Hosted VoIP Phone System

Call Recording
User Guide
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1 Introduction

This guide provides information about the Call Recording End User Interface features, functions, and reports presented as tools to be used to solve your business management requirements. This guide focuses on some of the most common tasks such as managing recorded calls and calls in progress. Step-by-step procedures and/or examples of how to complete functions within the application are also included where possible.

The End User Interface allows Users of the system to manage calls by number. The user experience of the Call Recording feature will differ depending on if your credentials provide you with access to view only your own call recordings or if you have been assigned administrative credentials that allow you to view the calls recorded for a group of people within your organization as well as the service plan assigned to your organization by the service provider.
2 Logging On

In order to access the application, you must logon with a user name and password. The user name is assigned by the System Administrator that created them in the End User Interface. Passwords are auto-generated by the application and emailed directly to you. Once you have access to the application, you have the ability to change your password using the **Change Password** link. You are then able to select a password of your choice. Passwords are initially auto-generated because Administrators and Providers are not permitted to know the passwords of the Users they create.

1. Open an Internet Session. Supported browsers and versions include the following and should be HTML 5 compliant:
   - Internet Explorer (IE)
   - Firefox
   - Google Chrome
   - Safari

   **NOTE:** The latest version and one version prior are supported for each browser.

2. Enter the URL for Call Recording: [https://recording.euserportal.com/CallRecorder/](https://recording.euserportal.com/CallRecorder/)

3. Enter your User Name and Password, and then click **Log On**.
3 Home Tab (Dashboard)

The Home Tab or Dashboard, provides you with a real-time view of the system data including information about the total number of calls in progress, active call handlers, calls, duration recorded, calls in the recycle bin, free audio storage, etc. The Dashboard is divided into eight distinctive panes that give you a pictorial and data overview of your company’s current call usage: First Look, Calls by Category, Frequent Callers, Calls by Location, Call Handler Summary, Active Call Handlers, Recent Calls, and Activity & Heat Map. Where applicable, the panes can be viewed as data or as a graph.

Additionally, the panes can be reorganized or relocated by clicking on a pane, dragging it, and dropping it in the desired location on the Dashboard. Each pane can also be collapsed by clicking on the arrow in the upper corner of the applicable pane.

With the exception of First Look, Active Call Handlers, Recent Calls, and Activity & Heat Map charts, you have the ability to view each pane as either a text or graphical display. Additionally, all panes have one field you can click on to drill down into the details of that information or play a call recording. The default is for the Dashboard to refresh every 30 seconds; however, you can reset the refresh value for each element individually except for the First Look pane. Refresh can be temporarily stopped by clicking the Pause button.

![Dashboard Screen Recording](image)
3.1 First Look
The First Look appears horizontally across the top of the Dashboard and displays a quick view of totals for the following information:

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Calls in Progress</td>
<td>Identifies the total number of calls in the system that are not terminated, by Tenant and/or User.</td>
</tr>
<tr>
<td>Active Call Handlers</td>
<td>Displays the total number of extensions with an active call. Active Call Handlers displays information by Tenant and then by User. Tenants and Users will only see information based on extensions to which they have access.</td>
</tr>
<tr>
<td>Calls</td>
<td>Identifies the total number of completed calls for the user that is currently logged in and that have a recording associated with them. This value is accumulative over the lifetime of the Tenant. However, the number will adjust accordingly when call files are deleted and/or routinely swept from the application.</td>
</tr>
<tr>
<td>Duration Recorded</td>
<td>Identifies the sum of duration for recorded calls that have a recording associated with them, by Tenant and User. This value is accumulative over the lifetime of the Tenant.</td>
</tr>
<tr>
<td>Calls in Recycle Bin</td>
<td>Identifies the total number of calls that have a recording associated with them and that are pending deletion. This value is accumulative over the lifetime of the Tenant. However, the number will adjust accordingly when call files are deleted and/or routinely swept from the application.</td>
</tr>
<tr>
<td>Free Audio Storage</td>
<td>Identifies the total amount of free audio storage, by Tenant only.</td>
</tr>
<tr>
<td>Free Video Storage</td>
<td>Identifies the total amount of free video storage, by Tenant only.</td>
</tr>
<tr>
<td>Last Week's Trend</td>
<td>Provides a visual display of the call history for the previous week.</td>
</tr>
</tbody>
</table>

![First Look Dashboard](image)
3.2 Calls by Category

The Calls by Category pane displays total calls by custom category. Categories are specific to the user. The calls included in the totals are determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Calls by Category pane can be displayed as text or a graph by selecting Details or Graph from the drop down list. You can drill down into the specific recorded calls by clicking on a specific category. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.

3.3 Frequent Callers

The Frequent Callers pane displays the total number of calls by calling number for the most frequently called numbers. The Frequent Callers chart displays inbound calls only. The number of frequent callers displayed in the pane will be determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Frequent Callers pane can be displayed as text or a graph by selecting Details or Graph from the drop down list. You can drill down into the specific recorded calls by clicking on a specific frequent caller. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.

3.4 Calls by Location

The Calls by Location pane displays total calls by each location as determined by the NPA/NXX. The calls included in the totals will be determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Calls by Location pane can be displayed as text or as a pie chart by clicking on the View Graph link. You can drill down into the specific recorded calls by clicking on a location under the Location column. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.
3.5 Call Handler Summary
The Call Handler Summary pane displays the maximum duration, average duration, and total number of calls by call handler/number for the duration determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Call Handler Summary pane can be displayed as text or as a pie chart by clicking on the View Graph link. You can drill down into the specific recorded calls by clicking on a call handler ID under the Call Handler ID column. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.

3.6 Active Call Handlers
The Active Call Handlers pane displays the call handlers/numbers that are currently on calls and the number of the other party. Users that have access are able to monitor an active call handler’s call in progress by clicking on the monitor button. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.

3.7 Recent Calls
The Recent Calls pane displays the most recent calls, incoming and outgoing, by call handler. The number of recent calls displayed in the pane will be determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Recent Calls pane can be displayed as text or a graph by selecting Details or Graph from the drop down list. You can play a recorded call by clicking on the Recorded Call icon. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.
### 3.8 Activity & Heat Map

The Activity & Heat Map displays the call activity for the top 10 numbers by hourly intervals over a 24 hour period. The Activity & Heat Map can be filtered by Call Handlers, Calling Parties, or Called Parties. Additionally, the call activity can be displayed as Number of Calls or Call Duration (in minutes). The darker colored blocks represent the higher volume call activity while the lighter colored blocks represent the lower column call activity. Each individual color block is clickable and will take you directly to the Recorded Calls tab where you are able to view the call activity, listen to the recording, and add a comment, etc.

![Activity & Heat Map](image_url)
4  Recorded Calls

When logged in as the Group Administrator, the Recorded Calls screen displays all completed recorded calls for all Users. However, when logged in as an End User, you are only able to see completed recorded calls that belong to you or your user ID. In order to better manage this screen, all column headers can be sorted by clicking on the applicable column header. Click once to sort the column in ascending order and click one more time to sort the column in descending order.

The following information is displayed on the Recorded Calls screen:

<table>
<thead>
<tr>
<th>Header</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>The number or description associated with the call.</td>
</tr>
<tr>
<td>Day</td>
<td>The day of the week the call took place.</td>
</tr>
<tr>
<td>Date</td>
<td>The actual date the call took place.</td>
</tr>
<tr>
<td>Time</td>
<td>The time the call originated.</td>
</tr>
<tr>
<td>From Number</td>
<td>The originating number.</td>
</tr>
<tr>
<td>From Caller ID</td>
<td>Displays the name or number of the person that originated the call, if caller ID is available.</td>
</tr>
<tr>
<td>To Number</td>
<td>The terminating number.</td>
</tr>
<tr>
<td>To Caller ID</td>
<td>Displays the name or number of the “To Number”, if caller ID is available.</td>
</tr>
<tr>
<td>Redirected To</td>
<td>Displays the number to which the call was transferred.</td>
</tr>
<tr>
<td>Duration</td>
<td>The length of the call.</td>
</tr>
<tr>
<td>Recording</td>
<td>Identifies whether or not there is a recording associated with the call.</td>
</tr>
<tr>
<td>Annotate</td>
<td>Comments and markers on calls to indicate where in the call a notable event occurred.</td>
</tr>
<tr>
<td>Header</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>CRM</td>
<td>Allows the user to upload recorded calls to an interfaced CRM system such as Sugar and Salesforce.com through the standard API.</td>
</tr>
<tr>
<td>Email</td>
<td>Allows the user to email a recorded call.</td>
</tr>
<tr>
<td>Comments</td>
<td>Any comments associated with the call.</td>
</tr>
<tr>
<td>Category</td>
<td>Allows the user to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction).</td>
</tr>
<tr>
<td>MD5</td>
<td>Identifies whether the call has been hashed using MD5 fingerprinting, thus ensuring that the call has not been tampered with and satisfying regulatory requirements.</td>
</tr>
<tr>
<td>Archive</td>
<td>Allows you to view the file path of a particular recorded call.</td>
</tr>
<tr>
<td>Evaluate</td>
<td>Allows Group Administrators to select individual recorded calls and evaluate the call handler’s performance during the call.</td>
</tr>
<tr>
<td>Audio Mining</td>
<td>This feature is not supported.</td>
</tr>
</tbody>
</table>

**NOTE:** All columns on the Recorded Calls tab may not be available to you depending on what features your Group Administrator was assigned.

