



## Cisco Unified Workforce Optimization

Quality Management Integration Guide for CAD and Finesse Version 10.5

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Quality Management Integration Guide for CAD and Finesse

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# Introduction

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You can integrate Cisco Agent Desktop (CAD) and Cisco Finesse with Cisco Unified Workforce Optimization Quality Management via the Recording Controls API. CAD does this via its Hypertext Transfer Protocol (HTTP) action. HTTP actions pass information in the form of HTTP requests from the agent desktop to a third-party application (in this case, the Recording Controls API) using HTTP methods.

Quality Management can record an agent's calls from the agent's desktop or from a server. It supports the following recording scenarios.

- Gateway Recording which includes:
  - Cisco MediaSense Recording
- Agent Recording includes:
  - Desktop Recording
  - Network Recording
  - Server Recording (SPAN)

## What's New In This Version

Added information on installing the Cisco Quality Management Playback gadget.

### 10.5(1)

- Enhanced the Pause, Pause URL, and Resume commands for Gateway Recording

**Note:** The Restart command is not supported with Gateway Recording and will be removed in a future release.

- Added the Start and Stop commands for an outbound dialer
- Added support for Cisco Finesse
- Added the ability to create a Calabrio Recording Controls gadget in Finesse.



# Requirements

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Before sending a command to the Quality Management system, you need to know where to send that command.

## Base Server Requirements

You need the following information when sending a recording command.

- Base server IP address
- Port number for the Base server—the Base server listens on port 80 for recording commands.
- sender\_id—when sending recording commands to a Base server, you need to identify the Quality Management user associated with the command. You need to pass an additional parameter called “sender\_id” and give it the value of the user's ID as known to the Quality Management Administrator. There is a variable available in the CAD system that you can use for this purpose. CAD cannot send the sender\_id and the peripheral\_id at the same time. You need to send each as separate values.
- QM workflow—Assign CAD agents to a team in Quality Management, assign the team to a workflow, assign the team to a site, and then assign recording clusters to the site.

Record Servers are available, to use the APIs. These recording clusters are not associated with any Record Servers.



# Recording Commands

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This section explains the following concepts:

- Syntax of recording commands
- Function of each recording command
- Active and last calls
- Using commands with an outbound dialer

## Command Functions

Recording commands allow you to control a recording.

**Example:** You can use recording commands to record a call, pause the recording, and attach metadata to a recording.

The following table describes how the recording commands interact with each other and the Quality Management components.

## Recording commands

Command	Function
Tag	<p>Records a call and uploads the call to the Quality Management server at the end of the day.</p> <p>In the Recording Controls API, the &lt;command&gt; is record.</p> <p>The Tag command behaves as follows:</p> <ul style="list-style-type: none"> <li>■ Agent Recording—marks a call for recording, even if archiving is not enabled and the call does not meet the workflow criteria. The Tag command overrides both the Don't Record list and the workflow classifiers.</li> <li>■ Gateway/MediaSense Recording—marks a recording as tagged if archiving is enabled and the call meets the workflow criteria. The Tag overrides the workflow, but does not override an exclusion list in the Exclusion List window because the root contact does not know the agent's identity when recording. See "Calabrio Recording Controls Considerations for Gateway Recording" in the <i>Administrator User Guide</i> for more information.</li> </ul> <p>Quality Management stores agent-tagged calls with the Agent Tagged reason code, and saves them for the retention time configured in Quality Management Administrator.</p> <p>Agent Recording:</p> <ul style="list-style-type: none"> <li>■ The Tag command is valid for the active call and the last call.</li> <li>■ If Quality Management is not recording the active call, Quality Management starts recording the call when you invoke the command and adds the Agent Tagged reason code.</li> <li>■ If Quality Management is recording two active calls (for example, an inbound ACD call and an outbound consultation call), Quality Management tags the call that triggered the recording to begin.</li> <li>■ If Quality Management is not recording two active calls (for example, an inbound ACD call and an outbound consultation call), Quality Management begins recording the first call sent to the agent, based on the call start times, and tags the first call when you invoke the Tag command.</li> </ul>

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Command	Function
	<p data-bbox="402 268 1101 300">Gateway/MediaSense Recording and Agent Recording:</p> <ul data-bbox="428 327 1360 646" style="list-style-type: none"><li data-bbox="428 327 1360 401">■ If Quality Management is recording an active call, Quality Management adds the Agent Tagged reason code to the data associated with the call.</li><li data-bbox="428 428 1360 501">■ If Quality Management recorded the last call, Quality Management updates the reason code to the Agent Tagged reason.</li><li data-bbox="428 529 1360 646">■ If Quality Management did not record the last call, nothing happens. Quality Management cannot update the reason code when no recording is available.</li></ul>

