

NEC Univerge Blue Engage Cloud Integration Guide

Encore Workforce Optimization Solution
Version 8.5 or later

March 27, 2023



**For Dealer
and Customer
Use Only**

DVSAnalytics
Phone: (480) 538-2020
Email: info@DVSAnalytics.com
Web: www.DVSAnalytics.com

PROPRIETARY NOTICE

This document is prepared for DVSAnalytics dealer and customer use only. Information contained herein is proprietary and confidential, and may not be disclosed, distributed, or reproduced without the express written permission of DVSAnalytics. 2023 DVSAnalytics All rights reserved.

TABLE OF CONTENTS

- Introduction3**
 - Supported Data Capture3
 - Call Data3
 - ENGAGE Call Disposition Data3
 - Supported Recording Features.....4
 - Screen Recording.....4
 - Software Requirements.....5

- Overview6**
 - NEC UNIVERGE BLUE ENGAGE Recording Import6

- Gather Required Information7**
 - Gather the list of recorded ENGAGE agents.....7
 - Gather the ENGAGE REST API URL7
 - Generate the API Access Token.....8
 - Gather the Timezone.....8
 - Provide DVSAalytics the required information for recording import.....8

- Call Handling Scenarios9**

- Appendix 1: Glossary11**

Introduction

The Encore system integrates with the NEC UNIVERGE BLUE ENGAGE Contact Center as a Service (CCaaS) using its REST APIs to import audio and capture call/queue metadata and makes it available in Encore’s UI and optionally Encore Speech Analytics.

This integration currently covers scenarios where an ENGAGE agent is using the UNIVERGE BLUE CONNECT application or web application. Scenarios involving OTT or Hybrid modes, where agent the agent is using a phone attached to an NEC SV9500 are not covered here. If recording SV9500 based phones is needed, please reference the *NEC UNIVERGE with OAI Integration Guide* for further details.

This integration allows the Encore system to successfully perform the following functions:

- Audio Collection – Import the audio recording that needs to be captured.
- Data Capture – Receive data associated with the call.
- Screen Recording (optional) – Associate the imported audio recording with an Encore Desktop recording.
- Speech Analytics (optional) – Process the imported audio using Encore’s Speech Analytics platform.

Supported Data Capture

The following is a list of the supported data elements that can be collected with each recording. Not every element is applicable for each call. For a description of each data element, refer to “[Appendix 1: Glossary](#)” on page 11.

Call Data

- | | | |
|-----------------------|-----------------------|-----------------------------|
| • Agent Login ID | • DNIS | • Recorded Party Name |
| • ANI | • Extension | • Recorded Party Number |
| • Call Direction | • Hold Time | • Recorded Party Disconnect |
| • Call Start/End Time | • Initial/Final Queue | • Recording ID |
| • Call ID | • Other Party Name | • Third Call ID |
| • Call Type | • Other Party Number | • Thread ID |
| • Call Time | • Receiving Party | |

ENGAGE Call Disposition Data

- | | | |
|---------------------------|-----------------|-------------------|
| • Client Type | • Creation Date | • Resolution |
| • Client Type Reference 1 | • Flagged | • Sub-Subject |
| • Client Type Reference 2 | • Flag Reason | • Subject Details |
| • Client Type Reference 3 | • Main Subject | |
| • Created By | • Notes | |

Supported Recording Features

RECORDING FEATURE	AUDIO COLLECTION METHOD
	NEC UNIVERGE BLUE ENGAGE RECORDING IMPORT
Record External Calls	YES
Record Internal Calls ^{1, 2}	YES
Record Dial out Calls ¹	YES
Record Encrypted Calls	N/A
Record Softphones	YES
Related Call Lookup ¹	YES
Hold and Transfer Event Markers ¹	YES
Screen Recording	DESKTOP RECORDING ONLY
Recording File Format	MP3 (Stereo)

1. See the Call Handling Scenarios section below for more information.

2. Internal calls are considered ENGAGE Agent to Agent calls using Dial Out.

Screen Recording

Encore's integration with NEC UNIVERGE BLUE ENGAGE is only able to support Encore's Desktop Recording method for making screen recordings of agent desktop PC's. Desktop Recording is a method where the agent's PC is continuously recorded while the agent is logged into the PC. For this to work successfully, the Encore server and ENGAGE must have their clocks in sync. Since ENGAGE is a cloud-hosted system and in many cases Encore will be hosted in Encore Cloud, both systems are staying in sync using an Internet time server, so this will not be a problem. If Encore is hosted in the customer's premise or data center, then be sure the Encore server is being synced regularly with an internet time server.

