VAR Process for New Customer Setup

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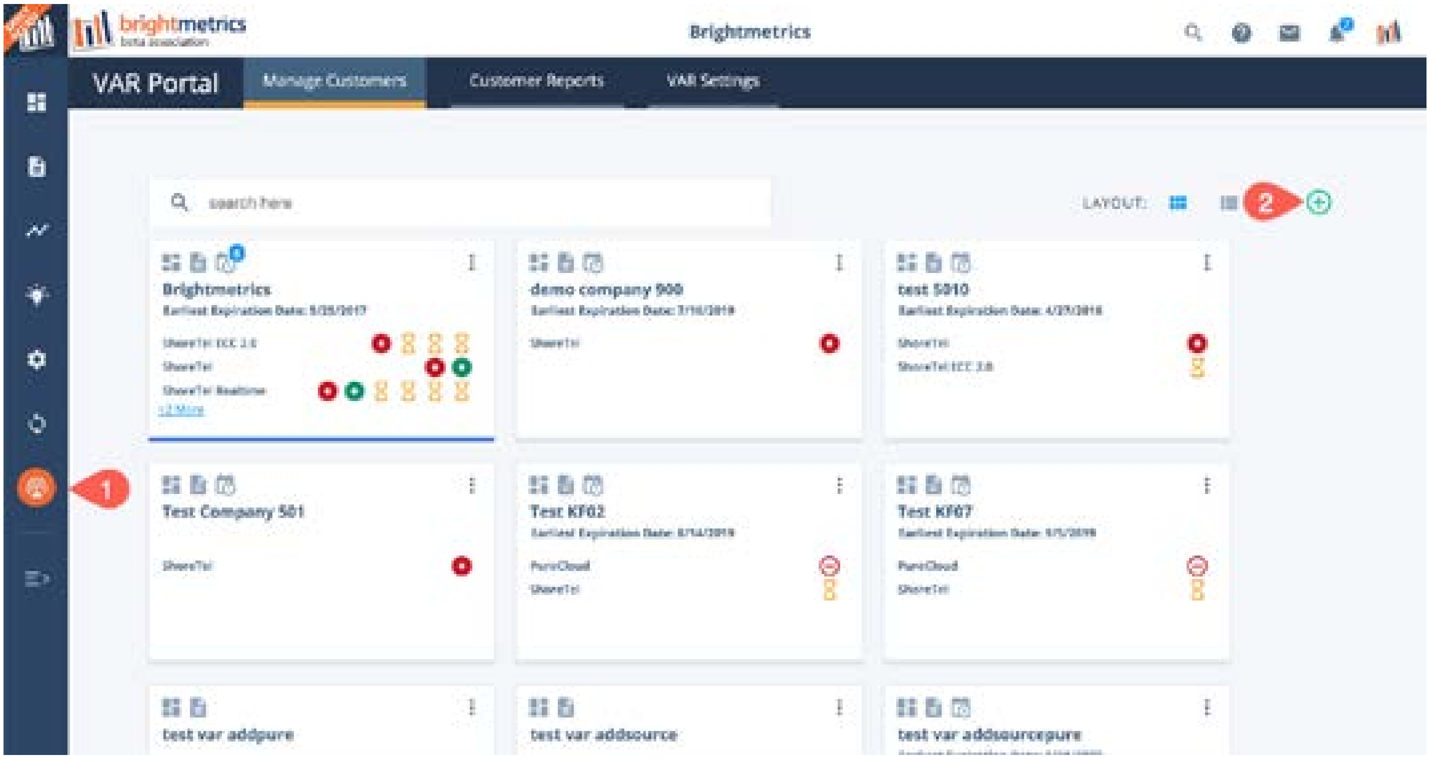
Adding a New Customer in Brightmetrics

You have a new customer interested in Brightmetrics? That's great, this guide will take you through the easy steps to deploy Brightmetrics for them.

It all starts on our VAR Portal page:

1. Navigate there by clicking on the icon in the sidebar. You'll see a list of your existing customers
2. To add a new customer, simply click the plus icon in the upper right (2)



Our dialog wizard will pop up. On the first page, you'll see a list of all the Brightmetrics products you're currently authorized to sell. Select all modules that apply to your customer.

If you're not sure which modules to use, here's a quick guide on our recommendations:

- Mitel MiVoice Connect Customer
  - No ECC - setup Brightmetrics **Core** and **Real Time** modules
  - Has ECC - setup **all three** modules (Core, ECC, Real Time)
- PureCloud
  - Always setup PureCloud and Real Time

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The next page you'll be taken to is the Customer Details. Here you'll want to enter:

1. Customer Company Name
2. Maintenance Renewal Date
   a. If you are a Brightmetrics Partner, this field is for your own internal tracking
   b. If you are a Brightmetrics Reseller, you'll also see the option for monthly or yearly subscription period. Select the appropriate billing period.
3. First User Info - this will be the first **customer** user. The user will be added with the administrator role in Brightmetrics
4. VAR Support Account - this will add your centralized support account as an admin account on the customer's Brightmetrics account. **Note: as a best practice, Brightmetrics recommends always checking this box.**

From here, the wizard dialog will guide you through the steps to set up the modules you selected. This should be fairly easy to follow, but we've added Help guides for each module to the rest of this document. You can click the quick links below to jump to any one of these you need:

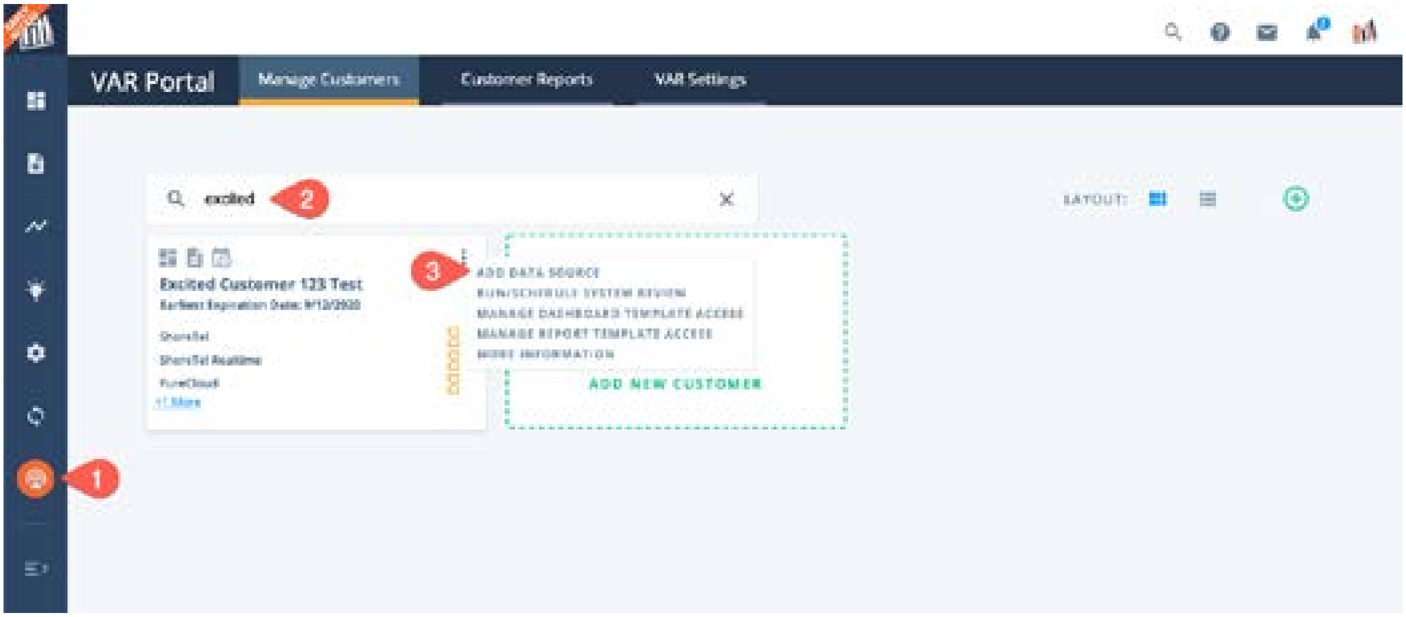
- MiVoice Connect Core Setup
- MiVoice Connect ECC Setup
- MiVoice Real Time Setup
- PureCloud Setup
- PureCloud Real Time Setup

Adding a New Module to an Existing Customer

From time to time a customer may become interested in a service module that they haven't had previously setup.

Here's how you do this:

1. Navigate to the VAR Portal page in Brightmetrics
2. Find your customer - if you have a long list, you can search by typing here
3. Click the menu icon and find the option for **Add Data Source**



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This will pop up a list of the modules you have available to deploy to this customer. Note that by default we only allow one instance of each module, so you'll see some items greyed out in this list. However there are edge cases where a customer may need multiples of the same module (ie. multiple HQ servers on MiVoice Connect). In this case, email support@brightmetrics.com and we'll help you take care of that.

Click on whichever modules you need to setup:

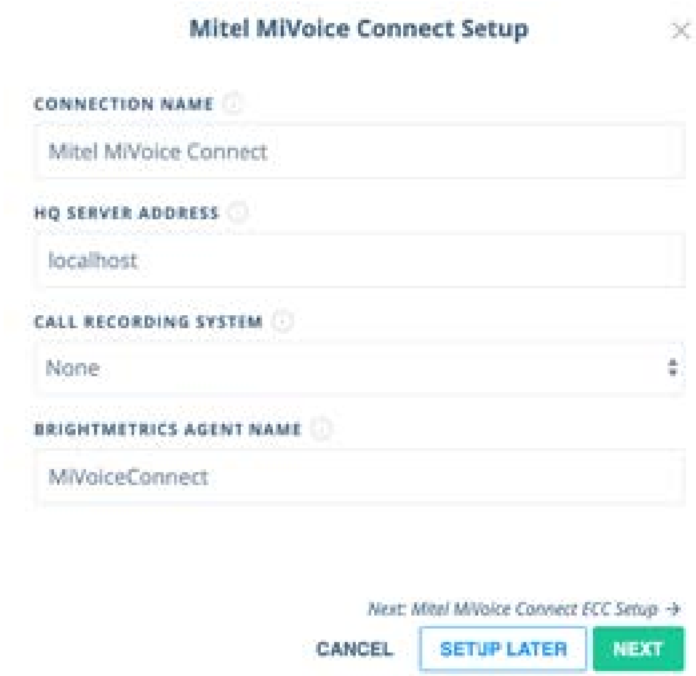
From here, the wizard dialog will guide you through the steps to setup the modules you selected. This should be fairly easy to follow, but we've added Help guides for each module to the rest of this document. You can click the quick links below to jump to any one of these you need:

- MiVoice Connect Core Setup
- MiVoice Connect ECC Setup
- MiVoice Real Time Setup
- PureCloud Setup
- PureCloud Real Time Setup

MiVoice Connect Core Setup

When setting up the Brightmetrics MiVoice Connect Core Module, there are 4 things you'll need to enter:

1. **Connection Name** - we automatically populate this and there is typically no need to change this.
2. **HQ Server Address** - we automatically fill this with **localhost**. For most customers, this never needs to be changed - only update this if they have a different HQ Server Address
3. **Call Recording System** - this is where you'll setup a call recording integration if needed. **More on this below**.
4. **Brightmetrics Agent Name** - this will be the name of the agent you install in their environment. We populate this with a default and there is typically no need to change this.



Call Recording Integrations

Brightmetrics currently supports two call recording integrations for MiVoice Connect - the Mitel Professional Services Call Recorder and nLighten by ProphecyIQ.

If you are setting up nLighten, all you have to do is select the Call Recorder - users will automatically be asked to authenticate to nLighten when they attempt to access a call recording in Brightmetrics.