Command	Function
Pause	<p data-bbox="397 268 950 300">Temporarily halts the recording of a contact.</p> <p data-bbox="397 325 1383 577">Use the Pause command to control the screen and audio that appears in the final recording. This command adheres to the Payment Card Industry Data Security Standard (PCI DSS) for protecting consumer data. When you cannot record sensitive information (such as Social Security numbers) for security or liability reasons, use the Pause command to omit sensitive information from the recording.</p> <p data-bbox="397 602 1356 766">When you use the Pause command, silence appears in the final recording where an agent discussed sensitive information. Calls are available for playback prior to reconciliation with silence where an agent issued the Pause command. These calls are accessible by anyone with the archive user role.</p> <p data-bbox="397 777 1055 808">When using the Pause command, note the following:</p> <p data-bbox="397 835 1112 867">In the Recording Controls API, the &lt;command&gt; is pause.</p> <p data-bbox="397 892 625 924">Agent Recording:</p> <ul data-bbox="430 949 1356 1449" style="list-style-type: none"><li data-bbox="430 949 1063 980">■ The pause command is valid for active calls only.</li><li data-bbox="430 1008 1331 1081">■ The pause command affects both the screen and audio portions of the contact.</li><li data-bbox="430 1108 1356 1182">■ If you send a pause command for a call currently in the paused state, the pause command has no effect.</li><li data-bbox="430 1209 1356 1329">■ When you play back a recording that contains a pause, the audio portion is silent and the screen portion displays the following message for the duration of the pause: <pre data-bbox="462 1354 885 1386">Screen recording paused</pre></li><li data-bbox="430 1413 1112 1444">■ The pause command does not affect live monitoring.</li></ul> <p data-bbox="397 1470 1356 1543">Gateway/MediaSense Recording delays the pause. The pause will appear in the recording after the recording is uploaded.</p> <p data-bbox="397 1570 1347 1602">Issue the Resume command when you want to start recording after a pause.</p>

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Command	Function
Resume	<p data-bbox="397 268 1377 346">Resumes recording the contact after you issued a Pause command to stop the recording.</p> <p data-bbox="397 367 1133 403">In the Recording Controls API, the &lt;command&gt; is resume.</p> <p data-bbox="397 424 673 459">For Agent Recording:</p> <ul data-bbox="430 483 1344 835" style="list-style-type: none"><li data-bbox="430 483 1263 518">■ The Resume command affects both voice and screen recording.</li><li data-bbox="430 539 1334 575">■ If the call is not currently paused, the Resume command has no effect.</li><li data-bbox="430 596 1096 632">■ The Resume command is valid for active calls only.</li><li data-bbox="430 653 1344 730">■ If you do not use the Resume command, the point at which you paused the recording is the end of the audio recording.</li><li data-bbox="430 751 1291 829">■ A Resume command does not appear as a mutual silence event or talkover event during post-call processing.</li></ul>

Command	Function
Restart	<p data-bbox="402 268 894 300">Restarts or starts the recording of a call.</p> <div data-bbox="402 323 1377 466" style="background-color: #d9ead3; padding: 10px;"><p data-bbox="440 354 1339 428"><b>Note:</b> The Restart command is not supported with Gateway Recording and will be removed in a future release.</p></div> <p data-bbox="402 489 1117 520">In the Recording Controls API, the &lt;command&gt; is restart.</p> <ul data-bbox="428 543 1339 1213" style="list-style-type: none"><li data-bbox="428 543 686 575">■ Agent Recording:<ul data-bbox="500 604 1339 1115" style="list-style-type: none"><li data-bbox="500 604 1339 764">• If Quality Management is currently recording an active call, the Restart command stops the audio and screen recording, deletes that recording, and restarts recording the call from the point when you issued the Restart command.</li><li data-bbox="500 793 1339 867">• If Quality Management is not currently recording an active call, the Restart command starts audio and screen recording.</li><li data-bbox="500 896 1146 928">• The Restart command is valid for active calls only.</li><li data-bbox="500 957 1339 1115">• Quality Management assigns an Agent Tagged reason code to calls recorded using the Restart command. Quality Management saves the agent tagged calls even if archiving is not enabled and the call does not meet workflow criteria.</li></ul></li><li data-bbox="428 1144 1247 1213">■ Gateway/MediaSense Recording does not support the Restart command.</li></ul> <p data-bbox="402 1243 1377 1402">Use this command if you call someone and you are immediately placed on hold for a long time. Issue the Restart command you leave the hold queue and begin speaking to a person. This eliminates the period when you are on hold (for example, 20 minutes of recorded on-hold music).</p>