IMPORTANT

Due to the nature of how ENGAGE records calls, the Desktop recording and the audio recording may not always be synchronized in all call scenarios, regardless the time synchronization mentioned above. Cases where the audio and screen will be out of sync are:

- Consultation calls
- Transferred calls – Any agents receiving the call after the initial recorded agent.
- Conference calls – Any recorded agents involved in the conference call.
- Dial Out calls – If an outbound call was transferred to another agent, the original agent's screen (if recorded) will be displayed for these additional agent's call segments.

Depending on the nature of your business, if outbound calls are a normal part of your agent's day and calls are transferred, you should consider the privacy concerns of these scenarios and decide if recording agent desktops is right for your needs.

Software Requirements

SYSTEM	SOFTWARE REQUIREMENTS
NEC UNIVERGE BLUE ENGAGE system	<ul style="list-style-type: none">• Encore can import call recordings from customer tenants that are subscribed to either ENGAGE ADVANCED or ENGAGE COMPLETE.
Encore system	<ul style="list-style-type: none">• Encore 8.5 or higher.• EncoreImportRecordingService 2.3.9.27023 or higher• If subscribed to Encore Cloud, no on-premise appliance is needed.• 1 VoIP Channel Licenses (VCL) per “named agent” that the customer wants to import recordings for.

Overview

NEC UNIVERGE BLUE ENGAGE Recording Import

The NEC UNIVERGE BLUE ENGAGE Recording Import audio collection method works in conjunction with the NEC UNIVERGE BLUE ENGAGE where ENGAGE records the call's audio and creates call metadata. Encore then imports the audio and metadata and makes it available in Encore's UI and optionally Encore Speech Analytics.

NOTE

Encore is only able to import recordings that are made by NEC UNIVERGE BLUE ENGAGE. Calls that are recorded only by NEC UNIVERGE BLUE CONNECT are not available to Encore for import.

Gather Required Information

Gather the list of recorded ENGAGE agents

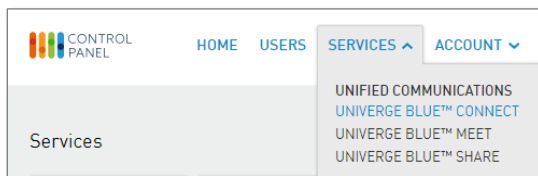
Please gather a list of all agent's email addresses, first name and last name, whose recordings you would like to be imported into Encore. If recorded agents will have their desktop recorded by Encore's Desktop Recording, please also provide their Windows Login ID.

NOTE

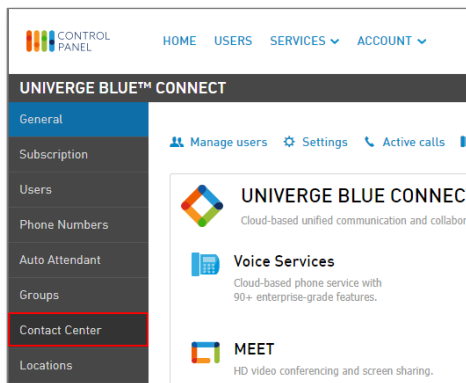
When a new recorded agent is added to ENGAGE, which is intended for Encore import, this agent must also be added to Encore, so it knows to collect the recording and metadata.

Gather the ENGAGE REST API URL

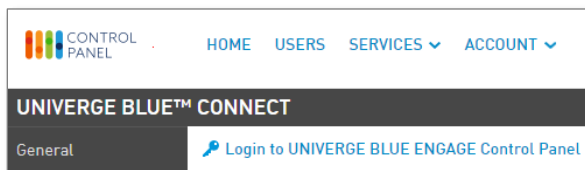
1. Login to the UNIVERGE BLUE admin console, by going to <https://admin.univerge.blue> and logging in with a user that has admin permissions.
2. From the UNIVERGE BLUE control panel, select Services->UNIVERGE BLUE CONNECT.




3. From the UNIVERGE BLUE CONNECT screen, select the Contact Center tab.



4. At the top of this screen, click the **Login to UNIVERGE BLUE ENGAGE Control Panel** link.



5. In the UNIVERGE BLUE ENGAGE control panel, on the left, click on the **Integrations** icon .
6. On the **Integrations** screen, click the **</> REST API** button.
7. Make note of the **API base url**, so you can provide it to your DVSAalytics Project Manager or Installation Tech.
8. Remain on this screen for the next step.