For the Mitel Professional Service Call Recorder there are a few more options to consider:

1. First, you'll select the **ShoreTel Call Recorder**
2. Enter the address for the recording server
3. Choose if you want users to credential **Per-user** or **System-wide**

- **Per-user** - If you select this option, everyone will use their own individual Call Recording Username and Password to access recordings in Brightmetrics. This gives your customer the ability to limit recording visibility to different user. To setup this integration on a per-users basis, select Per-User here.
- **System-wide** - if you select the this option (as pictured below), everyone will use the credentials you specify here. Enter the Call Recording Username and Password. The user ID and password set here is the same ID and password a user utilizes for Mitel Director or Mitel Communicator access. **Please note that if you are setting up System-wide credentials, everyone who listens to call recordings will be listening under that specific account.**

Mitel MiVoice Connect ECC Setup

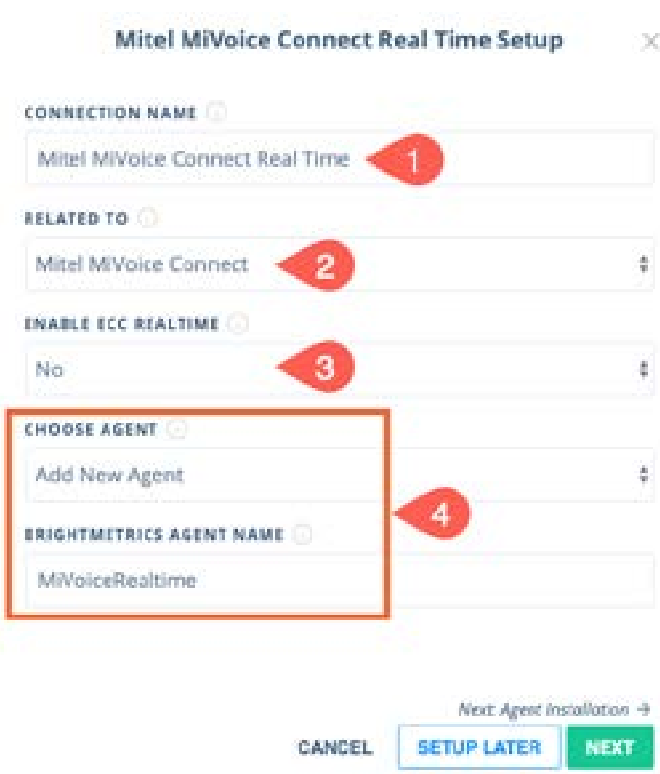
When setting up Brightmetrics for Mitel MiVoice Connect ECC, here's the details you'll need to enter.
Note: Brightmetrics requires the CCIR server be installed for ECC reporting. This does not incur additional licensing with Mitel and we have also included setup instructions in Appendix A.

1. Connection Name - we automatically populate this field and there is rarely a need to change the default.
2. Related To - this is where you'll choose which Mitel HQ Server this ECC instance is related to. most customers only have one HQ system, but if your customer has multiple, select the appropriate one here.
3. Data File Location - we automatically populate this field and there is rarely a need to change the default.
4. ECC Server Address - this is the address for the ECC Server
5. CCIR Server Address - this is the address for the CCIR Server
6. HQ Server Address - this is the address for the MiVoice Connect HQ Server
7. Agent - if you have already installed the ECC agent, select Choose Agent and pick an existing agent from the list that appears. If you are installing a new ECC Brightmetrics Agent, select Install a new agent and enter an Agent Name. **Note: as a best practice, Brightmetrics recommends installing a second agent for ECC on the CCIR server instead of using the existing Core UC or Real Time agents.**

Mitel MiVoice Real Time Setup

When setting up Brightmetrics for Mitel MiVoice Connect Real Time, here's the details you'll need to enter:

1. Connection Name - we automatically populate this field and there is rarely a need to change the default.
2. Related To - this is where you'll choose which Mitel HQ Server this Real Time instance is related to. Most customers only have one HQ system, but if your customer has multiple, select the appropriate one here.
3. Enable ECC Real Time - if your customer has ECC, you'll want to select Yes here. Additional details will appear to fill in:
   a. ECC Server Address
   b. Event Feed Username and Password. **If you need help setting up an Event Feed, refer to Appendix B.**



Mitel MiVoice Connect Agent Installation

Once you have entered details for the modules you are setting up, a page will appear with links to the agents you'll need to install on the environment. Depending on configuration, you'll have one to three agents to install here.

As a best practice, Brightmetrics recommends installing agents in these locations:

- Core Module Agent - HQ Server
- ECC Module Agent - CCIR Server
- Real Time Module - TAPI Application server **(required)**

CONTACT CENTER Analytics for MiContact Center Setup

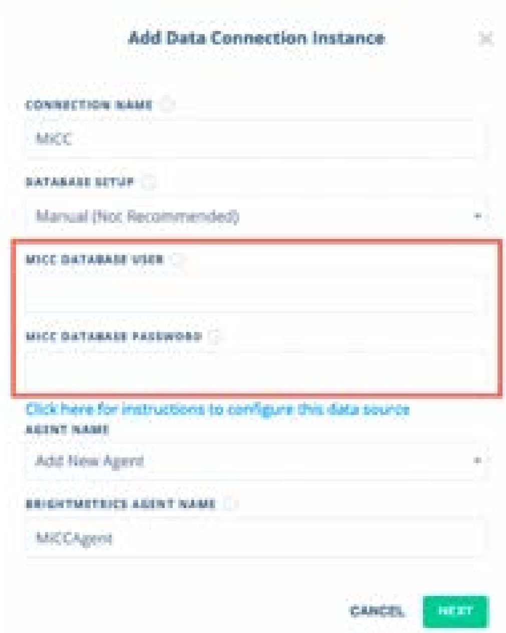
When setting up MiCC, it is almost always recommended to use our automatic setup - this will guide you through authenticating to your customer's MiCC environment and our diagnostics will automatically setup SQL credentials. If you are setting up automatically, there are three steps to this setup:

1. **Connection Name** - we automatically populate this field and there is rarely a need to change the default.

2. **Setup** - leave this as Automatic.

3. **Brightmetrics Agent Name** - this will be the name of the agent you install in their environment. We populate this with a default and there is typically no need to change this.

