



Cisco Unified Workforce Optimization

Quality Management CAD and Finesse Integration Guide

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Quality Management CAD and Finesse Integration Guide

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Introduction

You can integrate Cisco Agent Desktop (CAD) and Cisco Finesse with Cisco Unified Workforce Optimization Quality Management via the Recording 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 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

Quality Management includes the following new features.

Quality Management 10.0(1)

- Added support for Cisco Finesse.
- The API has been modified to use HTTP requests. IPC send actions no longer work.
- You no longer need a loopback IP address or port number for the agent's PC.
- Added support for Gateway Recording. The behavior of recording commands depends on whether you are using Gateway Recording or Agent Recording.
- Added the Start and Stop commands for an outbound dialer.

Recording Commands

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. For example, you can use recording commands to record a call, pause the recording, and attach metadata to a recording.

Table 1 describes how the recording commands interact with each other and the Quality Management components.

Table 1. Recording commands for Java

Command	Function
Record Tag	<p>Records a call and uploads the call to the Quality Management server at the end of the day. The Record Tag command behaves as follows:</p> <ul style="list-style-type: none"> • Agent Recording—marks a call for recording, even if archiving is not enabled and the call does not meet the workflow criteria. The Record Tag command overrides both the Don't Record list and the workflow classifiers. • Gateway Recording—marks a recording as tagged if archiving is enabled and the call meets the workflow criteria. The Record 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 "Gateway Recording Considerations" in the <i>Administrator User Guide</i> for more information. <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"> • The Record Tag command is valid for the active call and the last call. • 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. • 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. • 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 Record Tag command.
Record Tag (con't)	<p>Gateway Recording and Agent Recording:</p> <ul style="list-style-type: none"> • If Quality Management is recording an active call, Quality Management adds the Agent Tagged reason code to the data associated with the call. • If Quality Management recorded the last call, Quality Management updates the reason code to the Agent Tagged reason. • If Quality Management did not record the last call, nothing happens. Quality Management cannot update the reason code when no recording is available.

Command	Function
Pause	<p>Temporarily halts the recording of a contact.</p> <p>Use the Pause commands 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 commands to omit sensitive information from the recording.</p> <p>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. When using the Pause command, note the following:</p> <p>Agent Recording:</p> <ul style="list-style-type: none"> • The pause command is valid for active calls only. • The pause command affects both the screen and audio portions of the contact. • If you send a pause command for a call currently in the paused state, the pause command has no affect. • 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: Screen recording paused • The pause command does not affect live monitoring. <p>Gateway Recording delays the pause. The pause will appear in the recording after the recording is uploaded.</p> <p>Issue the Resume command when you want to start recording after a pause.</p>
Resume	<p>Resumes recording the contact after you issued a Pause command to stop the recording.</p> <p>For Agent Recording:</p> <ul style="list-style-type: none"> • The Resume command affects both voice and screen recording. • If the call is not currently paused, the Resume command has no effect. • The Resume command is valid for active calls only. • If you do not use the Resume command, the point at which you paused the recording is the end of the audio recording. • A Resume command does not appear as a mutual silence event or talkover event during post-call processing.

Command	Function
Restart	<p>Restarts or starts the recording of a call.</p> <ul style="list-style-type: none"> • Agent Recording: <ul style="list-style-type: none"> - 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. - If Quality Management is not currently recording an active call, the Restart command starts audio and screen recording. - The Restart command is valid for active calls only. - 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. • Gateway Recording does not support the Restart command. <p>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>
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> <ul style="list-style-type: none"> • The Delete command is valid for the active call only. • The Delete command has precedence over all other commands. • Once you delete a call you cannot record it by issuing the Record Tag command. • Deleted calls are not available for archive purposes or quality management purposes. • You cannot view deleted calls in Workforce Optimization. • For Gateway 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.
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>This command is not supported if you are using Gateway Recording.</p>

Command	Function
Logout	<p>Sends a logout request to associate an agent with the given extension for hot desking.</p> <p>This command is not supported if you are using Gateway Recording.</p>
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> <ul style="list-style-type: none">• The Metadata command is valid for the active call and the last call.• 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.• You can only attach metadata defined in Monitoring and Recording Administrator (Enterprise > Recordings > Metadata) to a call. If you add an unknown key to a Metadata command, Quality Management ignores the unknown key. <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> <p>NOTE: 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> <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 the call.</p>

Command	Function
Metadata (continued)	<p>Valid formats for metadata are as follows.</p> <ul style="list-style-type: none"> • Dates—Dates must be in yyyy-mm-dd format (for example 2009-09-24). • 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). • Text—Text key values cannot contain the reserved characters. For example: <ul style="list-style-type: none"> - & - = <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>
Start Segment	<p>Starts the audio and screen recording of an active call.</p> <ul style="list-style-type: none"> • Agent Recording: <ul style="list-style-type: none"> - If Quality Management is not currently recording an active call, the Start Segment command starts audio and screen recording. - If Quality Management is currently recording an active call, the Start Segment command has no effect. - If the active call ends before the recording is stopped by the agent, the recording is saved according to workflow criteria. - The Start Segment command does not override the workflow. - 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. For example, 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 on using recording commands with an outbound dialer, see "Using Commands with an Outbound Dialer" on page 15. • Gateway Recording does not support the Start Segment command.

