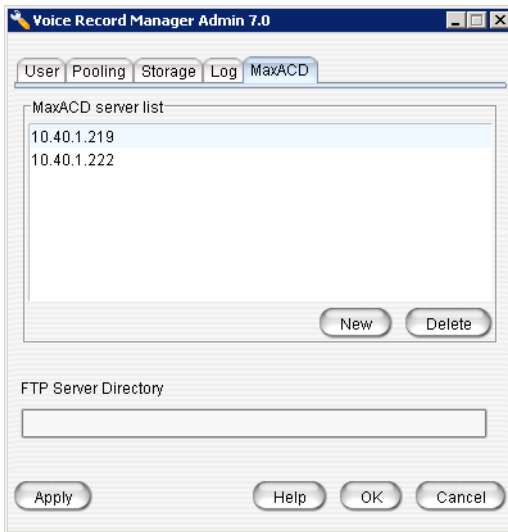


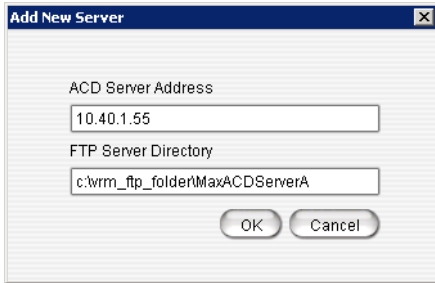
Figure 12. The VR Manager MaxACD tab

Adding Servers

To add a new MaxACD server at the MaxACD system,

1. Make sure that the FTP Server is properly configured in the VRManager Server system. IIS FTP Server or FileZilla are recommended.
2. Make sure Call Recording is properly configured in MaxACD Administrator Portal (**System > Call Recording**), so that all of the recording files will be sent to the FTP server running on VRManager under, for example, c:\vrm_ftp_folder\MaxACDServerA.
3. Make sure you have a VRManager license available on the MaxACD server.
4. Add the new server by entering the MaxACD server address and the ftp path located in the VRManager server.

1. In the **MaxACD** tab of VR Manager Admin, click the **New** button.



The screenshot shows a dialog box titled "Add New Server". It has a standard Windows-style title bar with a close button (X). The dialog contains two text input fields. The first field is labeled "ACD Server Address" and contains the IP address "10.40.1.55". The second field is labeled "FTP Server Directory" and contains the path "c:\wrm_ftp_folder\MaxACDServerA". At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

Figure 13. Adding a new server in VR Manager

2. Enter the **MaxACD Server IP Address** and the path to the **FTP Server Directory**. Then click **OK**.

After adding a new server, the VR Manager service immediately checks the MaxACD server for the **VR Manager License**. The newly added server is displayed in the **MaxACD Server List** field.

Note: VR Manager starts converting all voice recording data as soon as the MaxACD server information is added to the MaxACD Server List.

Note: If you change system ID of your MaxACD server, you will need to remove and re-add the server to VRM Admin. Otherwise, the system ID will not update.

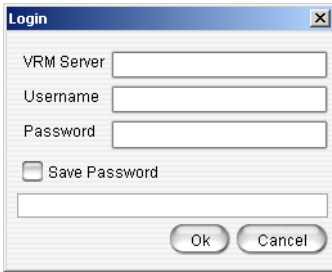
Changing the FTP Server Directory

To change the FTP server's location for the centralized recording directory, select the MaxACD server in the server list, then edit the path in the **FTP Server Directory** field

Using VR Manager Client

To run the VR Manager client:

1. Choose **Start > Programs > VRManager > VRM Client**.



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

VR Manager Client Main Window

When you start the VR Manager client, it opens to the main window.

Id	CallerID	SessionID	CallerID	DNIS	WorkGroup	Length
1	Roland A	1357230419	4000079020	4000079252	wg1	00:00:14
2	Roland A	1357230423	4000079020	4000079252	wg1	00:00:04
3	Roland A	1357503206	4000079020	4000079252	wg1	00:00:00
4	Roland B	1357503207	4000079020	4000079252	wg1	00:00:26
5	Roland B	1357503208	4000079020	4000079252	wg1	00:01:20
6	Roland B	1357503209	4000079020	4000079252	wg1	00:00:10
7	Roland A	1357503203	4000079030	4000079252	wg1	00:00:40
8	Roland A	1357503203	4000079030	4000079252	wg1	00:00:21
9	Roland A	1357503206	4000079030	4000079252	wg1	00:00:50
10	Roland A	1357503200	4000079030	4000079252	wg1	00:00:23
11	Roland A	1357503200	4000079030	4000079252	wg1	00:00:34
12	Roland A	1357503202	4000079030	4000079252	wg1	00:01:05
13	Roland A	1350447200	4000079020	4000079255	wg1	00:00:14
14	Roland A	1350447232	4000079020	4000079256	wg1	00:00:12
15	15102520712	13500543435	1000001		wg1	00:00:00
16	Roland A	13500500073	4000079020	4000079256	wg1	00:00:00
17	15102520712	13500240019	1000001		wg1	00:00:00
18	14000007200	13500000013	1000001		wg1	00:00:02
19	14000007200	13500000014	1000001		wg1	00:00:04

Total: 72

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

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** – Help contents, VR Manager version information

Quick Access Toolbar

The toolbar contains buttons that are menu shortcuts:

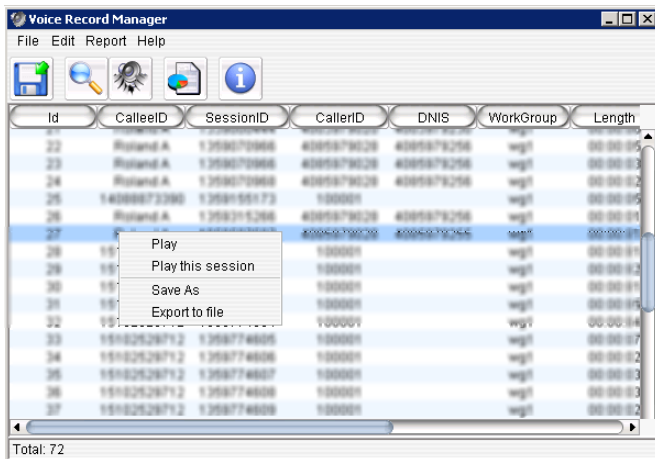


File Menu

This section describes the commands on the File menu.

