SmartRecord®

Group Administrator's End User Interface User's Guide

V4.8

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Introduction

This guide provides information about the End User Interface features, functions, and reports presented as tools to be used to solve your business management requirements. We've focused on some of the most common tasks such as managing recorded calls, calls in progress, Users, and extensions. Where possible we have included step-by-step procedures and/or examples of how to complete the functions within the application.

The End User Interface allows the Group Administrator to create Users of the system. Users of the system might be characterized as managers or supervisors of contact centers, members of law offices, or financial institutions. Users are assigned numbers by which they are then able to manage calls in progress and recorded calls. The Group Administrator is able to view and playback all calls made by any of the Users that they create. And, if applicable, the Group Administrator is also able to archive recorded calls and download the recorded call files of their Users, via FTP.

The End User Interface is made up of six, easy-to-navigate tabs that contain all of the functionality a Group Administrator needs to manage a call center. There are up to seven additional links available in the upper right hand corner of the application. Depending on the Application Features that you were given access to by the Administrator, you may see less than seven. These links allow you to download plug ins such as the Archive Tool, access Recent Alerts, and change your password.

The default landing tab is the Home or Dashboard Tab. This can be customized to best suit your needs. To set your default landing tab, click on the tab that you wish to make the default. Click the that appears on the tab or next to the label. A confirmation message is displayed notifying you that your default tab has been set. Click OK.

Logging On

In order to access the application, you must logon with a user name and password. The Group Administrator's user name is assigned by the Administrator or Provider that created them in the Administrative 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 allowed to know the passwords of the Group Administrators that they create.

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

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

2. Enter the call recorder URL.

3. Enter your User Name and Password.

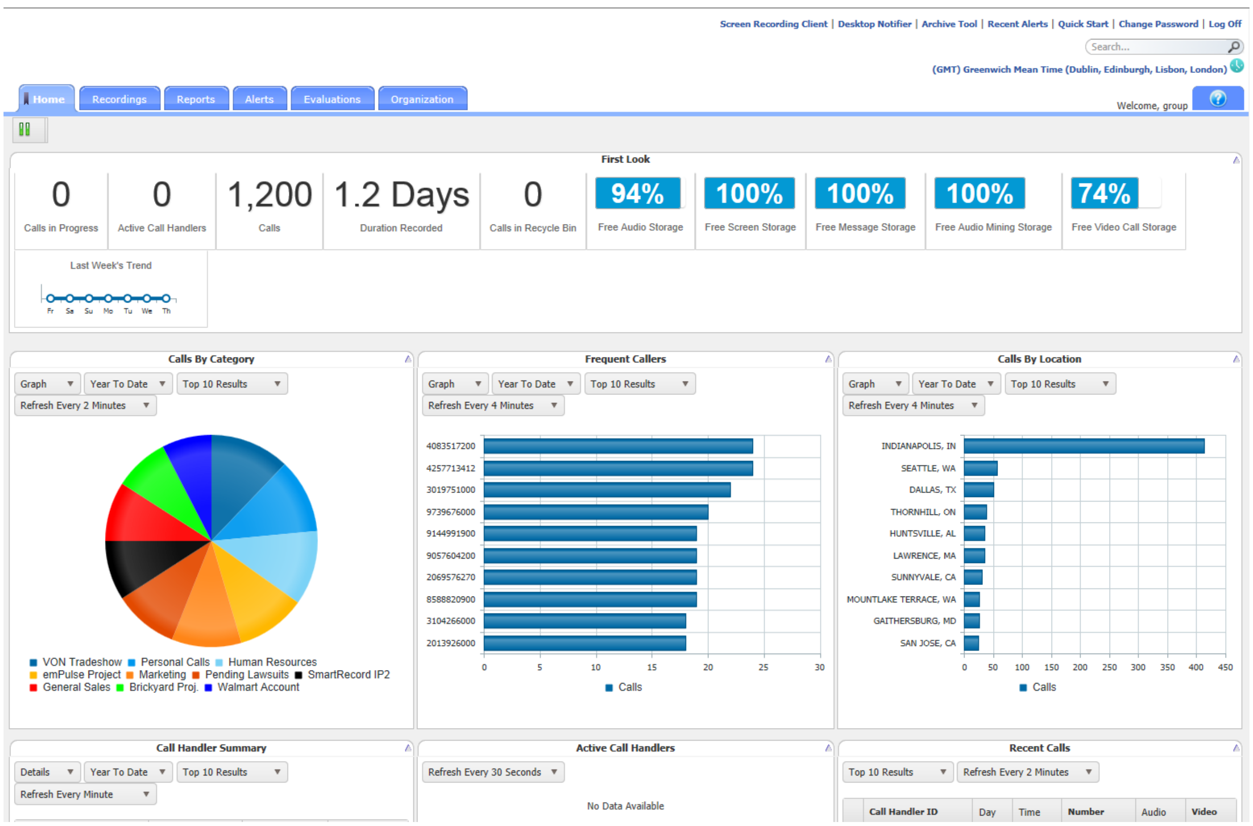
4. Click Logon.

Note: A logo is optional and may or may not be assigned to your particular account. Logos are assigned by the Administrator or Provider in the Administrator Interface.

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, free screen 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 upper right 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.



First Look

The First Look appears horizontally across the top of the Dashboard and displays a quick view of totals for the following information:

- Calls in Progress – identifies the total number of calls in the system that are not terminated, by Tenant and/or User.
- Active Call Handlers – 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.

- Calls – 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.
- Duration Recorded – 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.
- Calls in Recycle Bin – 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.
- Free Audio Storage – identifies the total amount of free audio storage, by Tenant only.
- Free Video Storage – identifies the total amount of free video storage, by Tenant only.
- Last Week's Trend – provides a visual display of the call history for the previous week.

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.

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.

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.

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.

Active Call Handlers

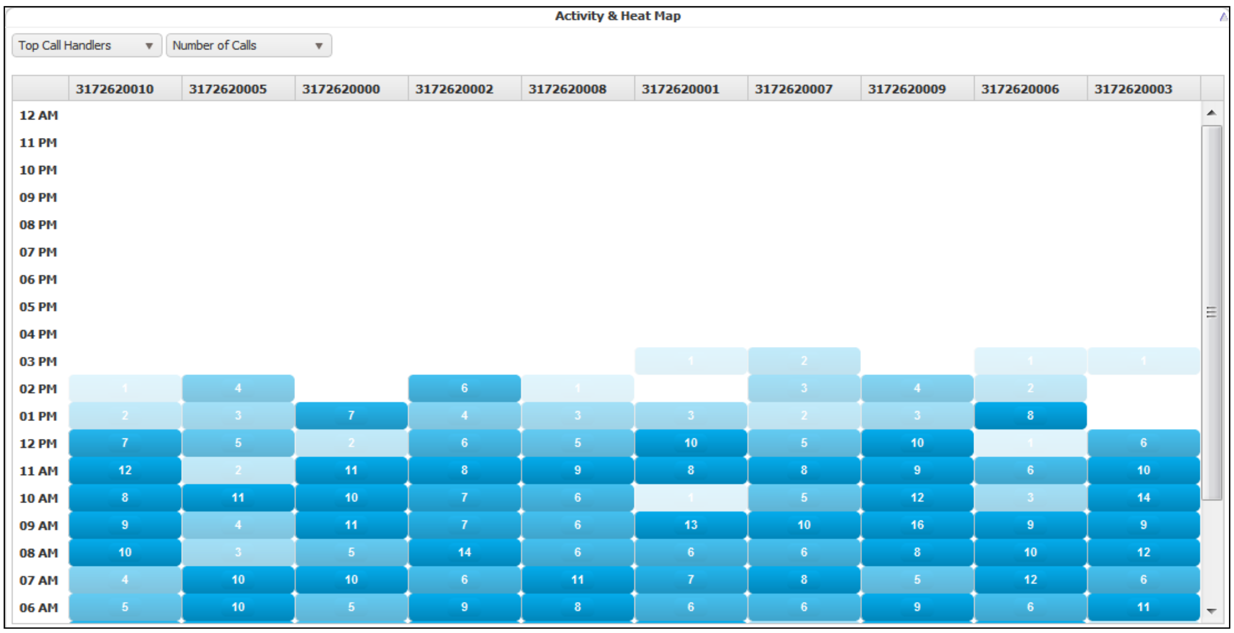
The Active Call Handlers pane displays the call handlers/numbers that are currently on calls and the number of the other party. Users that have access are able to monitor an active call handler's call in progress by clicking on the monitor button. Additionally, you are able to adjust the number of results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

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.

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 volume call activity. Each individual color block is clickable and will take you directly to the Recorded Calls tab where are you able to view the call activity, listen to the recording, add a comment, etc.



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Recorded Calls

When logged in as the Group Administrator, the Recorded Calls screen displays all completed recorded calls for all Users that have been created by you. 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:

- Number – the number or description associated with the call
- Day – the day of the week the call took place
- Date – the actual date the call took place
- Time – the time the call originated
- From Number – the originating number
- From Caller ID – displays the name or number of the person that originated the call, if caller ID is available
- To Number – the terminating number
- To Caller ID – displays the name or number of the To Number, if caller ID is available
- Redirected From – displays the number of the person or group transferring the call
- Redirected To – displays the number to which the call was transferred
- Duration – the length of the call
- Recording – identifies whether or not there is a recording associated with the call.
- Video – identifies whether or not there is a video associated with the call
- Annotate – comments and markers on calls to indicate where in the call a notable event occurred
- CRM – allows the user to upload recorded calls to an interfaced CRM systems such as Sugar and Salesforce.com through the standard API
- Email – allows the user to email a recorded call
- Comments – any comments associated with the call
- Category – allows the user to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction)
- Classification – allows the user to set access permissions on a call. Calls can be assigned a classification, and cannot be accessed by users without explicit classification permissions.
- MD5 – identifies whether or not the call has been hashed using MD5 fingerprinting, thus ensuring that the call has not been tampered with and satisfying regulatory requirements
- Archive - allows you to view the file path of a particular recorded call
- Evaluate – allows Group Administrators to select individual recorded calls and evaluate the call handler's performance during the call
- Audio Mining – allows users to view the results of the audio mining pack search

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 (MP3 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 (see Appendix A for a list of supported features by media player). 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.

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. A (Annotate button) indicates there are currently no annotations associated with the corresponding recorded call file. However, a (Annotate button) indicates there are annotations associated with the recorded call file. To add an annotation, click on the Annotate button. 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 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.

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

You have the option to upload recorded calls from the Recorded Calls tab 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.

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 toolbar 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 does not appear, enter new criteria in the CRM Search field and click Search. If multiple contacts, accounts, or cases are returned deselect the ones you don't 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.

Additionally, situations will occur where you need to send a specific recorded call to a person that may not have access to the application or just for emphasis. In these instances, you have the ability to email the recorded call to that recipient. To send a recorded call file via email, select the (Email button) that corresponds to the call that you want to send. A new email page will open with the recorded call link displayed in the text area. Select your recipients and send the email.

Note: There will not be an email option for any calls that have been deleted. You will still see the call detail but there will not be a recording associated with it.

From the Recorded Calls screen you can also add comments to each of the recorded call files. A (Add Comment button) indicates there are currently no comments associated with the corresponding recorded call file. A 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  button.

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. Multiple categories can be assigned to a recorded call. Click on the Category link and select the specific category from the drop down list. Repeat this as necessary for each category you wish to apply to a recorded call.

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.

MD5 is a technique used to ensure that a file has not been altered in any way. When the call is recorded, we take 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 file has changed. If a different string of characters that don’t 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.

Clicking on 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.

Evaluate allows Group Administrators to select individual recorded calls and rate the call handler's performance during the call by responding to a predefined evaluation. Evaluations can be used for training purposes, during review time, or as feed back for the call handler. To evaluate an call handler’s performance, click on the button that corresponds to the recorded call you wish to rate. Select the specific evaluation from the drop down list and respond to each question on the predetermined evaluation from by entering or selecting the appropriate answers and comments. Verify you have answered all of the questions from the Summary page and click Finish.

Once an audio mining pack has been added and released and a filter has been applied, you have the ability to view the results of the filter and listen to the calls, if necessary. The application also rates the returned calls in order of confidence, or how sure the application is that the word or phrase is contained in the recording. To view the audio mining results, click the button that corresponds to the recorded call for which you wish to view results.

Number, Employee, Redirection, Date/Time, Duration, Category, Audio Mining Pack, Evaluations, or Other (or a combination of all four) filters located below the Recorded Calls, Recycle Bin, Calls in Progress, Screen Recordings, and Messages 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, Employee, Redirection, Date/Time, Duration, Category, Audio Mining Pack, Evaluations, or Other tab(s).

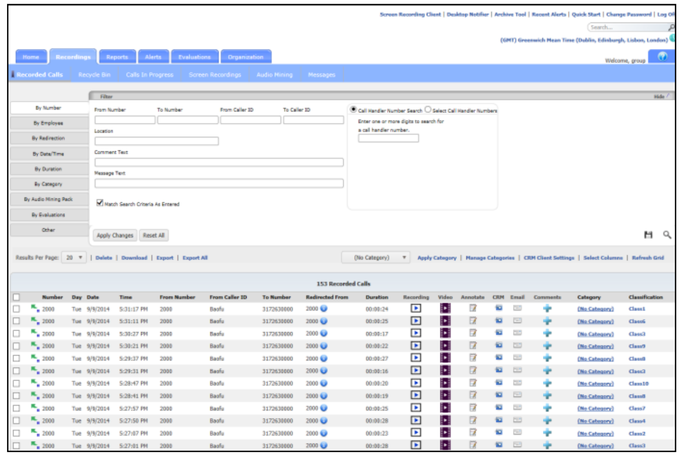
Enter or select the applicable information for each filter and click Apply Changes. To return to the default information, click Reset All. Click Hide to close the Filter window.

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

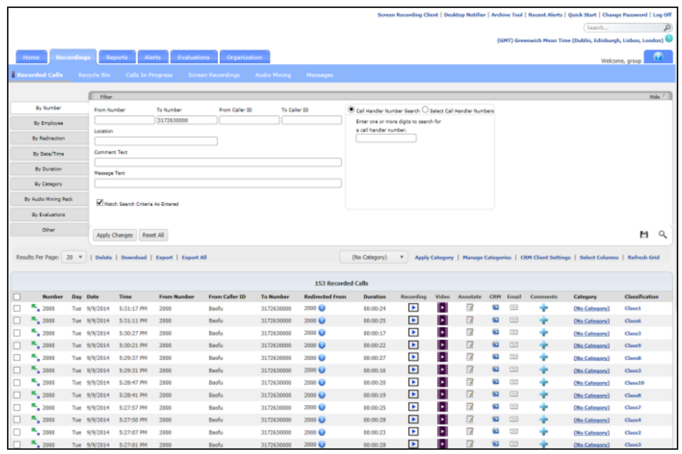
The Payment Card Industry Data Security Standard (PCI DSS) is a set of requirements designed to ensure that all companies that process, store **or** transmit credit card information maintain a secure environment. Therefore, when a customer is set to read their credit card number over the phone, the PCI 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.

Example: Applying a filter

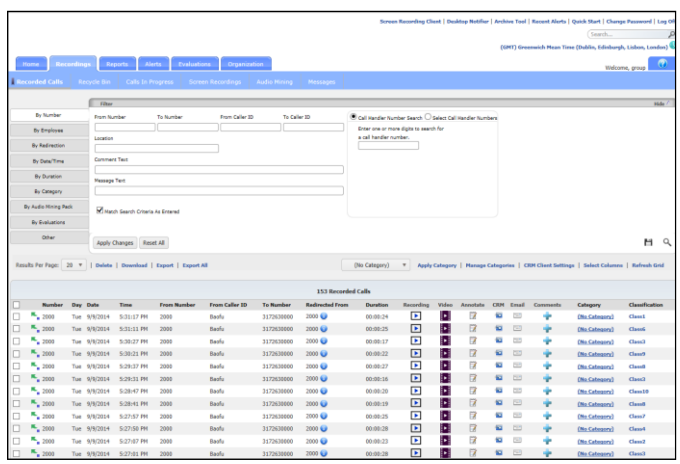
5. Click on the **Filter** toolbar to expand it.
6. If it isn't already selected, select the **By Number** tab.



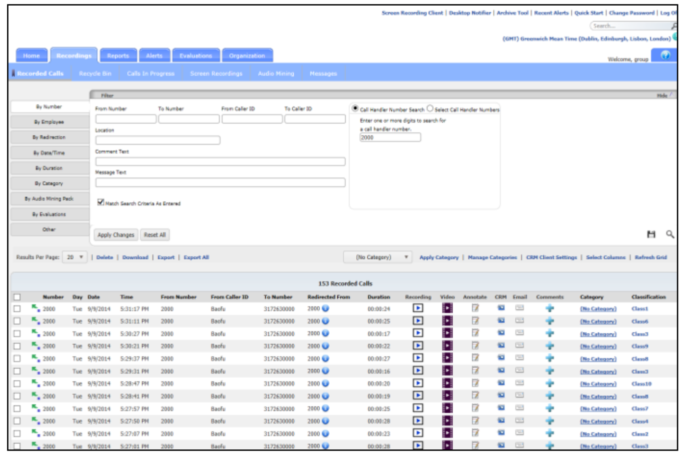
7. Enter the following information:
   - To Number – **enter a number that appears under the From Number column of the list of Recorded Calls.**



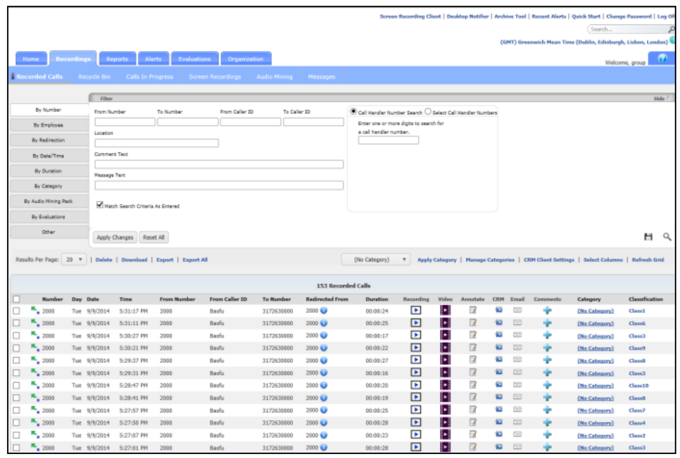
8. Click **Reset All** to remove the filter from the list of Recorded Calls.
9. If it isn't already selected, select the **By Number** tab.



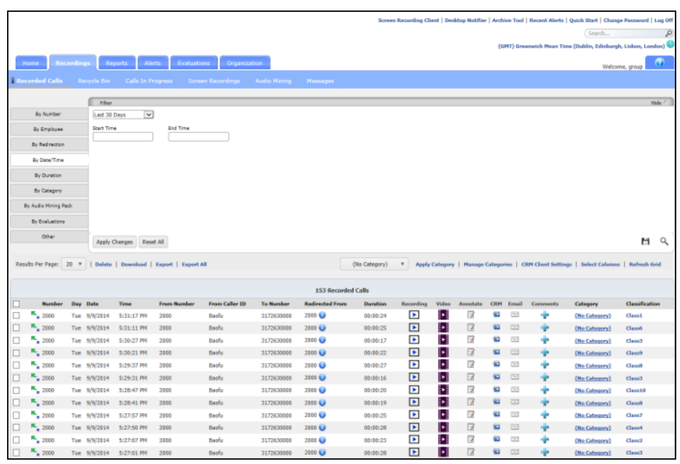
10. Click in the **Call Handler Number Search** option box and enter the following:
    - Enter one or more digits to search for an call handler number – **enter 3 to 4 numbers from a number found on the recorded calls tab.**
11. Click **Apply Changes** to apply the filter to the list of Recorded Calls.



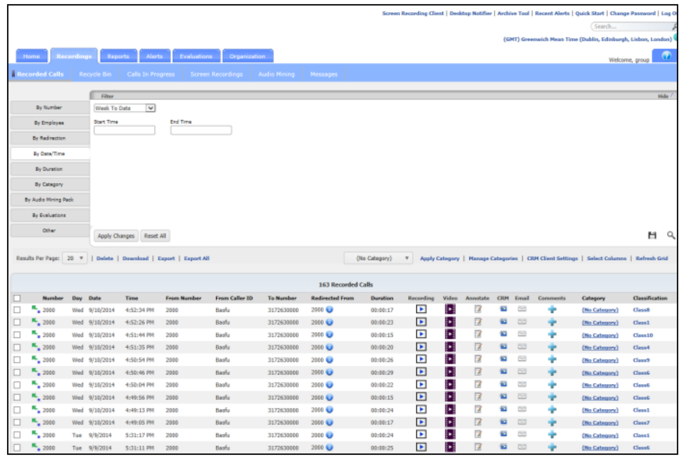
12. Click **Reset All** to remove the filter from the list of Recorded Calls.



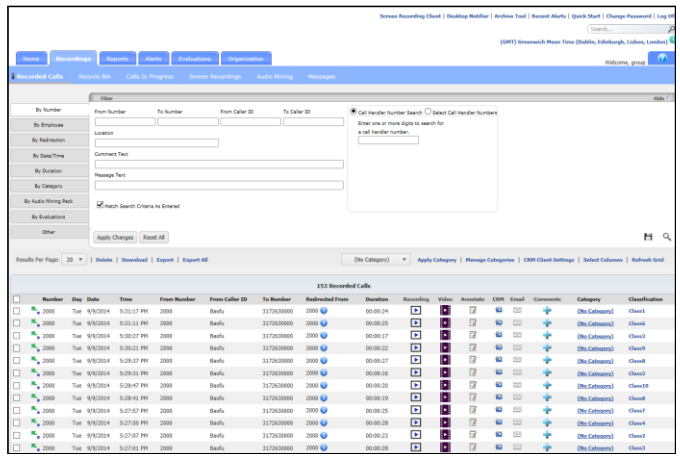
13. Select the **By Date/Time** tab.



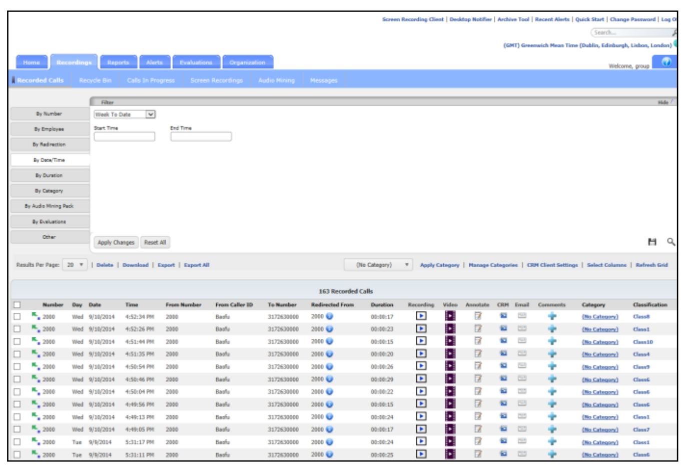
14. Select **Week to Date** from the drop down list.
15. Click **Apply Changes** to apply the filter to the list of Recorded Calls.