Command	Function
Stop Segment	<p>Stops the audio and screen recording of an active call. The recording is then saved according to workflow criteria as a new contact.</p> <ul style="list-style-type: none"> • Agent Recording: <ul style="list-style-type: none"> - The Stop Segment command is valid for active calls only. • Gateway Recording does not support the Stop Segment command. <p>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>
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

[Table 2](#) indicates the effect of issuing a recording command when the call is currently being recorded, and when the call is not being recorded.

Table 2. Effect of issuing recording control commands on calls

Command	Currently Recording	Not Currently Recording
Record Tag	Sets Reason Code to TAGGED.	Call recording starts. Sets Reason Code to TAGGED.
Pause	Recording paused.	None.
Pause URL	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.

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.

[Table 3](#) indicates whether the recording command applies to the active call, the last call, or both.

Table 3. Recording commands that support Active Calls or Last Calls

Command	Active Call	Last Call
Record Tag	Yes	No
Pause	Yes	No
Pause URL	Yes	No
Resume	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	Yes
Start Segment	Yes	No
Stop Segment	Yes	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” on page 7](#).

Requirements

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.

Integrating CAD with the Recording API Commands

This section provides the information you need to integrate CAD with the Recording API commands. The information 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

Configuring an HTTP Request for the Metadata Command

PREREQUISITE Before configuring an HTTP Request for the Metadata command in CAD, configure the user-defined metadata in Quality Management Administrator. See the *Monitoring and Recording Services Administrator User Guide Quality Management Administrator User Guide* for more information. This example uses the following metadata: [SYSTEM FIELD:AGENT_NAME]

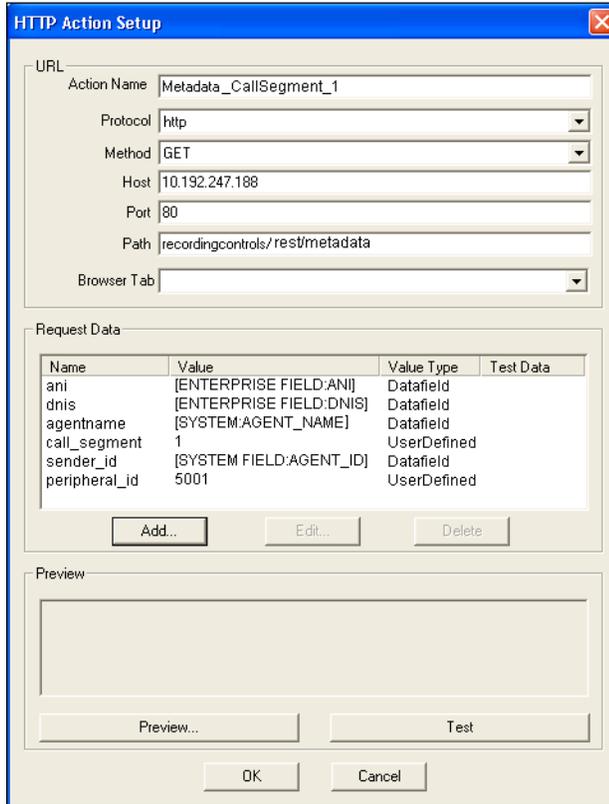
Use the following task to configure an HTTP request for the Metadata command. The HTTP request command sends the Metadata command to the Calabrio Recording Controls on the Base server.

TASK

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: the IP address or hostname for the Base server. Note that this address is case sensitive.
 - Port: 80
 - Path: recordingcontrols/rest/metadata

STEP RESULT: Figure 1 shows an example of a completed HTTP Action Setup dialog box.

Figure 1. HTTP Action Setup dialog box



2. In the Request Data section, click Add.

STEP RESULT: 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: Enter the Key Name configured in Quality Management Administrator (for example, agentname)
- Value Type: UserDefined
- Value: [SYSTEM:AGENT_NAME]

STEP RESULT: Figure 2 shows an example of a completed HTTP Request Data Dialog box for the “agentname” metadata field.

Figure 2. HTTP Request Data Dialog box



4. 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).

ADDITIONAL INFORMATION: All commands require the sender_id and peripheral_id.