Command	Function
Delete	<p>Marks a recording for deletion, even if archiving is enabled, the call meets workflow criteria, the extension is in the inclusion list, or it is tagged for retention. The Delete command deletes the recorded files and any metadata, and uploads the basic contact data to Quality Management to maintain accurate call counts.</p> <p>In the Recording Controls API, the &lt;command&gt; is delete.</p> <ul style="list-style-type: none"> <li>■ The Delete command is valid for the active call only.</li> <li>■ The Delete command has precedence over all other commands.</li> <li>■ Once you delete a call you cannot record it by issuing the Tag command.</li> <li>■ Deleted calls are not available for archive purposes or quality management purposes.</li> <li>■ You cannot view deleted calls in Calabrio ONE.</li> <li>■ For Gateway/MediaSense Recording, the recording is deleted for the person who sends the command, but the audio recording might continue to exist in the root call or in other calls associated with this call.</li> </ul>
Login	<p>Sends a login request to associate an agent with the given extension for hot desking.</p> <p>The Recording Controls IP Phone Service does not have login/logout capabilities. Use Cisco's Extension Mobility IP Phone application to log in by phone.</p> <p>In the Recording Controls API, the &lt;command&gt; is login. You must include the unique extension of the phone that the agent is logging into.</p> <p>This command is not supported if you are using Gateway/MediaSense Recording.</p>
Logout	<p>Sends a logout request to associate an agent with the given extension for hot desking.</p> <p>In the Recording Controls API, the &lt;command&gt; is logout.</p> <p>This command is not supported if you are using Gateway/MediaSense Recording.</p>

Command	Function
Metadata	<p>The Metadata command attaches metadata to an active call. If Quality Management does not upload the current call (or previous) for archiving because of workflow criteria, then the metadata will be uploaded to the database but will not appear in the interface.</p> <p>In the Recording Controls API, the &lt;command&gt; is metadata. You must include at least one key/value pair (&lt;key&gt;=&lt;value&gt; or &lt;key&gt;:&lt;value&gt;).</p> <ul style="list-style-type: none"><li>■ The Metadata command is valid for the active call and the last call.</li><li>■ You can associate maximum of 10 metadata items with a call. You can accomplish this with 10 Metadata commands containing one key/value pair each, or one Metadata command containing up to 10 key/value pairs.</li><li>■ You can only attach metadata defined in Quality Management Administrator (Recordings &gt; Metadata) to a call. If you add an unknown key to a Metadata command, Quality Management ignores the unknown key.</li></ul> <p>The Metadata command interacts with the active call, including the time up until the next call starts. If you invoke the Metadata command during a call, Quality Management uploads the metadata to the database at the same time as the rest of the call data. If you invoke the Metadata command after the call but before the next call, Quality Management uploads the metadata separately at the time you invoke the command and Quality Management stores the metadata with the last known call. Calls that occur after a recorded call that do not match the inclusion list are not counted as the next call.</p> <div style="background-color: #e1f5fe; padding: 10px; border-radius: 5px;"><p><b>Note:</b> Quality Management resets the last known call at login, so Quality Management cannot attach metadata to the last known call before logout or shutdown after the next login occurs. Quality Management attaches metadata to calls that span the configured end of day/upload time.</p></div> <p>Successive calls to the Metadata command using the same key name update the existing metadata for that call.</p> <p>Specifying an empty value for a key removes that metadata field association for</p>

Command	Function
	<p>the call.</p> <p>Valid formats for metadata are as follows.</p> <ul style="list-style-type: none"><li>■ Dates—Dates must be in yyyy-mm-dd format (for example 2009-09-24).</li><li>■ Numbers—Numbers can start with and contain a decimal point (for example, valid numbers are .30, 10.7, and 2500). Numbers cannot end with a decimal point or contain a comma (for example, invalid numbers are 30. and 2,500).</li><li>■ Text—Text key values cannot contain the reserved characters.</li></ul> <div data-bbox="467 684 1360 785" style="border: 1px solid #ccc; border-radius: 10px; background-color: #e6f2ff; padding: 10px;"><p><b>Example:</b> &amp; or =</p></div> <p>All other alphanumeric characters are valid.</p> <p>You can find the decimal point in the * key menu and the dash in the zero key menu on your phone.</p>