If you are going to setup SQL Credentials manually, some additional fields will appear to enter:



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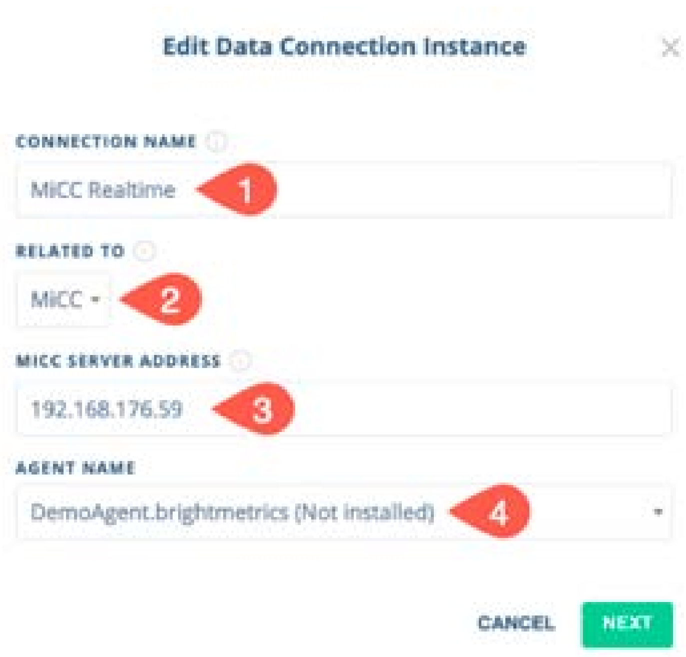
REAL TIME Analytics for MiContact Center Setup

When setting up REAL TIME for MiContact Center, here are the details you'll need to enter:

1. **Connection Name** - we automatically populate this field and there is rarely a need to change the default.
2. **Related To** - this is where you'll choose which MiCC system this REAL TIME instance is related to. Most customers only have one HQ system, but if your customer has multiple, select the appropriate one here.
3. **MiCC Server Address** - this is the address for the MiCC server.
4. **Agent Name** - here you can choose to use an existing agent for REAL TIME access or a new one. **As a best practice, Brightmetrics recommends using the same agent as installed for the CONTACT CENTER Analytics for MiContact Center.**



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Mitel MiContact Center Agent Installation

Once you have entered details for the modules you are setting up, a page will appear with links to the agents you'll need to install on the environment. Depending on the configuration, you may have one or two agents to install here.

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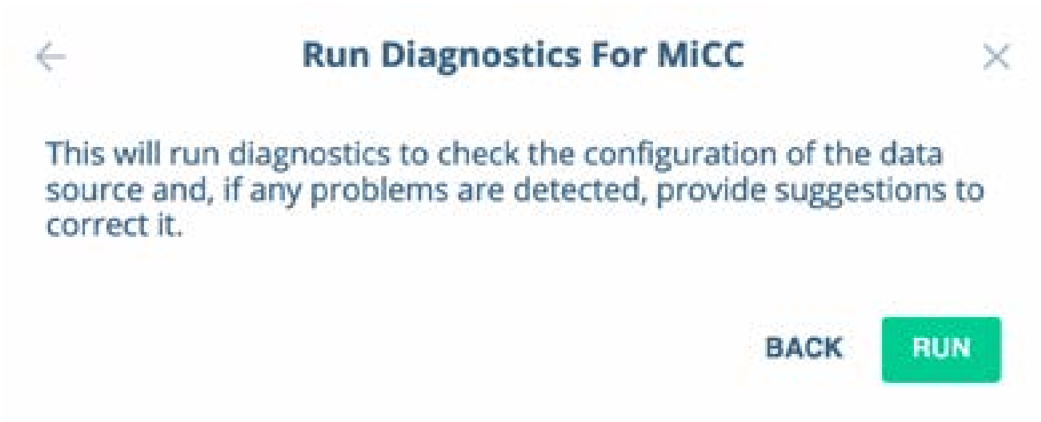
Mitel MiContact Center Diagnostics

After applying the configuration settings for the MiCC modules and installing the software agents, you'll be brought to the Diagnostics portion of the setup dialog. Click "Run" to start diagnostics - this will check that the Brightmetrics agents are installed correctly and that the MiCC environment is configured for detailed reporting. If any errors are found, the Diagnostic will prompt you with steps to correct them.

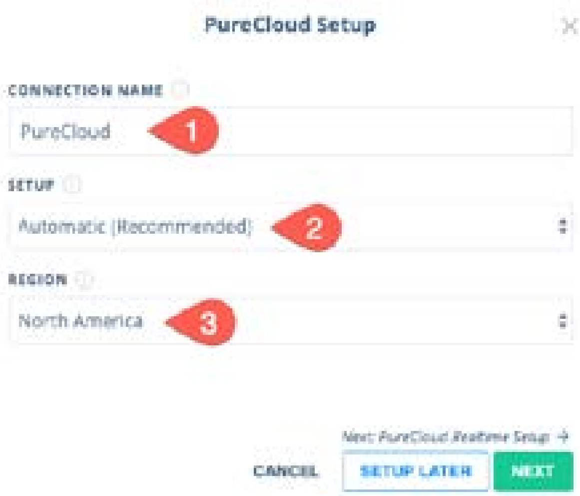


PureCloud Setup

When setting up PureCloud, it is nearly always recommended to use our Automatic setup - this will guide you through authenticating to your customer's PureCloud environment and our diagnostics will automatically setup the OAuth connection.

If you are setting up automatically, you'll see three fields on the setup page:

1. Connection Name - we automatically populate this field and there is rarely a need to change the default.
2. Setup - leave this as Automatic
3. Region - select the region your customer's PureCloud environment is setup in.