### 4.1 Recording

When numbers are assigned to Users, the default setting is to record and retain all calls that are made from or to those numbers. This setting can be changed to do not retain recording by the Group Administrator. If the default setting has been preserved for a number and calls are being recorded and retained, a **Recordings** button will appear under the **Recording** column indicating there is a recorded call file for that particular call. To listen to the recorded call file, click on the **Recordings** button. Your default media player will open and begin playing the recorded call file (MP4 file). Please be aware that the way in which media players load and play the recorded call files will vary. For instance, QuickTime Player and Windows Media® Player will immediately launch the recorded call file. However, iTunes® will load the recorded call file in the library and you will have to click play to begin listening to the file.

**NOTE:** Group Administrators will see recorded calls for all numbers assigned to Users they have created.
4.2 Annotations

Annotations allow you to add comments and markers to specific parts of calls to indicate where in the call a notable event might have occurred. For example: a contact center manager (or any other user) can find a notable event in a call and mark it for future review with a comment. Click the **Annotate** button to add an annotation. Select the **Play** button to begin playing the recorded call. Select **Pause** when you come to the point in the call that you wish to add an annotation. Enter a subject marker description and add any notes to better identify the annotation and click **Add Marker**. You can also attach external documents to an annotation by clicking **Upload Document**. You must repeat each step for each annotation you wish to add to the call.

After an annotation has been made the **Annotate** button will change to a filled in notepad icon.

**NOTE:** Pausing or resuming a recording will automatically create an annotation for the call.

4.3 Customer Relationship Management (CRM)

You have the option to upload recorded calls from the **Recorded Calls** screen to a CRM application. This functionality allows you to connect the recording system with CRM applications such as Sugar or Salesforce.com to upload recorded call files to specific contacts in the CRM application.

**NOTE:** You can only have one active connection to a CRM application at a time. If you want to log into another CRM application, click “CRM Client Settings”, select the CRM application, and enter the credentials.

To upload a recorded call to a CRM, select **CRM Client Settings** link. The CRM Client Settings Link can be accessed from the tool bar on the **Recorded Calls** tab or from the **Archive to CRM**
dialog box. Select the CRM application from the drop down list and enter or select the URL, username, and password to that CRM application. Click **Test Connection**. A message is displayed notifying you if the connection was successful or failed. If the connection was successful, click **Save**.

Select the **CRM** button that corresponds to the call that you want to upload.

**NOTE:** The number of the recorded call must be a number that belongs to at least one contact in the CRM application in order to perform the upload.

If the contact, account, or case you want to upload the call to do not appear, enter new criteria in the CRM Search field and click **Search**. If multiple contacts, accounts, or cases deselect the ones you do not need by clicking in the option boxes to remove the checkmark. Enter a subject and a note about the recorded call file and click **Archive to CRM**.

### 4.4 Emailing a Recorded Call

From the Recorded Calls screen you can email a link for a recorded call out. Click the **Email** button that corresponds to that call. A new message will open in your computer’s default mail application. It will have a subject of “Call Recording” and the body of the message will already contain a link to the selected call recording file. Enter the email address(es) of the person(s) to which you wish to send the recorded call and make any other changes you need then send the message. When the recipient receives the message and clicks on the link, depending on their browser/mail client, it will automatically prompt a download of the recording file or begin playing the recording in their default media player.
4.5 Comments
From the Recorded Calls screen you can also add comments to each of the recorded call files. The **Add Comment** button indicates there are currently no comments associated with the corresponding recorded call file. The **Edit** button indicates there are currently comments associated with the corresponding recorded call file. To add comments to a recorded call file, click on the **Add Comment** button and enter the applicable text in the text field. Click **Submit**. This is the point at which the **Add Comment** button changes to the **Edit** button.

NOTE: Comment text cannot be greater than 1,024 characters.

4.6 Category
The ability to create categories for calls is beneficial to call handlers and managers, allowing them to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction). You are then able to filter calls or run reports based upon these call categories. Create categories by clicking on the **Manage Categories** link. Enter a **Category Name** and choose a color code for the category from the drop down box then click **Add**. Click **Close** when you are done.

To assign a category to a recording, click on the **Category** link and select the specific category from the drop down list.

NOTE: Categories are specific to the user. Therefore, the categories that you create and assign to your recorded calls cannot be seen by other users.
4.7 Audio Mining
Audio Mining is not a supported feature.

4.8 MD5
Message-Digest Algorithm (MD5) is a technique used to ensure that a file has not been altered in any way. When the call is recorded, the system takes an MD5 hash of it, outputting a string of random characters. The point is that if MD5 fingerprinting is applied to the same call at a later point, it will create the same string of characters, unless the call files has changed. If a different string of characters that do not match the original is created, you know the call has been modified. The default is to hash all calls. Hovering your mouse over the MD5 icon for a specific call will reveal the hash string. If you have the recorded call file downloaded or available in another location, click on the MD5 icon to open the Verify Recording dialog box. Upload the recorded call file to verify the file has not been tampered with.

4.9 Archive
Clicking on a specific Archive button will display a list of ISO images that contain specific call recordings. The ISO image will identify the user that archived the call, the date and time, and the file path to where it was archived. The Archive Tool (covered later in this document) is used to archive files.

4.10 Filter
Number, Redirection, Date, Time, Category, or Other (or a combination of all four) filters located below the Recorded Calls, Recycle Bin, Calls in Progress, and Reports navigation tabs can be applied to the screen to assist in searching and displaying only the information pertinent to your current needs. Select the filter you wish to apply by clicking on Filter and then selecting the Number, Redirection, Date, Time, Category, or Other tab(s).
Enter or select the applicable information for each filter and click **Apply Changes**. To return to the default information, click **Reset All**. Click **Hide** to close the **Filter** window.

**NOTE:** You do not have the option to filter by category under the Reports tab.

### 4.11 PCI DSS
The Payment Card Industry Data Security Standard (PCI DSS) is a set of requirements designed to ensure that all companies that process, store or transmit credit card information maintain a secure environment. Therefore, when a customer is set to read their credit card number over the phone, the PCI Compliance feature allows you to disable the call recorder briefly so that the credit card information is not recorded. At the time they begin to read their credit card number, you can enter a series of numbers on your touch pad to temporarily disable the recorder. Once they are done giving their credit card number you will re-enable the call recorder by entering the same numbers.

### 4.12 Playing a Recorded Call
To play a recorded call, from the **Recordings Tab**, select the **Recorded Calls** menu to ensure that you are looking at the list of recorded calls.

Select a call and click on the **Recording** button 🎧 that corresponds to that call.

Your default media player will open and begin playing the recorded call file (MP4 file).

**NOTE:** The way in which media players load and play the recorded call files will vary. For instance, QuickTime Player and Windows Media® Player will immediately launch the recorded call file. However, iTunes® will load the recorded call file in the library and you will have to click play to begin listening to the file.

Click the browser’s **BACK** button ← to return to the Recorded Calls Screen.
4.13 Downloading a Recorded Call

To download a recorded call(s), from the **Recordings Tab**, select the **Recorded Calls** menu to ensure that you are looking at the list of recorded calls.

Select the recorded call(s) you wish to download by clicking in the corresponding option box to the left of the **Number** column. Then select the **Download** link at the top or bottom of the **Recorded Calls** page.

Use your computer’s file system to choose a destination for the .zip file containing the recording(s).
4.14 Exporting a Recorded Call
If you wish to export the information from the Recorded Calls menu such as the Number, Day, Date, Time, From Number, From Caller ID, To Number, To Caller ID, Redirected From, and Redirected To you may use the Export or Export All links to obtain this data in a .CSV file format.

Select the recorded calls you wish to export by clicking in the corresponding option box to the left of the Number column and then click the Export link. Or if you wish to export data for all available recordings click the Export All link. Use your computer’s file system to download the RecordedCalls.csv file that is generated.

4.15 Verifying a Recording
From the Recorded Calls menu, select the recorded call you wish to verify a recording for and click on the corresponding MDS icon.

Click the Choose File button to locate the recorded call file you have saved to your computer or network drive. Click Verify Against Original Recording. You will receive a message notifying you whether or not the uploaded recording is identical to the original recording. Click Close to return to the Recorded Calls menu.
5 Calls in Progress

The Calls in Progress screen displays all calls that are currently taking place. There are several functions that can be performed from the Calls in Progress tab including call recording on demand, pause/resume; monitor, save recordings, and add notes and categories. In order to better manage Calls in Progress, all column headers can be sorted by clicking on the applicable column header. Click once to sort the column in ascending order and click one more time to sort the column in descending order.

