

# Call Recording Quick Reference Guide

## Logging Into the Portal

Before accessing the Call Recording service, you will need a few fundamental pieces of information:

- The URL for the Call Recording Portal. This URL may be specific to your organization. Please consult your administrator for your specific URL.
- Your username and password provided by your administrator.

Browse to the administrator provided URL. At the login screen enter your full username@domain and password and click "Login". Depending on your level of access, you might only see your recordings as an agent/user or if enabled as a supervisor you will be able to see multiple agents/users and manage recordings. Functionality only to supervisor role will be explained below.

The screenshot shows the login interface for the Call Recording Portal. At the top, there is a dark grey header with a microphone icon and the text 'CALL RECORDING'. Below this is a light grey box titled 'Please login'. Inside this box, there are two input fields: 'User name' and 'Password'. To the right of these fields is a circular logo with a microphone and the text 'CALL RECORDING'. Below the input fields is a 'Login' button and a 'Recover Password' link. Two green arrows point to the input fields from the text 'Enter Username & Password' and to the 'Login' button from the text 'Click Login'.

Call Recording Portal Login Page

## Browse Recordings - Overview

Logging into the portal automatically opens the "Browse : Recordings "page. Search for recordings based-on multiple criteria and then play, tag, and if enabled as a supervisor, you can also forward, or download them.

Enter criteria such as a date range, tags, remote parties, and more.

This area shows call recording information such as date, time, duration, and a unique ID for each recording.

Shows the local party making or receiving recording.

Shows call information from the remote party.

Shows actions that can be assigned to a recording such as tags and forwarding via e-mail. Selecting the check box includes the record in a bulk action.

The screenshot shows the 'Call Recording Browse Page' interface. At the top, there are tabs for 'Recordings', 'Tags', and 'Audit Trail'. A search bar and filter options are on the left. The main area displays a table of recordings with columns for TYPE, ID, DATE, TIME, DURATION, LOCAL PARTY, DIRECTION, REMOTE PARTY, USER, and TAGS. A playback window is visible on the right side of the table.

TYPE	ID	DATE	TIME	DURATION	LOCAL PARTY	DIRECTION	REMOTE PARTY	USER	TAGS		
🔊	783	2019-04-10	12:53:36	478	johngrover@myco.com	👉	chihung@myco.com	John Grover	🔖	✉	☐
🔊	782	2019-04-10	12:19:08	33	johngrover@myco.com	👈	chihung@myco.com	John Grover	🔖	✉	☐
🔊	779	2019-04-10	12:07:14	183	johngrover@myco.com	👈	5559975443	John Grover	🔖	✉	☐
🔊	778	2019-04-10	11:46:44	478	johngrover@myco.com	👈	marysinclair@myco.com	John Grover	🔖	✉	☐
🔊	777	2019-04-10	11:27:11	33	johngrover@myco.com	👈	5559975443	John Grover	🔖	✉	☐
🔊	776	2019-04-10	10:42:19	280	johngrover@myco.com	👈	5552123456	John Grover	🔖	✉	☐
🔊	775	2019-04-10	10:23:55	478	johngrover@myco.com	👈	5556789012	John Grover	🔖	✉	☐
🔊	774	2019-04-10	10:11:32	70	johngrover@myco.com	👈	robertlavi@myco.com	John Grover	🔖	✉	☐
🔊	773	2019-04-10	09:37:21	300	johngrover@myco.com	👈	5559977432	John Grover	🔖	✉	☐
🔊	772	2019-04-10	09:03:04	183	johngrover@myco.com	👈	5552341236	John Grover	🔖	✉	☐

Call Recording Browse Page

Click the speaker icon to listen to the recording.

Clicking on either the recording ID or the date opens a details page for the selected recording.

The arrows indicate if the recorded call was inbound or outbound.

## Search Call Recordings

Call Recording provides a powerful, multi-criteria search feature. It allows you to search using one or multiple search criteria.

The screenshot shows a search interface for call recordings. It includes a 'Filter by' dropdown, a 'Search' button, and a 'Monitored only' checkbox. Below these are several search criteria: Tag name, Tag text, ID, Min duration (secs), Max duration (secs), Local party, Remote party, IP addresses, Start date, and End date. At the bottom, there are radio buttons for 'Outgoing', 'Incoming', and 'Both', along with a 'More metadata filters...' section containing 'Calculate disk space', 'Reset', and 'Search' buttons. A 'Select tag' button is also present. A callout box shows a 'Results' dialog with a table of tag types: Compliment, Customer Issue, and New Tag Type. Callouts provide detailed instructions for each element.

Filter search by individual or group.

Search based on specific tags. Click "Select tag" to choose the tags from a dialog box and click "Select Tag Type".

Search additional notes or tag text associated with the recording.

Search for recordings based on their minimum and maximum recording.

Quickly find a recording using its unique ID number.

Search based on local / remote party information (SIP ID, phone number, IP).

Search for recordings from a specific date or range of dates.

Filter the search results by type of call.