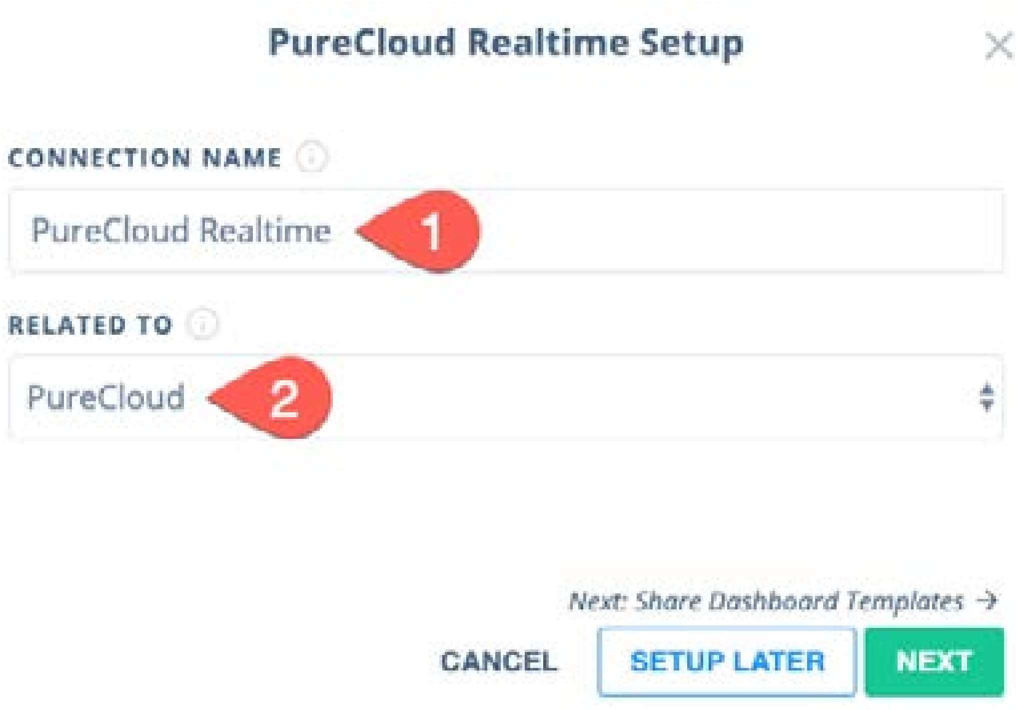


If you are setting up the OAuth Client manually, some additional fields will appear to enter:

PureCloud Real Time Setup

The Brightmetrics PureCloud Real Time module will use the same OAuth connection as the PureCloud module, so this setup is very simple. You have two fields on the setup page:

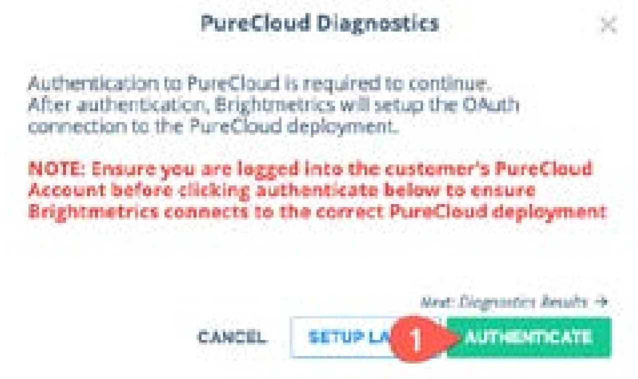
1. Connection Name - we automatically populate this field and there is rarely a need to change the default.
2. Related To - this is where you'll choose which PureCloud module this Real Time instance is related to. Most customers only have one PureCloud system, but if your customer has multiple and they are all setup on Brightmetrics, select the appropriate one here.



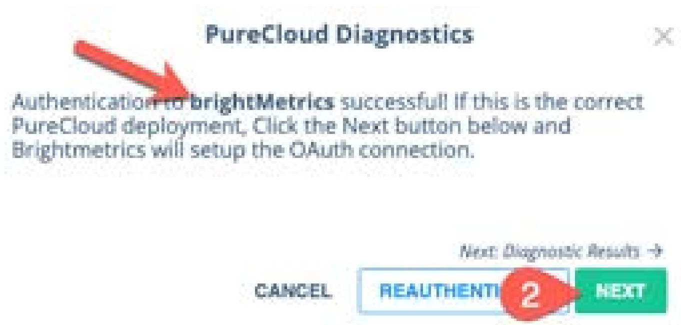
PureCloud Diagnostics

After applying configuration setting for the PureCloud modules, you'll be brought to the Diagnostics portion of the setup dialog. There are 3 steps here.

1. Authenticate to the customer's PureCloud environment. **Note: Ensure you are logged into the customer's PureCloud account and not your own to ensure Brightmetrics connects to the right PureCloud deployment.**



2. Confirm you authenticated to the right organization - you'll see the organization name listed in bold. If it is correct, click Next.



3. Brightmetrics will run the diagnostic setup and confirm for you once the setup has successfully completed. From here, you may have additional steps or be finished with the setup. Click Next or Done to move on.

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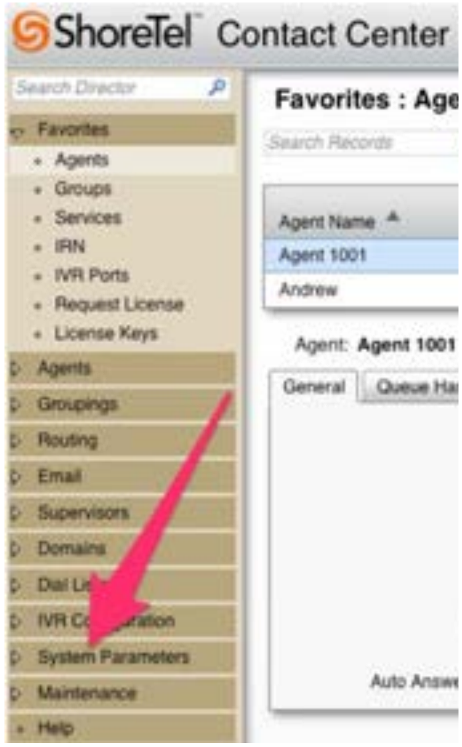
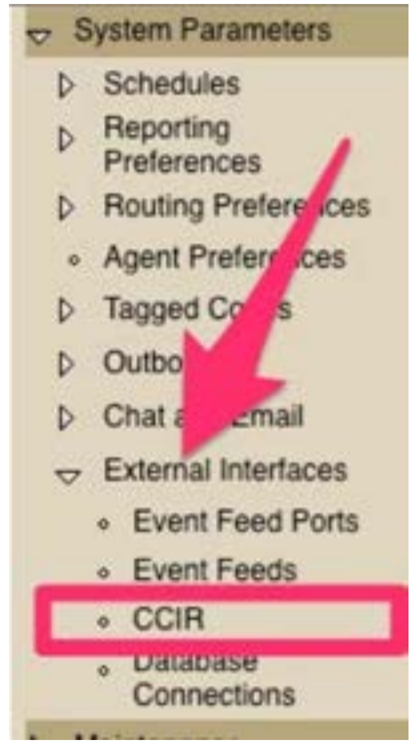
Appendix A: Setting up CCIR Transform Service in ECC

We've also created a video walk through on this process- [access it here](#).