The following information is displayed on the Calls in Progress screen:

<table>
<thead>
<tr>
<th>Header</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>Displays the number or description associated with the call.</td>
</tr>
<tr>
<td>Day</td>
<td>Displays the day of the week the call took place.</td>
</tr>
<tr>
<td>Date</td>
<td>Displays the actual date the call took place.</td>
</tr>
<tr>
<td>Time</td>
<td>Displays the time the call originated.</td>
</tr>
<tr>
<td>From Number</td>
<td>Displays the originating number.</td>
</tr>
<tr>
<td>From Caller ID</td>
<td>Identifies the name or number of the person that originated the call, if caller ID is available.</td>
</tr>
<tr>
<td>To Number</td>
<td>Displays the terminating number.</td>
</tr>
<tr>
<td>To Caller ID</td>
<td>Identifies the name or number of the ‘To Number’, if Caller ID is available.</td>
</tr>
<tr>
<td>Recording Status</td>
<td>Displays whether or not a specific call is being called and/or screen recorded. If On Demand is identified as a trigger in an active Recording Policy, these buttons will also act as the Pause/Resume triggers for both call and screen recording.</td>
</tr>
<tr>
<td>Monitor</td>
<td>If monitoring is available, a Monitor button is displayed for each call in progress. Monitoring allows the user to listen in on a call undetected by the other call participants.</td>
</tr>
<tr>
<td>Whisper</td>
<td>Not available.</td>
</tr>
<tr>
<td>Barge</td>
<td>Not available.</td>
</tr>
<tr>
<td>Save Recording</td>
<td>Identifies whether or not the call is to be saved as a recorded call when it is complete. If all calls are set to be saved, the option box will appear disabled. If calls are not set to be saved, the option box will be enabled and the user can save a call on the fly by clicking in the option box while the call is still in progress.</td>
</tr>
<tr>
<td>Screen Recording</td>
<td>Not available.</td>
</tr>
</tbody>
</table>
### Header | Description
---|---
Comments | Allows the user to add comments to associate with the call.
Category | Allows the user to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction).

**NOTE:** Monitor, Comments, and Category are features identified in the Administrative interface and allocated by Group and Extension. Some of these features may not be available if they were not allocated to the Group and/or Extension. Additionally, Recording Status is a feature that is configured by Extension and may not be available or contain all possible functionality.

#### 5.1 Recording Status
Recording status identifies whether or not calls in progress are being call recorded. An **Audio Recording** button 🎧 is displayed if the call in progress is being audio recorded.

Additionally, if On Demand is identified as a Pause and/or Resume trigger in an active Recording Policy, these buttons become interactive allowing the user to Pause and/or Resume the audio recording. To Pause and/or Resume recording, click on the applicable **Audio Recording** button. When the recording is paused, the buttons will appear grey. When the recording is resumed or active, the buttons will appear green 🎧.

**NOTE:** Pausing or resuming a recording will automatically create an annotation for the call.

#### 5.2 Call Monitoring
The Monitor functionality is useful in situations where training is needed for a new employee, behavior issues have occurred or need to be monitored or legal reasons. The benefit of this functionality is that all or some of the participants are never aware that you are on the line. To monitor, select the **Monitor** button 🎧 that corresponds to the specific call. Depending on the browser you are using, this may generate a download for an M3U Audio Playlist. Save the file to your computer then open it with your default media player. Your browser may open and play the file automatically by default. This will begin a stream of the call. Note that the stream may have a delay depending on your internet connection and the computer in use.
5.3  Save Recording
By default, all calls to and from a number are recorded and saved. The Group Administrator does have the option to override this default in the Number Information screen by applying the Do Not Record feature. If you look at the Calls in Progress screen, you can identify which calls are recorded and saved on a regular basis and which ones are not. For the calls that are not setup to be saved, you can, on a one-time-basis, save them on the fly by clicking in the Save Recording option box while the call is in progress.

5.4  Screen Recording
This feature is not available.

5.5  Comments
From the Calls in Progress screen you can also add comments to each of the calls. An Add Comment button 📝 indicates there are currently no comments associated with the corresponding call in progress call file. An Edit Comment button ✏️ indicates there are currently comments associated with the corresponding call file.

To add comments to a call file, click on the Add Comment button 📝 and enter the applicable text in the text field. Click Save to keep your changes.

NOTE: Comment text cannot be more than 1,024 characters.

This is the point at which the Add Comment button 📝 changes to the Edit Comment button ✏️.
5.6 Category

The ability to create categories for calls is beneficial to call handlers and managers because it allows them to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction). You are then able to filter calls or run reports based upon these call categories. Click on the Category link and select the specific category from the drop down list.

NOTE: Categories can be added, edited, and deleted from the Recorded Calls screen by clicking on the “Manage Categories” link.
6 Recycle Bin

Group Administrators have the ability to delete recordings by selecting the option box of a recording they wish to discard and then clicking the Delete link from the Recorded Calls screen. Those calls will remain in the Recorded Calls list but will now have a Recycle Bin icon to indicate they have been deleted.

From the Recycle Bin screen, you may permanently delete recordings, recover deleted recordings, download recordings, and add/view comments on deleted recordings.

The following information is displayed on the Recycle Bin screen:

<table>
<thead>
<tr>
<th>Header</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>The number or description associated with the call.</td>
</tr>
<tr>
<td>Day</td>
<td>The day of the week the call took place.</td>
</tr>
<tr>
<td>Date</td>
<td>The actual date the call took place.</td>
</tr>
<tr>
<td>Time</td>
<td>The time the call originated.</td>
</tr>
<tr>
<td>From Number</td>
<td>The originating number.</td>
</tr>
<tr>
<td>From Caller ID</td>
<td>Displays the name or number of the person that originated the call, if caller ID is available.</td>
</tr>
<tr>
<td>To Number</td>
<td>The terminating number.</td>
</tr>
<tr>
<td>To Caller ID</td>
<td>Displays the name or number of the “To Number”, if caller ID is available.</td>
</tr>
<tr>
<td>Redirected To</td>
<td>Displays the number to which the call was transferred.</td>
</tr>
<tr>
<td>Duration</td>
<td>The length of the call.</td>
</tr>
<tr>
<td>Recording</td>
<td>Identifies whether or not there is a recording associated with the call.</td>
</tr>
<tr>
<td>Comments</td>
<td>Any comments associated with the call.</td>
</tr>
</tbody>
</table>
6.1 Permanently Delete a Recording

Once a recording has been marked to be deleted in the Recorded Calls screen it is automatically sent to the Recycle Bin. From the Recycle Bin the recording is still available to be viewed, downloaded or recovered. If you wish to remove the recording from the system completely, place a checkmark in the option box corresponding to the recording and then click the Delete Selected link. You will be presented with a pop-up notification stating:

“Are you sure you want to permanently delete these recordings? You cannot undo this action.”

Click OK to proceed with the deletion or Cancel if you wish to retain the recordings in the Recycle Bin.

NOTE: Once a recording is permanently deleted, it cannot be recovered even by the carrier.

If you wish to permanently delete all of the recordings in the Recycle Bin at once click on the Empty Recycle Bin link under the Filter section. You will be prompted with the same pop-up warning message verifying you want to permanently delete the recordings and notifying you that this action is not reversible.

6.2 Recover Recordings

Recordings in the Recycle Bin may be recovered back to the Recorded Calls screen. To do this, place a checkmark in the option box for the recording(s) you wish to recover and then click the Recover Selected Calls link.

The system will not issue any warnings. The recording will be removed from the Recycle Bin and be available within the Recorded Calls screen again.
6.3 Download Deleted Recording
From the Recycle Bin, recordings can still be downloaded for archiving. To do this, place a checkmark in the option box that corresponds to the recording(s) you wish to download, and then click the Download link.

Use your computer’s default file system to download the compressed (zipped) folder.

6.4 Recording
When numbers are assigned to Users, the default setting is to record and retain all calls that are made from or to those numbers. This setting can be changed to do not retain recording by the Group Administrator. If the default setting has been preserved for a number and calls are being recorded and retained, a Recordings button will appear under the Recording column indicating there is a recorded call file for that particular call even when the recording is sent to the Recycle Bin. To listen to the recorded call file, click on the Recordings button. Your default media player will open and begin playing the recorded call file (MP4 file). Please be aware that the way in which media players load and play the recorded call files will vary. For instance, QuickTime Player and Windows Media® Player will immediately launch the recorded call file. However, iTunes® will load the recorded call file in the library and you will have to click play to begin listening to the file.
6.5 Comments

From the Recycle Bin screen you can also add comments to each of the calls. An Add Comment button 💬 indicates there are currently no comments associated with the corresponding recycle bin call file. An Edit Comment button 📝 indicates there are currently comments associated with the corresponding call file.

To add comments to a call file, click on the Add Comment button 💬 and enter the applicable text in the text field. Click Save to keep your changes.

```
Call Comments

Number: Jason Dickheiser
Day: Fri
Date: 5/29/2015
Time: 8:32:39 AM
From Number: 4195553751  Jason Dickheiser
To Number: 15675550955  Mateen Juan
Duration: 00:00:17
Comment Text

Notes: Comment text cannot be more than 1,024 characters (1024)
```

NOTE: Comment text cannot be more than 1,024 characters.

This is the point at which the Add Comment button 💬 changes to the Edit Comment button 📝.
7 Screen Recordings
This feature is not available.
8 Audio Mining
This feature is not available.
9  Reports
There are ten reports included in the application that assist the user with administration activities. The reports identify information that can be found on the dashboard, or Home tab, but in more detail. Reports can be viewed as text or in a graphical format. You can also have the ability to export reports and save them to your own PC. Additionally, you can filter on information in the reports such as number, date, and time.