5. Click OK to save HTTP Action Setup.

Configuring an HTTP Request for the Stop Command

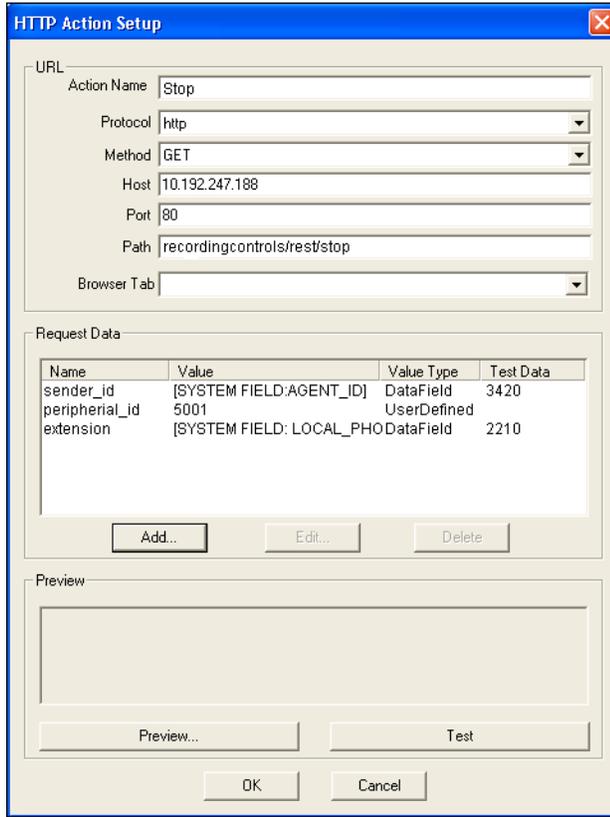
Use the following task to configure an HTTP request for the Stop command. The HTTP request command sends the Stop command to the Calabrio Recording Controls on the Base server.

TASK

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

STEP RESULT: Figure 3 shows an example of a completed HTTP Action Setup dialog box.

Figure 3. HTTP Action Setup dialog box



2. In the Request Data section, click Add.

STEP RESULT: 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: Enter the Key Name configured in Quality Management Administrator (for example, agentname)
 - Value Type: UserDefined
 - Value: [SYSTEM FIELD:LOCAL_PHONE:EXTENSION]
 - Test Data: 3420

STEP RESULT: Figure 4 shows an example of a completed HTTP Request Data Dialog box for the “extension” field.

Figure 4. HTTP Request Data Dialog box



The screenshot shows a dialog box titled "HTTP Request Data Dialog". It contains the following fields and values:

- Value Name: extension
- Value Type: UserDefined (dropdown menu)
- Value: ||SYSTEM FIELD:LOCAL_PHONE_EXTE
- Test Data: 3420

Buttons for "OK" and "Cancel" are located at the bottom of the dialog.

4. Add the HTTP Request data for the sender_id and the peripheral_id (in this order).

ADDITIONAL INFORMATION: All commands require the sender_id and peripheral_id.

5. Click OK to save HTTP Action Setup.

Integrating Finesse with Recording API Commands

You can 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

TASK

- 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: 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": "5001", "sender_id": "loginId ✖" }
```

Note in the previous Body example that 5001 is a sample peripheral ID. You need to specify the peripheral ID for your Unified CCX system.

STEP RESULT: The following figure shows an example of a completed HTTP request action that will start a call recording.

Edit Action

Name: QM Record Start
Type: HTTP Request
Handled by: Finesse Desktop

Method: POST
Location: Finesse
Content Type: text/json

URL: http://192.0.2.0:80/recordingcontrols/rest/start

Body: {"peripheral_id": "5001", "sender_id": "loginId"}

Preview

Sample Data

loginId: 1001

URL: http://localhost:8082http://192.0.2.0:80/recordingcontrols/rest/start

Body: {"peripheral_id": "5001", "sender_id": "1001"}

Save Cancel

Configuring an HTTP Request Action for Metadata in Cisco Finesse

TASK

- 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: 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": "5001", "sender_id": "loginId ✖",  
  "metadata": {  
    "accountnumber": "callVariable1 ✖", "agentname": "firstName ✖",  
    "call_segment", "1"  }}
```

Note in the previous Body example that 5001 is a sample peripheral ID. You need to specify the peripheral ID for your Unified CCX system.

STEP RESULT: The following figure shows an example of a completed HTTP request action that will invoke the Quality Management metadata command.

Edit Action

Name: QM Meta Data
Type: HTTP Request
Handled by: Finesse Desktop

Method: POST
Location: Finesse
Content Type: text/json

URL: http://192.0.2.0:80/recordingcontrols/rest/metadata

Body: { "peripheral_id": "5001", "sender_id": "loginId ✖",
 "metadata": {
 "accountnumber": "callVariable1 ✖", "agentname": "firstName ✖",
 "call_segment", "1" }}

Preview

Sample Data

callVariable1: 12345678
firstName: Bill
loginId: 1001

URL: http://localhost:8082http://192.0.2.0:80/recordingcontrols/rest/metadata

Body: { "peripheral_id": "5001", "sender_id": "1001",
 "metadata": {
 "accountnumber": "12345678", "agentname": "Bill",
 "call_segment", "1" }}

Save Cancel

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