Input one or multiple search criteria and then click the "Search" button.

TAG TYPE NAME	
Compliment	<input type="radio"/>
Customer Issue	<input checked="" type="radio"/>
New Tag Type	<input type="radio"/>

# Playback Call Recordings

Easily playback recordings directly from the web browser.

Choose a recording and click the speaker icon to listen.

Playback controls for the recording.

Account Logout

Welcome Supervisor1

Recordings Tags Audit Trail

Filter by Search

Monitored only

Tag name  Select tag

Tag text

ID

Min duration (secs)

Max duration (secs)

Local party

Remote party

IP addresses

Start date

End date

Outgoing  Incoming  Both

More metadata filters...

Calculate disk space Reset Search

Recordings Reports

Pick action

T	ID	DATE	TIME	DURATION	LOCAL PARTY	DIRECTION	REMOTE PARTY	USER	T	T	T
	783	2019-04-10	12:53:36	478	johngrover@myco.com		chihung@myco.com	John Grover			
	782	2019-04-10	12:19:08	33	johngrover@myco.com		chihung@myco.com	John Grover			
	779	2019-04-10	12:07:14	183	johngrover@myco.com		5559975443	John Grover			
	778	2019-04-10	11:46:44	478	johngrover@myco.com		maysinclair@myco.com	John Grover			
	777	2019-04-10	11:27:11	33	johngrover@myco.com		5559975443	John Grover			
	776	2019-04-10	10:42:19	280	johngrover@myco.com		5552123456	John Grover			
	775	2019-04-10	10:23:55	478	johngrover@myco.com		5556789012	John Grover			
	774	2019-04-10	10:11:32	70	johngrover@myco.com		robertlavi@myco.com	John Grover			
	773	2019-04-10	09:37:21	300	johngrover@myco.com		5559977432	John Grover			
	772	2019-04-10	09:03:04	183	johngrover@myco.com		5552341236	John Grover			

20190629\_174546\_CKMI.wav.crypt

00:00 02:36

## Download Recordings

Supervisors and administrators have two different methods for downloading recordings. Individual agent/users cannot download recordings.

### Download All the Media Files Associated with a Search Query.

1. Perform a search.
2. From the “Pick action” drop down menu choose “Export query results media files”.
3. Choose a location and click “Save” This will download all media files from that search.

### Manually Select Files for Download

1. Perform a search.
2. Choose the files to be downloaded.
3. From the “Pick Action” drop down menu choose “Export selected media files”.
4. Choose a location and click “Save”.

Check the box of one or more recordings you wish to download

TYPE	ID	DATE	TIME	DURATION	LOCAL PARTY	DIRECTION	REMOTE PARTY	USER	TAGS		
	783	2019-04-10	12:53:36	478	johngrover@myco.com	←	chihung@myco.com	John Grover			<input checked="" type="checkbox"/>
	782	2019-04-10	12:19:08	33	johngrover@myco.com	→	chihung@myco.com	John Grover			<input checked="" type="checkbox"/>
	779	2019-04-10	12:07:14	183	johngrover@myco.com	←	5559975443	John Grover			<input checked="" type="checkbox"/>
	778	2019-04-10	11:46:44	478	johngrover@myco.com	←	marysinclair@myco.com	John Grover			<input type="checkbox"/>
	777	2019-04-10	11:27:11	33	johngrover@myco.com	→	5559975443	John Grover			<input type="checkbox"/>
	776	2019-04-10	10:42:19	280	johngrover@myco.com	→	5552123456	John Grover			<input type="checkbox"/>
	775	2019-04-10	10:23:55	478	johngrover@myco.com	←	5556789012	John Grover			<input type="checkbox"/>
	774	2019-04-10	10:11:32	70	johngrover@myco.com	→	robertlavi@myco.com	John Grover			<input type="checkbox"/>
	773	2019-04-10	09:37:21	300	johngrover@myco.com	→	5559977432	John Grover			<input type="checkbox"/>
	772	2019-04-10	09:03:04	183	johngrover@myco.com	→	5552341236	John Grover			<input type="checkbox"/>

Call Recording Browse Page

After selecting one or more recordings for download, the system can calculate the expected file size. Click “Calculate Disk Space” to start the calculation.

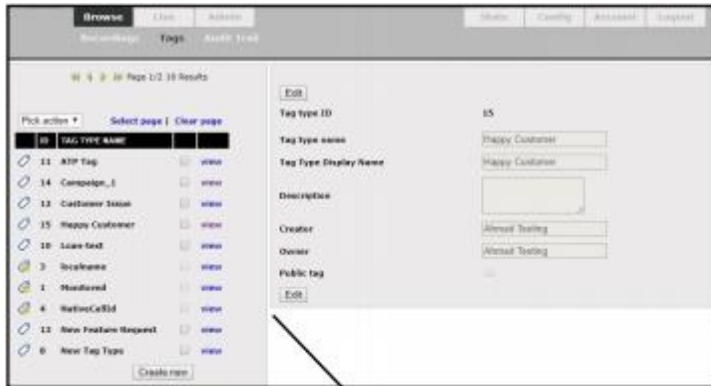
Choose “Export selected media files” or “Export query results media files from the dropdown menu.