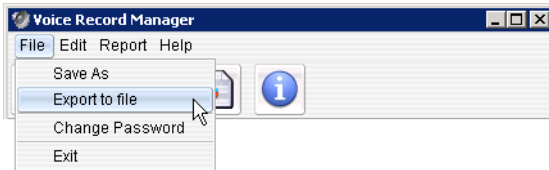
Saving Files

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



Exporting to Files

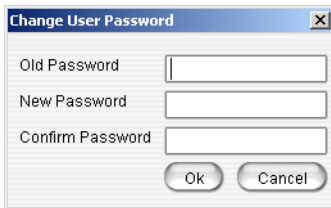
To export search results to a tab-separated text file (.txt), choose **File > Export To File** from the main menu, or right-click the search results list and choose **Export To File**.



Changing the Password

To change your password:

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



The new password applies at the next log in.

Edit Menu

This section describes the commands on the Edit menu.

Searching Voice Records

To search voice records, choose **Edit > Search** or click the **Search** button in the toolbar. 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 Agent's Voice Records

If you query an agent's voice records and in that query you also specify a workgroup, the query results show only the agent'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.

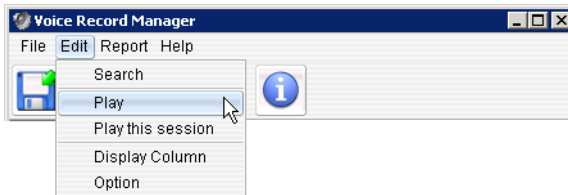
Playing Voice Records

To play a voice record,

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

To play a session,

Click a voice record in the main window to highlight it, then right-click a record and select **Play this Session**. You can also select a record and choose **Edit > Play this Session** from the menu. A series of voice records of this session will play continuously



Note: Deleted voice files cannot be 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:

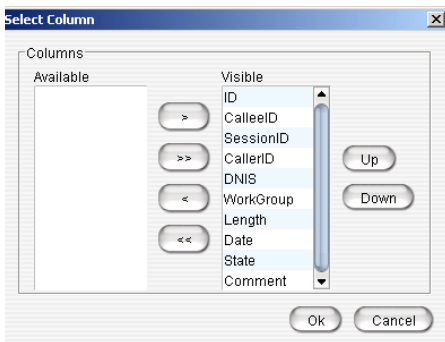
- ID
- Callee ID
- Session ID
- Caller ID
- DNIS
- Workgroup

- Length
- Date
- State – There are three states that a record file can be in:
 - *Delete* – Deleted records cannot be played or saved.
 - *Backup* – You must manually put the right backup media in the path if you back up the record and remove it.
 - *Normal* –The file can be played or saved.
- Comment

To select columns for display,

1. Choose **Edit > Display Column.**

The fields in the **Visible** list are displayed as columns under the VR Manager client toolbar.



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.

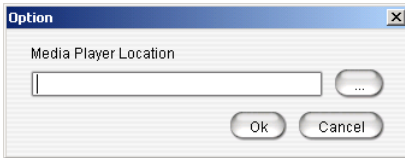
Sorting

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

The VR Manager client plays recorded voice files using a media player. If your system does not have a default media player, VR Manager opens a dialog box so you can assign a media player.

You can also select the media player by clicking **Edit > Option**. In the dialog box, select the type the path to the program in the field or browse to the folder, then click **OK**.

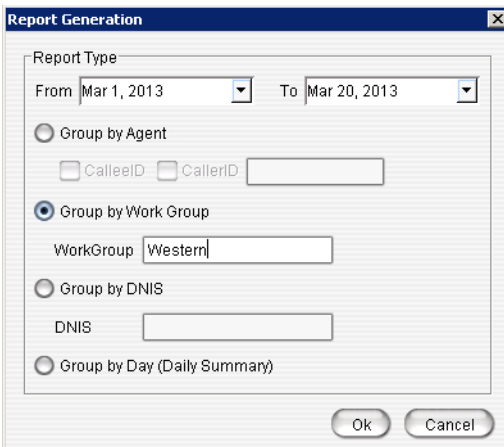


Report Menu

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.



2. In the 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** – Select Callee ID or Caller ID, or both, and enter the agent's extension in the field.
 - **Group by Workgroup** – Enter the workgroup name in the Workgroup field.
 - **Group by DNIS** – Enter the DNIS number in the DNIS field.
 - **Group by Day (Daily Summary)** – Formats the report based on date period summary for each day.
4. Click **OK**.
 5. VR Manager 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).

Date	Number of Record	Total Length	Total Size(K)
2004-10-25	157	08:36:44	24236
2004-10-26	219	12:05:51	34038
2004-10-27	198	13:01:53	36657
2004-10-28	173	11:27:09	32220
2004-10-29	202	12:18:55	34639
2004-10-30	2	00:05:11	244
2004-11-01	62	03:57:55	11156

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