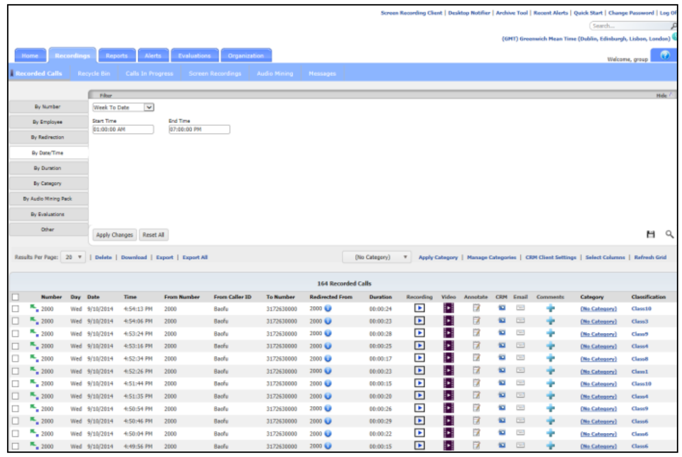
16. Click **Reset All** to remove the filter from the list of Recorded Calls.



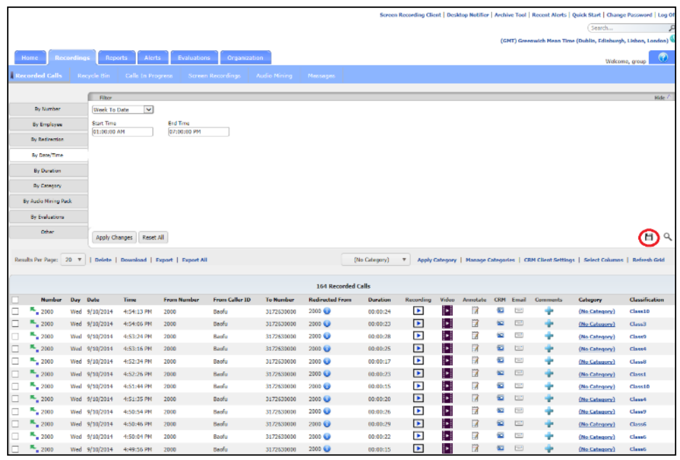
17. Select the **By Date/Time** tab.



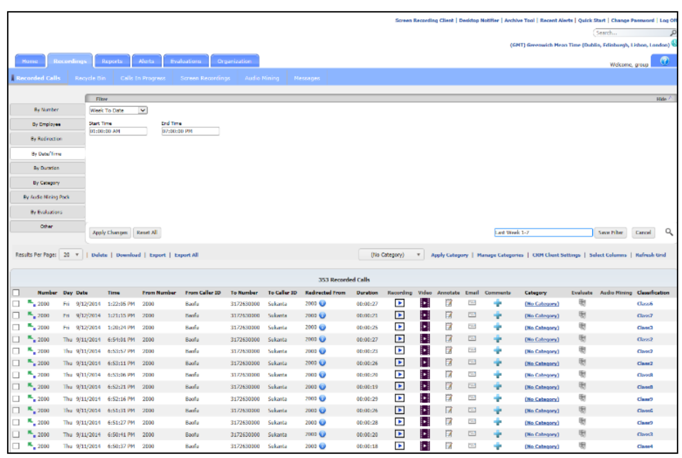
18. Click **Apply Changes** to apply the filter to the list of Recorded Calls.
19. Enter the following information:
    - Start Time – **01:00:00 a.m.**
    - End Time – **07:00:00 p.m.**



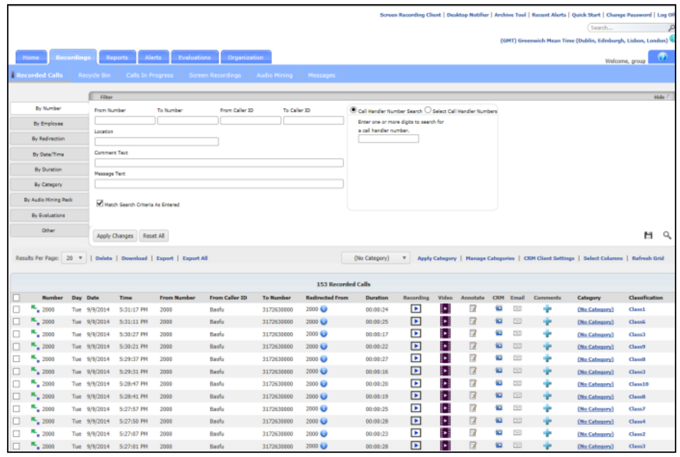
20. Click (Save Filter) button to save the filter criteria.



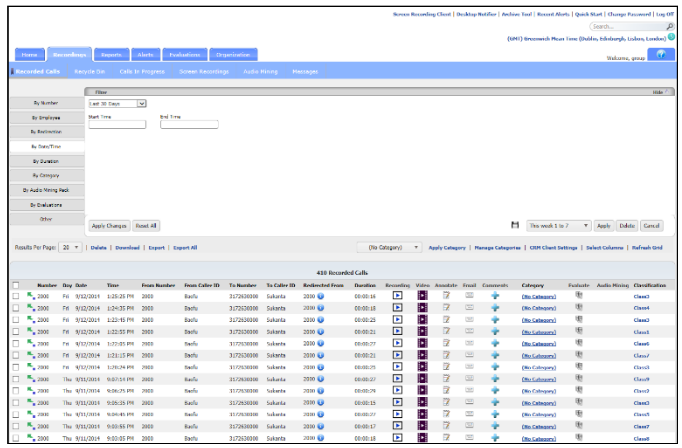
21. Enter the filter name and click **Save Filter**.



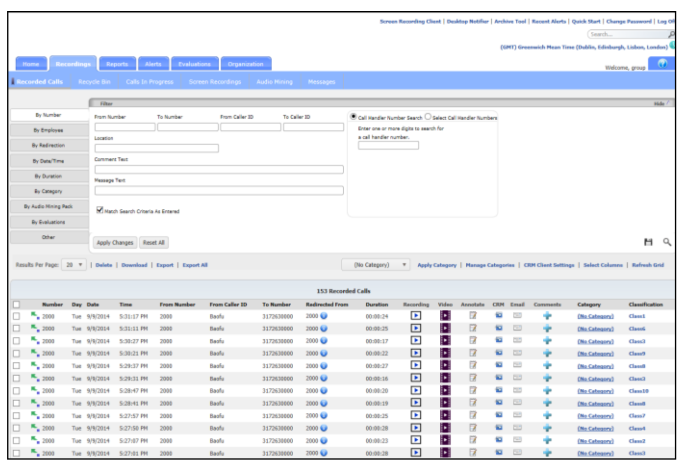
22. Click **Reset All** to remove the filter from the list of Recorded Calls.



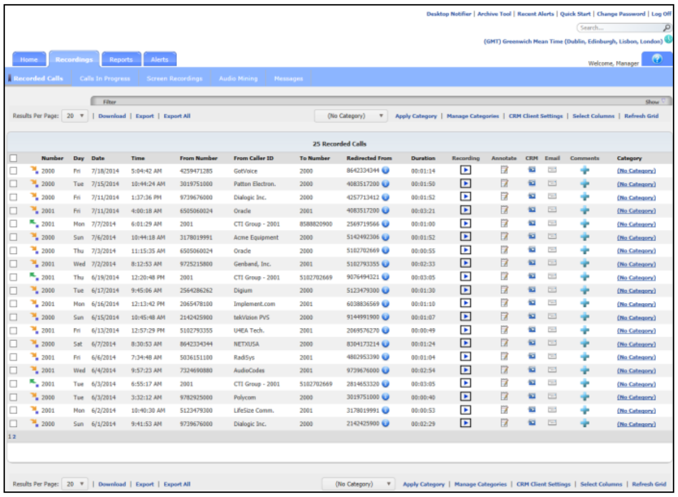
23. Select (Apply Saved Filter).
24. Select **Last Week Filter** from the drop down list and click **Apply**.



25. Click **Reset All** to remove the filter from the list of Recorded Calls.

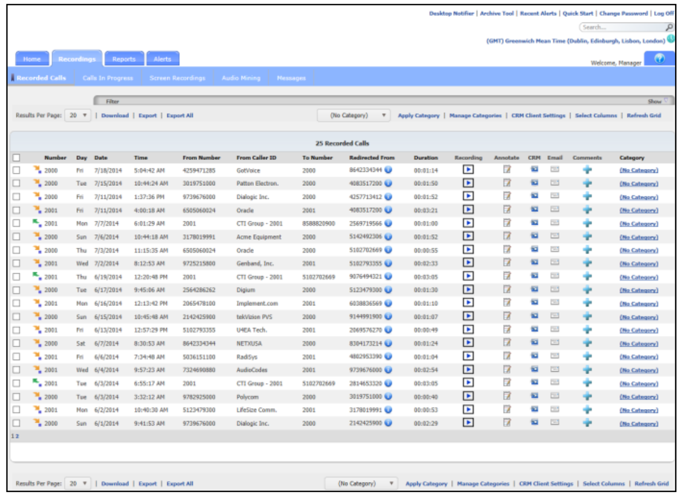


26. Click **Hide** to close the filter toolbar.

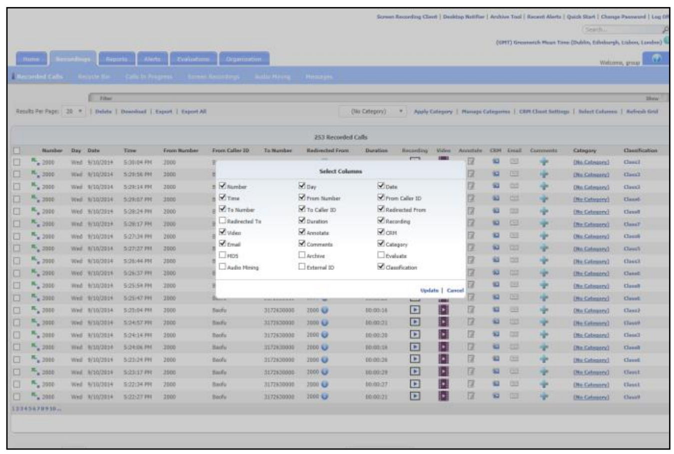


Example: Managing the Recorded Calls tab columns

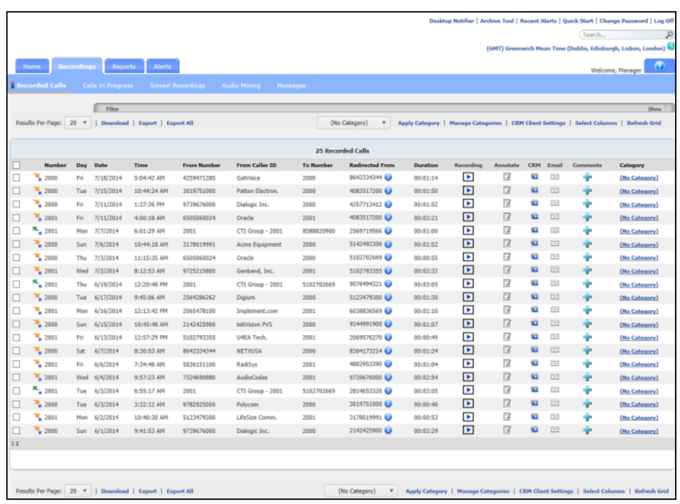
27. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



28. Select the **Select Columns** link at the top or bottom of the Recorded Calls page.
29. Select the following option boxes (this action will either insert or remove a check mark from the option box):
    - **Annotate**
    - **To Caller ID**
    - **Category**
    - **From Caller ID**
    - **Email**

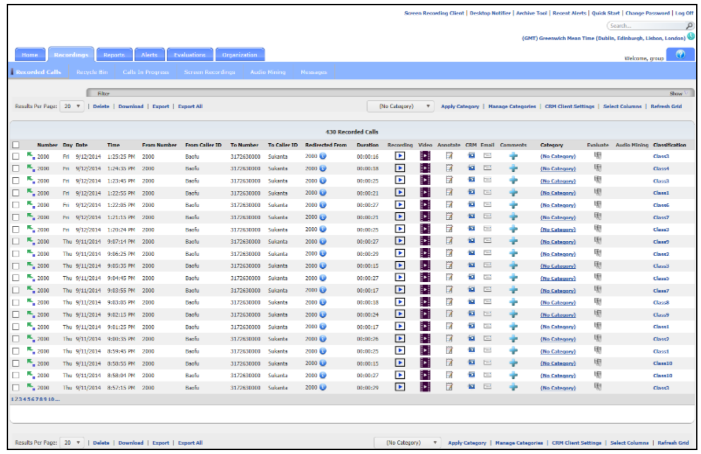


30. Select the **Update** link.

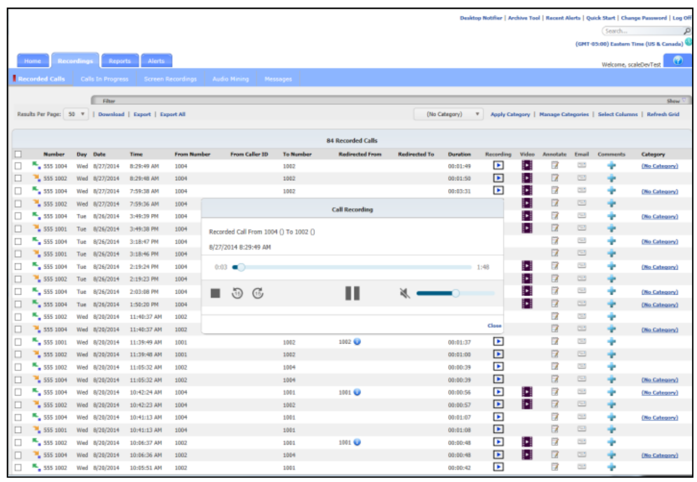


Example: Playing recorded audio

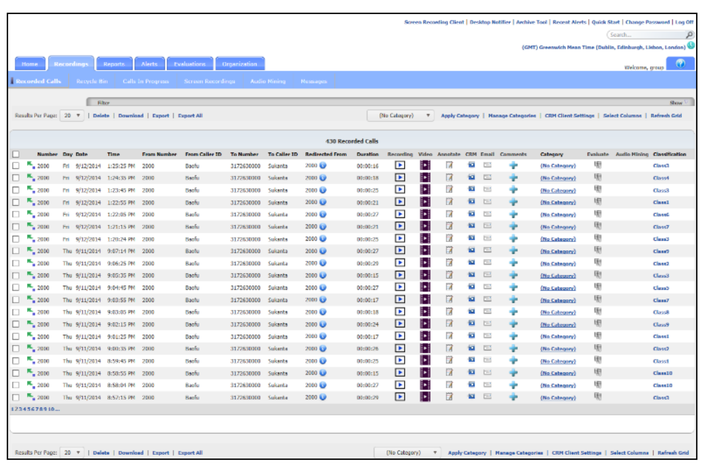
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



2. Select a call and click on the (Recording button) that corresponds to that call.
   The media player will appear and begin playing the call.
   - The skip buttons will skip forward or backward 15 seconds.
   - The stop button will stop the recording and return to the beginning of the call.
   - The pause button will pause the recording.
   - Toggling the volume button will mute and unmute the call; the slider will adjust the volume.

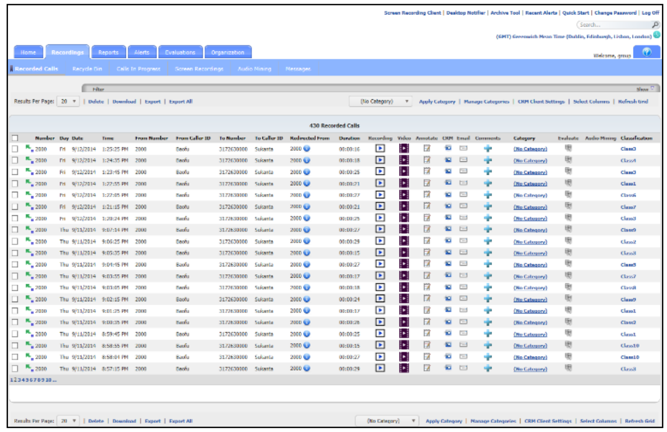


3. Click **Close** button to return to the Recorded Calls screen.



Example: Playing recorded video

1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



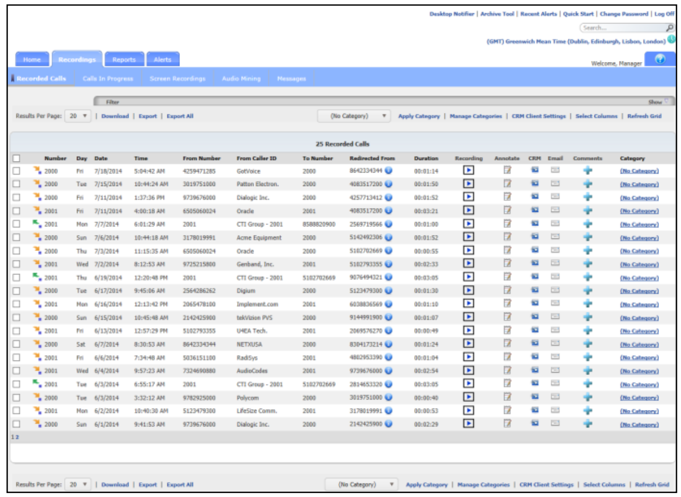
2. Select a call and click on the (video button) that corresponds to that call.
   The media player will appear and begin playing the video.

- The skip buttons on the lower left will skip the recording forward or backward 15 seconds.
- The stop button will stop the recording and return to the beginning of the call.
- The pause button will pause the recording.

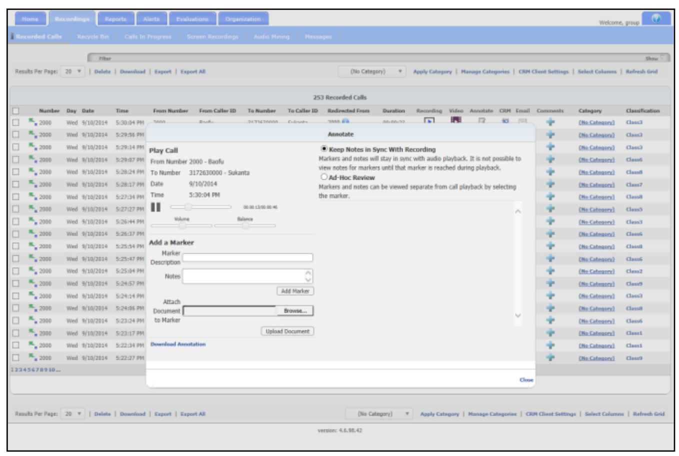
Toggling the volume button will mute and unmute the call; the slider will adjust the volume.

Example: Adding an annotation to a recorded call

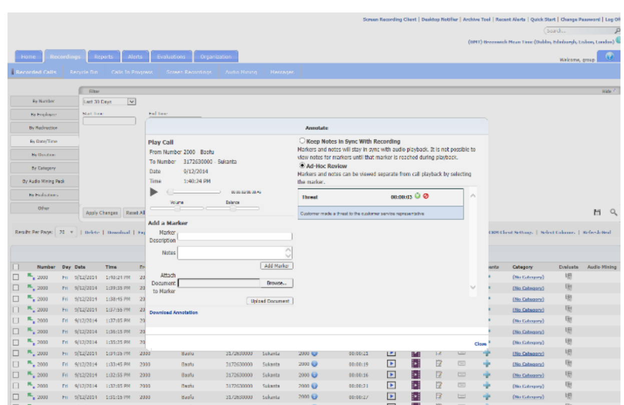
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



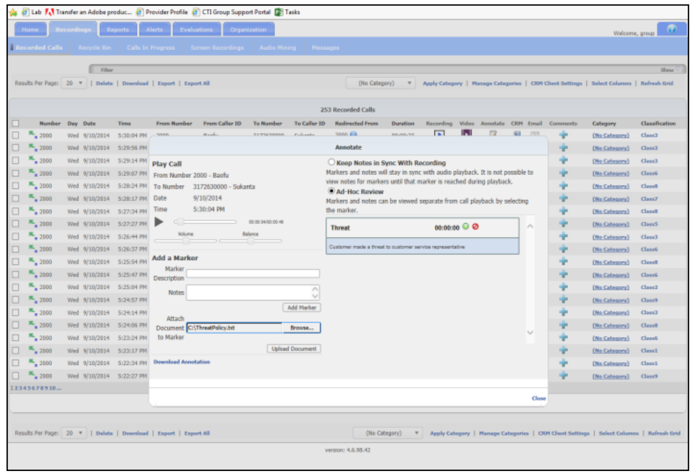
2. Select a call and click on the (Annotate button) that corresponds to that call.



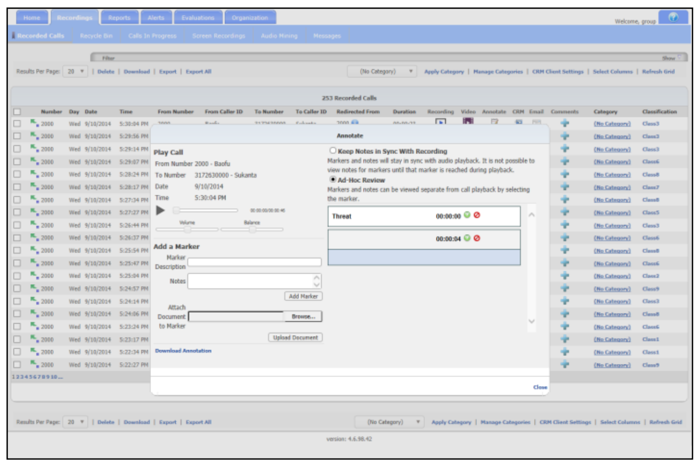
3. Select the **Play** button to begin playing the recorded call.
4. Select **Pause** when you come to the point in the call that you wish to annotate.
5. Enter the following information:
   - **Marker Description – Threat**
   - **Notes – Customer made a threat to customer service representative**
6. Click the **Add Marker** button.



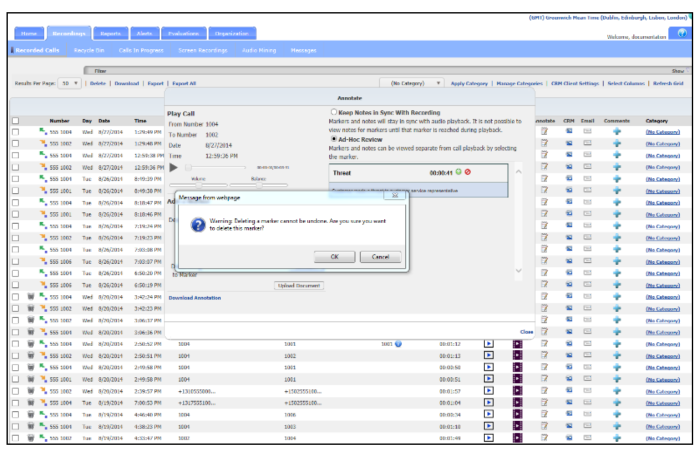
7. Select the **Play** button to begin playing the recorded call.
8. Select **Pause** when you come to the point in the call that you wish to annotate.
9. Click the **Browse** button and select a document.



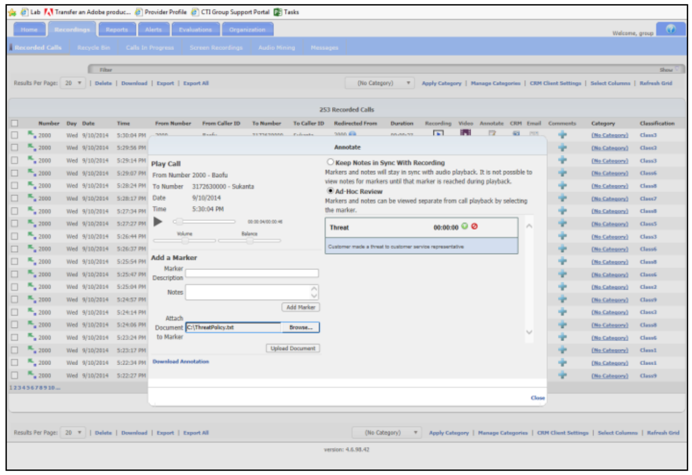
10. Click the **Upload Document** button.