The following reports are available:

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Reporting Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Handler Activity</td>
<td>Call Handler, Description, Calls, Average Duration, Minimum Duration, Maximum Duration</td>
</tr>
<tr>
<td>Calling Locations</td>
<td>Number, Location, Calls (Number of)</td>
</tr>
<tr>
<td>Calls By Category</td>
<td>Category, Calls (Number of), Average Duration, Minimum Duration, Maximum Duration</td>
</tr>
<tr>
<td>Daily Usage</td>
<td>Date, Calls (Number of), Average Duration, Minimum Duration, Maximum Duration</td>
</tr>
<tr>
<td>Frequent Callers</td>
<td>Number, Caller ID, Calls (Number of), Average Duration, Minimum Duration, Maximum Duration</td>
</tr>
<tr>
<td>Hourly Usage</td>
<td>Time, Calls, Average Duration, Minimum Duration, Maximum Duration</td>
</tr>
<tr>
<td>Unused Numbers</td>
<td>Number, Description, View and Edit Details link</td>
</tr>
<tr>
<td>User Details</td>
<td>User Name, Email, Created On, Last Logon, Password Changed On, Assigned Numbers, Annotations, Categories, CRM Enabled</td>
</tr>
<tr>
<td>Call Evaluation Details</td>
<td>Call Handler, Description, From Number, From Caller ID, To Number, To Caller ID, Completed Evaluation Name, Modified Time, Points Earned, Points Available, Score</td>
</tr>
<tr>
<td>Call Handler vs. Average</td>
<td>Evaluation Name, Call Handler Description, Call Handler Average Score, Organization Average Score, Number of Evaluations, Last Evaluation</td>
</tr>
</tbody>
</table>
9.1 Call Handler Activity Report

The Call Handler Activity report displays the last 30 days of activity for each call handler in the application. The Call Handler Activity report can be displayed as text or as a pie chart by clicking on the Chart button found on the report toolbar. The report displays the number, description, total number of calls, average call duration, minimum duration, and maximum duration by call handler.

The data from the report may also be exported to a CSV file by clicking on the Export button found on the report toolbar.
9.2 Calling Locations Report

The Calling Locations report displays the total calls by each location as determined by the NPA/NXX, for the last 30 days. The Calling Locations report can be displayed as text or as a pie chart by clicking on the Chart button found on the report toolbar. The report displays the number, location, and total number of calls made to that location.

The data from the report may also be exported to a CSV file by clicking on the Export button found on the report toolbar.
9.3 Calls by Category

The Calls by Category report displays the total calls by custom category for the last 30 days. The Calls by Category report can be displayed as text or as a pie chart by clicking on the Chart button found on the report toolbar. The report displays total number of calls, average call duration, minimum duration, and maximum duration by category.

The data from the report may also be exported to a CSV file by clicking on the Export button found on the report toolbar.
9.4 Daily Usage

The Daily Usage report displays the activity totals for the day in the application. The Daily Usage Report can be displayed as text or as a column chart by clicking on the Chart button found on the report toolbar. The report displays the date, total number of calls, average call duration, minimum duration, and maximum duration for the day.

The data from the report may also be exported to a CSV file by clicking on the Export button found on the report toolbar.
9.5 Frequent Callers

The Frequent Callers report displays the callers (by number) that have called the most frequently. The Frequent Callers pane can be displayed as text or as a bar chart by clicking on the Chart button found on the report toolbar. The report displays the number, the name associated with the number (caller ID), the total number of calls, average call duration, minimum duration, and maximum duration. The report is sorted in order of the most frequently called or dialed number.

The data from the report may also be exported to a CSV file by clicking on the Export button found on the report toolbar.
9.6 Hourly Usage Report

The Hourly Usage report displays a distribution of call activity across the hours of the day. The report can be displayed as text or as a column chart by clicking on the Chart button found on the report toolbar. The report displays the hour, total number of calls, average call duration, minimum duration, and maximum duration for each hour.

The data from the report may also be exported to a CSV file by clicking on the Export button found on the report toolbar.
9.7 Unused Numbers Report

The Unused Numbers report identifies numbers that have had no usage. The Unused Numbers report is text format only. The report displays the number and description.

The data from the report may also be exported to a CSV file by clicking on the Export button on the report toolbar.
9.8 User Details Report

The User Details report identifies information about each user of the application. The User Details report is text format only. The report displays the username, email address, the date the user was created, the date the user last logged on to the application, the date the user’s password was last changed, the total amount of numbers assigned to the user, total number of annotations and categories created by the user, and whether or not the user has permission to upload recorded calls to a CRM application.

The data from the report may also be exported to a CSV file by clicking on the Export button found on the report toolbar.
9.9 Call Evaluation Details Report

The Call Evaluation Details report displays call handlers that have evaluations associated with one or more of their recorded calls. The report displays the call handler; description; from number and caller ID; to number and caller ID; the name, date, and time the evaluation was completed; the date and time the evaluation was modified; the total number of points earned vs. the total number of points available for the evaluation; and the score.

The data from the report may also be exported to a CSV file by clicking on the Export button found on the report toolbar.
9.10 Call Handler vs. Average Report

The Call Handler vs. Average report compares an individual call handler’s average evaluation score to the organization’s overall average score for the same evaluation. The Call Handler vs. Average report can be displayed as text or as a column chart by clicking on the Chart button found on the report toolbar. The report displays the evaluation name, call handler, call handler average score, organization average score, number of evaluations, and the date and time of the last evaluation. The report is sorted by date and time.

The data from the report may also be exported to a CSV file by clicking on the Export button found on the report toolbar.
10 Alerts

Alerts allow you to define specific conditions based on fields such as From Number, To Number, and time periods that may indicate emergency, excessive call duration, international calling occurring, etc. When those conditions are met, you will be notified with the pertinent details so that you can address any issues or make any necessary changes to current policies or procedures. Additionally, a history of the alerts that have executed is available from the Alerts tab. You can also view any recent alerts by clicking on the Recent Alerts link on the top right side of the end user application window.

NOTE: Alerts will be temporarily disabled if they begin to cause excessive logging/emailing resulting in possible network congestion. In such cases, an email will be sent to the owner of the alert. Excessive logging/email is defined as greater than 1000 alerts per second.

To create an alert, click New (if applicable). Enter a name and brief description for the alert. The Alert name can be a maximum of 50 characters. Select the following: Event Type, whether or not the alert is enabled/disabled, and when the alert should run. Your input options will vary depending on your selection.
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alert on any day</td>
<td>The alert will run every day that remains active.</td>
</tr>
<tr>
<td>Days of Week</td>
<td>The options Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday will appear. Select the specific days the alert should run. The alert will run on the selected day(s) as long as it remains active.</td>
</tr>
<tr>
<td>Date</td>
<td>Enter a specific call date. The alert will only run during this date range.</td>
</tr>
<tr>
<td>Date Range</td>
<td>Enter a start and end date. The alert will only run during this date range.</td>
</tr>
</tbody>
</table>

**NOTE:** You can select multiple criteria such as Days of the week and a Date Range.

Enter or select the following:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start Time</td>
<td>If applicable, select the start time the Alert should begin running on the selected day(s).</td>
</tr>
<tr>
<td>End Time</td>
<td>If applicable, select the end time that the Alert should stop running on the selected day(s).</td>
</tr>
<tr>
<td>Time Zone</td>
<td>Select a time zone that you wish to apply to the alert.</td>
</tr>
<tr>
<td>From Caller ID</td>
<td>Defines the originating caller ID or partial originating caller ID on which to alert.</td>
</tr>
<tr>
<td>To Caller ID</td>
<td>Defines the terminating caller ID or partial terminating caller ID on which to alert.</td>
</tr>
<tr>
<td>From Number</td>
<td>Defines the dialed number or partial dialed number on which to alert.</td>
</tr>
<tr>
<td>Redirected From</td>
<td>Defines the number of the person or group transferring the call.</td>
</tr>
<tr>
<td>Redirected To</td>
<td>Defines the number to which the call was transferred.</td>
</tr>
<tr>
<td>Location</td>
<td>Defines the location or partial location on which to report.</td>
</tr>
<tr>
<td>DTMF Digits</td>
<td>Only appears when <strong>Call Terminated</strong> event type is selected. Defines whether the on demand alert will be a clip alert or will be triggered only when the DTMF digits are entered. Additionally, this field identifies the DTMF digits used to initiate the on demand alert.</td>
</tr>
<tr>
<td>End Clip DTMF Digits</td>
<td>Only appears when <strong>Call Terminated</strong> event type is selected and when <strong>Clip</strong> is selected above. Identifies the DTMF digits used to end the on demand alert clip.</td>
</tr>
<tr>
<td>DTMF Tolerance</td>
<td>Only appears when <strong>Call Terminated</strong> event type is selected. Identifies the amount of time the user has to complete the entry of the DTMF digits to initiate the on demand alert and, if applicable, end the on demand alert clip.</td>
</tr>
<tr>
<td>Add a Category</td>
<td>Allows the user to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction). This category will apply to all calls that fall within the alert criteria and will automatically appear on the <strong>Recorded Calls</strong> tab when the alert is fired.</td>
</tr>
<tr>
<td>Add a Comment</td>
<td>Allows the user to add comments about the call. These comments will apply to all calls that fall within the alert criteria and will automatically appear on the <strong>Recorded Calls</strong> tab when the alert is fired.</td>
</tr>
</tbody>
</table>

**NOTE:** The From Caller ID, To Caller ID, From Number, To Number, and Location fields must be at least 3 characters long.

Select whether or not you want to be notified by email when an alert occurs by clicking in the Email option box. If you selected to be notified by email, enter the **To** and **From email addresses**. Click **Save** to add the alert to the list of Alerts.
The Alerts dialog box displays a list of alerts that have occurred under the Alerts History section. You can clear the Alert History by selecting the alert(s) and clicking the Clear Selected link. You can also view a list of recent alerts by clicking on the Recent Alerts link located at the top of the application page.