Command	Function
Start Segment	<p data-bbox="402 268 1073 300">Starts the audio and screen recording of an active call.</p> <p data-bbox="402 325 1092 357">In the Recording Controls API, the &lt;command&gt; is start.</p> <ul style="list-style-type: none"><li data-bbox="428 384 1344 919">■ Agent Recording:<ul style="list-style-type: none"><li data-bbox="500 443 1344 516">• If Quality Management is not currently recording an active call, the Start Segment command starts audio and screen recording.</li><li data-bbox="500 541 1299 615">• If Quality Management is currently recording an active call, the Start Segment command has no effect.</li><li data-bbox="500 640 1344 714">• If the active call ends before the recording is stopped by the agent, the recording is saved according to workflow criteria.</li><li data-bbox="500 739 1295 770">• The Start Segment command does not override the workflow.</li><li data-bbox="500 795 1312 919">• The Start Segment command does override the exclusion list in the Exclusion List window, because the root call does not know the agent's identity when recording.</li></ul></li></ul> <div data-bbox="529 947 1344 1308" style="border: 1px solid #ccc; border-radius: 10px; padding: 10px; background-color: #e6f2ff;"><p data-bbox="566 978 1304 1272"><b>Example:</b> If you are using an Outbound Dialer, you can add the Outbound Dialer to the exclusion list to prevent recording from starting when an agent logs in. The agent can use the Start Segment and Stop Segment commands to override the exclusion list and record each outbound call. For more information, refer to <a href="#">Using Commands with an Outbound Dialer</a>.</p></div> <ul style="list-style-type: none"><li data-bbox="428 1329 1336 1402">■ Gateway/MediaSense Recording does not support the Start Segment command.</li></ul>

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Command	Function
Stop Segment	<p data-bbox="397 268 1339 342">Stops the audio and screen recording of an active call. The recording is then saved according to workflow criteria as a new contact.</p> <p data-bbox="397 369 1089 401">In the Recording Controls API, the &lt;command&gt; is stop.</p> <ul data-bbox="427 428 1333 600" style="list-style-type: none"><li data-bbox="427 428 1300 501">■ Agent Recording supports the Stop Segment command only during active calls.</li><li data-bbox="427 529 1333 600">■ Gateway/MediaSense Recording does not support the Stop Segment command.</li></ul> <p data-bbox="397 630 1352 747">The agent can use the Stop Segment command to stop the recording after a sale has been made and before payment information is taken in order to omit customer data in adherence with PCI DSS.</p>

Command	Function
Start Screen	<p data-bbox="399 268 1370 386">Starts screen only recording regardless of whether or not you are participating in an active call. Voice contact recordings and screen only contact recordings can be bracketed or interleaved.</p> <div data-bbox="399 411 1377 772" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 10px;"> <p data-bbox="440 443 1336 737"><b>Example:</b> You can send the Start Screen command to record your screen while not participating in an active call. If you receive a phone call or make a call during this time, a separate voice and screen contact might be created according to workflow (or you can send the Start Segment and Stop Segment commands to create the contact). After the active call has ended, another screen only contact is created and will continue until you send the Stop Screen command.</p> </div> <p data-bbox="399 793 1321 869">In the Recording Controls API, the &lt;command&gt; is start_screen. You must include at least one key/value pair (&lt;key&gt;=&lt;value&gt; or &lt;key&gt;:&lt;value&gt;).</p> <ul data-bbox="428 894 1344 1503" style="list-style-type: none"> <li data-bbox="428 894 685 926">■ Agent Recording: <ul data-bbox="500 951 1344 1402" style="list-style-type: none"> <li data-bbox="500 951 1328 1026">• The Start Screen command is only supported with the Advanced bundle.</li> <li data-bbox="500 1052 1344 1127">• If Quality Management is not currently recording an active call, the Start Screen command starts screen only recording.</li> <li data-bbox="500 1152 1308 1402">• If Quality Management is currently recording an active call, the Start Screen command has no effect on the current recording. The screen only recording will begin after the active call has ended (if the Stop Screen command has not been issued). The call recording and the screen only recording are saved as separate contact recordings.</li> </ul> </li> <li data-bbox="428 1428 1308 1503">■ Gateway/MediaSense Recording does not support the Start Screen command.</li> </ul> <p data-bbox="399 1528 1360 1646">After issuing the Start Screen command, you can send other commands. The following list contains the commands that are supported with screen only recording and the expected behavior.</p> <ul data-bbox="428 1671 1328 1768" style="list-style-type: none"> <li data-bbox="428 1671 1089 1703">■ Pause—Pauses the current screen only recording</li> <li data-bbox="428 1728 1328 1768">■ Resume—When sent after the Pause command, resumes the screen</li> </ul>