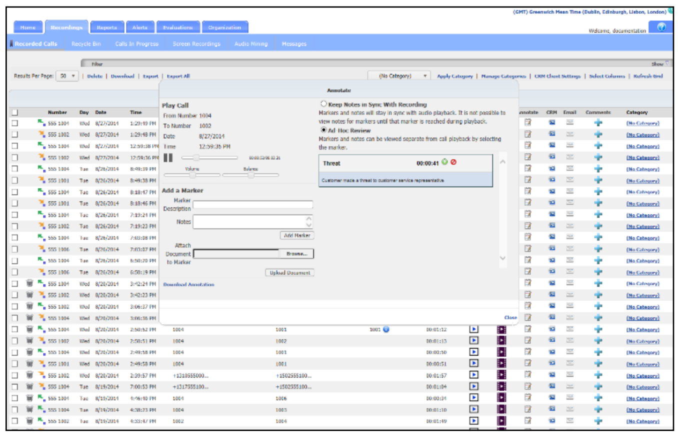
11. Click the (Delete Marker) button that corresponds to the uploaded document.



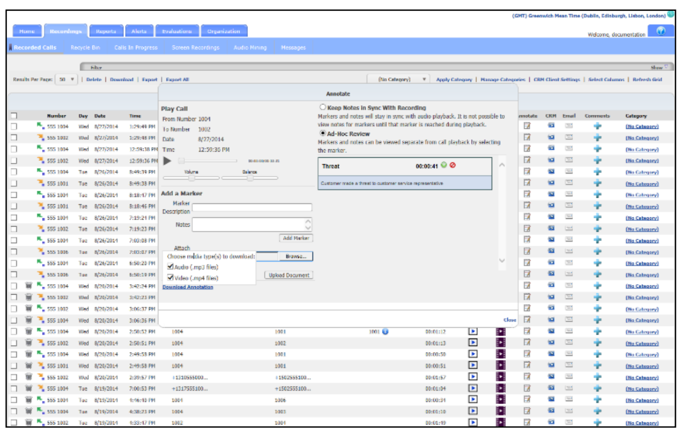
12. Click **OK**.



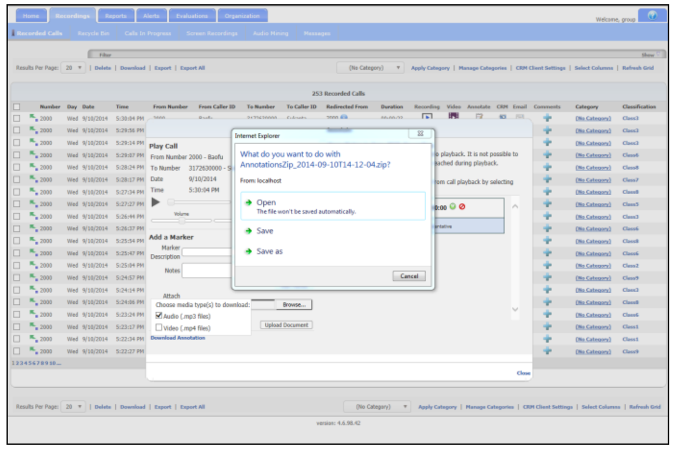
13. Click the (Seek) button to jump to the annotated spot in the call.



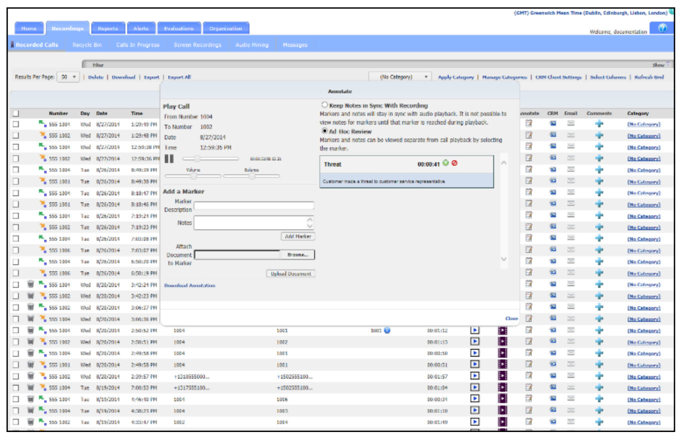
14. Hover over the **Download Annotation** link.
15. Select the media you wish to download: audio, video, or both.



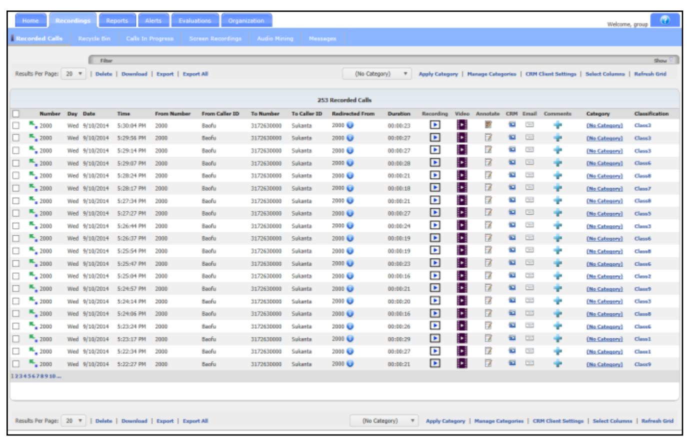
16. Click the **Download Annotation** link.
17. Select **Open With** and then **OK**.



18. Click the  in the right corner of the AnnotatedCall.zip dialog box.



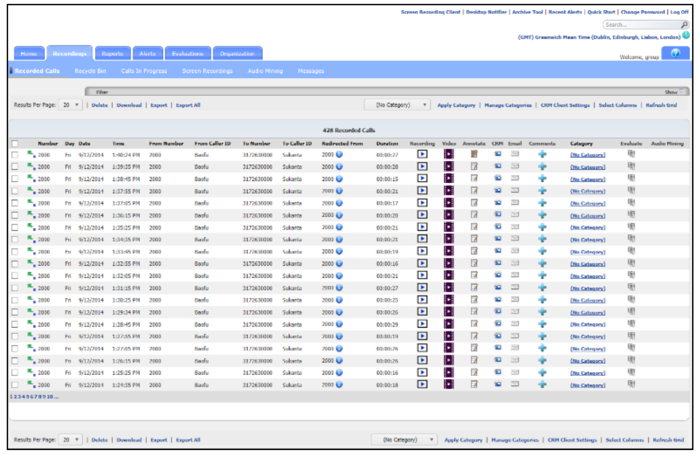
19. Click the **Close** link at the bottom of the Annotation dialog box.



Example: Uploading a recorded call to a CRM

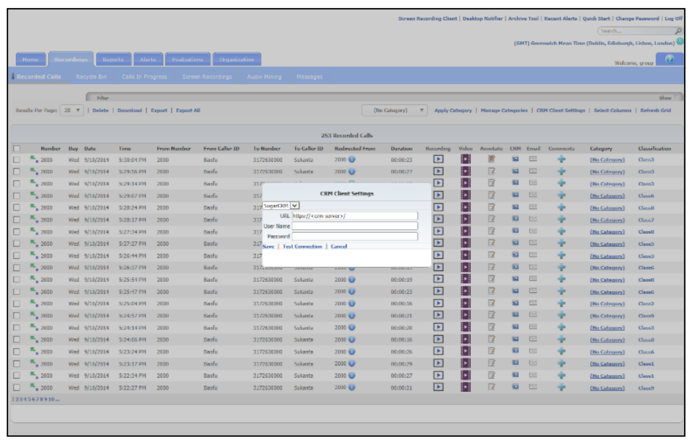
Note: If your company does not interface with a CRM application, this use case will not apply.

1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



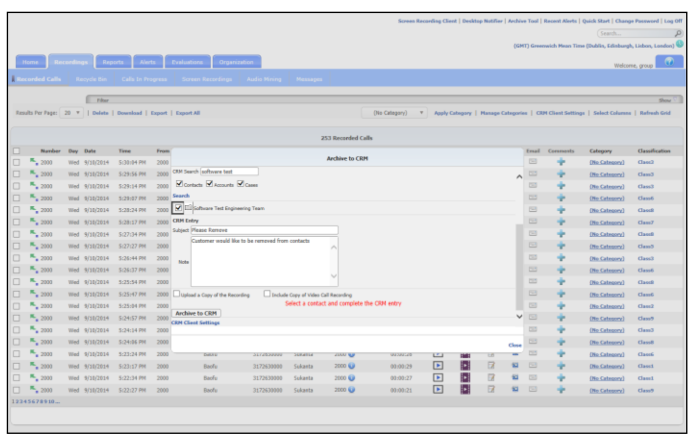
2. Click on the **CRM Client Settings** link found at the top or bottom of the Recorded Calls tab.
3. Select a CRM application from the drop down list.

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.

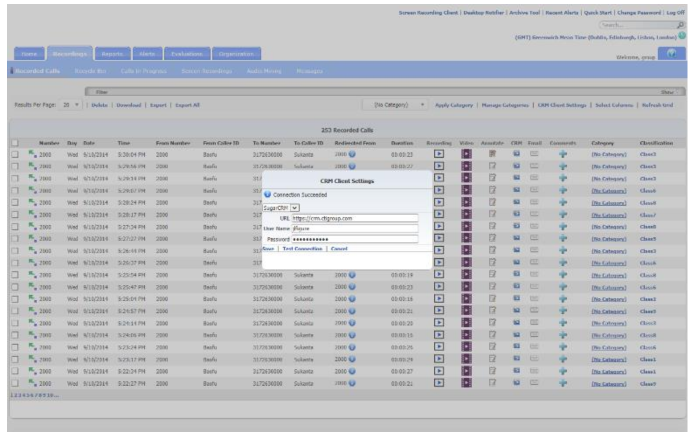


4. Enter or select the following information:
   - URL – **the URL where the CRM application is located**
   - User Name – **your user name used to access the CRM application**
   - Password – **your password used to access the CRM application**

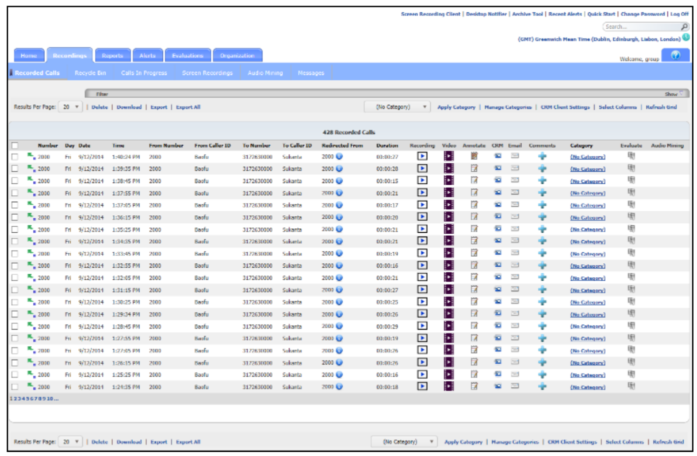
Note: Once you have performed steps 3 & 4 the first time, you will not be asked to enter the information again.



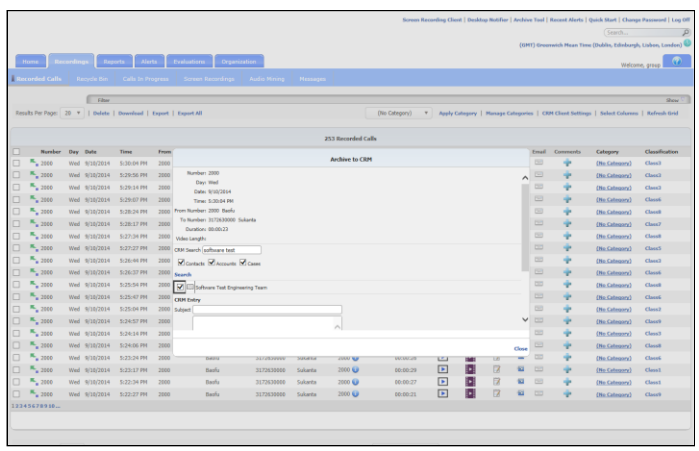
5. Click **Test Connection**.



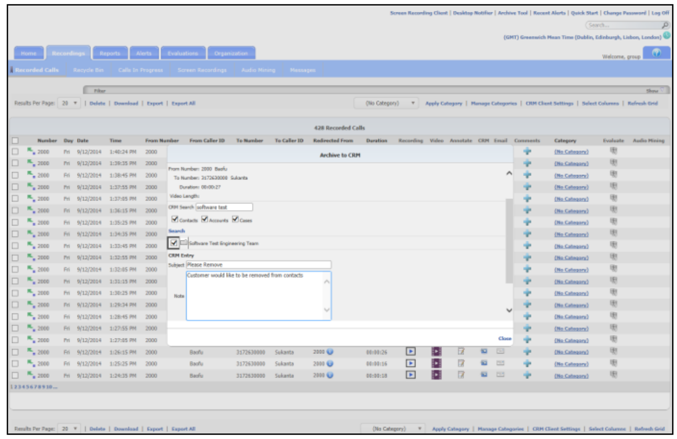
6. Click **Save** to save your credentials.



7. Select a call and click on the (CRM) button that corresponds to that call.
8. If applicable, enter new search criteria in the CRM Search field. Select or deselect Contacts, Accounts, or Cases depending on what you want to upload this call to. Click **Search**.
9. If multiple contacts, accounts, or cases deselect the ones you don’t need by clicking in the option boxes to remove the checkmark.

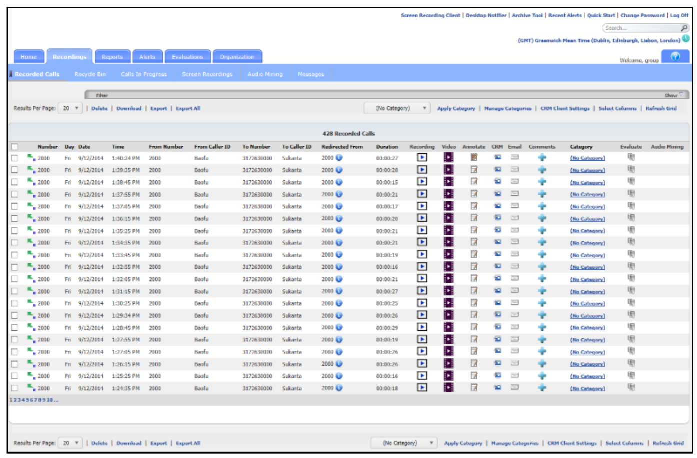


10. Enter the following information:
    - Subject – **Please Remove**
    - Note – **Customer would like to be removed from contacts**



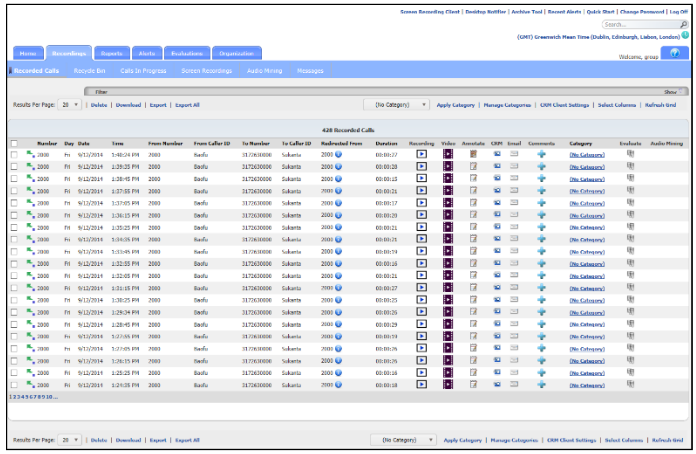
11. Select **Archive to CRM**.

12. Select the **Close** link to close the CRM dialog box.

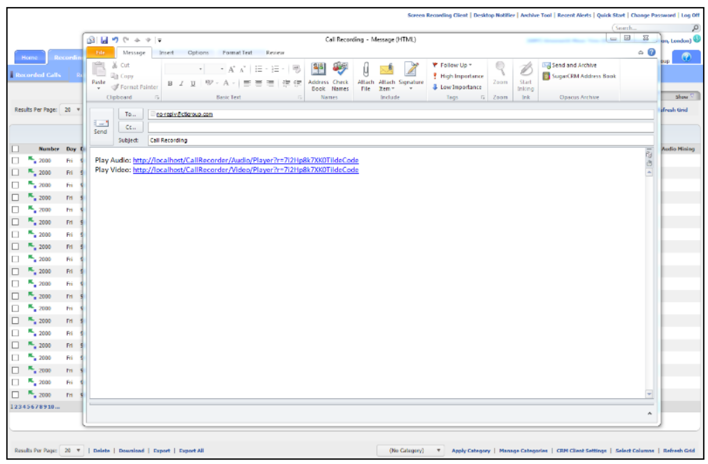


Example: Emailing a recorded call

1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



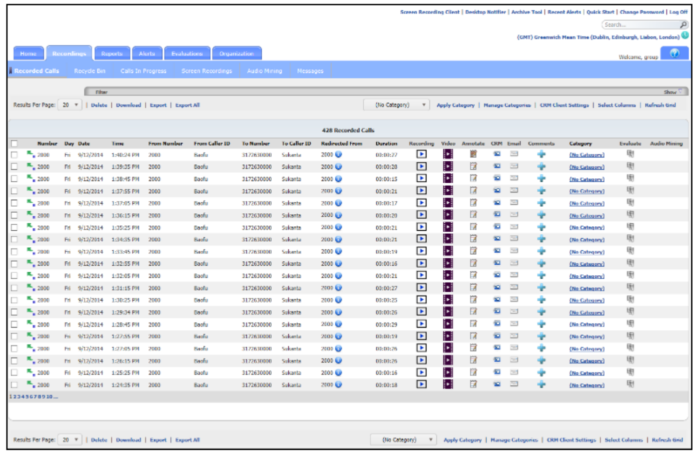
2. Select a call and click on the  (Email) button that corresponds to that call.
3. Enter the email address(es) of the person(s) to which you wish to send the recorded call.



4. Click **Send**.

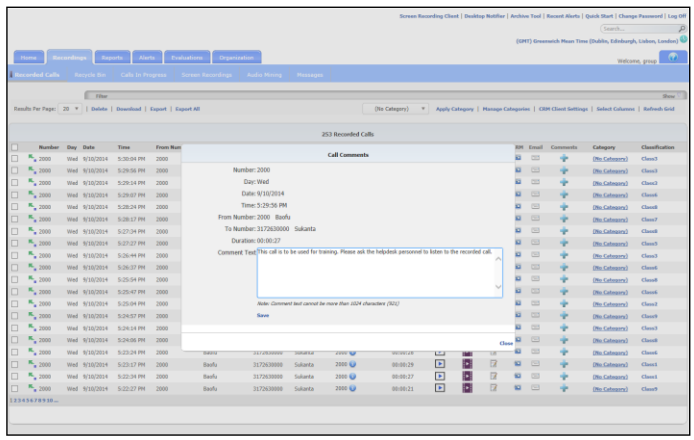
Example: Adding comments to a recorded call

1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.

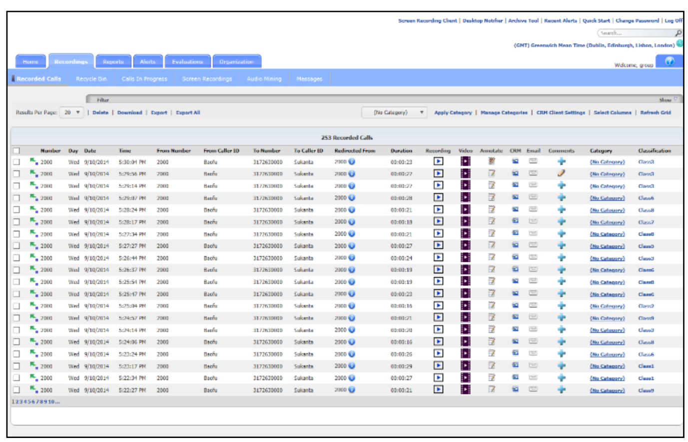


2. Select a call and click on the (Add Comment) button that corresponds to that call.
3. Enter the following information:
   - Comment – **This call is to be used for training. Please ask the helpdesk personnel to listen to the recorded call.**

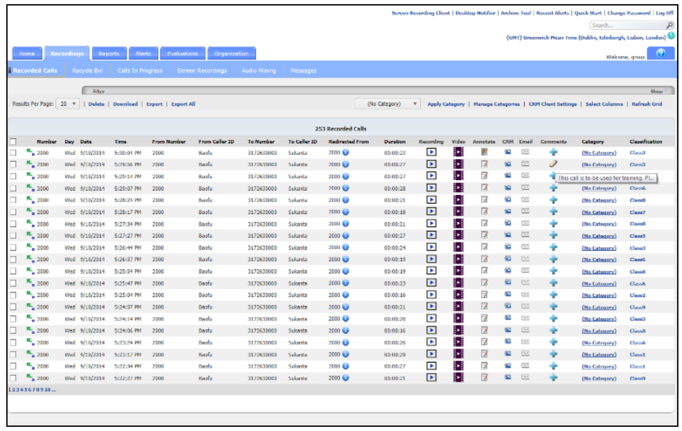
> **Note:** Comment text cannot be greater than 1024 characters.



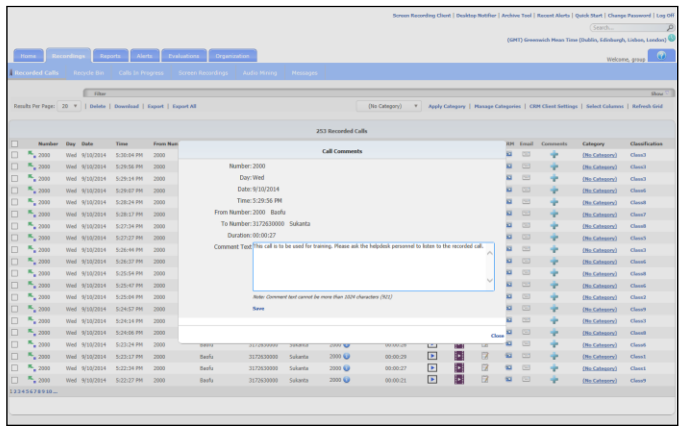
4. Click **Save**. Notice that the Add Comment button has changed to a button indicating that there is a comment associated with this call.



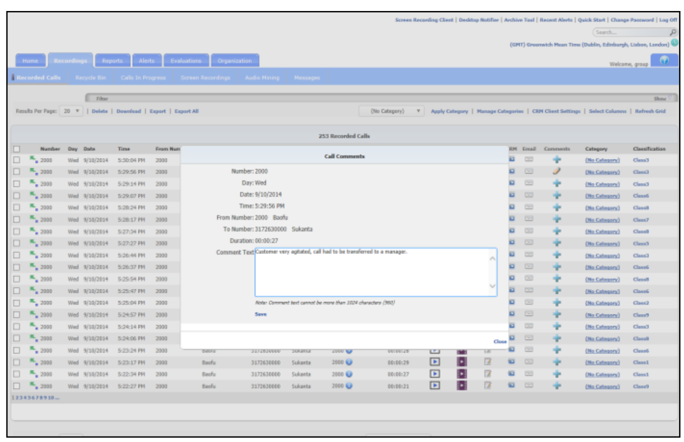
5. Position your mouse pointer over the button. Notice that part of the comment is displayed as a tooltip.