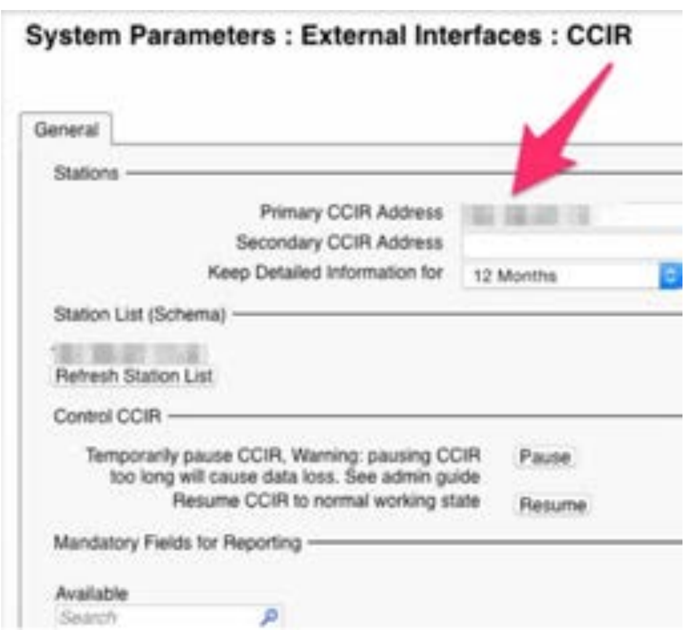
1. Local Host

In ShoreTel (Mitel) Contact Center, from within System Parameters, drill down into External Interfaces and select **CCIR .**





2. Primary CCIR Transform Service



If the Primary CCIR Address field is populated, then CCIR is already configured.

The address displayed here is what needs to be entered in the Brightmetrics ECC data source setup dialog.

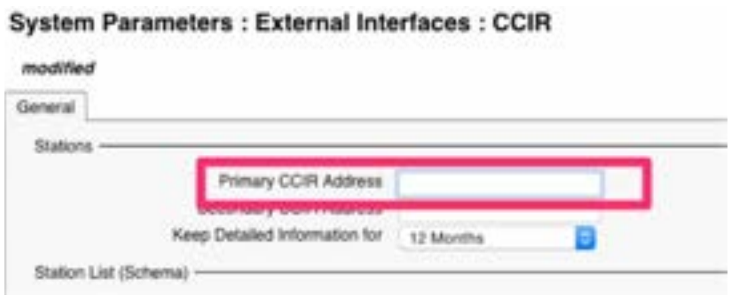
3. Local Host

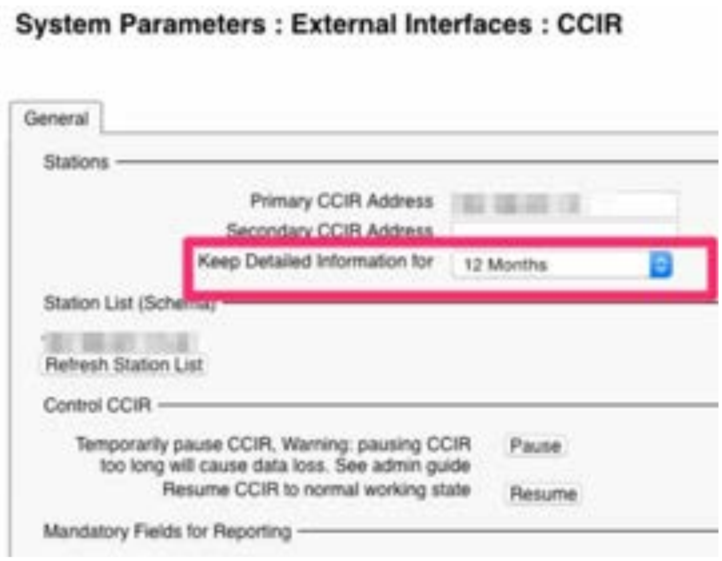
If it is “localhost”, “127.0.0.1”, or the ECC server’s own IP address on the network, then CCIR’s C2G database is installed locally and the ECC server’s IP address should be entered in both fields of the Brightmetrics ECC data source setup dialog. If you have upgraded from ECC version 7 (using port 4306), you may need to select port 6306 as the updated Brightmetrics C2G Port. If the address fields are blank, as shown in the accompanying screenshot, then proceed to the next step.

4. Primary CCIR Transform Service Address

If the **Primary CCIR Address** field is blank, then CCIR needs to be installed. CCIR can be installed locally on the ECC server or on a separate server. Mitel recommends installing CCIR on a separate server especially if any of the following are true:

- Keeping CCIR data for more than 30 days (Brightmetrics recommends keeping the data for at least 90 days. We do create our own data set from processing the CCIR data, however, if there is ever an issue and we need to go back and reimport, 3 months usually gives us the data we need).
- ECC handles more than 500 calls per hour.
- You use or want to use redundancy for ECC and CCIR.