Command	Function
	<p>only recording</p> <ul style="list-style-type: none"><li>■ Restart—Stops the screen only recording, deletes that recording, and restarts the screen only recording from the point when you issued the Restart command.</li></ul> <div data-bbox="467 470 1360 611" style="background-color: #d9ead3; padding: 10px;"><p><b>Note:</b> The Restart command is not supported with Gateway Recording and will be removed in a future release.</p></div> <ul style="list-style-type: none"><li>■ Delete—Deletes the screen only recording. You must send the Stop Screen command either before or after the Delete command in order to be able to send the Start Screen command again to start another screen only recording.</li><li>■ Metadata—Attaches metadata to the active screen only recording</li></ul> <p>All other commands have no affect on the current screen only recording. Issue the Stop Screen command to stop screen only recording.</p>

Command	Function
Stop Screen	<p>Stops screen only recording.</p> <p>In the Recording Controls API, the &lt;command&gt; is stop_screen. You must include at least one key/value pair.</p> <div style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 10px; margin: 10px 0;"> <p><b>Example:</b> &lt;key&gt;=&lt;value&gt; or &lt;key&gt;:&lt;value&gt;</p> </div> <ul style="list-style-type: none"> <li>■ Agent Recording: <ul style="list-style-type: none"> <li>• The Stop Screen command is only supported with the Advance bundle.</li> <li>• If Quality Management is currently recording screen only, the Stop Screen command stops the screen recording. The Stop Screen command only has an effect if you previously issued the Start Screen command.</li> <li>• If the Stop Screen command is not sent after the Start Screen command, the maximum contact recording length is 4 hours.</li> </ul> </li> <li>■ Gateway/MediaSense Recording does not support the Stop Screen command.</li> </ul>
Config	<p>Displays configuration information for the specified user. A user is configured for desktop recording if no serverHost is returned. In this case you need to send commands via the applet, not the server.</p>

## Effects of Issuing Recording Control Commands

The following table indicates the effect of issuing a recording command when the call is currently being recorded, and when the call is not being recorded.

### Effect of issuing recording control commands on calls

Command	Currently Recording	Not Currently Recording
Tag	Sets Reason Code to TAGGED.	Call recording starts. Sets Reason Code to TAGGED.

Command	Currently Recording	Not Currently Recording
Pause	Recording paused.	None.
Resume	Recording resumes (if previously paused).	None.
Restart	Recording restarts. Sets Reason Code to TAGGED.	Recording starts. Sets Reason Code to TAGGED.
Delete	Call deleted.	None.
Start Segment	None.	Recording starts.
Stop Segment	Recording stops and is saved according to workflow criteria.	None.
Start Screen	If there is a current voice and screen recording, the Start Screen command has no effect on the current recording. The screen only recording will begin after the active call has ended (if the Stop Screen command has not been issued) and will be created as a separate contact recording. If there is a current screen only recording, the Start Screen command has no effect.	Screen only recording starts.
Stop Screen	If there is a current screen only recording, screen recording stops. The Stop Screen command only has an effect if you previously issued the Start Screen command.	None.

## Active and Last Call

You must understand the difference between the terms *active call* and *last call*. Some commands can apply to either one of these call types. Some commands can apply to a single call type.

An active call occurs when the Quality Management user is on a call with one or more parties. A call on hold is still an active call. The active call starts when the Quality Management user receives the call (phone is ringing) or makes a new call. The active call ends when the user hangs up the phone.

The last call is the previously recorded call. Any valid recording commands sent after a call ends, and until another call, that matched the inclusion list, is received or made by the user, apply to the last call.

The following table indicates whether the recording command applies to the active call, the last call, or both.

**Recording commands that support Active Calls or Last Calls**

Command	Active Call	Last Call
Pause	Yes	No
Resume	Yes	No
Tag	Yes	No
Restart	Yes	No
Delete	Yes	No
Login	No—The recording command applies to the next active call.	No
Logout	Yes—An active call stop recording.	No
Metadata	Yes	No
Metadata and &active_call_only=true	Yes	No
Start Segment	Yes	No
Stop Segment	Yes	No
Start Screen	Yes—And when there is no active call.	No
Stop Screen	Yes—And when there is no active call.	No

## Using Commands with an Outbound Dialer

An outbound dialer creates a single “nailed up” call for the entire time you are logged in. This results in all of your outbound calls being combined into one large recording, even though you might make numerous outbound calls during your session. Use the Start Segment and Stop Segment commands to break this large nailed up call into multiple contact recordings.