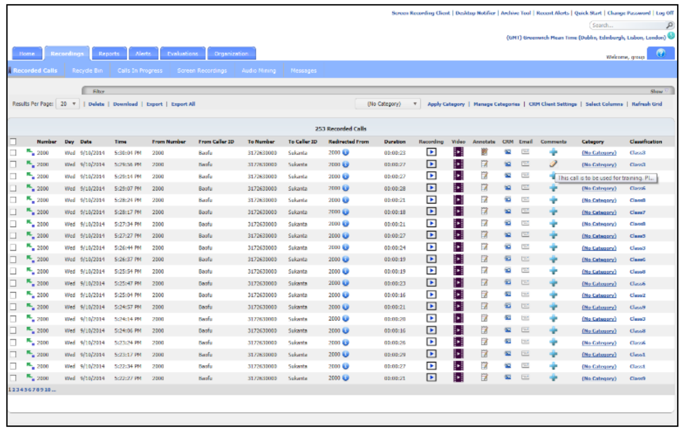
6. Click on the button.



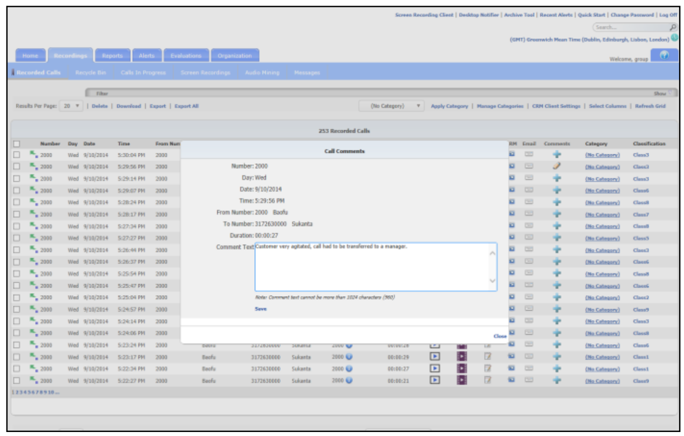
7. Review the comment, select it, and enter the following:
   - Comment – **Customer very agitated, call had to be transferred to a manager.**



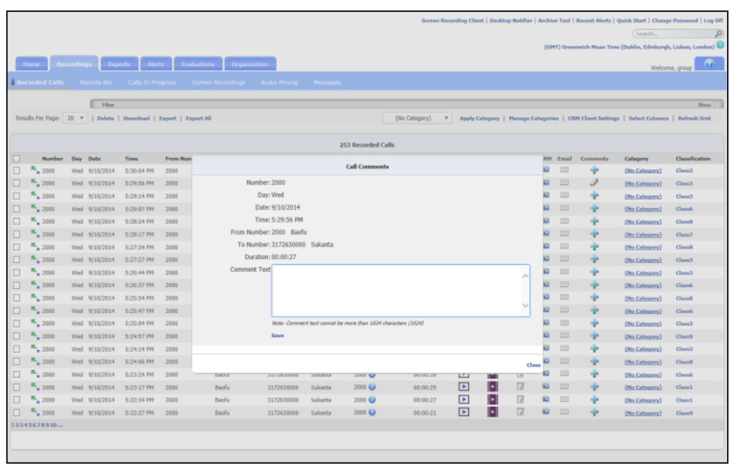
8. Click **Save** to save your changes.



9. Click on the button.

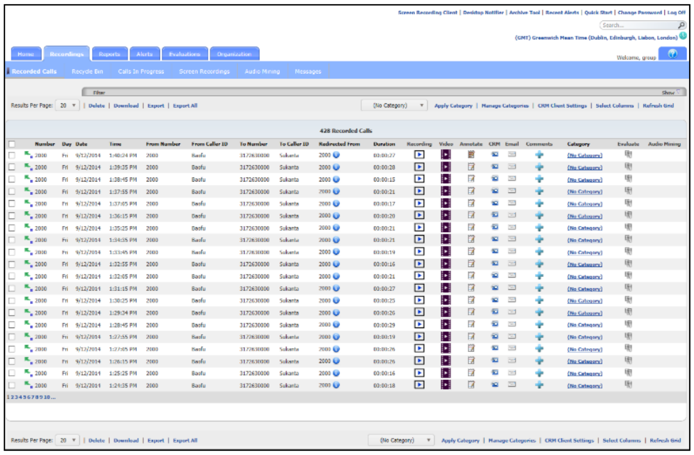


10. Delete the comment from the Comment field by selecting it and clicking the Delete button on your keyboard.



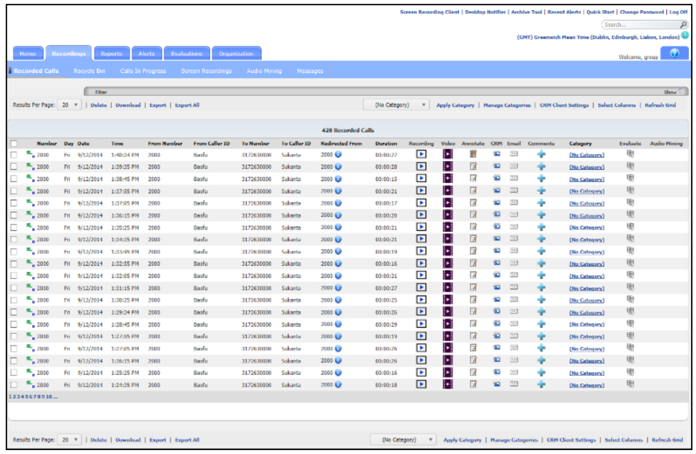
11. Click **Save** to save your changes.

    Notice that the  button has changed back to the Add Comment button.

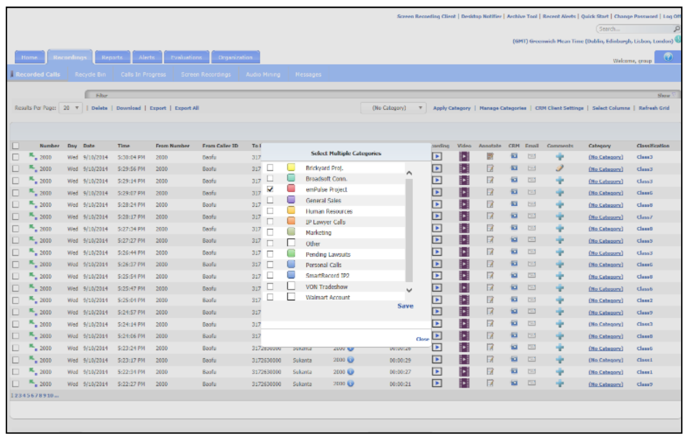


Example: Categorizing a recorded call

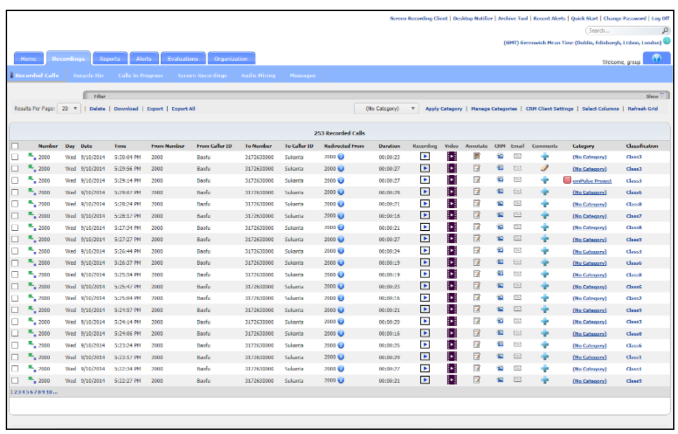
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



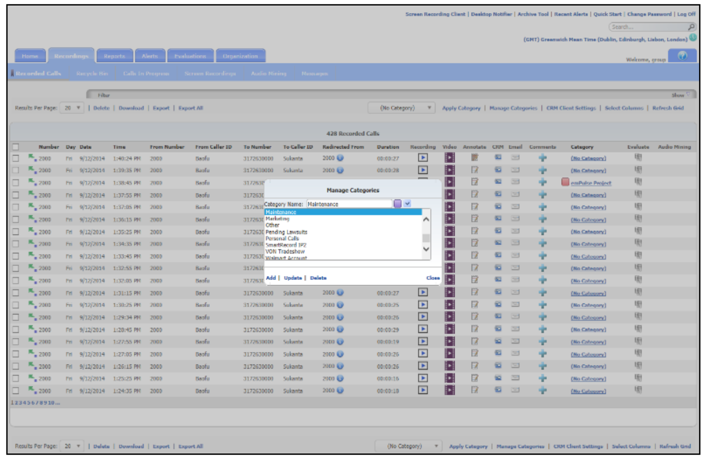
2. Select the **Category** link that corresponds to the call that you wish to categorize.
3. Select one category to apply to the call by clicking in the corresponding option box and click **Save**.



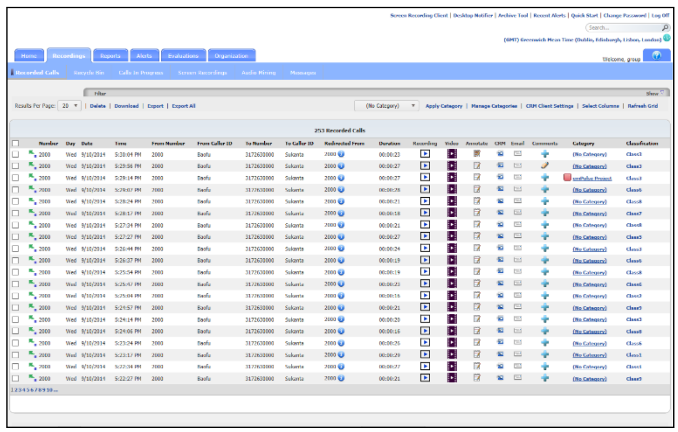
4. Click **Save**.



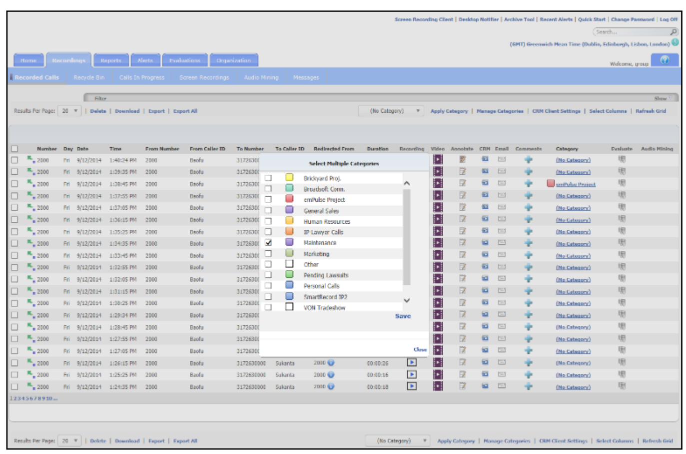
5. Select the **Manage Categories** link.
6. Enter the following:
    - Category Name – Maintenance
7. Select the drop down arrow to the right of the Category Name field and select the color purple.
8. Select the **Add** link.



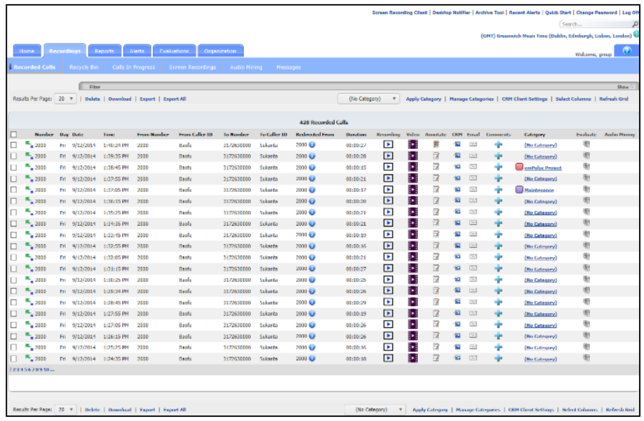
9. Select the **Close** link to close the Manage Categories dialog box.



10. Select the **Category** link that corresponds to a call that is not already categorized.
11. Select the **Maintenance** category that we just added by clicking in the corresponding option box

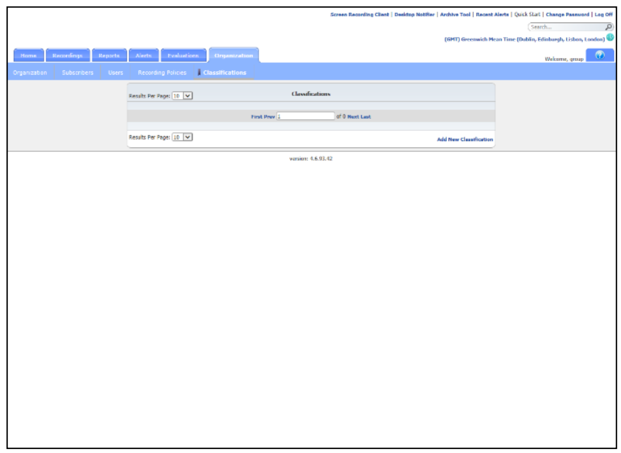


12. Click **Save**.

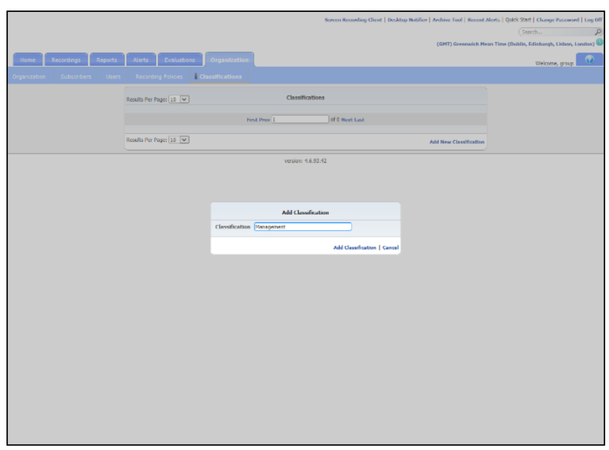


Example: Adding a classification

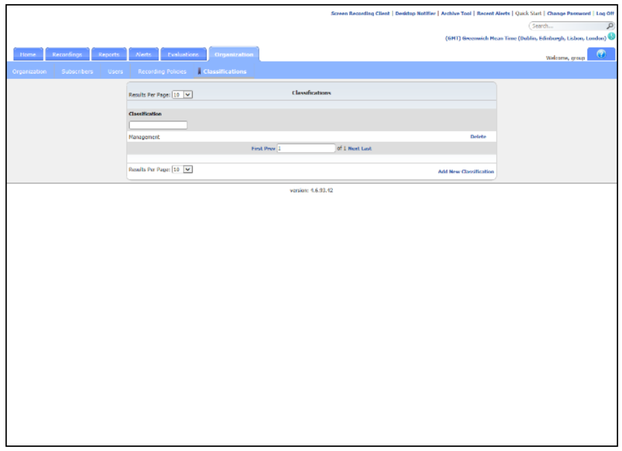
1. Select the **Organization** tab and click **Classifications**.



2. Click **Add New Classification**.
   The **Add Classification** window appears.
3. Enter **Management** in the **Classification** text box.

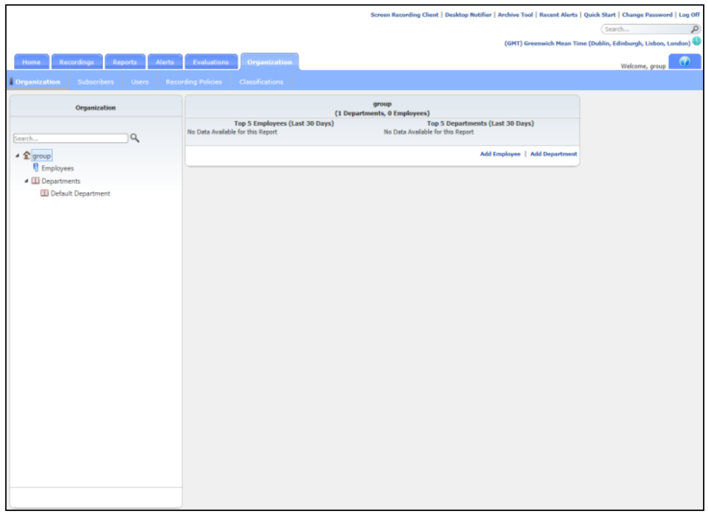


4. Click **Add Classification**.
   The **Add Classification** window closes, the classification is added to the list of classifications.

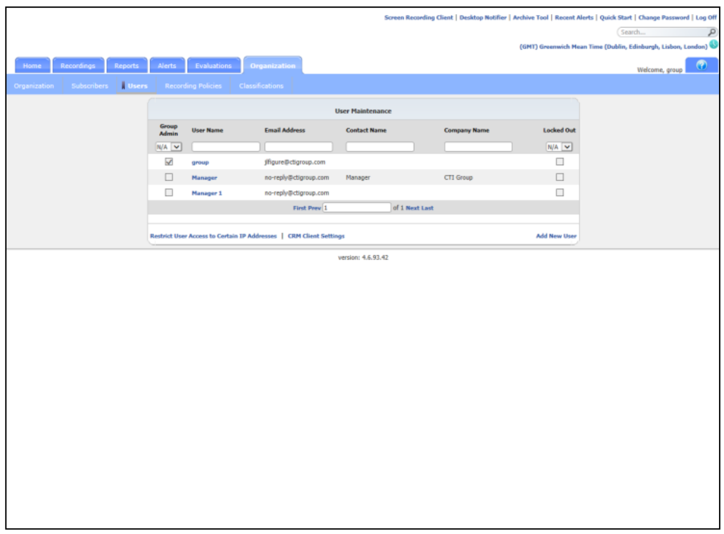


Example: Assigning classification permissions

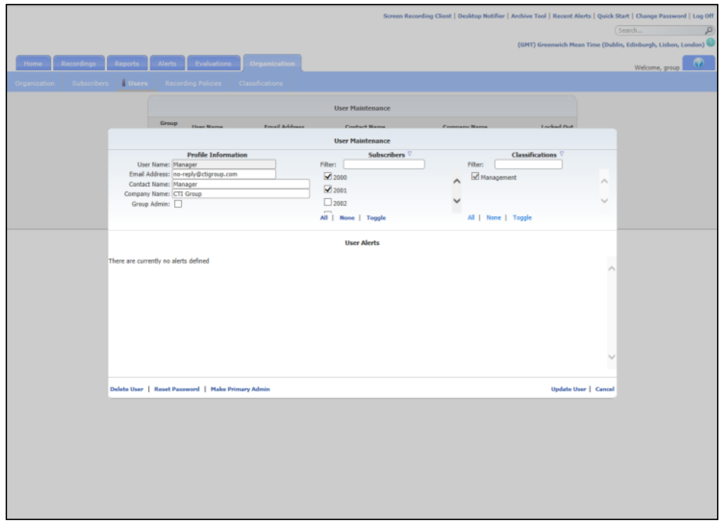
1. Click the **Organization** tab.



2. Click **Users**.

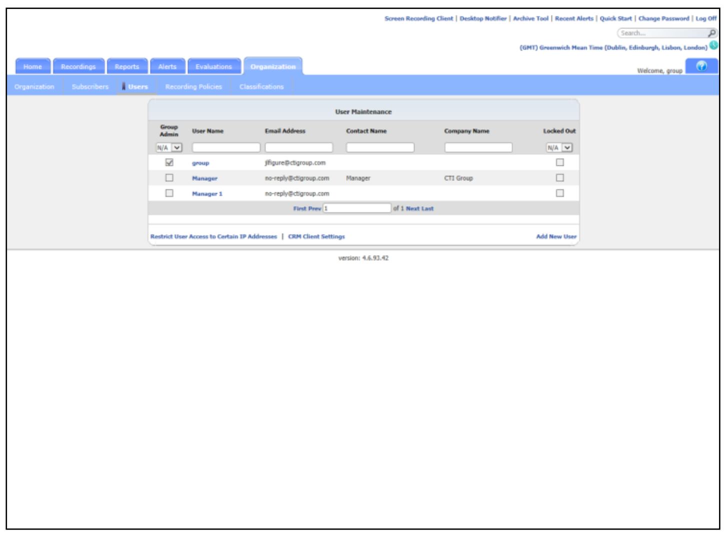


3. Click the **User Name** of the user whose classification permissions you would like to add or remove.
   The **User Maintenance** dialog appears.



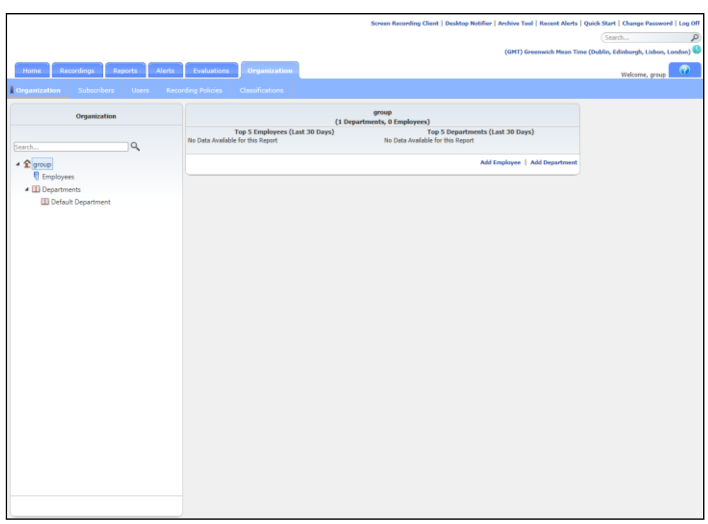
4. In the **Classifications** column, select **Management**.
   A checked box will grant a user access to calls of that classification. An unchecked box will remove access permission

5. Click **Update User**.
   The **User Maintenance** dialog closes.

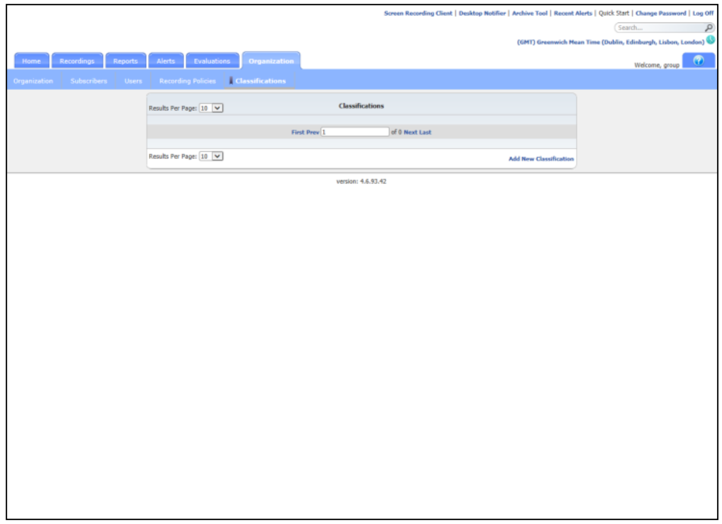


Example: Classifying a recorded call

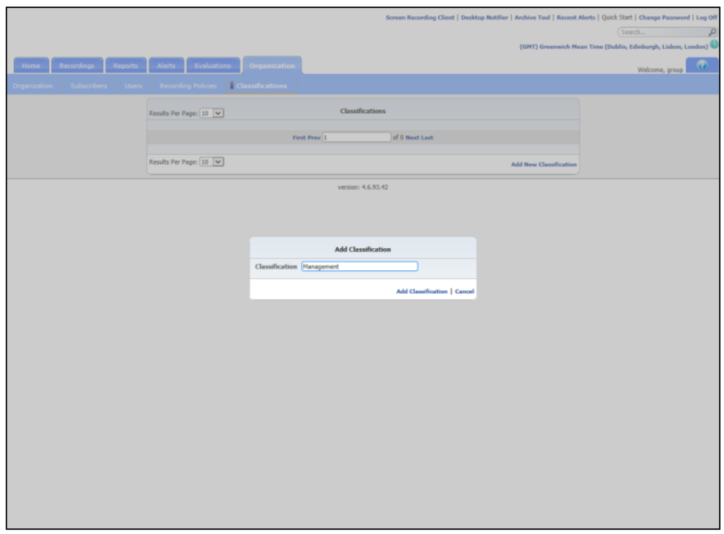
1. Click the **Organization** tab.