Generate the API Access Token

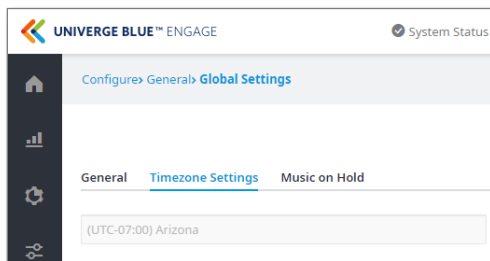
CAUTION

If your ENGAGE tenant already has an access token, DO NOT proceed with the following steps. Instead, obtain the existing access token and provide that string to your DVSA Analytics Project Manager or Installation Tech. If other applications are already using an existing access token, generating a new token will stop other application's use of the API.

1. While still on **Integrations->REST API** page, click the **Generate New Token** button.
2. The new token can be found under the text **Your token is:** and is a string of random characters ending with an =.
3. Make a copy of the entire generated token, including the trailing =, as this will be the only time you will have access to this token. Keep this token in a secure location in case it is needed in the future.
4. Provide the token string to your DVSA Analytics Project Manager or Installation Tech.

Gather the Timezone

1. In the UNIVERGE BLUE ENGAGE control panel, on the left, click on the **Configure** icon  and then click the **General** button.
2. Click the **Global Settings** button and then click the **Timezone Settings** tab.



Make note of the full text string that's in the timezone field and provide this string exactly as displayed. In the example above, the string to provide would be "(UTC-07:00) Arizona".

Provide DVSA Analytics the required information for recording import

Please provide your DVSA Analytics Project Manager or installation Technician the following information:

- The list of **agent email addresses, first names and last names** for all agents that Encore will import audio.
- In addition to the above, provide **Windows login IDs** for any agents where Desktop Recording will be used.
- The **ENGAGE REST API base url** – See [Gather the ENGAGE REST API URL](#) on page 7.
- The **API Access Token**. – See [Generate the API Access Token](#) above.
- The **Timezone** string. – See [Gather the Timezone](#) above.

Call Handling Scenarios

This section explains how different call scenarios are displayed, recorded, related, and associated with Desktop recording(if applicable) in Encore's UI. It is assumed that all agents involved in the calls are configured to be recorded.

CAUTION

Read over these scenarios carefully to better understand how the Univerge Blue ENGAGE recording import may have limited data for some agents or portions of calls and how this could impact your ability to rate and evaluate some agents.

- **Mute**
 - If an ENGAGE agent is using a remote phone for their audio source, rather than an ENGAGE/CONNECT softphone, and they use the ENGAGE agent's mute function, the agent's audio may still be recorded, even though the other party does not hear them while muted.
- **Hold and Retrieve**
 - The recording for this agent's interaction with the other party is in one segment.
 - If an agent receives a transferred call, any calls placed on hold will not show any call markers, nor will there be hold duration data for these agents.
- **Consultation Call**
 - Only one recording segment is provided, this recording spans the Customer-Agent portion of the call and the Agent-Agent portion of the consultation calls. When an agent puts the customer on hold and make a consultation call to another agent, some audio may be missing during the consultation call setup. Because of this missing audio, all call markers that follow the consultation are offset on the waveform display. This offset is stacking and the greater number of consultations, the greater error.
 - Desktop recording playback may not be synchronized with all portions of the audio.
 - The agent that was consulted will not have a recording assigned to them, even if they are a recorded agent.
- **Warm Transfer**
 - Like the Consultation call above, the audio for the Customer-Agent portion and Agent-Agent consultation portion is in one recording segment and is only available for the original agent. When the original agent completes the transfer, the new agent and customer portion will be placed into a separate recording segment/call record, although the call recording may be split in the wrong place. Some initial portion of the new Agent-Customer call may be at the end of the original agent's recording segment and that portion will not be in the new agent's recording segment. The new agent's recording segment may start in the middle of their conversation with the customer. The degree to which this occurs is dependent on several factors, including how long the consult call lasted and if there were any hold/retrieves prior to the transfer.