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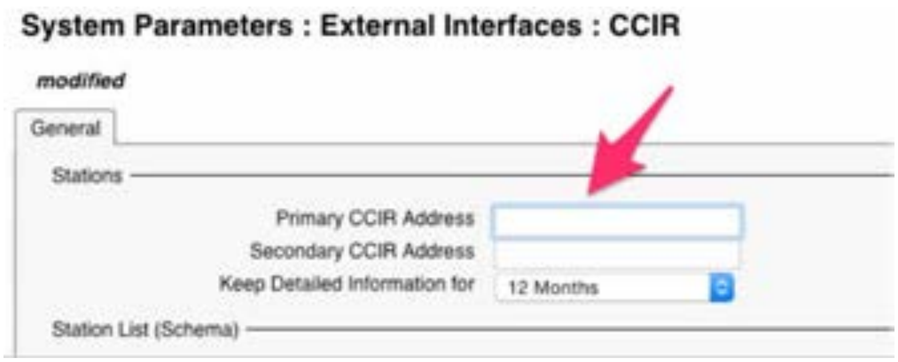
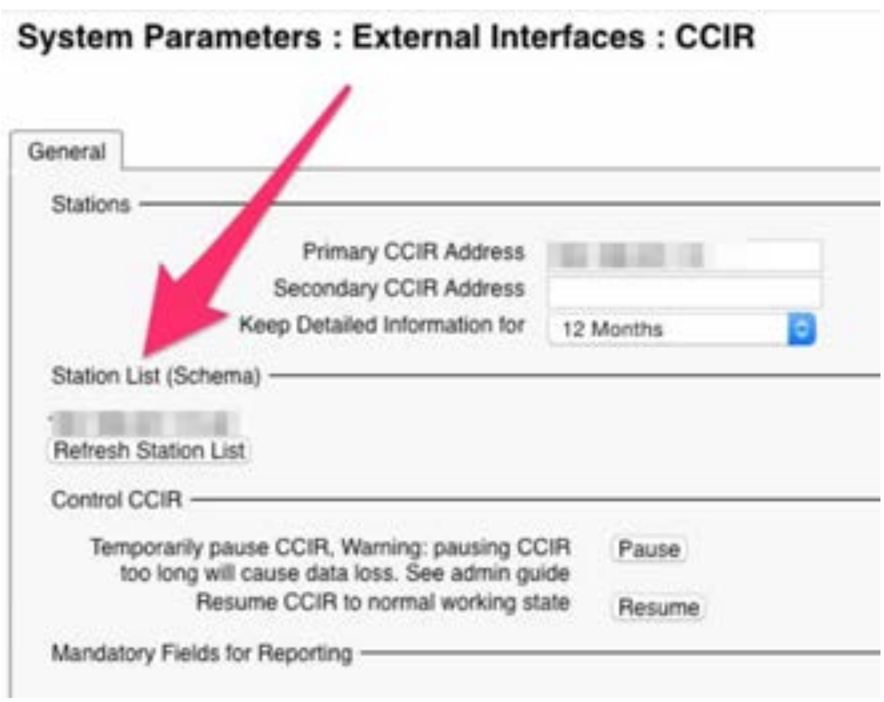
Now that the server has been identified on which CCIR Transform Service will be installed, locate the installation media for MiVoice Connect Contact Center. This may be either an installation CD or a download package from Mitel's support site.
On the identified CCIR server, run setup.exe located in the "Mitel CCIR Transform Service" folder. You will be prompted to enter the ECC server's address, Once the server address is entered, the installer will verify that it can contact the ECC server.

5. After Installing CCIR Transform Service

After CCIR is installed, return to the CCIR section of Contact Center Director and enter the CCIR server's IP address in the **Primary CCIR Address** field.



6. Station List (Schema)

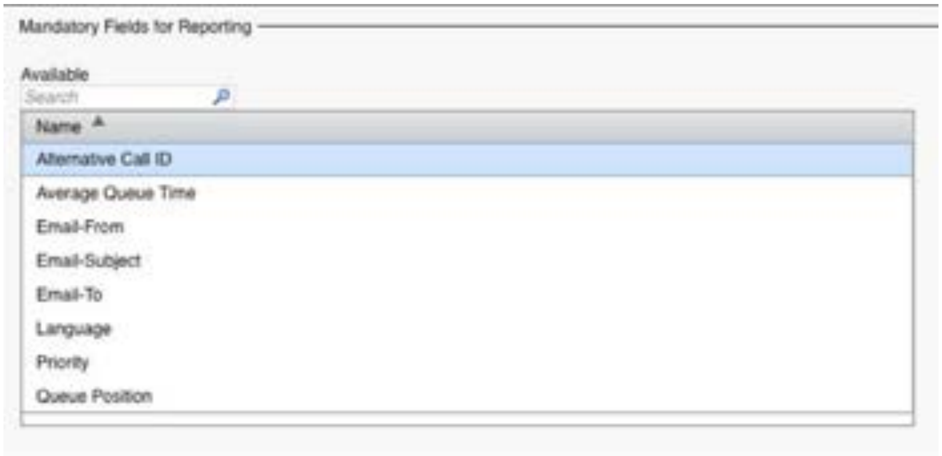


The CCIR server should be visible in the **Station List (Schema)** area. If it is not as shown in the accompanying screenshot, click Refresh Station List. If it still does not appear, restart the CCIR server, or at minimum the CCIR services on the CCIR server, and verify that the server appears in this section. Until it shows here, CCIR will not work.

7. Customer Name and Customer Number

In the Mandatory Fields for Reporting section, move the **Customer Name** and **Customer Number** fields from Available to Selected. Then click the Save button at the top of the page to save changes.

8. No Other Mandatory Fields Necessary



No other Mandatory Fields, Call Profiles, or Skills fields are supported by Brightmetrics at this time.