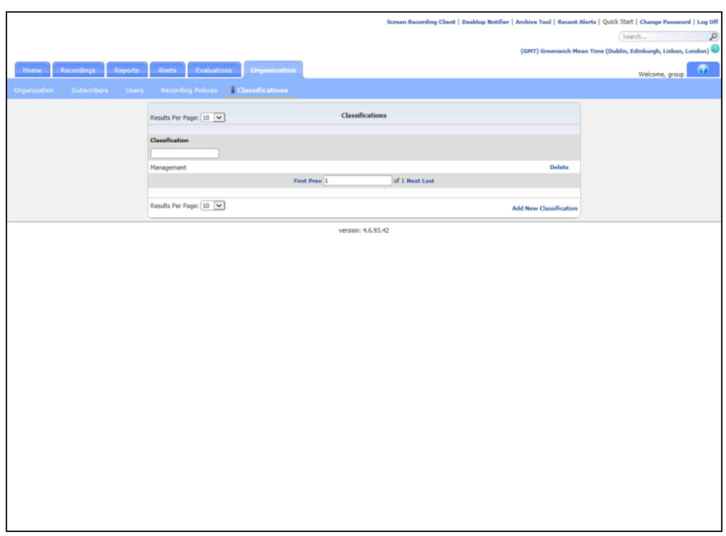
2. Click **Classifications**.



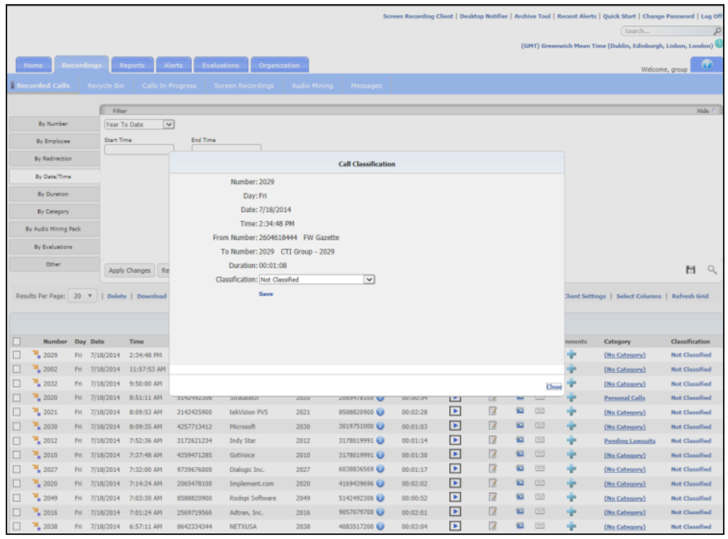
3. Click **Add New Classification**. The **Add Classification** dialog appears.
4. Enter **Management** in the **Classification** text box.



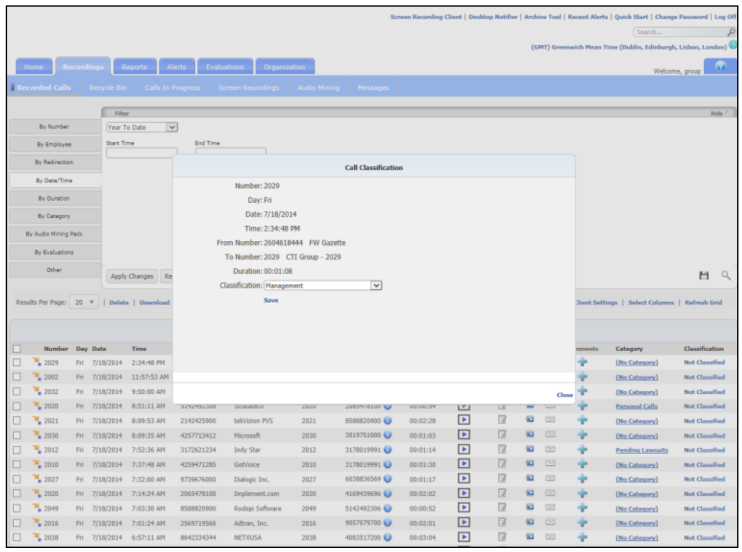
5. Click **Add Classification**. The **Edit Classification** dialog closes, the classification appears in the **Classification** list.



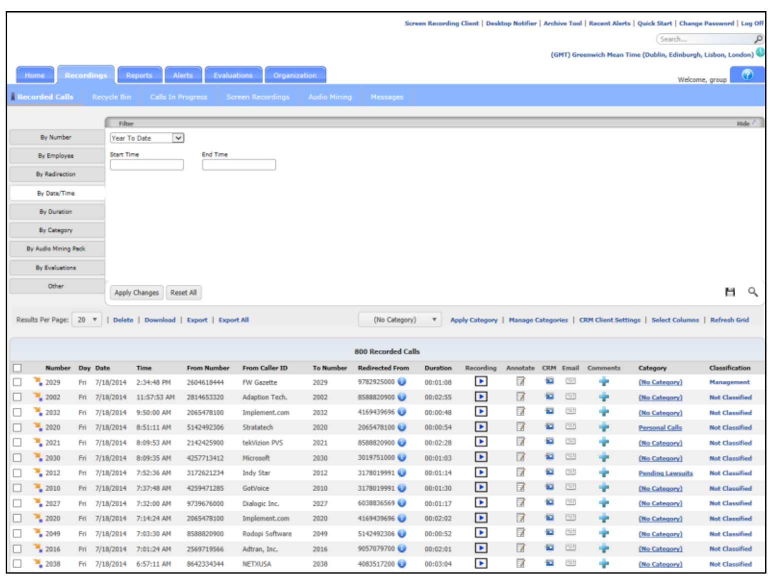
6. Click the **Recordings** Tab.
7. Click the **Not Classified** link in the **Classification** column of one of your recorded calls.
   The **Edit Classification** window appears.



8. Select **Management** from the **Classification** drop down.

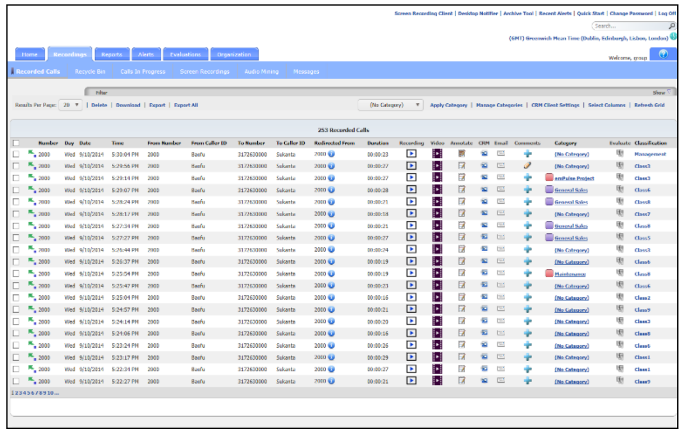


9. Click **Save**.
   The **Edit Classification** window closes.
   The recorded call is now classified as Management.

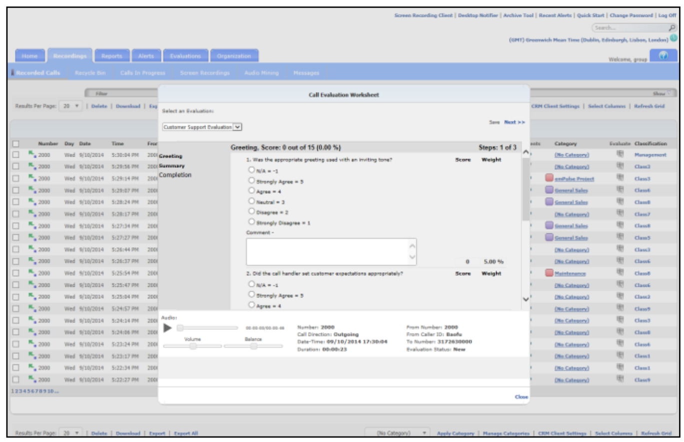


Example: Evaluating a recorded call

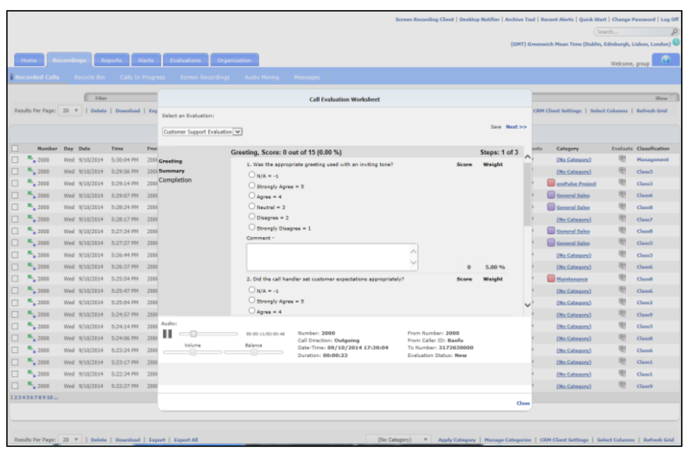
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



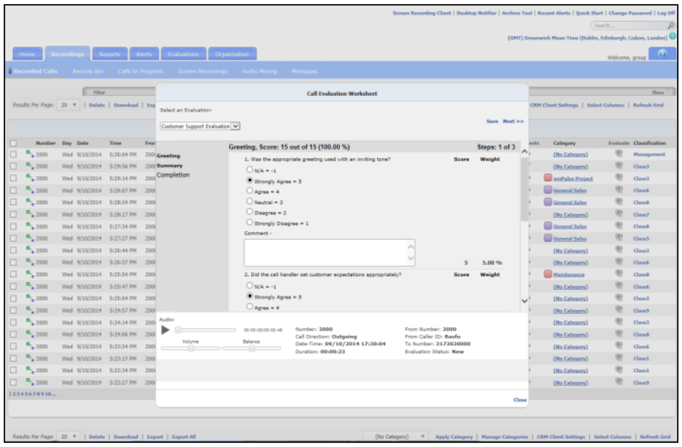
2. Select the **Evaluate** button that corresponds to the call that you wish to evaluate.
3. Select the applicable evaluation form from the drop down list.



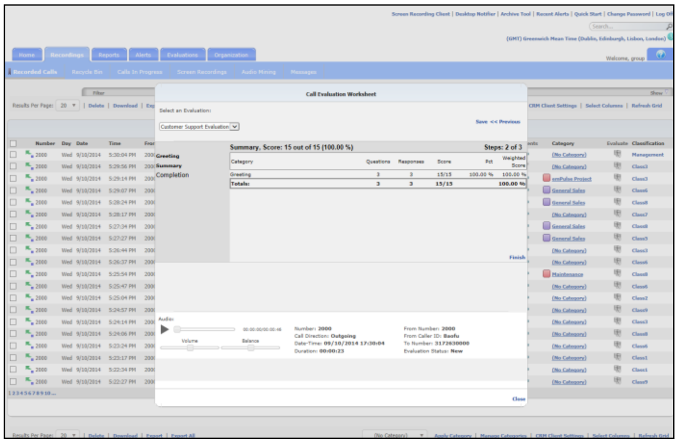
4. Select the **Play** button to listen to the recorded call.



5. Respond to each question on the evaluation form by entering or selecting the appropriate answers and comments.

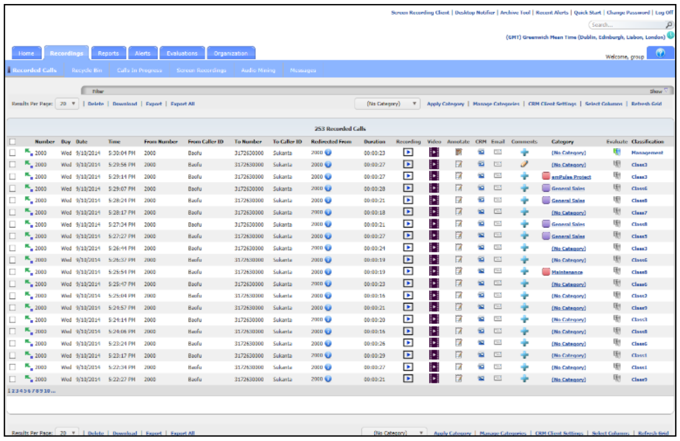


6. Click **Next** between each question until you reach the Summary Page.



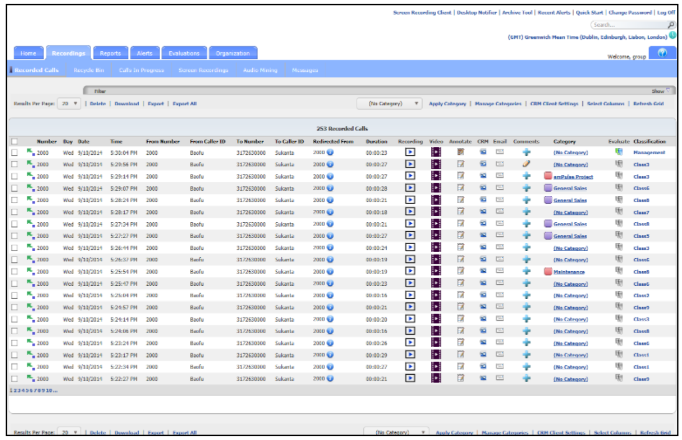
7. Review your work, verify all questions were answered, and click **Finish**.

Note: The Finish link will not be available if any responses are missing.

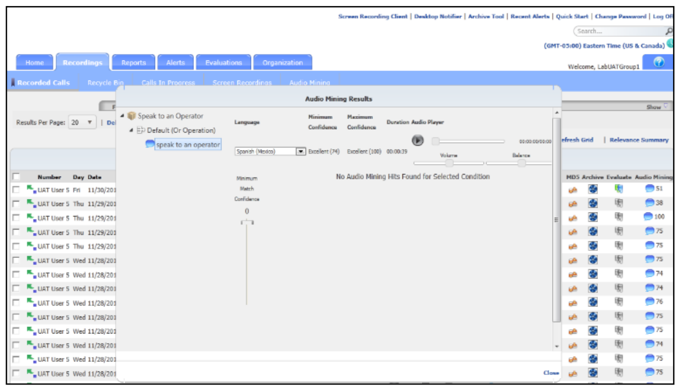


Example: Viewing audio mining results

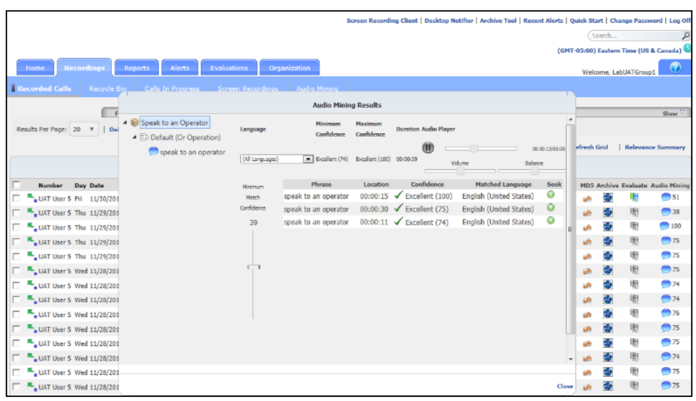
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



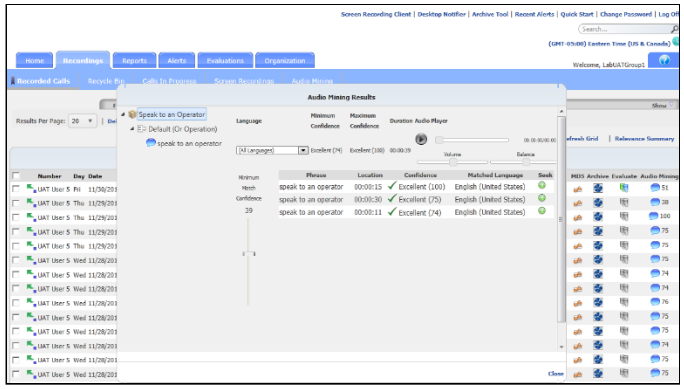
2. Select the **Audio Mining** button that corresponds to the call for which you wish to view results.



3. Click the **Seek** button that corresponds to a specific audio mining pack to jump to the point where the audio mining pack is mentioned in the recorded call.

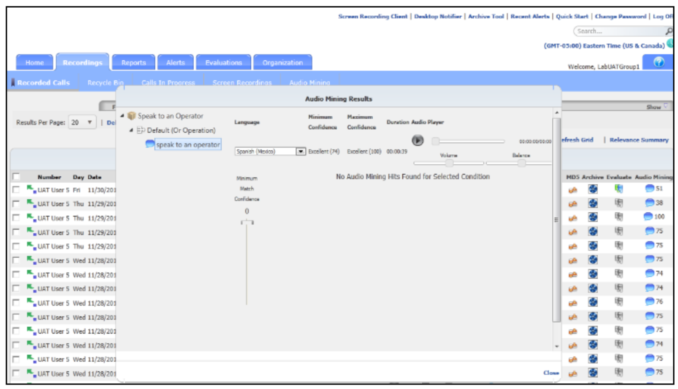


4. Filter the results by Confidence Level by clicking on the **Minimum Match Confidence** control and sliding it down.

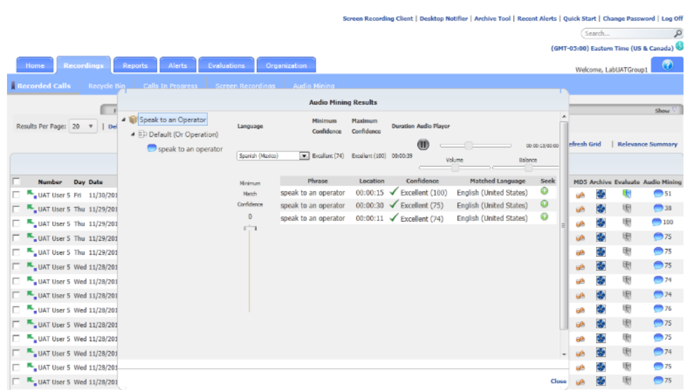


5. Return the **Minimum Match Confidence** control back to its original level by sliding it up until it reaches 0.

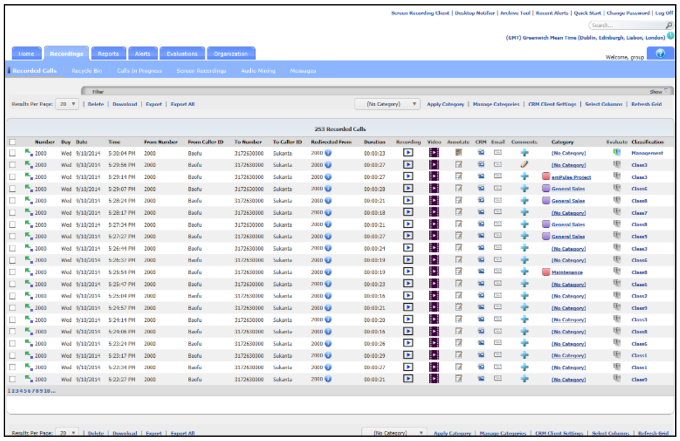
6. If there are multiple audio mining pack operations, select one by clicking on it.



7. If applicable, select a specific language from the Language drop down list.



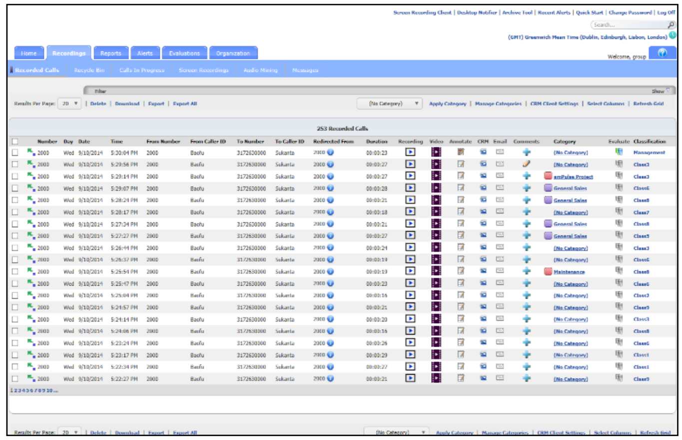
8. Click **Close**.



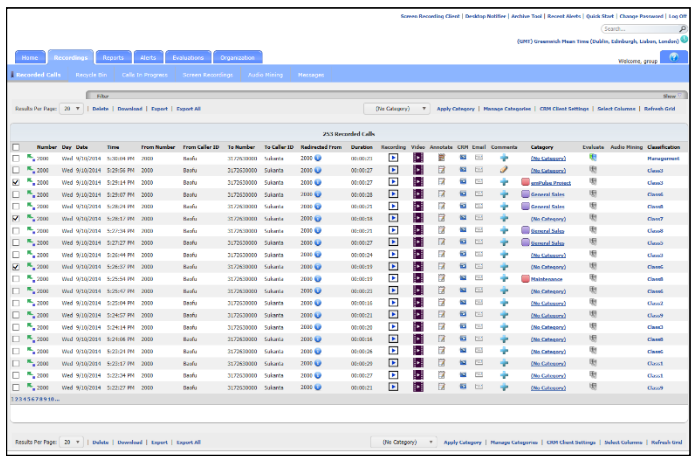
Example: Deleting a recorded call

Note: The call record and the recording will appear on both the Recorded Calls and Recycle Bin tabs. The call record and recording will not be deleted until they are deleted from the Recycle Bin. A copy of the call record remains in the Recorded Calls tab but cannot be seen unless you have the Show Calls Without Recordings filter turned on.

9. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.

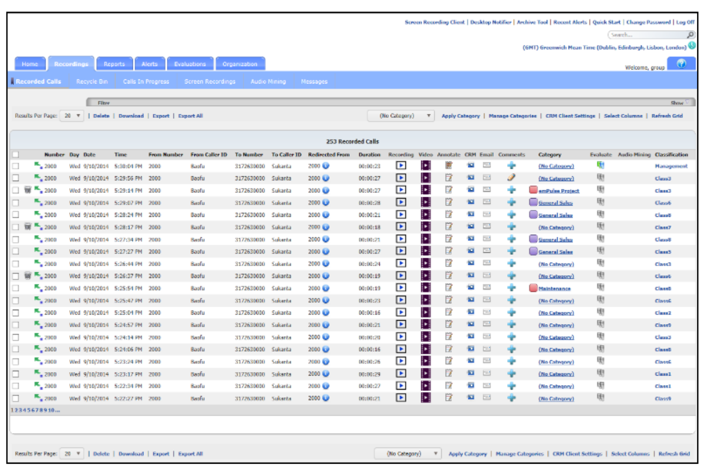


10. Select the recorded call(s) you wish to delete by clicking in the corresponding option box to the left of the Number column.