Send the Start Segment command at the beginning and the Stop Segment command at the end of each outbound call to create a unique contact recording for each outbound call. The Start Segment command starts the audio and screen recording of an active call. The Stop Segment command stops the recording. The recording is then saved according to workflow criteria as a new contact. Send the Start Segment command again at the beginning of your next outbound call to start another unique contact recording.

You can also add the Outbound Dialer to the exclusion list to prevent recording from starting when an agent logs in. The agent can use the Start Segment and Stop Segment commands to override the exclusion list and record each outbound call.

For information about commands, refer to [Command Functions](#).



# Integrating CAD with the Recording Controls API Commands

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This section provides examples on how to integrate CAD with the Recording Controls API commands. The examples provided in this section includes:

- Tasks for configuring an HTTP Send Action to invoke the Metadata command to the Base Server
- Task for configuring an HTTP Send Action to invoke the Stop command

## Enabling the Integrated Browser

Before you can use HTTP actions, you must configure the Cisco Desktop Work Flow Administrator to support an integrated browser.

***To enable the integrated browser in Cisco Desktop Work Flow Administrator:***

1. From Cisco Desktop Work Flow Administrator, drill-down to CAS Agent > User Interface.
2. Clear the Enable Integrated Browser check box and then click Apply.

## Configuring an HTTP Request for the Metadata Command Example

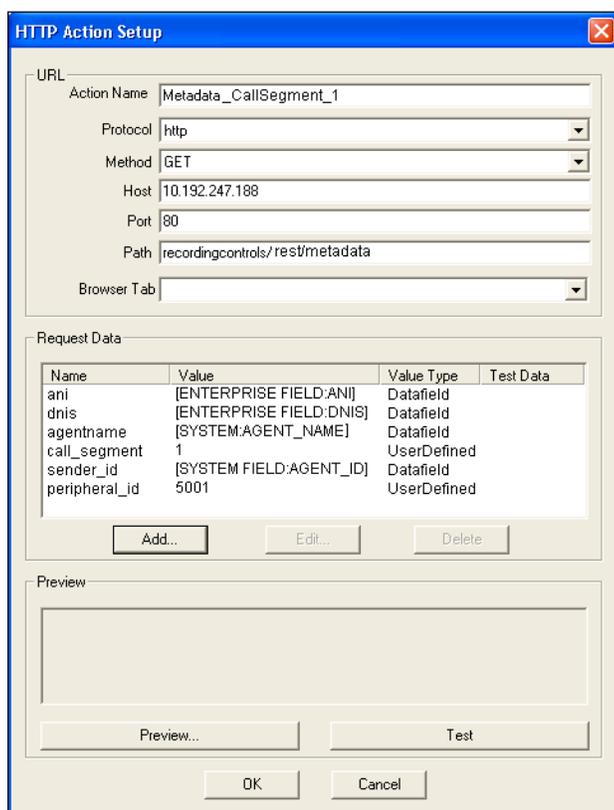
Before configuring an HTTP Request for the Metadata command in CAD, configure the user-defined metadata in Quality Management Administrator. See the *Quality Management Administrator User Guide* for more information. This example uses the following metadata: agentname.

Use the following example to configure an HTTP request for the Metadata command. The HTTP request command sends the Metadata command to the Calabrio Recording Controls on the Base server.

1. In Cisco Desktop Workflow Administrator, create a new HTTP request in the HTTP Action Setup dialog box by completing the fields as follows:

- Action Name: Metadata\_CallSegment\_1
- Protocol: http
- Host: <Base server IP address>  
where <Base server IP address> is the IP address or hostname for the Base server. Note that this address is case sensitive.
- Port: 80
- Path: recordingcontrols/rest/metadata

The following figure shows an example of a completed HTTP Action Setup dialog box.



2. In the Request Data section, click Add.  
The HTTP Request Data Dialog box appears.
3. Complete the fields and then click OK to close the HTTP Request Data Dialog box. For

example:

- Value Name: <key name>

where <key name> is the Key Name configured in Quality Management Administrator

**Example:** agentname

- Value Type: UserDefined
- Value: [SYSTEM:AGENT\_NAME]

The following figure shows an example of a completed HTTP Request Data Dialog box for the “agentname” metadata field.



- Continue adding HTTP request data for each metadata field configured in Quality Management (up to a total of 10 fields). The HTTP Request data also requires the sender\_id and the peripheral\_id (in this order).

All commands require the sender\_id and peripheral\_id.

- Click OK to save HTTP Action Setup.

## Configuring an HTTP Request for the Stop Command Example

Use the following example to configure an HTTP request for the Stop command. The HTTP request command sends the Stop command to the Recording Controls on the Base server.