10.1 Creating an On Demand Alert

There are two types of on demand alerts: on demand clip alerts and general on demand alerts. Clip alerts will record only a portion of the call identified by the DTMF start and end digits. General on demand alerts record the entire conversation but are initiated when the DTMF digits are entered.

From the Alerts tab, start a new alert. Enter the following information:
- Name: On Demand Alert
- Description: This alert is for calls that need to enable on demand alerts.

Set the Event Type to Call Terminated and set the alert to Enabled.

Set the alert recurrence to Alert on any day.

Enter or select the following information.
- DTMF Digits: Clip
- DTMF Digits: 1111
- End Clip DTMF Digits: 2222
- DTMF Tolerance: 20 seconds

Click Save.

Begin a new alert with the following information:
- Name: On Demand Alert2
- Description: This alert is for calls that need to enable on demand alerts.

Set the Event Type to Call Terminated and set the alert to Enabled.

Set the alert recurrence to Alert on any day.

Enter or select the following information.
- DTMF Digits: Contains
- DTMF Digits: 1111
- DTMF Tolerance: 30 seconds

Click Save.
10.2 Editing and Deleting Alerts

From the Alerts tab, click on the View link corresponding to the alert from the Alert List that you wish to modify.

To the right you will see a summary of the alert configuration.

If you wish to make changes to the alert, click the Edit link at the lower, right-hand corner of the summary window. If you wish to remove the alert, click the Delete link at the lower, left-hand corner of the summary window.

If you choose to delete an alert, you will be presented with a pop-up notification that states:

"Warning: Deleting an Alert cannot be undone. Deleting an Alert will also delete any Alert History records for the Alert. Are you sure you want to delete this alert?"

Click OK to remove the alert or Cancel to retain the alert.
11 Evaluations

The Evaluation tab provides managers of phone based teams with the functionality to easily create evaluations that can be applied to recording and to quickly view statistics based upon the created evaluations. Evaluations can be created for a multitude of business reasons including the following:

- Training
- Performance monitoring
- Script development and adherence monitoring
- Process adherence

The Evaluations Dashboard provides you with a real-time view of evaluations data including information about the most frequently used evaluations, which call handlers are being evaluated, the call handlers average confidence score, the average confidence score of the evaluations being used, etc. The dashboard is divided into the following four charts that give you a pictorial and data overview of how the evaluations are being used:

<table>
<thead>
<tr>
<th>Chart</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Score by Evaluation Form</td>
<td>Displays the top 5 most used evaluation forms sorted by average score.</td>
</tr>
<tr>
<td>Call Handler Trend</td>
<td>Displays the top 10 most evaluated call handlers over time.</td>
</tr>
<tr>
<td>Call Handler Average</td>
<td>Displays the average score, by call handler, over the selected date range.</td>
</tr>
<tr>
<td>Call Evaluation Grid</td>
<td>Displays information for each completed evaluation, by call handler. The</td>
</tr>
<tr>
<td></td>
<td>grid is sortable by clicking on the headings. The default sort order is by</td>
</tr>
<tr>
<td></td>
<td>evaluation date/time. The name of the evaluation, the evaluator, the date</td>
</tr>
<tr>
<td></td>
<td>the evaluation was completed, and the call handler that was evaluated, and</td>
</tr>
<tr>
<td></td>
<td>the overall score they received are all displayed in the Call Evaluation Grid.</td>
</tr>
<tr>
<td></td>
<td>The View link takes you to the completed evaluation to view the results.</td>
</tr>
</tbody>
</table>
An unlimited number of evaluations can be created with an unlimited number of questions. Evaluations should be carefully thought out prior to creation. Once an evaluation is released, it cannot be changed or deleted. It can, however, be cloned and the information in the cloned evaluation can be updated. Additionally, each question in an evaluation is assigned a weight or level of importance in relation to other questions in the evaluation. The questions that make up an evaluation must equal 100% before it can be released.

NOTE: The overall weight of an evaluation must equal 100% before it can be released and used in the application.

11.1 Creating a New Evaluation
To begin the process of creating an evaluation, select the Form Designer tab and click New.

Enter the appropriate information such as Evaluation Name, Type, Description, and whether or not the evaluation is active. Click Save to add the evaluation to the list of Evaluations.

Once it is saved, you are now ready to begin adding categories and questions. Select Add Category, enter a descriptive name, and click Save.

Select Add Question and enter the question as you want it to appear on the evaluation. Determine and enter the weight or level of importance in relation to the other questions for this question. You must enter or select at least one option to apply to the question. Options are essentially the evaluator’s choices to the question.

NOTE: There cannot be more than five options under a question.
To select a predetermined option, hover the mouse over the **Add Option** link and select an option by clicking on the applicable **Add** link.

To create your own list of options, click **Add Option**, enter the Option information (for example: very polite, extremely polite, rude, etc.) and assign a score to the option.

Save your work and continue adding questions and options as necessary to finish creating the evaluation.

**NOTE:** There cannot be more than five options under a question.
11.2 Predefined Evaluation Templates

Since creating an evaluation from “scratch” can be a tedious process, you can select from predefined templates and apply them “as is” or edit the categories and questions to better suit your needs.

To create an evaluation using a template, select the applicable template from under the Evaluations Form Templates heading.

A system pop-up notification will ask you:

“Are you sure that you want to create an evaluation form from this template?”

Click OK to proceed or Cancel to return to the previous menu.

The Evaluation form will be created with the same name as the template. Click on it in the Evaluations List to view the configuration. Make any necessary additions or deletions to the template, including giving it a more meaningful name. Use the Edit button to make changes. Use the Move Up and Move Down arrow buttons to reorder the Categories, Questions, and Options one spot at a time or you may reorder Questions and Options using a drag and drop option when you see the Reorder icon. Remove Categories, Questions, and Options by clicking on the Delete button. Links are provided to Add Questions, Add Categories, and Delete All Questions. Once you are done editing the Evaluation keep your changes by clicking Save.

NOTE: There cannot be more than five options under a question.
11.3 Cloning an Evaluation

If there is not a template that meets your needs, odds are that one of the already created evaluations could. In that case, you can clone that evaluation and then make the necessary changes.

Select the specific evaluation you wish to clone by clicking the View link from the Evaluation List to view the summary of the existing Evaluation and then click the Clone link.
Make any necessary additions or deletions to the clone, including giving it a more meaningful name. Use the Edit button to make changes. Use the Move Up and Move Down arrow buttons to reorder the Categories, Questions, and Options one spot at a time or you may reorder Questions and Options using a drag and drop option when you see the Reorder icon. Remove Categories, Questions, and Options by clicking on the Delete button. Links are provided to Add Questions, Add Categories, and Delete All Questions. Once you are done editing the Evaluation keep your changes by clicking Save.

**NOTE:** There cannot be more than five options under a question.

## 11.4 Releasing an Evaluation

An evaluation will not be available for use from the Recorded Calls screen until it has been released. However, an evaluation cannot be released until it is complete and the overall weight is 100%. Once an evaluation is released, it cannot be edited. Evaluations are released from the Form Designer tab. Select the evaluation you wish to release by clicking on the corresponding View link from the Evaluation List. Select Release Now in the Evaluation Summary on the right-hand side of the page.

A pop-up system notification will prompt you stating:

> “Are you sure that you want to release this form and make it available for evaluating calls? Upon release you will no longer be able to make modifications to this form. Warning, this operation cannot be undone!”

Click OK to proceed or Cancel to return to the Form Designer.
11.5 Evaluation Types

Since the list of evaluations can potentially get very large, you have the ability to apply an evaluation type to specific or all evaluations to essentially “categorize” them. To create a new evaluation type, click on the Form Designer tab and select the Manages Types link.

Simply enter the name of the new evaluation type and select Add Type. Click on the Type heading to sort the evaluations in alphabetical order by type to make it easier to find what you are looking for.
12 Organization

The Organization tab is only available to Group Administrators. This is where Group Administrators will add and maintain their Organization, Subscribers, Users, and Recording Policies.

Organization allows Group Administrators to create and manage a hierarchical structure of their organization and/or department and its employees.

The Organization not only displays the organization’s hierarchy, but it also displays statistics regarding the hierarchy. The Organizational Grid displays the total number of employees and departments in the hierarchy, the top 5 employees, and the top 5 departments.

The top 5 employees and departments are ranked based on their number of incoming calls.

**NOTE:** For organizational purposes, it is best to create all employees and departments first and then assign employees to the departments.
The Group will always appear as the top level “account” in the hierarchy structure and marked with the Group icon 🗒. This account is created automatically during the installation process or when the Group is created in the Administrative Portal. The Group can have multiple Employees and/or Departments marked with the Employees icon 🏬 and the Departments icon 🏢.

Employees are created under the Group 🗒 and then assigned to Departments 🏢. Employees can have multiple Employees. When logged on to the application Employees can only see other Employees that are assigned to them. Click on “All Employees” (the top level of the employee hierarchy), to display a list of employees that are not currently assigned to subscribers.