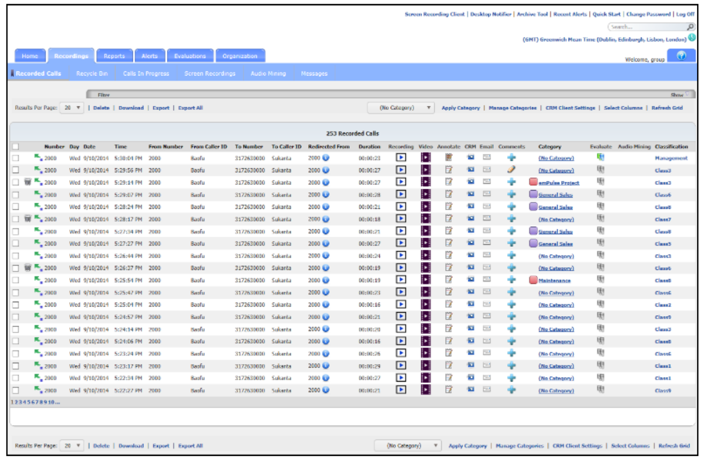
11. Select the **Delete** link at the top or bottom of the Recorded Calls page.

    Notice that a (Calls in Recycle Bin) icon appears next to the deleted calls indicating that the calls are now in the Recycle Bin.

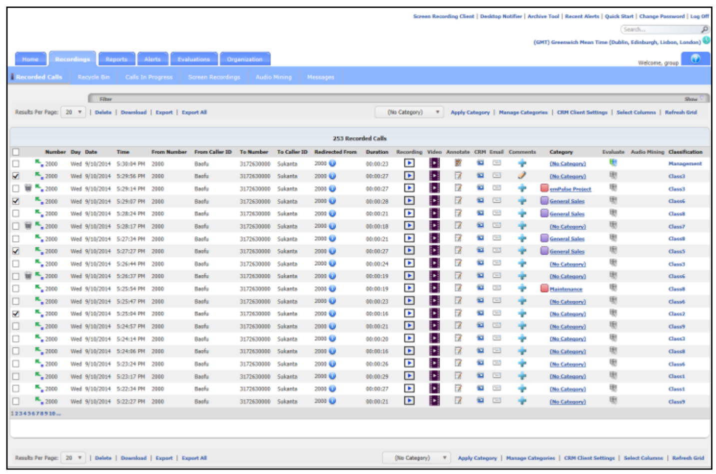


Example: Downloading a recorded call

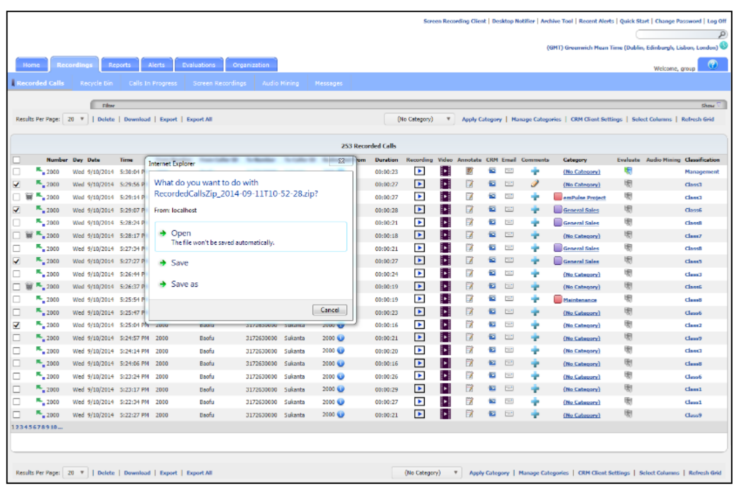
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



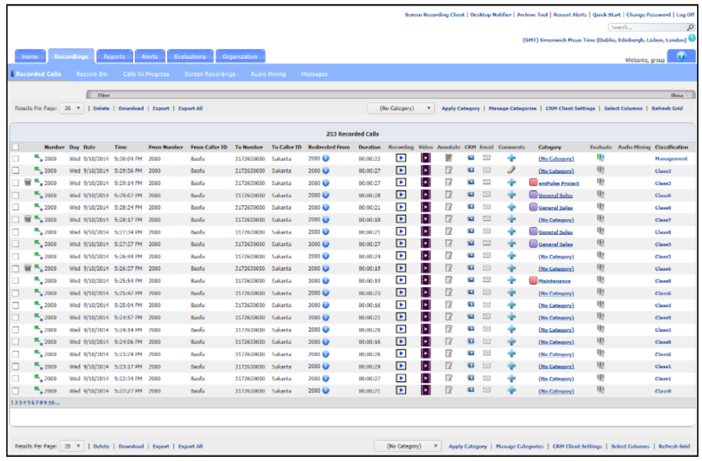
2. Select the recorded calls you wish to download by clicking in the corresponding option box to the left of the Number column (or click in the option box to the left of the Number column, in the header, to select all recorded calls).



3. Hover over the **Download** link at the top or bottom of the Recorded Calls page.
4. Select the media you wish to download: audio, video, or both
5. Click the **Download** link.

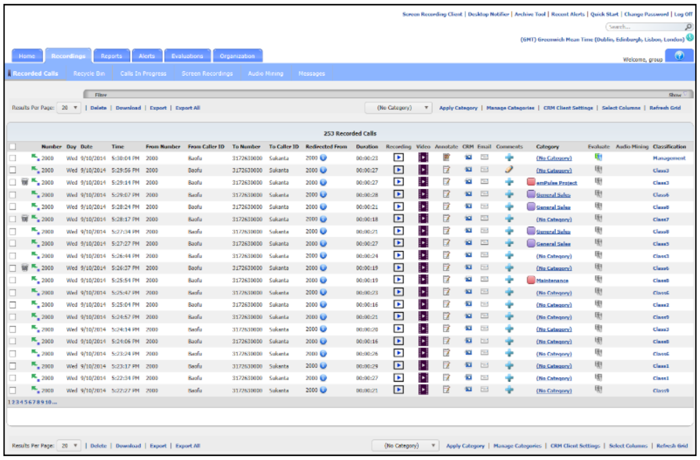


6. Normally you would choose to extract the files and save them to the location of your choice. For the purposes of this example, click the X in the right corner of the RecordedCalls.zip dialog box.

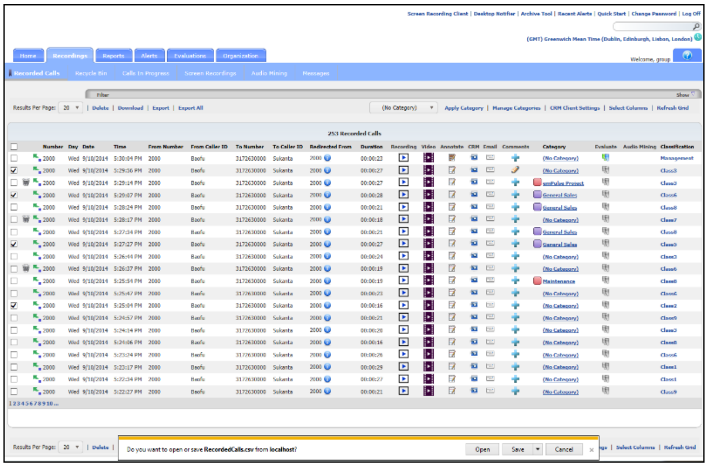


Example: Exporting a recorded call

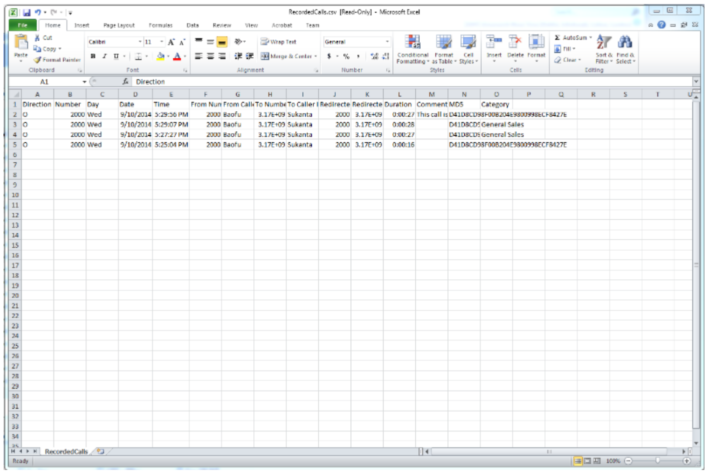
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



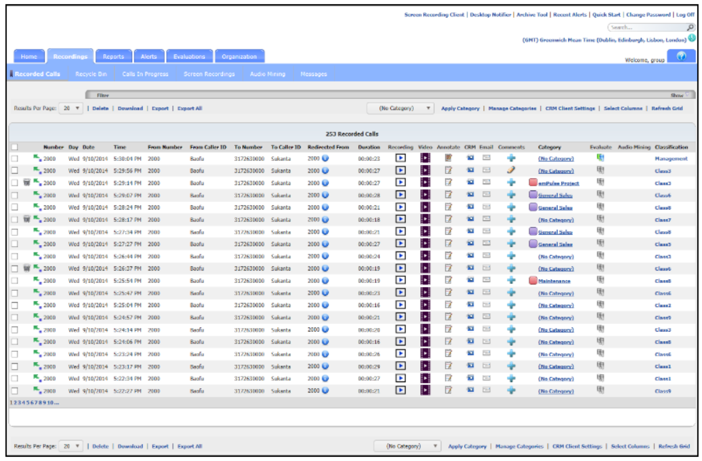
2. Check the box(es) to the left of the Number column corresponding to the calls you wish to export, or click the **Export All** link at the top or bottom of the Recorded Calls page.
3. Select the **Export** link at the top or bottom of the Recorded Calls page.



4. Select **Open**.



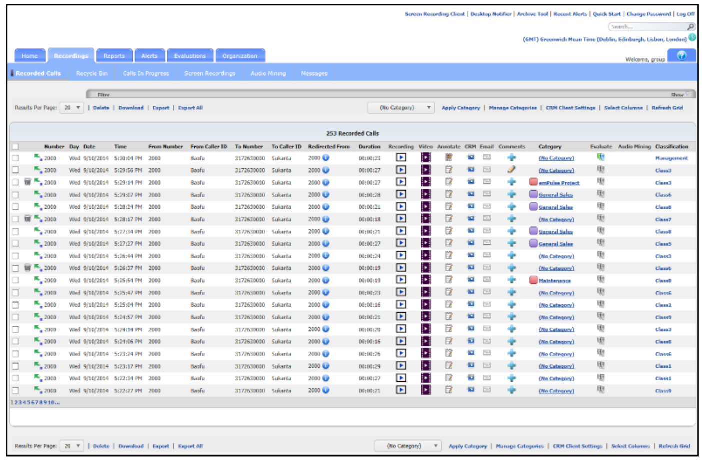
5. Click the in the right corner of the RecordedCalls.csv window.



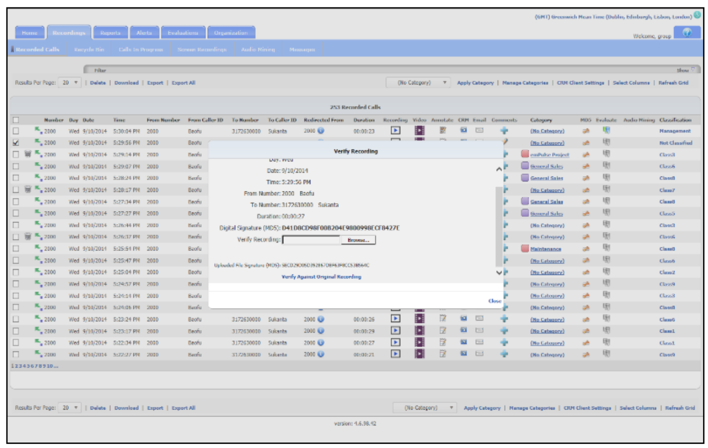
Example: Verifying a recording

Note: To complete this use case, you must have a recorded call downloaded and available for verification.

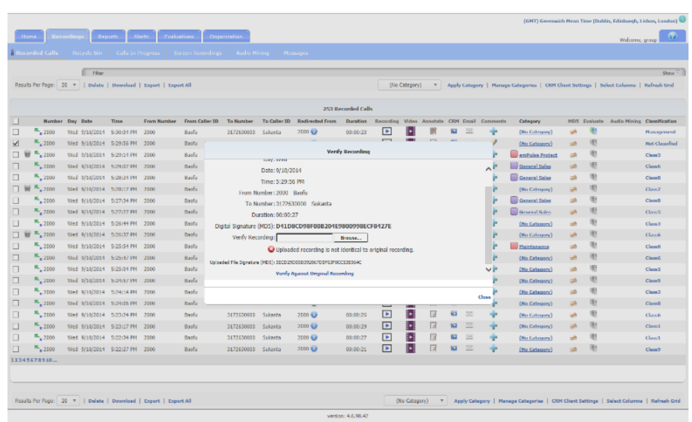
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



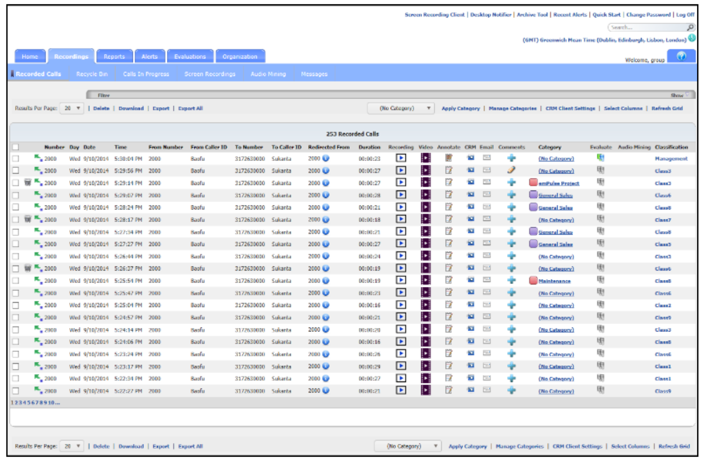
2. Select the recorded call you wish to verify a recording for and click on the corresponding button.



3. Click **Browse** to locate the recorded call file.
4. Click **Open**.
5. Click **Verify Against Original Recording**. You will receive a message notifying you whether or not the uploaded recording is identical to the original recording.



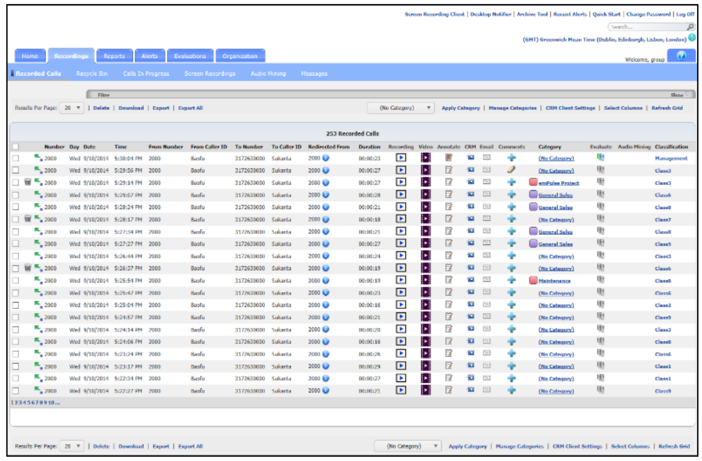
6. Click **Close**.



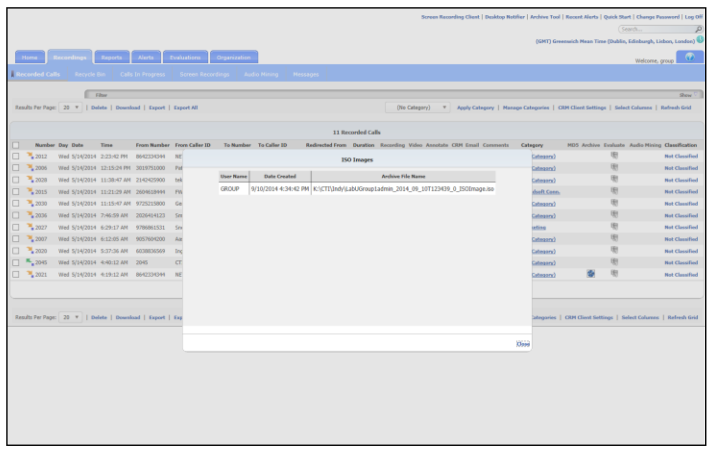
Example: Viewing an archived recorded call

Note: Archived calls cannot be viewed from the End User Interface. You are simply viewing the location or path to which the calls were archived.

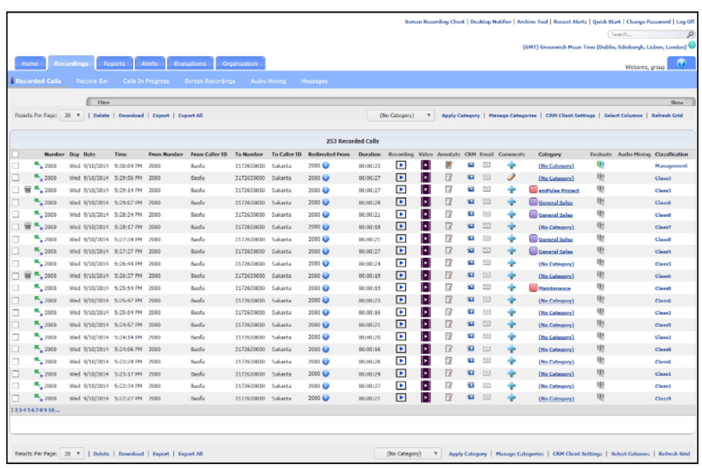
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



2. Select the recorded call you wish to view archiving for and click on the corresponding  (Archive) button. The ISO Images dialog box opens and displays the Username, Date/Time stamp, and the location of the archived call.



3. Select the **Close** link.



Recycle Bin

The Recycle Bin is intended to be a sort of "checks and balance" system when deleting recorded call, message, and screen recording files. When you delete a file, it is placed into the Recycle Bin. The files in the Recycle Bin will remain there until you permanently delete them from the application. If you accidentally deleted a file and it is still in the Recycle Bin you have to option to restore it to the applicable tab. You also have the option to download any or all of the recorded call and message files in the Recycle Bin in order to store them for later use.

There will be times that you accidentally delete a file, or have deleted a file that must be retained. In these instances, you are able to recover a particular file(s) to the applicable tab as long as they have not been deleted from the Recycle Bin. To recover files, select the tab that applies to the type of files you wish to recover: Recorded Calls, Messages, or Screen Recordings. Select the specific file(s) you wish to recover by clicking in the corresponding option box to the left of the Number column. Select the Recover Selected Calls (Messages or Screen Recordings) link at the top or bottom of the Recycle Bin page to restore the files to the applicable tab.

You do have the ability to download batches or multiple recorded call, message, or screen recording files as a zipped file from the Recycle Bin tab. This is useful in instances where you need to send a batch of files to another person or want to save them for future reference.

To download a file, select the tab that applies to the type of files you wish to recover: Recorded Calls, Messages, or Screen Recordings. Select the specific files by clicking in the corresponding option box to the left of the Number column. If you want to download all files, click in the option box found in the grey header row on the first page of the recorded calls, messages, or screen recordings. Select the Download link at the top or bottom of the Recycle Bin page and respond accordingly to the prompts.

When it comes to deleting files permanently from the Recycle Bin, you have two options: delete selected files or empty the Recycle Bin in its entirety.

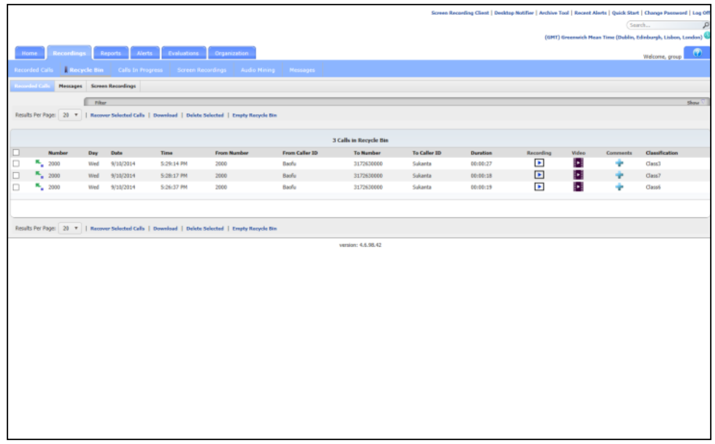
To delete specific files from the Recycle Bin, select the tab that applies to the type of files you wish to recover: Recorded Calls, Messages, or Screen Recordings. Select the specific file(s) by clicking in the corresponding option box to the left of the Number column. Select the Delete Selected link at the top or bottom of the Recycle Bin page. The system displays a warning message asking if you would like to permanently delete the selected file(s). **This is your last warning before the file(s) is permanently deleted**.

Since all files with attachments count against your allocated storage limit, it is good practice to empty your Recycle Bin from time-to-time. Before doing so, it would be reasonable to verify that all recorded calls, messages, and screen recordings in the Recycle Bin can be permanently deleted. Once they have been deleted from the Recycle Bin, they can no longer be recovered.

To empty the recycle bin in its entirety, select the Empty Recycle Bin link at the top or bottom of the Recycle Bin page. The system displays a warning message asking if you would like to permanently delete the files. **This is your last warning**.

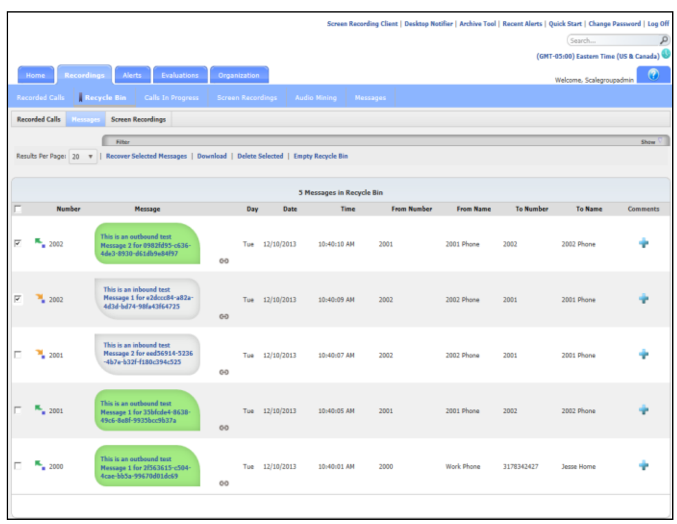
Example: Recovering recorded calls, messages, or screen recordings

1. Click the **Recordings** tab and select **Recycle Bin**.

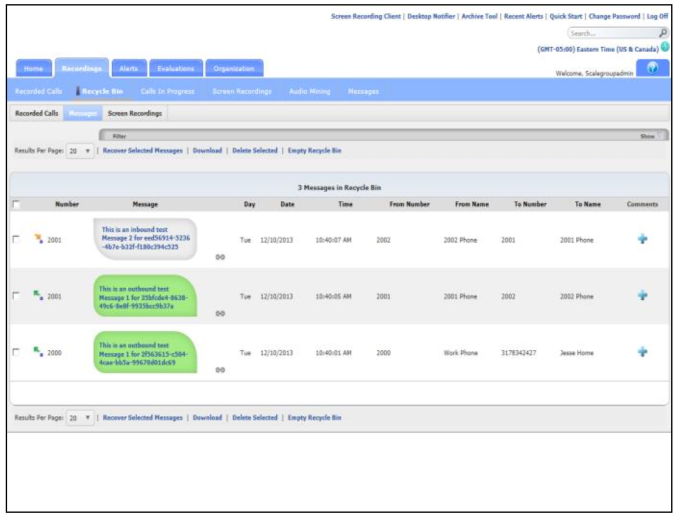


2. Select **Messages**.

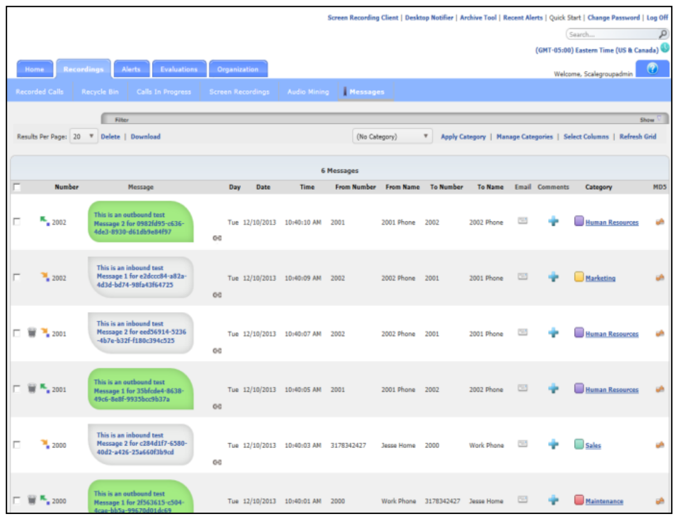
3. Select the messages you wish to recover by clicking in the corresponding option box to the left of the Number column.