- In Cisco Desktop Workflow Administrator, create a new HTTP request in the HTTP Action Setup dialog box by completing the fields as follows:

- Action Name: Stop
- Protocol: http
- Host: <Base server IP address> where <Base server IP address> is the IP address or hostname for the Base server. Note that this address is case sensitive.
- Port: 80
- Path: recordingcontrols/rest/stop

The following figure shows an example of a completed HTTP Action Setup dialog box.

Name	Value	Value Type	Test Data
sender_id	[SYSTEM FIELD: AGENT_ID]	DataField	3420
peripheral_id	5001	UserDefined	
extension	[SYSTEM FIELD: LOCAL_PHO]	DataField	2210

2. In the Request Data section, click Add.

The HTTP Request Data Dialog box appears.

3. Complete the fields and then click OK to close the HTTP Request Data Dialog box. For example:

Field Name	Value
Value Name	<p>&lt;key name&gt;</p> <p>where &lt;key name&gt; is the Key Name configured in Quality Management Administrator</p> <div style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px; display: inline-block;"> <p><b>Example:</b> agentname</p> </div>
Value Type	UserDefined
Value	[SYSTEM FIELD:LOCAL_PHONE:EXTENSION]
Test Data	3420

The following figure shows an example of a completed HTTP Request Data Dialog box for the “extension” field.



4. Add the HTTP Request data for the sender\_id and the peripheral\_id (in this order).  
All commands require the sender\_id and peripheral\_id.
5. Click OK to save HTTP Action Setup.



# Integrating Finesse with Recording Controls API Commands

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This section provides examples on how to configure Quality Management Recording Controls API commands from the Cisco Finesse Administrator. To do this, you must perform the following steps:

1. Create an HTTP Request workflow action. See “Add HTTP Request Workflow Action” in the *Cisco Finesse Administration Guide*.
2. Assign the action to a workflow that will trigger on “When a Call is answered”. See “Edit Workflow” in the *Cisco Finesse Administration Guide*.
3. Assign the workflow to a team of agents. See “Assign Workflows to Team” in the *Cisco Finesse Administration Guide*.

Once the workflow action is configured, the Recording Controls API commands are invoked from the Cisco Finesse Desktop when an agent answers a call.

## Configuring an HTTP Request Action to Start Recording in Cisco Finesse Example

Use the following example to configure an HTTP request action to start recording in Cisco Finesse.

- In Cisco Finesse Administrator, create a new HTTP request action that will start a call recording by completing the fields as follows:
  - **Name:** QM Record Start
  - **Type:** HTTP Request
  - **Handled by:** Finesse Desktop
  - **Method:** POST
  - **Location:** Other

**Note:** Do not specify Finesse.

- **Content Type:** `text/json`
- **URL:** `http://<Base server IP address>/recordingcontrols/rest/start`  
where `<Base server IP address>` is the IP address or hostname of the Quality Management Base server.
- **Body:** `{ "peripheral_id": "1", "sender_id": "${loginId}" }`  
Note in the Unified CCX Body example that the peripheral ID is always 1.

## Configuring an HTTP Request Action for Metadata in Cisco Finesse Example

Use the following example to configure an HTTP request action for metadata in Cisco Finesse.

**Note:** Workflow and Actions are configured in Cisco Finesse Administration Console. The workflows must be performed when the Dialog (call) ends. Otherwise, the metadata is tagged to the recording of the agent's previous call, not the current call.

- In Cisco Finesse Administrator, create a new HTTP request action that will invoke the Quality Management metadata command to set the account number and agent first name for the call by completing the fields as follows:
  - **Name:** `QM Meta Data`
  - **Type:** `HTTP Request`
  - **Handled by:** `Finesse Desktop`
  - **Method:** `POST`
  - **Location:** `Other`

**Note:** Do not specify Finesse.

- **Content Type:** `text/json`
- **URL:** `http://<Base server IP address>/recordingcontrols/rest/metadata`

where <Base server IP address> is the IP address or hostname of the Quality Management Base server.