**NOTE:** You can also add a new employee from the top hierarchy level under the Employees and Departments hierarchies.

### 12.1 Adding a New Employee

To add a new employee, click on the Group 🗒 and select the Add Employee link at the bottom of the page. If applicable, enter or select the following New Employee information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>Identifies the department to which the employee is assigned.</td>
</tr>
<tr>
<td>NOTE: Employees can also be dragged and dropped under the applicable department once they have both been created.</td>
<td></td>
</tr>
<tr>
<td>Manager</td>
<td>Identifies the manager to which the employee is assigned, if applicable.</td>
</tr>
<tr>
<td>Name</td>
<td>Identifies the name of the employee.</td>
</tr>
<tr>
<td>Title</td>
<td>The employee’s title within the organization.</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description about the employee, job title, etc.</td>
</tr>
<tr>
<td>Shift Start Time</td>
<td>Identifies the start time of the call handler’s work shift.</td>
</tr>
<tr>
<td>Shift End Time</td>
<td>Identifies the end time of the call handler’s work shift.</td>
</tr>
</tbody>
</table>

Click Update Employee.

The Assigned Subscribers section allows you to assign subscribers to the new employee. Select the subscriber by clicking the option box corresponding to the subscriber you wish to assign, and then click the Assign Subscribers link.
The Screen Recording Profile allows you to configure screen recording criteria. Screen recording is not a supported feature, you may skip this step.

12.2 Creating a New Department

To create a new department, click on the Group and select the Add Department link. Enter or select the name of the department (can be a department name, manager’s name, etc.) and brief description about the new department. Click Update Department.

12.3 Updating an Employee or Department

To update an Employee or Department, click on the item in the hierarchy list, and then scroll down to the bottom of the page.

If you clicked on an Employee you will be presented with the Employee Information, Assigned Subscribers, and Screen Recording Profile screens.

For the Employee Information, click the available field you wish to modify and make your changes, and then click the Update Employee link.

For the Assigned Subscribers, you will see subscribers currently Assigned to the Employee by default. Remove subscribers by clicking on the option box to remove the checkmark for the subscriber(s) you wish to remove then click the Assign Subscribers link to update the Employee. Add subscribers by clicking on the “Show Only Subscribers For This Employee Which Are” drop down box and choose All Subscribers or Not Assigned to the Employee. Then click the option boxes for the employee(s) you wish to assign. Click the Assign Subscribers link when you are done.

The Screen Recording Profile allows you to configure screen recording criteria. Screen recording is not a supported feature, you may skip this step.

If you clicked on a Department you will be presented with the Department Information screen.

Click the available text boxes to update the Name and Description fields. Click the Update Department link to save your changes.
12.4 Deleting an Employee or Department

To delete an Employee or Department, click on the item in the hierarchy list, and then click on the Remove button.

The system will present you with a pop-up notification stating:

“This operation cannot be undone. Are you sure you want to perform this operation?”

Click OK to proceed with the deletion or Cancel to keep your Employee or Department and return to the Organization menu.
### 13 Subscribers

Subscribers are assigned by the Administrator or Provider in the Administrative Interface when the Group Administrator is created.

![Call Recording Interface](image)

13.1 Subscriber Information

It is then the Group Administrator’s responsibility to identify the recording criteria and application features for each subscriber and then assign the subscribers to users via the End User Interface. Click on the Subscriber’s number to access the Subscriber Information screen and configure the Subscriber’s criteria.

![Subscriber Information Screen](image)
Recording criteria includes the following:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscriber</td>
<td>Identifies the subscriber. This information is automatically entered by the application.</td>
</tr>
<tr>
<td>Description</td>
<td>If applicable, provides a description for this subscriber. For instance who it belongs to or where it is located.</td>
</tr>
<tr>
<td>Do Not Retain Recording</td>
<td>Identifies whether or not recordings from this subscriber will be retained each time a call occurs. The recordings will not be retained if a check mark does not appear in the option box.</td>
</tr>
<tr>
<td>Only Record Calls From</td>
<td>Identifies a specific number or numbers from which calls should be recorded. For example: Every time the incoming number identified in this field calls this subscriber, the system should record the calls. The wildcard percent symbol (%) can be used in place of a number. An underscore (_) is identified as a single character substitution. The comma (,) and semicolon (;) can be used as delimited values if you would like to apply two or more rules.</td>
</tr>
<tr>
<td>Only Record Calls To</td>
<td>Identifies a specific number or numbers to which calls should be recorded. For example: Every time the outgoing number identified in this field is called from this subscriber, the system should record the calls. The wildcard percent symbol (%) can be used in place of a number. An underscore (_) is identified as a single character substitution. The comma (,) and semicolon (;) can be used as delimited values if you would like to apply two or more rules.</td>
</tr>
<tr>
<td>Only Record Calls Redirected From</td>
<td>Identifies a specific number or numbers a call was redirected from that should be recorded. For example: Every time the incoming number identified in this field is redirected to this subscriber, the system should record the calls. The wildcard percent symbol (%) can be used in place of a number. An underscore (_) is identified as a single character substitution. The comma (,) and semicolon (;) can be used as delimited values if you would like to apply two or more rules.</td>
</tr>
<tr>
<td>Only Record Calls Redirected To</td>
<td>Identifies a specific number or numbers a call was redirected to that should be recorded. For example: Every time the outgoing number identified in this field is redirected from this subscriber, the system should record the calls. The wildcard percent symbol (%) can be used in place of a number. An underscore (_) is identified as a single character substitution. The comma (,) and semicolon (;) can be used as delimited values if you would like to apply two or more rules.</td>
</tr>
<tr>
<td>Only Record Calls With DTMF Sequence</td>
<td>Identifies the number sequence, or DTMF digits, entered by the user while a call is in progress, to identify calls that are to be recorded.</td>
</tr>
<tr>
<td>Criteria</td>
<td>Definition</td>
</tr>
<tr>
<td>----------</td>
<td>------------</td>
</tr>
<tr>
<td>Only Record Calls From Caller ID</td>
<td>Identifies a specific person, people, or place (the actual text part or ID) from which calls should be recorded. For example: Every time the name or ID identified in this field calls this subscriber, the system should record the calls. The wildcard percent symbol (%) can be used in place of a number. An underscore (_) is identified as a single character substitution. The comma (,) and semicolon (;) can be used as delimited values if you would like to apply two or more rules.</td>
</tr>
<tr>
<td>Only Record Calls to Caller ID</td>
<td>Identifies a specific person, people, or place (the actual text part or ID) to which calls should be recorded. For example: Every time the outgoing name or ID identified in this field is called from this subscriber, the system should record the calls. The wildcard percent symbol (%) can be used in place of a number. An underscore (_) is identified as a single character substitution. The comma (,) and semicolon (;) can be used as delimited values if you would like to apply two or more rules.</td>
</tr>
</tbody>
</table>

### Percent of calls to record

| Inbound | Percent of inbound calls to record for this subscriber. Range values are 0-100%. The default is 100% |
| Outbound | Percent of outbound calls to record for this subscriber. Range values are 0-100%. The default is 100% |

| Record Start Time | It may only be necessary to record for a certain time range during the day. In this case, you can designate a specific time of day to begin recording calls. |
| Record Stop Time | Designates a specific time of day to stop recording in the event you have designated a record start time. |
| Time Zone | Identifies the time zone in which the calls will be recorded. |
| Days of week to record | Identifies specific days of the week on which to record calls for a particular subscriber. |

Until alternative recording criteria is selected, all calls are recorded by default. To update a subscriber’s recording criteria, click on the **Subscribers** tab and select the specific subscriber that you wish to update. Make any applicable updates to the recording criteria on the **Subscriber Information** screen and select **Update Subscriber** to save your changes.

**NOTE:** The record start time, record stop time, and time zone that you apply to the subscriber from the **Subscriber Information** dialog affects the calls that will be recorded. This overrides the default time zone set from the page header.
13.2 Subscriber Features
Features identify what functionality or features the user(s) assigned to this subscriber will have access to in the End User Interface. Features can be assigned as feature packs or individual features. Feature packs contain a subset of individual features. Individual features are also known as Application Features.

Application Features include the following:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alerting</td>
<td>Allows the user to use the alerting functionality.</td>
</tr>
<tr>
<td>Archive to ISO</td>
<td>Allows the user to archive selected calls as an ISO image file that can be stored on a CD or DVD.</td>
</tr>
<tr>
<td>Audio Mining</td>
<td>Allows the user to create audio mining packs and apply them to recorded calls. <em>(Not Supported)</em></td>
</tr>
<tr>
<td>Call Annotation</td>
<td>Allows the user to add comments and markers on calls to indicate where in the call a notable event might have occurred. This allows other users to find a notable event in a call and mark it for future review with a comment.</td>
</tr>
<tr>
<td>Call Annotation File Upload</td>
<td>Allows the user to upload and attach a file into call annotations.</td>
</tr>
<tr>
<td>Call Categorization</td>
<td>Allows the user to categorize calls into areas unique to their business such as geographic region or customer satisfaction. These calls can then be filtered and reported on based upon these categories.</td>
</tr>
<tr>
<td>Call Comments</td>
<td>Allows the user to add a description or notes to a call record in order to recall the purpose of that recorded call at a later date.</td>
</tr>
<tr>
<td>Call CRM Integration</td>
<td>Allows the user to upload recorded calls to various CRM systems (for example: SalesForce.com and Sugar).</td>
</tr>
<tr>
<td>Call Monitor</td>
<td>Allows the user to list in on a call without the other participants of the call knowing.</td>
</tr>
<tr>
<td>Desktop Notifier Client</td>
<td>Allows the user to receive automated notifications of new incoming alerts. It then picks up on what call the alert is associated with, and enables you to playback the call, associate a category with the call, save the call (if it is still in progress), and write up comments for the call.</td>
</tr>
<tr>
<td>Email Links</td>
<td>Allows the user to email links to audio recordings from the recorded calls tab.</td>
</tr>
<tr>
<td>Evaluation</td>
<td>Allows the user to access the call handler evaluation functionality in order to create evaluations to assign to recorded calls.</td>
</tr>
<tr>
<td>Screen Recording</td>
<td>Allows the Group Administrator to select and enable the screen recording functionality for employees. <em>(Not Supported)</em></td>
</tr>
</tbody>
</table>

Click **Update Subscriber** to save changes you have made to the subscriber or **Cancel** to discard any changes and return to the **Subscribers** menu.
13.3 Excluding a Subscriber From Being Recorded

From the **Organization** tab, select the **Subscribers** menu. Click on the number for the subscriber you wish to exclude from being recorded.