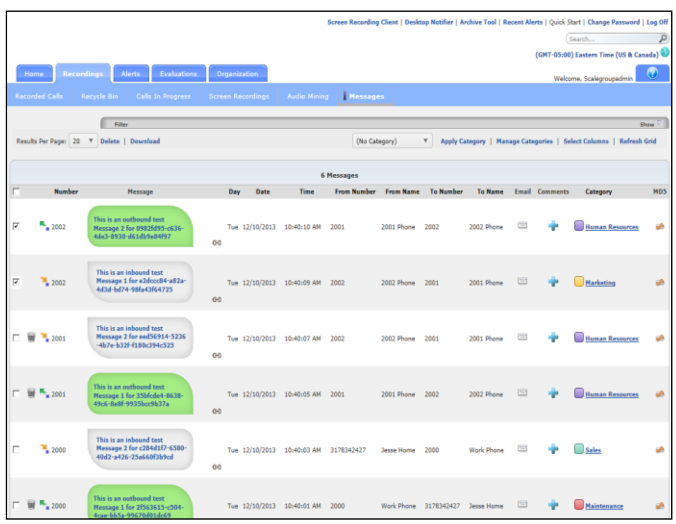
4. Select the **Recover Selected Messages** link at the top or bottom of the Recycle Bin page.



5. Click the **Messages** tab.

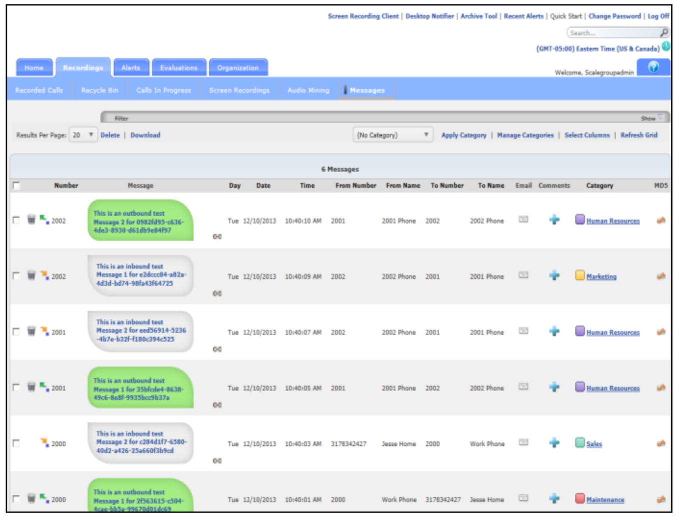


6. Select the recovered messages by clicking in the corresponding option box to the left of the Number column.



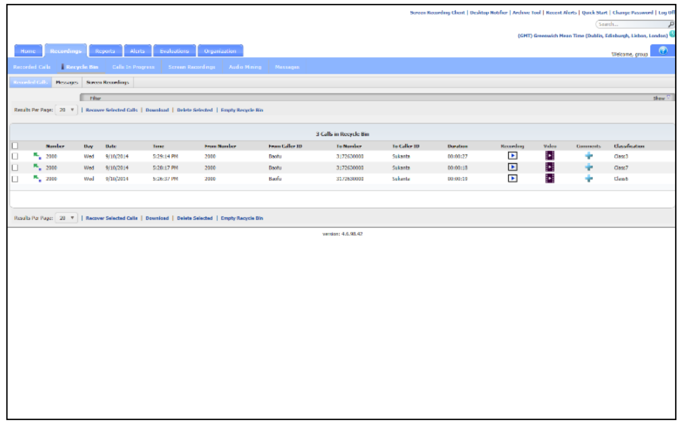
7. Select the **Delete** link at the top or bottom of the Messages page.

   Notice that a (Messages in Recycle Bin) icon appears next to the deleted message files indicating that the files are now in the Recycle Bin.

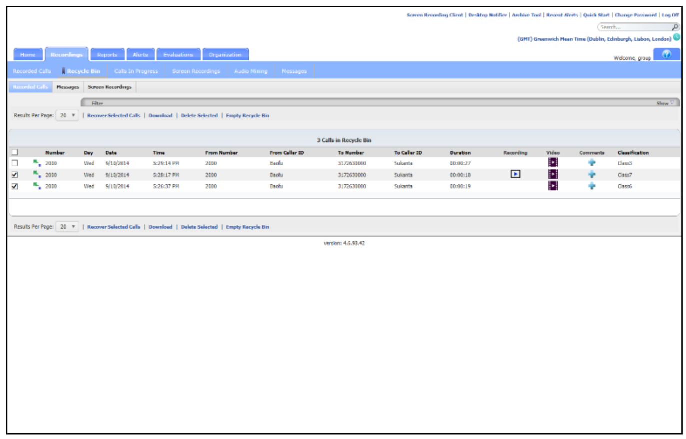


Example: Downloading a deleted recorded call or message

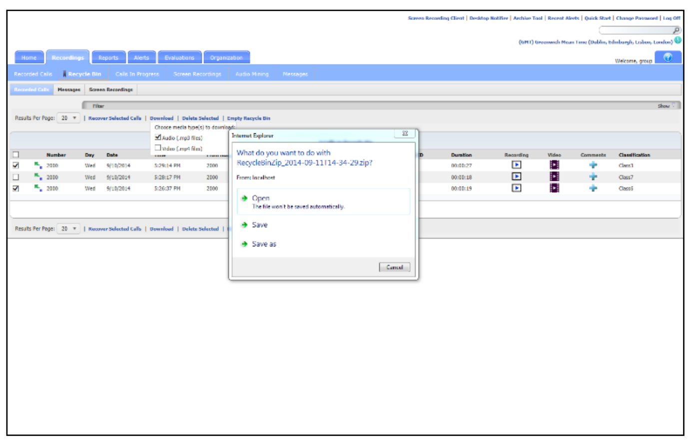
1. Click the **Recordings** tab and select **Recycle Bin**.
2. If it is not already selected, click **Recorded Calls**.



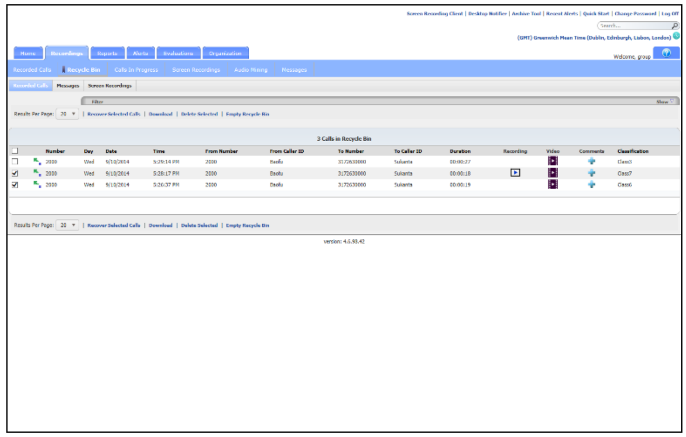
3. Select the recorded calls you wish to download by clicking in the corresponding option box to the left of the Number column, or click in the option box to the left of the Number column, in the header, to select all recorded calls.



4. Select the **Download** link at the top or bottom of the Recycle Bin page.

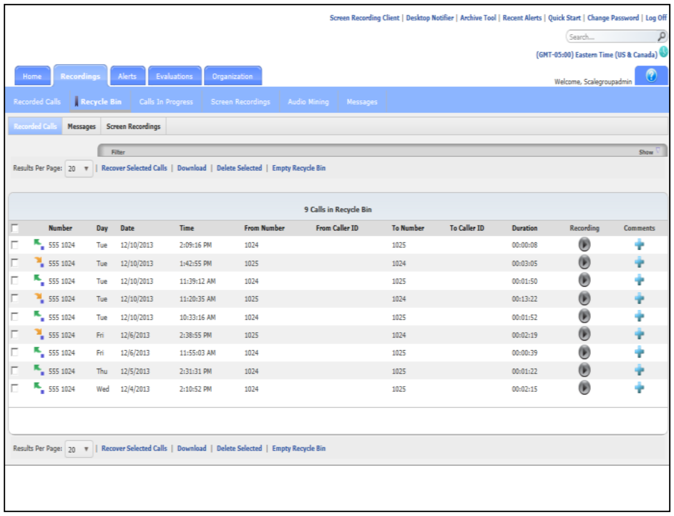


5. Normally you would choose to extract the files and save them to the location of your choice. For the purposes of this example, click the ☒ in the right corner of the RecordedCalls.zip dialog box.

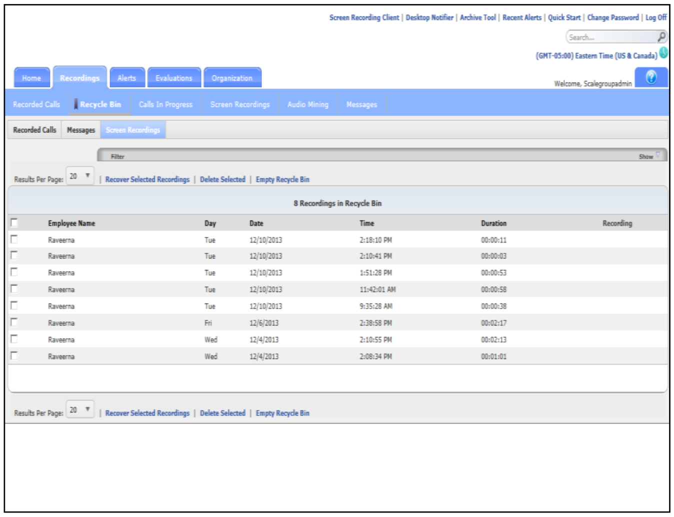


Example: Deleting recorded calls, messages, or screen recordings – permanently

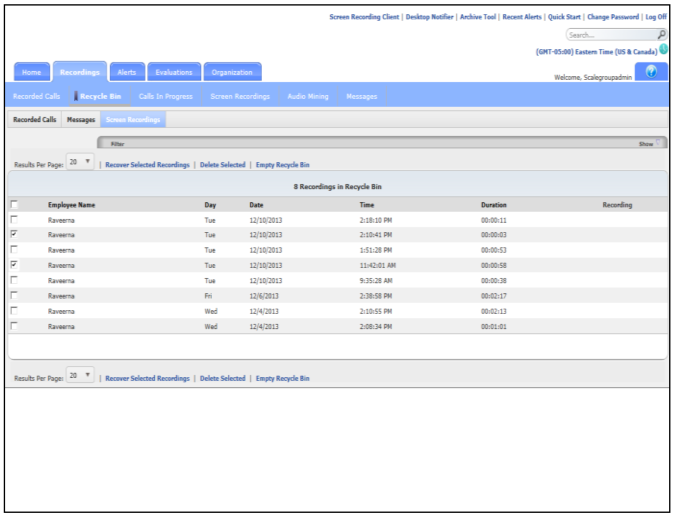
1. Click the **Recordings** tab and select **Recycle Bin**.



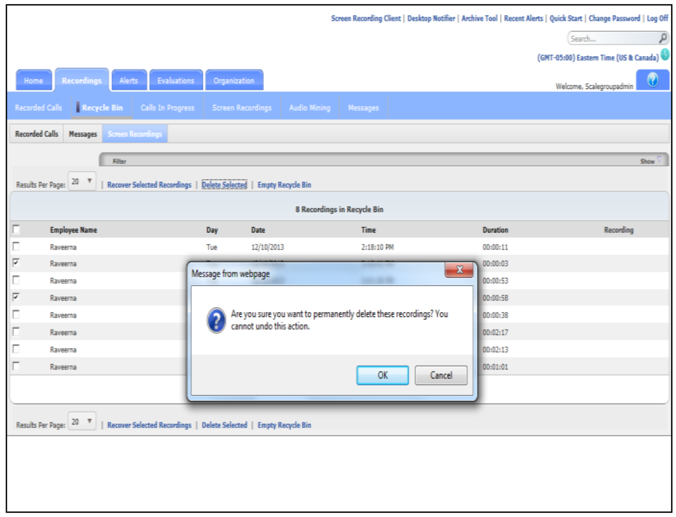
2. Select **Screen Recordings**.



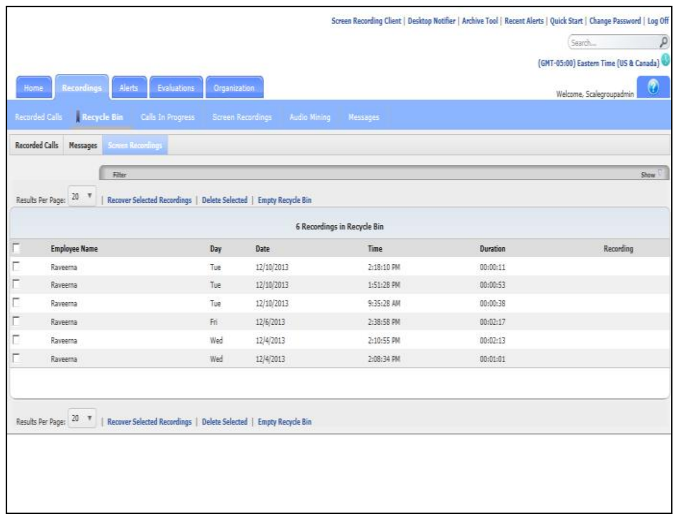
3. Select the screen recording(s) you wish to delete by clicking in the corresponding option box to the left of the Number column.



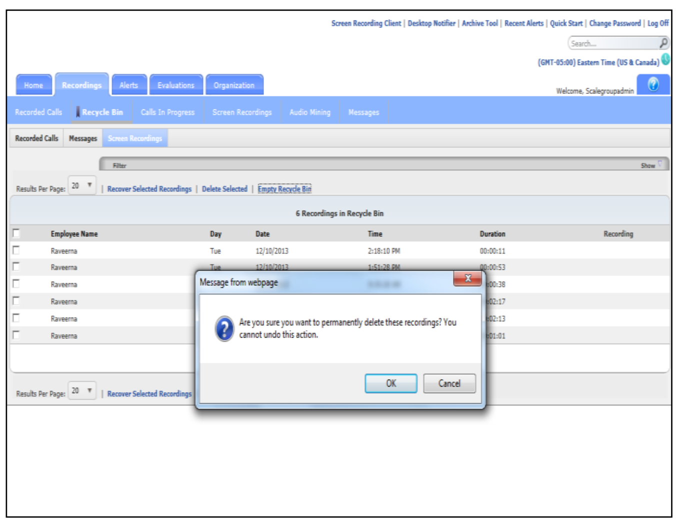
4. Select the **Delete Selected** link at the top or bottom of the Recycle Bin page.



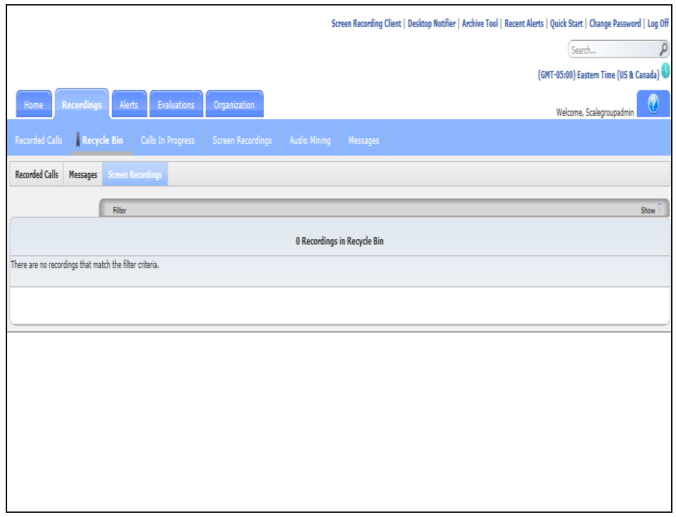
5. Click **OK**.



6. Select the **Empty Recycle Bin** link at the top or bottom of the Recycle Bin page.



7. Click **OK**.


Screen Recording Client | Desktop Notifier | Archive Tool | Recent Alerts | Quick Start | Change Password | Log Off
Search...
(GMT-05:00) Eastern Time (US & Canada)
Home
Recordings
Alerts
Evaluations
Organization
Welcome, Scalegroupadmin
Recorded Calls
Recycle Bin
Calls In Progress
Screen Recordings
Audio Mining
Messages
Recorded Calls
Messages
Screen Recordings
Filter
Show
0 Recordings in Recycle Bin
There are no recordings that match the filter criteria.

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 screen and call recording on demand pause/resume; monitor, whisper, or barge calls; 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:

- Number – displays the number or description associated with the call.
- Day – displays the day of the week the call took place.
- Date – displays the actual date the call took place.
- Time – displays the time the call originated.
- From Number – displays the originating number.
- From Caller ID – identifies the name or number of the person that originated the call, if caller ID is available.
- To Number – displays the terminating number.
- To Caller ID – identifies the name or number of the To Number, if caller ID is available.
- External ID – allows users to associate an external call ID to a clip recording.
- Recording Status – displays whether or not a specific call is being call 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.
- Monitor – 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.
- Whisper – if whisper is available, a Whisper button is displayed for each call in progress. Whisper allows the user to listen in on a call and actively participate with the call handler (selected number), but not to the other party on the call.
- Barge – if barge is available, a Barge button is displayed for each call in progress. Barge allows the user to actively participate in a call that is currently taking place and actively participate with both parties of the call.
- Save Recording – 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.
- Screen Recording – identifies whether or not the screen recording functionality is available for this particular call. If screen recording is available, a check mark will appear.
- 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, Whisper, Barge, Screen Recording, Comments, and Category are features identified in the Administrative interface and allocated by Group and Subscriber. Some of these features may not be available if they were not allocated to the Group and/or Subscriber. Additionally, Recording Status and Screen Recording are features that are configured by Subscriber and may not be available or contain all possible functionality.

Recording status identifies whether or not calls in progress are being call and/or screen recorded. An Audio Recording button is displayed if the call in progress is being audio recorded. Similarly, a Screen Recording button is displayed in the same column if the call in progress is being screen 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 and/or screen recording. To Pause and/or Resume recording, click on the applicable Audio and/or Screen 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.

The Monitor, Whisper, and Barge 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, depending on which feature is being used, all or some of the participants are never aware that you are on the line. To monitor, whisper, or barge a call, select the monitor, whisper, or barge button that corresponds to the specific call and enter the work number from which you will monitor, whisper, or barge the call. Click the Monitor, Whisper, or Barge link and the application will call the number that you entered and place you into the call. When you are done, simply hang up.

Note: You must enter a valid number and cannot enter the To or From numbers. Additionally, the number that you enter must be registered to your server. The application will attempt to call the number but if it is not valid, it will essentially time out.

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 aren't. For the calls that aren't set up 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.

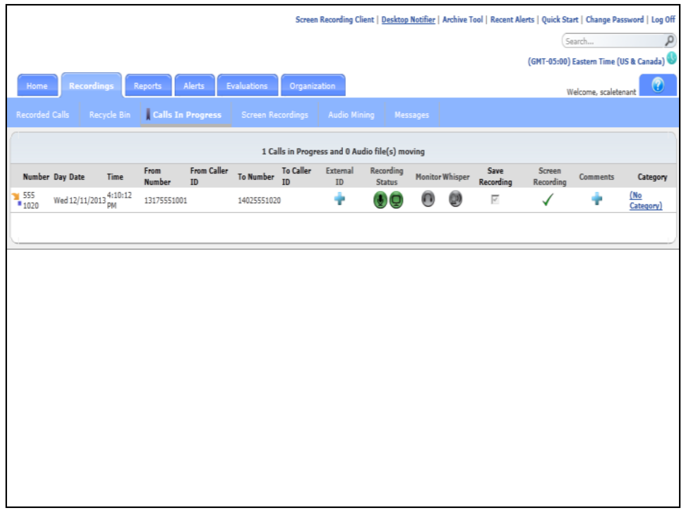
When numbers are assigned to Users, the default setting is to record all screen activity that is made from or to those numbers. This setting can be changed to do not record by the Group Administrator. If the default setting has been preserved for a number, a green checkmark will appear under the Screen Recording column on the Calls in Progress screen.

From the Calls in Progress screen you can also add comments to each of the calls. A (Add Comment button) indicates there are currently no comments associated with the corresponding calls in progress call file. A 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 Submit to save your changes. This is the point at which the Add Comment button changes to the button.

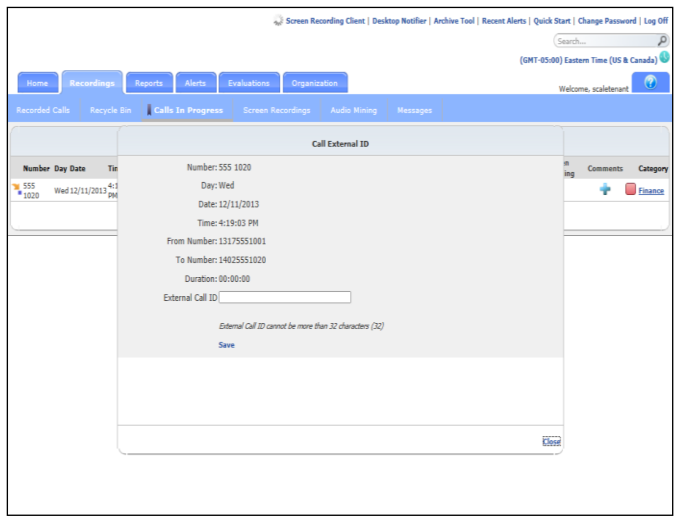
The ability to create categories for calls is beneficial to call handlers and managers because it allows them to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction). You are then able to filter calls or run reports based upon these call categories.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

Example: Adding an external ID to a call in progress

1. Click the **Recordings** tab and select **Calls in Progress** to ensure that you are looking at the list of calls in progress.