## Creating New Tags and Tagging Recordings

Tags can be created and added to recordings to reflect common actions, experiences or potential search criteria. Tags can be added during a live call or after the call is complete. Tags can even be applied based on a specific point in the recording. Multiple tags can be added to the same recording to improve the granularity of future search results.

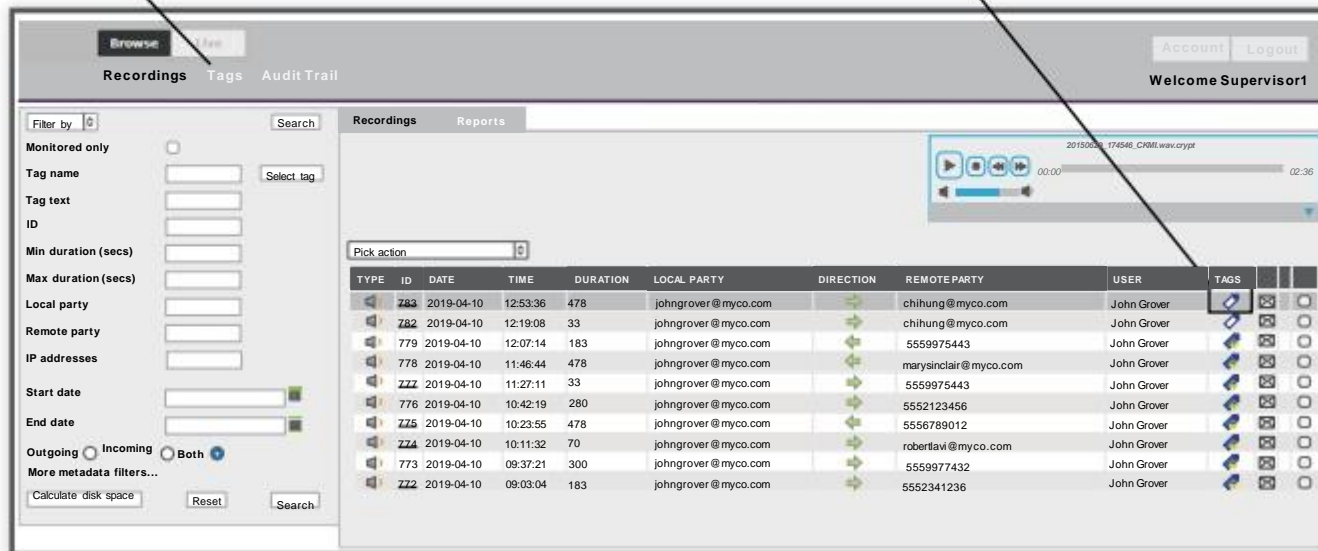
### To create a new tag:

1. Click on "Tags" to open the Tags page.
2. Click "Create new". This will reveal the Tags edit screen.
3. Click "Edit" to start creating a new tag.
4. Enter the name and description (optional) of the new tag and click Submit.



### To tag a recording:

1. Click on the tag icon of the recording to be tagged. This will open the tag dialog box.
2. Click on the "Tag type" drop down menu and choose the tag.
3. Enter the tag text to help describe the event being tagged.
4. Click "Add". Multiple tags can be added to a recording.
6. Click "Submit".



## Live Call Monitoring

Supervisors and administrators can monitor calls in real-time while they are being recorded. By default, any user set-up for call recordings has their calls recorded automatically. Supervisors and administrators have the access to override the automatic recording settings and either keep, discard, or pause a recording. Users will only see their line in the below window and can pause and resume the call to avoid capturing sensitive information such as a password or credit card information.

The interface features a top navigation bar with 'Browse' and 'Live' buttons, and 'Account' and 'Logout' links. Below is a table of call logs with columns for user information, duration, and control actions. Call 5 is active and being recorded. Call 23 is being dropped. Call 44 is paused. Call actions include Keep, Discard, Monitor, and Pause. A 'TAG' button is available for each call.

USER ID	USER NAME	LOCAL PARTY	DIRECTION	REMOTE PARTY	ELAPSED	KEEP	DISCARD	MONITOR	PAUSE	STATUS	TAG	LIVE TAGS
5	Chi Hung	chihung@myco.com	➔	555-123-4565	00:20:30					This conversation will be recorded		
23	Robert Lavi	boblavi@myco.com	➔	555-987-6543	00:00:17					This recording will be dropped		
44	Mary Sinclair	msinclair@myco.com	➔	fdesk@myco.com	00:12:37					(paused)		

Click the "Live" button to monitor live call recordings.

Click the keep button to keep the call recording of the call that is complete.

Listen to calls in real-time.

Click the discard button to delete the call recording after the call is complete.

Click the pause button to pause recordings.

Tag call recordings in real-time to increase search ability.