Select the **Do Not Retain Recording** option box to place a checkmark in the box.

Click the **Update Subscriber** link to save your changes. A check mark will also appear in the **Do Not Record** option box on the **Subscribers** menu.

**NOTE:** A check mark will not appear in the “Save Recordings” option box on the “Calls in Progress” screen when “Do Not Record” is selected for a subscriber.
14 Users

In order to view recordings, User must first be added to the application and have subscribers assigned to them. Only the Group Administrator has the ability to add new Users to the application. When a new User is added, the application will automatically email them a password. Users have the ability to change their passwords at any time. However, in the event that they forget their password, they can come to the Group Administrator at which time their password can be reset from the User Maintenance screen.

14.1 Adding a New User

To add a new User, click on the Add New User link at the bottom of the User Maintenance screen.

Enter the applicable Profile Information.
Scroll through the list and select the **Subscribers** that you wish to assign to this User by clicking in the corresponding option boxes. You can also filter for specific subscribers by entering the first few digits of the subscriber in the **Filter** dialog box.

Designate whether or not this user is a Group Admin by clicking in the option box. If **Group Admin** is selected, determine whether or not they will automatically be assigned new subscribers by clicking in the option box labeled **Automatically assign new numbers**.

If **Group Admin** is selected the **Admin User Tasks** section will appear. By default, all **Admin User Tasks** are activated or selected for this user. You can deselect tasks by clicking in the applicable option box. Admin User Tasks include the following:

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Calls</td>
<td>Allows Group Administrators to delete calls from the <strong>Recorded Calls</strong> tab.</td>
</tr>
<tr>
<td>Edit Users</td>
<td>Allows Group Administrators to create and edit new and existing users in the <strong>End User Interface</strong>.</td>
</tr>
<tr>
<td>Edit Organization</td>
<td>Allows Group Administrators to add, edit, and delete employees and departments within the organization structure.</td>
</tr>
<tr>
<td>View Screen Recordings</td>
<td>Allows the Group Administrators to access the screen recording functionality in order to view and play back screen recordings (<strong>Not Supported</strong>).</td>
</tr>
<tr>
<td>Access Audio Mining</td>
<td>Allows the Group Administrators to create audio mining packs and apply them to recorded calls (<strong>Not Supported</strong>).</td>
</tr>
<tr>
<td>Access the Recycle Bin</td>
<td>Allows the Group Administrators to access the <strong>Recycle Bin</strong> tab to recover, download, or permanently delete calls in marked for deletion.</td>
</tr>
<tr>
<td>Edit Subscribers</td>
<td>Allows the Group Administrators to edit the recording criteria and application features of subscribers assigned to users.</td>
</tr>
<tr>
<td>Edit Recording Policies</td>
<td>Allows the Group Administrators to view, create, and edit recording policies.</td>
</tr>
<tr>
<td>Task</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Access Evaluations</td>
<td>Allows the Group Administrators to access the call handler evaluation functionality in order to create evaluations to assign to recorded calls.</td>
</tr>
<tr>
<td>FTP Access</td>
<td>Allows the Group Administrators access to FTP into the system to download any recorded call files that belong to them. The following is an example of why the FTP option is beneficial: if you are notified that recorded calls are going to be deleted, you can use FTP to access the calls to be deleted and download them to a permanent directory at your location. <em>(Not Supported, instead log into the Call Recording Portal and initiate a download of recorded call files and save them to a local directory).</em></td>
</tr>
</tbody>
</table>

Some Admin User Tasks may not be available if they were not selected as an Application Feature when the primary Group Administrator was originally created. Additionally, even if a feature was selected at the parent level in the Administrative Portal, deselecting that Admin User Task for this Group Administrator will override the Application Feature functionality. The Group Admin functionality is useful in situation where a company needs a person or authority figure to monitor the activity of all users, but does not need them to have full functionality. Essentially, a read-only Group Administrator.

Click **Add User** to save your changes.

**NOTE:** The primary Group Administrator will automatically inherit every subscriber that is added to this Group now and in the future. The same applies for any User that has Group Administrator privileges and the Automatically assign new subscribers option is selected.
14.2 User Alerts

The User Alerts display a list of alerts created specifically by the user. Group Administrators have the ability to see the list of alerts for all users regardless of whether their subscribers are assigned to them or not. User Alerts allow Group Administrators to temporarily disable alerts that might be high volume, disruptive, or unapproved, by user. You can enable the alert at any time or go to the Alerts tab and edit or delete the alert as necessary.

To disable Alerts by user, click on the specific user for which you wish to disable an alert. Locate the alert under the list of User Alerts and click Disable.

14.3 Primary Admin

By default, the primary Group Administrator is the original Group Administrator created by the Administrator in the Admin Portal and appears in the hierarchy tree. However, you can reassign the primary Group Administrator by clicking on the user you wish to make the primary Group Administrator and clicking on the Make Primary Admin link.
14.4 Restrict User Access to Certain IP Addresses

Using the Restrict User Access to Certain IP Addresses functionality restricts access of the users based upon their IP address. For example: if the Administrator enters the IP address of a Group and saves it, only the Group and their Users will be able to access the application from that IP address. Therefore, if Users were to try to access the application from home, they would not have access because it is not an IP address accepted by the application. Keep in mind that restricting user access to a certain IP address affects all users. To restrict a user’s access, enter the IP address. IP addresses can also contain wild cards. For example: if you want to restrict a user’s access to all IPs at 123.156.78 you would add wild cards to the end of the value to appear as “123.156.78.*”.

To restrict a user’s access, from the Organization Tab, on the Users menu, click on the Restrict User Access to Certain IP Addresses link at the bottom.

Enter the Address in the available text boxes and then click Add Address. Continue adding all addresses you would like to restrict access to.

Remove addresses by clicking the Remove button ❌. When removing an IP Address from the restriction list the system does not prompt you, it simply removes the IP Address and saves the changes immediately. This change is not reversible.

Click Close when you are done.
14.5 Resetting a User’s Password
From the Organization tab, in the Users menu, select the User by clicking on the User Name.

Ensure that the user’s Profile Information has a valid Email Address that the user is able to access. At the bottom of the User Maintenance screen there is a Reset Password link. Click the Reset Password link.

A system notification will pop-up stating:

“Are you sure you want to reset the password for this user?”

Click OK to proceed. The user will receive an email with their new password. Click Cancel to discard the change and retain the current password. You will be returned back to the User Maintenance screen.
14.6 Deleting a User

From the Organization tab, on the User menu, select the User that you wish to remove by clicking on the User Name to access the User Maintenance screen.

At the bottom, left-hand corner of the User Maintenance screen, click the Delete User link.

You will receive a system notification pop-up notifying you that:

"Warning: Deleting a user cannot be undone. Are you sure you want to delete this user?"

Click OK to proceed with deleting the user or Cancel to retain the user and return to the User Maintenance screen.
15 Recording Policies
The Recording Policies tab is used to create and manage recording policies. Recording policies are needed to meet the Payment Card Industry Data Security Standard (PCI DSS or PCI Compliance). PCI DSS is a set of requirements designed to ensure that all companies that process, store, or transmit credit card information maintain a secure environment.

NOTE: Pausing or resuming a recording will automatically create an annotation for the call.

To ensure compliance, when the credit card number is read over the phone, the PCI Compliance feature disables the call recorders briefly via recording policies. Recording policies define the criteria that enable the pause and resume triggers. Call recording can be paused and resumed using the following triggers:

<table>
<thead>
<tr>
<th>Trigger</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>In-focus Window Title Text</td>
<td>If the window that is in focus matches the title text criteria trigger pause or resume.</td>
</tr>
<tr>
<td>No In-focus Window with this Title Text</td>
<td>If a window that is not in focus matches the title text criteria trigger pause or resume.</td>
</tr>
<tr>
<td>Any Window Title Text</td>
<td>If any window that, in focus or not, matches the title text criteria trigger pause or resume.</td>
</tr>
<tr>
<td>No Window with this Title Text</td>
<td>If none of the windows match the title text criteria trigger pause or resume.</td>
</tr>
<tr>
<td>On Demand</td>
<td>If the Pause or Resume button is selected from the Calls in Progress tab, trigger pause or resume.</td>
</tr>
<tr>
<td>API Call</td>
<td>If the trigger criteria are met using an externally created API method, trigger pause or resume.</td>
</tr>
</tbody>
</table>

Recording policies can be defined at any level of the hierarchy in the Administrative (Administrator, Provider, and Group) or End User Interface (Group, Employee, and Extension). Recording policies are inherited from parent nodes and are read only when inherited. Because only one recording policy can be active at a time each child node has the ability to break the inheritance by defining their own recording policy.