- Desktop recording playback may not be synchronized with all portions of the audio. Call markers may be off for the original agent, and not present at all for any subsequent agents that handle the call with the Customer.
- These separate call records can be located using Related Call Lookup.
- Some call data captured in the agent's application, such as the Interaction Notes, may be overwritten if a subsequent agent adds data to the same field. Encore will receive data from the most recent agent's input. In some cases, there may be a mixture of data, if the first agent entered data into some fields, while the second agent entered data into other fields.
- **Cold Transfer**
 - When a call is cold/blind transferred, the recording ends for the first agent after the agent presses the transfer button and hangs up. The recording for the second agent begins when the second agent answers the transferred call. The second recording ends when the second agent or customer ends the call.
 - These separate call records can be located using Related Call Lookup.
- **Conference Call**
 - Only one recording segment is provided and it starts when the first agent answers the call from the customer and ends when the first agent hangs up.
 - If the first agent, who is inside an active conference call hangs up, the recording ends. No other recording segments are created for any remaining recorded agents.
 - In the scenario where the first agent performs any consulting prior to joining the third or additional parties into a conference, those consulting portions will be a part of this single recording segment for the first agent.
 - Regardless of any agent's status as a recorded agent, there will not be a separate recording segment made for the other agents, for either the consult call or for the conference itself.
 - If the first agent hangs up while the conference is still ongoing or where the second agent and the customer are the only parties left, there will not be a recording for these interactions.
 - Desktop recording playback may not be synchronized with all portions of the audio.
- **Dial Out Call**
 - When a recorded agent uses the Dial out feature, only one recording segment will be made. This is the case if the agent calls another recorded agent or if the agent calls an external party and then transfers the call to another recorded agent. Even though the first agent has hung up, the portion of the call between the second agent and the and external party will continue to record, but the audio will be in the first agent's recorded segment.
 - If Desktop recording in use, the first agent's desktop will continue to play back during the portion of the audio recording between the second agent and the external party.

Appendix 1: Glossary

abandoned call

An incoming call which is answered by the ACD but terminated by the caller before it is answered by an agent.

ACD

Automatic Call Distributor. An application that answers calls and directs them to a predetermined queue, or line, of waiting calls. In most cases, the ACD ensures that the first call in is the first call answered. It also determines which agent receives a call based on predetermined criteria such as idle time or availability and generates reports on call volume and distribution.

ACD number

This is the equivalent of the Directory Number (DN) where the call originated.

agent

A person who handles phone calls. Other variations include operator, attendant, representative, customer service representative (CSR), telemarketer, phone sales representative (TSR), and so on.

agent login ID

The recorded user's email address.

ANI

The Calling Party Number. This value displays the phone number associated with the party that originated the call.

automated attendant

A voice processing system that answers calls with a recording and then enables callers to press touch-tone buttons to navigate through a menu system to a person, department, or voice mail.

Call ID

The ENGAGE generated Call ID.

Call Direction

Display's *Incoming* for incoming queue calls. Displays *Outgoing* for Dial Out calls.

Call End

The time the ENGAGE call ended. Uses the Preferred Time Zone, if set.

call record

An entry in a database that holds the data associated with a call.

Call Start

The time the call entered into the ENGAGE system. Uses the Preferred Time Zone, if set.

Call Time

The ENGAGE call's total duration, in seconds. This call time is calculated as the total time the call is in the ENGAGE system, from Call Start to Call End. It is specific to the entire ENGAGE call, not just interaction times with specific agents.

Call Type

Will always be set to External.

CCaaS

Call Center as a Service.

Date

The Encore UI's Date field will display the time the recorded agent first answered the call.

Dial Out calls

When an ENGAGE agent needs to make an outbound call, they use the Dial Out feature, which first rings the agent's phone and once connected to the agent, places the outgoing call and bridges the two into a single call.

DNIS

Dialed Party. This value displays the phone number dialed by the party that originated the call.

Duration

The duration of the recording, in seconds. If a call is placed on hold, this hold time is not reflected in the recording or its duration.

extension

The recorded agent's phone number.

external calls

In these calls, the calling or called parties are outside the PBX.

Final Queue

The last queue of the call.

Hold Time

The total hold time of this recorded segment.

inbound

Calls which are received/answered by a recorded party.

Initial Queue

The first queue of the call.

internal calls

In these calls, the calling and called parties are both ENGAGE agents.

other party name

For incoming calls, the calling party name.

other party number

For incoming calls, the calling party number. For Dial Out calls, the dialed number.

outbound

Calls which are made using ENGAGE's Dial Out feature.

PBX (PABX)

Private (Automated) Branch Exchange. The phone system to which the office phones are connected.

Receiving Party

For incoming calls, this will be the same as DNIS. For Dial Out calls, this will be empty.

Recorded party name

The recorded agent's name.

Recorded party number

The recorded agent's phone number.

Recorded Party Disconnect

In Encore's UI, this field will display *No* when the caller hangs up and *Yes* when the agent hangs up.

recording

The audio recording or screen recording associated with a single phone call or segments of a conversation that may have holds, transfers or conferences.

Recording ID

The ENGAGE generated recording id.

related call lookup

A customer's experience in a call center may include multiple recordings even though the customer was on one, continuous call. This feature shows recordings that are related to the selected recording.

Thread ID

The ENGAGE generated thread ID.

Third Call ID

The ENGAGE generated Dial Out ID.

Total duration

This time is based on a segment of the call from that time the agent answered the call, to the time the agent entered wrap-up. If the agent placed the call on hold, the hold time is still reflected in this duration.