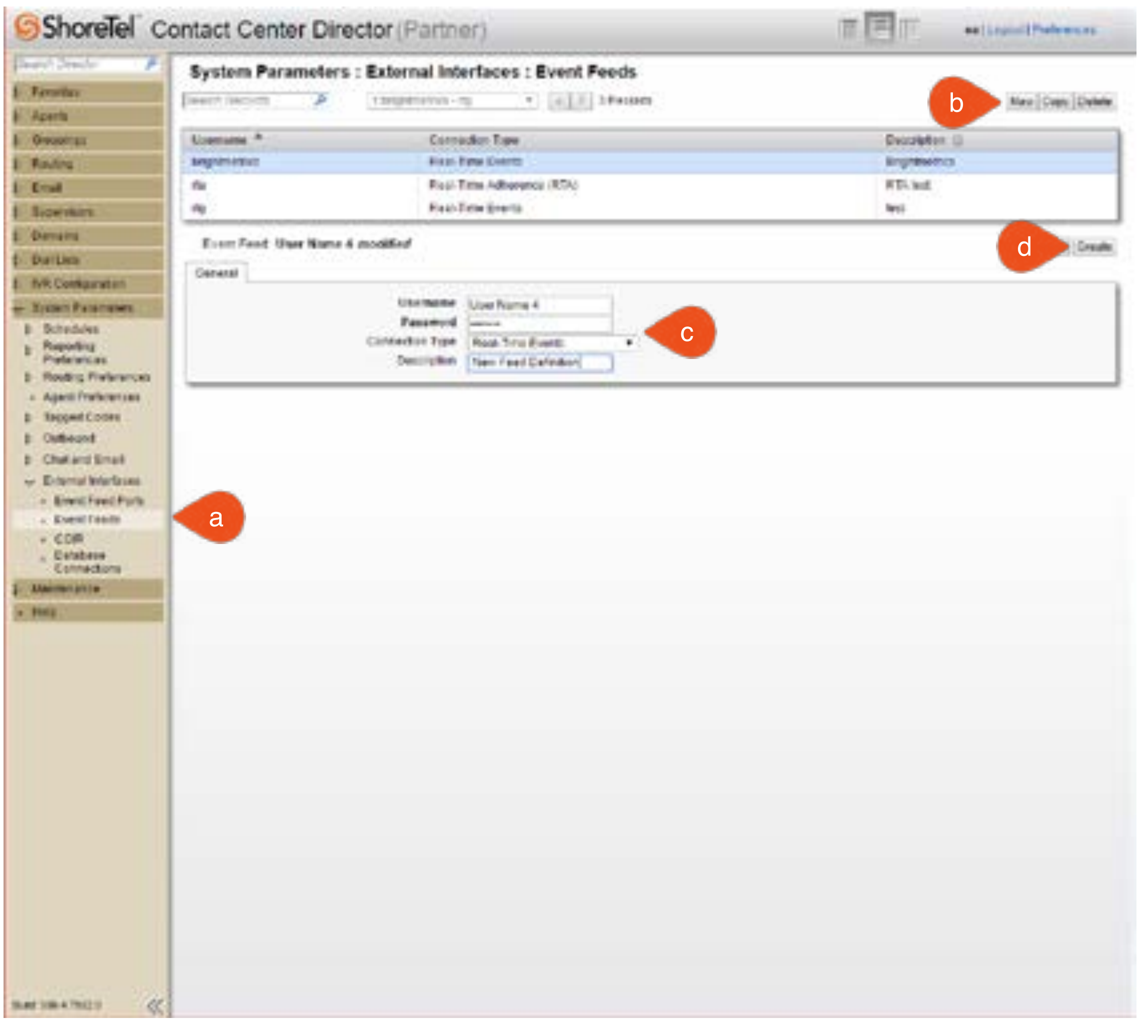
Appendix B: Adding an Event Feed in Contact Center Director

a. In Contact Center Director, navigate to System Parameters -- External Interfaces -- Event Feeds.

b. Click New to add a new event feed profile.

c. Enter the event feed profile information. The username and password can be anything you set. The example here uses brightmetrics for the username but there is no requirement for the username. You will enter the matching username and password in the Brightmetrics settings later on. The **Real-Time Events** connection type must be selected. DO NOT CHOOSE Real-Time Adherence. Any description can be entered. It is only to describe to anyone viewing this page what the entry is for.

d. Click Create to add the event feed profile.

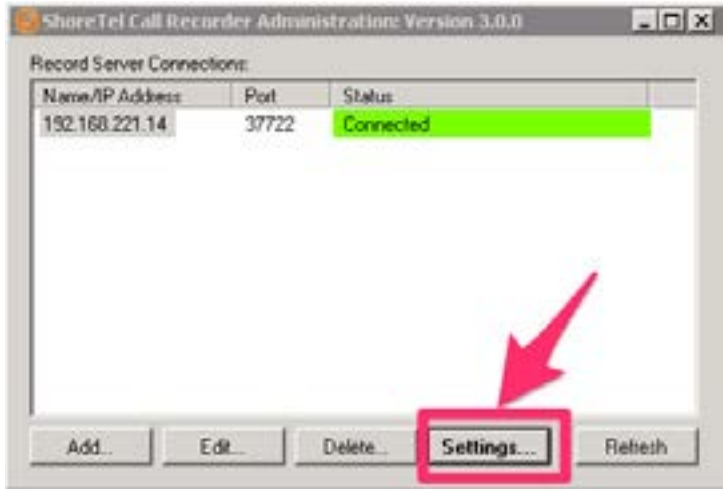


Appendix C: Configuring Mitel Call Recording Administrator

1. Call Recording Settings

WithintheShoreTel(Mitel)CallRecordingApplication, navigate to the Recorder's Administration screen.

At the bottom of the screen, click on the **Settings...** button.

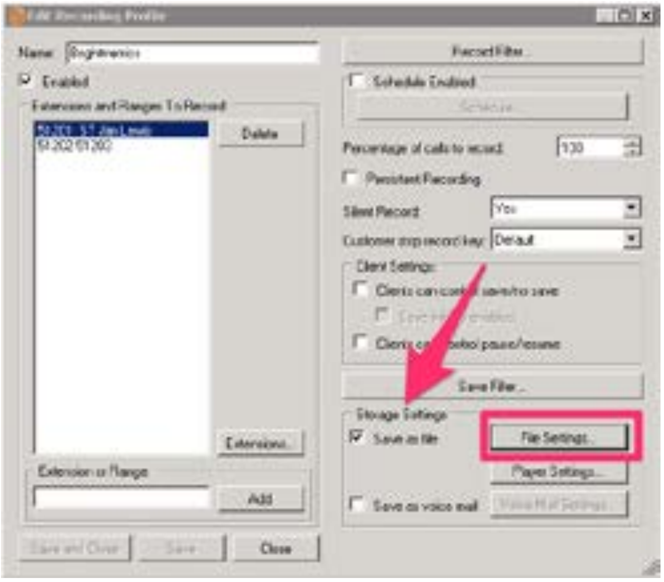


2. Recording Profiles

From here, click on the **Recording Profile** tab.

Next, select the your recording profile then, click the **Edit...** button at the bottom of the tab.

3. File Settings



Within the Edit Recording Profile, go to the lower right side of the dialog box to Storage Settings.

Click on the **File Settings...** button.

4. File Templates

Within the File Storage Settings, navigate to the File Template section. As a default, Call GUID will be added here already.

GUID is the only field in the recording naming convention that is mandatory for Brightmetrics/ Mitel Call Recording integration.

The call GUID allows the Brightmetrics service to identify the calls recorded by the Mitel Call Recording Application.

While it not neccessary to have other fields in the recording filename, it is mandatory to have the GUID if you want have access to the recording on the Brightmetrics Cradle to Grave reports.