NOTE: At any given level in the hierarchy, if a recording policy is defined, that is the recording policy that will be used for audio and/or screen recording. If a recording policy is not defined at the Provider, Group, Employee, or Extension levels, the system will look to each parent node for an active recording policy to inherit on behalf of the child node. For example: if the Extension level does not have a recording policy defined, the system will look to the Employee for an active recording policy to inherit. If the Employee does not have a recording policy defined, the system will then look to the Group for an active recording policy to inherit. The system will continue to look to the parent nodes to inherit an active recording policy from all the way up to the Administrator.

A recording policy can have multiple triggers and/or policy sections. Policy sections contain the pause and resume triggers. A policy section can have multiple pause and/or resume triggers. When multiple
triggers or policy sections are present, a resume trigger must be met for each pause trigger that is met. For example: a recording policy has three policy elements: policy element 1, policy element 2, and policy element 3. Recording is paused when policy element 1’s DTMF Digits and policy element 3’s In Focus Title Window pause triggers are met. To resume recording, both policy element 1 and policy element 3’s resume triggers must be executed.

**NOTE:** Auto Resume is an additional trigger that will resume recording after a certain amount of time (identified in seconds). If there is a value present in Auto Resume Time, this setting overrides all resume triggers defined in the policy element.

### 15.1 Adding a Recording Policy

To add a new recording policy or policy section click **Add Policy Section.**

Under the **Pause Triggers** section, click **Add Trigger.**

Select the trigger type from the **Type** drop down list. If applicable, enter the value or criteria that will enable the trigger. A value is required if an asterisk (*) appears next to the **Value** field.
Identify whether this trigger pauses call recordings only, screen recording only (Not Supported), or both by selecting a value from the Manages drop down list. Repeat the same steps for the Resume Trigger if necessary or enter a value in the Auto Resume Time field. To add another policy element to the recording policy, click Add Trigger under the Pause and/or Resume Triggers section(s). Similarly, to add another Policy Section, click Add Policy Section. When you have finished creating the recording policy, click Update Policy.

**NOTE:** While recording policies must have a pause trigger, a corresponding resume trigger is not required. If a resume trigger is not defined, once a call recording is paused, it will not resume.

<table>
<thead>
<tr>
<th>Hierarchy Level</th>
<th>Interface</th>
<th>Inherits From</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator</td>
<td>Administrative</td>
<td>Administrator</td>
</tr>
<tr>
<td>Provider</td>
<td>Administrative</td>
<td>Group, Provider, or Administrator</td>
</tr>
<tr>
<td>Group</td>
<td>Administrative &amp; End User</td>
<td>Group, Provider, or Administrator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Since a Group can be created as a child node under another Group, it is possible to inherit a recording policy from a parent Group node.</td>
</tr>
<tr>
<td>Employee</td>
<td>End User</td>
<td>Group, Provider, or Administrator</td>
</tr>
<tr>
<td>Extension</td>
<td>End User</td>
<td>Employee, Group, Provider, or Administrator</td>
</tr>
</tbody>
</table>

The Recording Policy is Enabled option is used to disable and/or enable recording policies. Just keep in mind that if a parent node disables a recording policy, the recording policy will also be disabled for any child nodes currently inheriting that recording policy. Recording policies can be enabled and/or disabled as often as necessary. To disable a recording policy, click in the Recording Policy Enabled option box to remove the check mark. For example: to disable a recording policy for the Group and all associated Employees and Extensions, click in the Recording Policy Enabled option box found at the Group level.

**NOTE:** The Block Recording Policy Inheritance link is only available if a recording policy is currently being inherited. Once a new recording policy has been defined, the link will no longer be available and will only be available to child node inheriting the recording policy.
15.2 Inherited Recording Policies
Similarly, because inherited recording policies are read only, in order to update or create a new recording policy at a child node the current recording policy must be copied and then updated. To edit or create a new recording policy at the child node level, click **Copy Inherited Recording Policy** to enable the Recording Policy fields. Make the necessary edits or additions to the recording policy and click **Update Policy**.

While recording policies can be deleted, keep the following in mind:

- Deleting a recording policy at a parent node will delete inherited recording policies for any child nodes as well.
- Depending on the parent node level the recording policy is deleted at, the child nodes will look to inherit an active recording policy from the higher level parent nodes. The same is true if the recording policy is deleted at the child node level.

15.3 Deleting a Policy
From the Organization tab, on the Recording Policies menu, locate the policy you wish to remove using the **Group Policy Selection** hierarchy list. Once you locate the policy, click the **Delete Policy** link on the right.
A system pop-up notification will appear stating:

“Are you sure you want to delete this Recording Policy?”

Click **Yes** to proceed with the deletion and remove the policy, click **No** to cancel the action and retain the policy.

If you click **Yes** to delete the policy another system notification will show:

“Changes to your Recording Policy Properties have been saved.”

Click **OK** to return to the **Recording Policies** menu.
16 Screen Recording Client

This feature is not supported.
17 Desktop Notifier

The Desktop Notifier is an external application that allows the User to receive automated notifications of new incoming alerts. It then picks up what call the alert is associated with, and enables you to playback the call, associate a category with the call, save the call (if it is still in progress), and write up comments for the call.

**NOTE:** When using Windows 8, you must run Desktop Notifier as an administrator.

17.1 Downloading the Desktop Notifier

Click the Desktop Notifier link.

Depending on the web browser you are using you may be prompted to **Save** the setup file then **Open** the downloaded file to proceed with the setup or you may choose to **Run** the setup immediately. If you receive a Security Warning for the CTI Billing Solutions, Inc. application, click the **Run** button.

The system will prepare the Install; this may take a few moments.
Click **Next** at the **Welcome to the InstallShield Wizard for DesktopNotifier** screen.

![](image)

Then click **Install**.

![](image)
The installation will begin. This may take a few minutes.

Once the **InstallShield Wizard Completed** screen comes up, click **Finish**.

By default, the installer will place a shortcut to the Desktop Notifier application on your desktop. Locate this shortcut and launch the application.
Enter the Call Recording Portal URL and your login information into the text fields. Click the **Save Settings** button to login.

The URL is: https://recording.euserportal.com/CallRecorder

Once you login to the application you will see the **Call Recording** logo appear and the status bar at the bottom will show that it is **Connected** or **Checking for Alerts**...
18 Archive Tool

The Archive Tool allows users to achieve call recordings to ISO images. These image files can be burned to CD/DVD at the convenience of the user.

The following describes how to download the Archive Tool via the End User Interface. For information about how to use the application, refer to the Archiving Quick Start Guide found in the online help.

From the Call Recording web interface, click on the Archive Tool link at the top of the page.

Depending on the web browser you are using you may be prompted to Save the setup file then Open the downloaded file to proceed with the setup or you may choose to Run the setup immediately. If you receive a Security Warning for the CTI Billing Solutions, Inc. application, click the Run button.

The system will prepare the Install; this may take a few moments.
From the welcome screen, click **Next** to continue.

Click the **Install** button on the **Ready to Install the Program** screen.
The system will begin the installation process. This may take a few minutes.

Installation is completed. Click the **Finish** button.

A shortcut to the Archive Tools application will be placed on your desktop by default. Launch the application.
Go to the **Configuration** tab and enter the correct Call Recording URL.

The call recording URL is: [https://recording.euserportal.com/CallRecorder](https://recording.euserportal.com/CallRecorder)

Go to the **Parameters** tab and enter your User Name and Password that you use for the Call Recording portal.
From the **Parameters** tab, enter the **Search Criteria** for the calls you wish to archive. From the **Image Details** section, set the **Output Directory** which will determine what local directory will contain the archived recordings. Then click the **Create** button at the bottom to being archiving.

The archived .iso file will be available in the local directory.
19 Passwords

Group Administrators are created in the Administrative Interface by the service provider. The Group Administrator is assigned a User Name during the creation process. The password, however, is auto-generated by the application and will be emailed to you once the new account is saved. Passwords are auto-generated because Administrators and Providers are not allowed to know the passwords of Group Administrators.

Once you have access to the End User Interface, you have the ability to change your password using the Change Password link. At this point you are able to select a password that is more meaningful to you.

The Change Password link is available at the top of the Call Recording web interface.

Passwords are case sensitive. The password must contain a minimum of 10 characters, with at least 1 number, 1 special character, 1 uppercase letter and 1 lowercase character.

Enter your Old Password then enter your New Password into the marked field, and enter it again in the field labeled Confirm. Click Submit to proceed with the change or Cancel to quit the process and retain the old password.
20 Search

The Search feature allows you to search any part of the call record (Number, Duration, Time, Comments, etc.) on the Recorded Calls screen in order to find a specific call record. For example: if there are 10 pages of recorded call files on the Recorded Calls screen and you need to find a specific call record that you know has a comment associated with it that has the word “training” in it, you can search for that word to find that call record. You can also use the percent symbol (%) wild card to replace part of the word or number for which you are searching.

The Search box is available at the top of the Call Recording page.

Enter your search criteria and then click the View search results link.

The search results will return any recordings that contain text from any fields that contain the text you entered in your Search box.
21 Time Zones

The Call Recording application has 85 standard preloaded time zones. When applied, time zones affect all aspects of the application. Adjusting the time zone will adjust the Day, Date, Time associated with all recordings which will affect the Reports, Alerts, and Archiving features.

To adjust the time zone, click on the current time zone link at the top of the page.

The link will change to a drop down box. Scroll through to find the desired time zone. Click on the desired time zone, then click the Save link.

The current time zone link will not be represented by the selected time zone. All times associated with recordings will automatically update.