■ Body:

```
{
  "peripheral_id": "1",
  "sender_id": "{loginId}",
  "metadata": {
    "account" : "${callVariable1}"
    "active_call_only":false
  }
}
```



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# Creating Calabrio Gadgets in Finesse

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This section explains how to install the Calabrio gadgets on a Finesse server. The following gadgets are available:

- Calabrio Recording Controls gadget—a Finesse URL gadget wrapper for Calabrio Recording Controls
- Cisco Quality Management Playback gadget—a Finesse URL gadget wrapper for playing back recordings from Calabrio ONE

## Installing a Calabrio Gadget

To install a Calabrio gadget:

1. Log in to the Quality Management Web Base server and copy one of the following folders to a safe location:
  - For the Calabrio Recording Controls gadget:
    - C:\Program Files\Cisco\WFO\_QM\Jetty\work\cone\_ui\webapp\gadgets\RecordingControlsGadgetFinesseURL-10.0.1
    - C:\Program Files\Cisco\WFO\_QM\Jetty\work\cone\_ui\webapp\gadgets\RecordingControlsGadgetFinesseURL-10.5.1
  - For the Cisco Quality Management Playback gadget:
    - C:\Program Files\Cisco\WFO\_QM\Jetty\work\cone\_ui\webapp\gadgets\FinessePlayBackGadget-10.0.1
    - C:\Program Files\Cisco\WFO\_QM\Jetty\work\cone\_ui\webapp\gadgets\FinessePlayBackGadget-10.5.1
2. Open the RecordingControls.xml or FinessePlayBackGadget.xml and make the following changes:
  - a. Change the IP address passed to the `finesse.modules.EmbeddedWebAppGadget.init` function in this XML file to match your Quality Management Web Base server address.

- b. Change the peripheral\_id passed to the `finesse.modules.EmbeddedWebAppCadget.init` function to match your Quality Management system. That is 1 for Unified CCX.
3. Log in to the Finesse server.
4. Upload all the files from your safe location to the Finesse 3rdpartygadget folder on the Finesse server as described in the *Cisco Finesse Web Services Developer(API) Guide* on the [Cisco Finesse DevNet](#) website. When uploading the files, note the following:
  - You will need to create a RecordingControls or FinessePlayBackGadget folder for the gadget files that avoids naming conflicts with other third-party gadget files.
  - You will need to add the gadget to your Finesse layout as follows:

For the Calabrio Recording Controls gadget:

```
<gadget>/3rdpartygadget/files/RecordingControls/RecordingControls.xml</gadget>
```

The gadget will appear as follows within the Finesse Agent Desktop.



For the Cisco Quality Management Playback gadget:

```
<gadget>/3rdpartygadget/files/FinessePlayBackGadget/FinessePlayBackGadget.xml</gadget>
```

Once you enter you Cisco Quality Management username and password, the gadget will appear as follows within the Finesse Agent Desktop.

Contact ID	First Name	Last Name	Date	Called Number	Calling Number	Call Duration	Extensions
396738	QA	CAS3	Dec 4, 2014 12:02:20 AM	5003	11100	00:03:00	5003
396741	QA	CAS3	Dec 4, 2014 12:09:39 AM	5003	11100	00:03:00	5003
396744	QA	CAS3	Dec 4, 2014 12:18:24 AM	5003	11100	00:03:00	5003
396747	QA	CAS3	Dec 4, 2014 12:25:43 AM	5003	11100	00:03:00	5003
396750	QA	CAS3	Dec 4, 2014 12:33:02 AM	5003	11100	00:03:00	5003
396753	QA	CAS3	Dec 4, 2014 12:40:22 AM	5003	11100	00:03:00	5003
396756	QA	CAS3	Dec 4, 2014 12:47:41 AM	5003	11100	00:03:00	5003
396759	QA	CAS3	Dec 4, 2014 12:55:00 AM	5003	11100	00:03:00	5003
396762	QA	CAS3	Dec 4, 2014 01:02:20 AM	5003	11100	00:03:00	5003
396765	QA	CAS3	Dec 4, 2014 01:09:39 AM	5003	11100	00:03:00	5003
396768	QA	CAS3	Dec 4, 2014 01:18:24 AM	5003	11100	00:03:00	5003
396771	QA	CAS3	Dec 4, 2014 01:25:43 AM	5003	11100	00:03:00	5003
396774	QA	CAS3	Dec 4, 2014 01:33:02 AM	5003	11100	00:03:00	5003
396777	QA	CAS3	Dec 4, 2014 01:40:22 AM	5003	11100	00:03:00	5003
396780	QA	CAS3	Dec 4, 2014 01:47:41 AM	5003	11100	00:03:00	5003
396783	QA	CAS3	Dec 4, 2014 01:55:00 AM	5003	11100	00:03:00	5003
396786	QA	CAS3	Dec 4, 2014 02:02:20 AM	5003	11100	00:03:00	5003
396789	QA	CAS3	Dec 4, 2014 02:09:39 AM	5003	11100	00:03:00	5003
396792	QA	CAS3	Dec 4, 2014 02:18:23 AM	5003	11100	00:03:00	5003

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