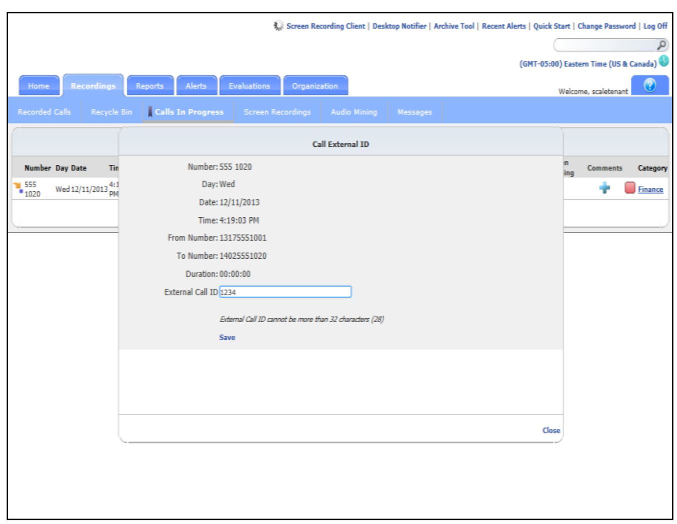


2. Select a call and click on the (Add External ID) button that corresponds to that call.

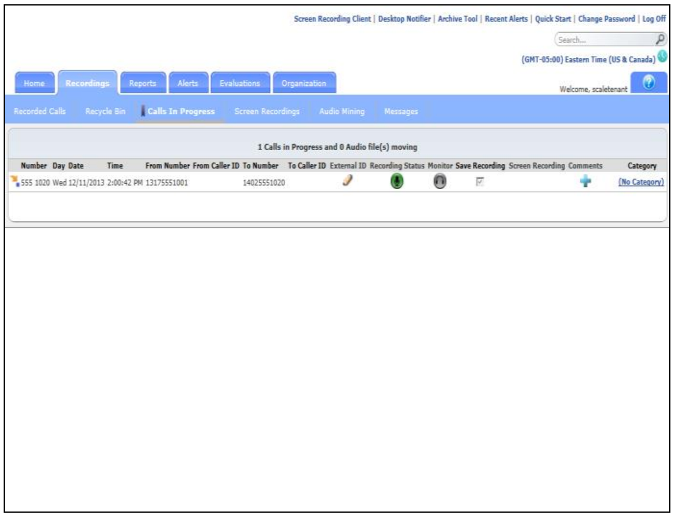


3. Enter the following information:
   - External Call ID **– 1234**

Note: External Call IDs cannot be greater than 32 characters.



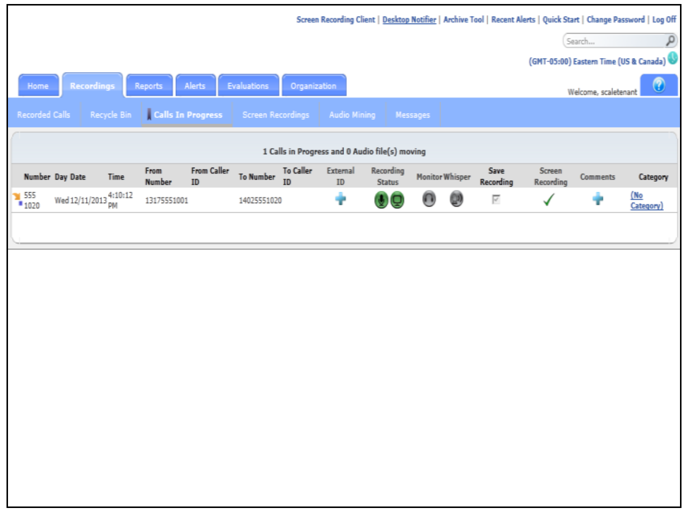
4. Click **Save**.


Screen Recording Client | Desktop Notifier | Archive Tool | Recent Alerts | Quick Start | Change Password | Log Off
Search...
(GMT-05:00) Eastern Time (US & Canada)
Home
Recordings
Reports
Alerts
Evaluations
Organization
Welcome, scaletenant
Recorded Calls
Recycle Bin
Calls In Progress
Screen Recordings
Audio Mining
Messages
1 Calls in Progress and 0 Audio file(s) moving
Number Day Date Time From Number From Caller ID To Number To Caller ID External ID Recording Status Monitor Save Recording Screen Recording Comments Category
555 1020 Wed 12/11/2013 2:00:42 PM 13175551001 14025551020
(No Category)

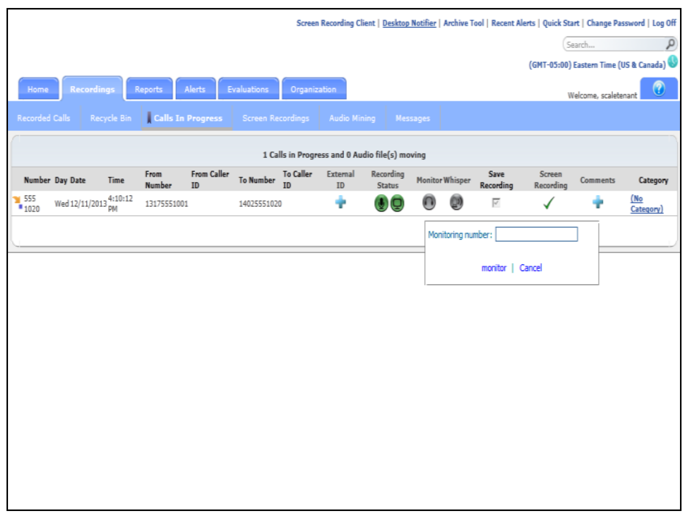
Example: Monitoring, Whispering, or Barging a call

Note: Depending on your service provider's implementation, monitoring will appear 1 of 2 ways. Both examples have been demonstrated below.

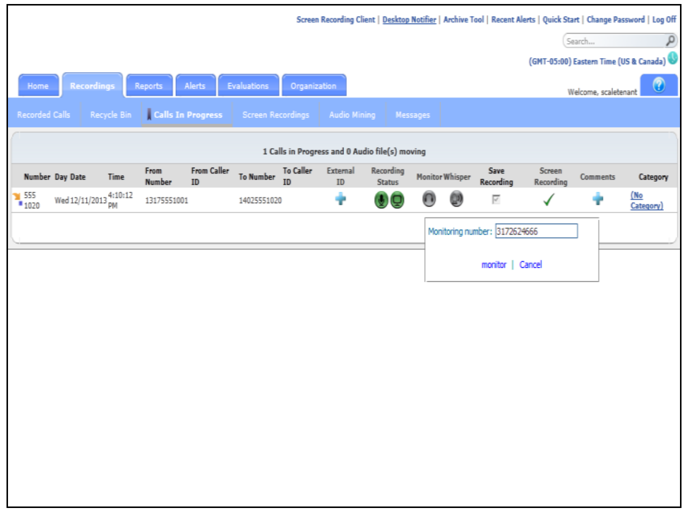
1. Click the **Recordings** tab and select **Calls in Progress** to ensure that you are looking at the list of calls in progress.



2. Select a call and click on the (Monitor Live Conversation button) that corresponds to that call.

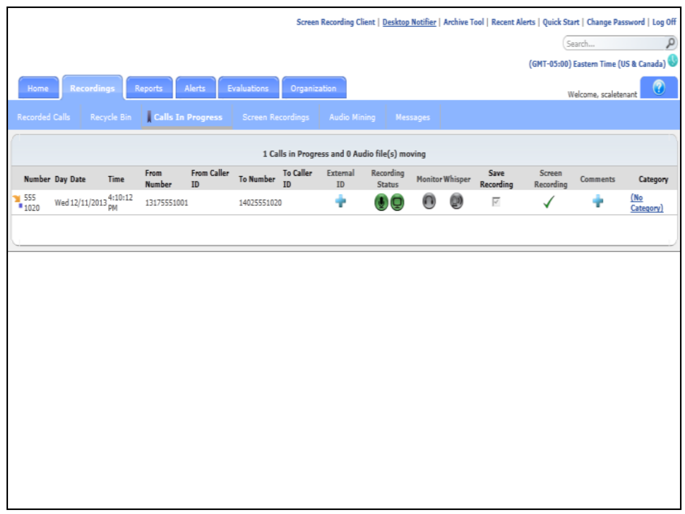


3. Enter your desk or mobile number.



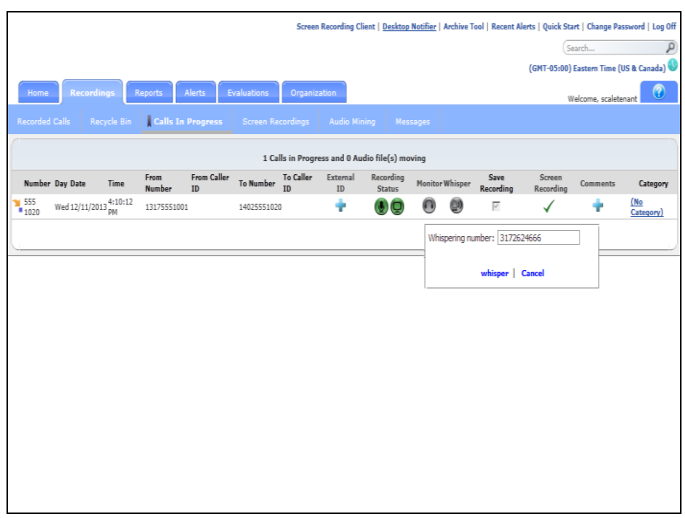
4. Click **Monitor**.

   The application will call your desk or mobile phone to begin monitoring the call.



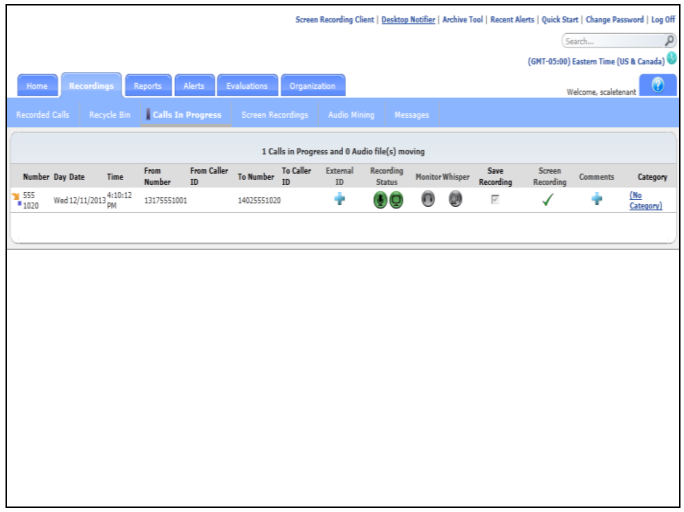
5. Select a call and click on the (Whisper Live Conversation button) that corresponds to that call.

   Note: The number that was last entered in the Monitor, Whisper, or Barge call dialog box will automatically appear until a new number is entered or you log out of the application.



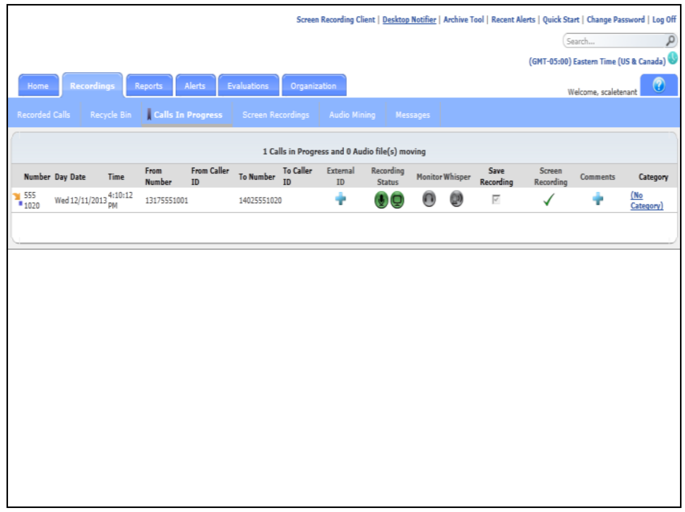
6. Click **Whisper**.

   The application will call your desk or mobile phone to begin monitoring the call.

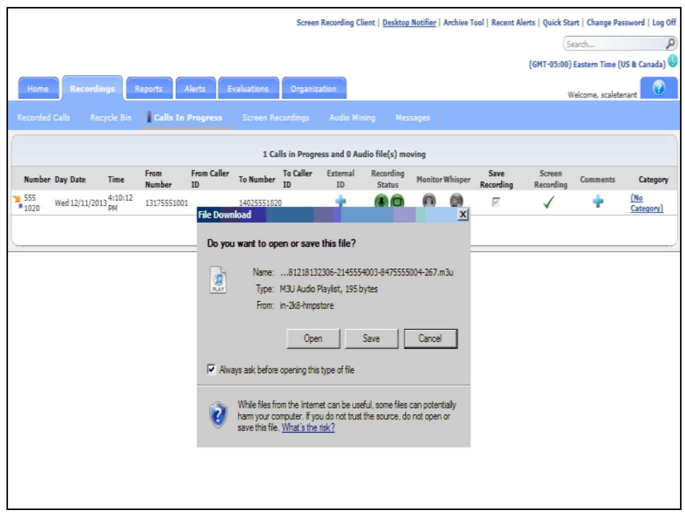


Example: Monitoring a call (alternative call recorder method)

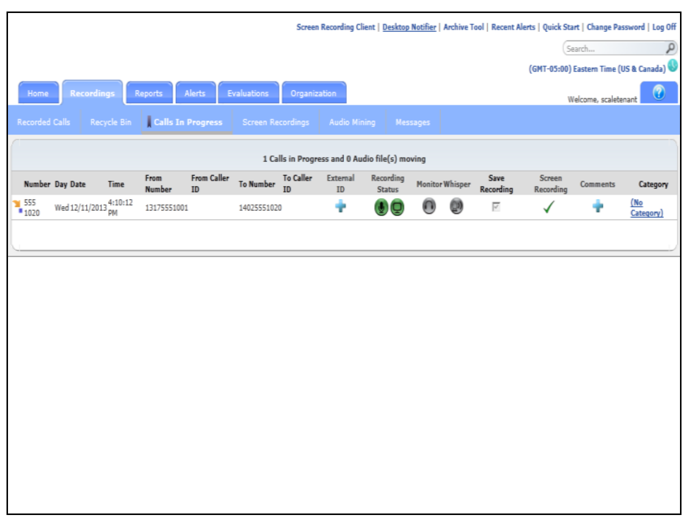
1. Click the **Recordings** tab and select **Calls in Progress** to ensure that you are looking at the list of calls in progress.



2. Select a call and click on the  (Monitor Live Conversation button) that corresponds to that call.
   .

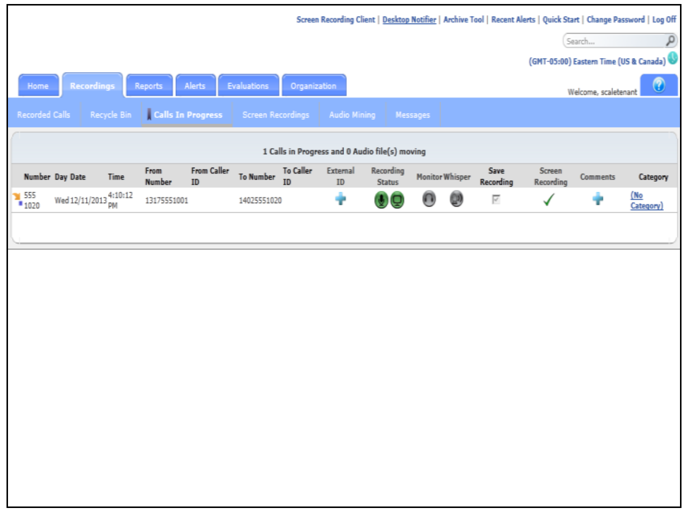


3. Click **Open**.

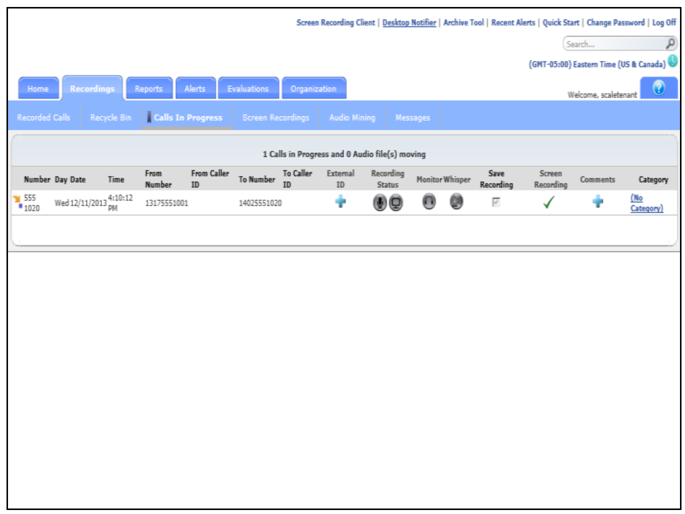


Example: Pausing and/or resuming audio and screen recording

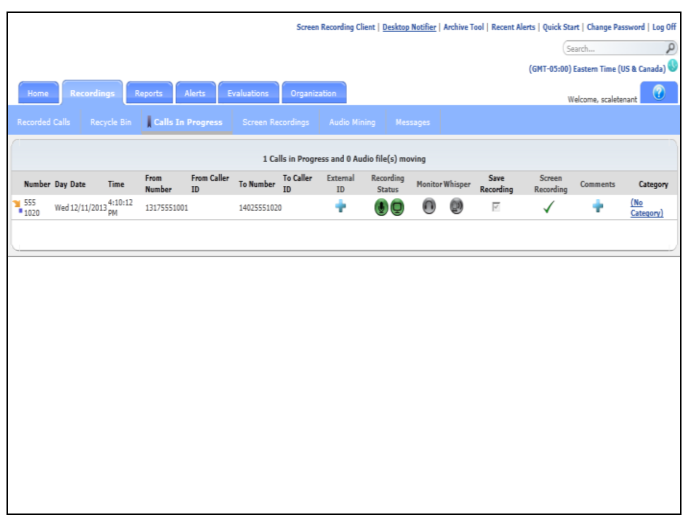
1. Click the **Recordings** tab and select **Calls in Progress** to ensure that you are looking at the list of calls in progress.



2. To Pause recording, select both the Audio and Screen Recording buttons by clicking on them.

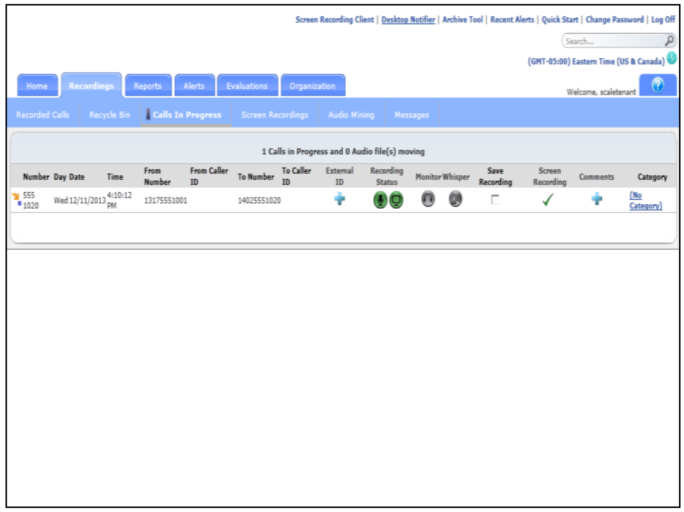


3. To Resume recording, select both the Audio and Screen Recording buttons by clicking on them.



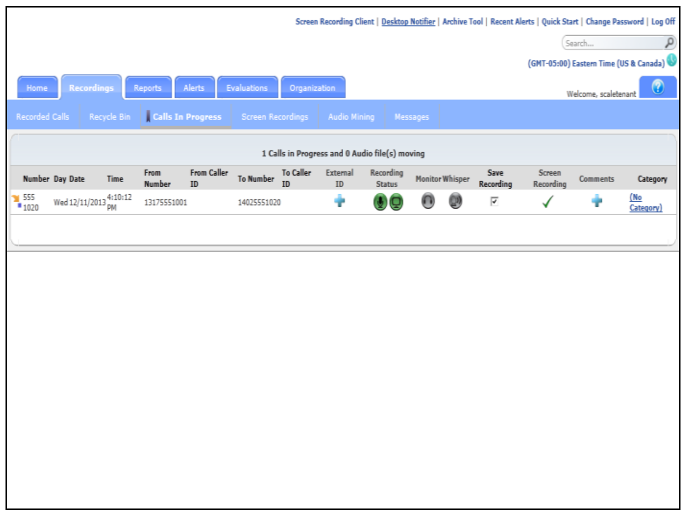
Example: Recording a call in progress

1. Click the **Recordings** tab and select **Calls in Progress** to ensure that you are looking at the list of calls in progress.



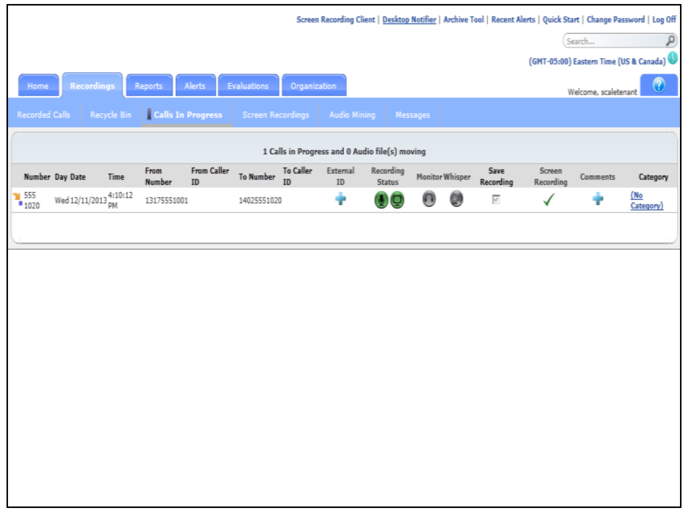
2. Click in the option box of a call that does not have Save Recording selected (a checkmark in the option box).

   Note: Clicking in the Save Recording option box will only record this call. It will not record all calls going forward for this number.

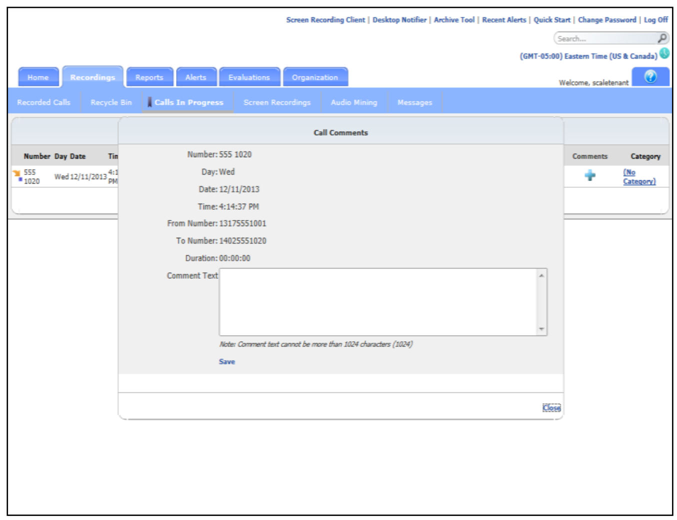


Example: Adding comments to a call in progress

1. Click the **Recordings** tab and select **Calls in Progress** to ensure that you are looking at the list of calls in progress.

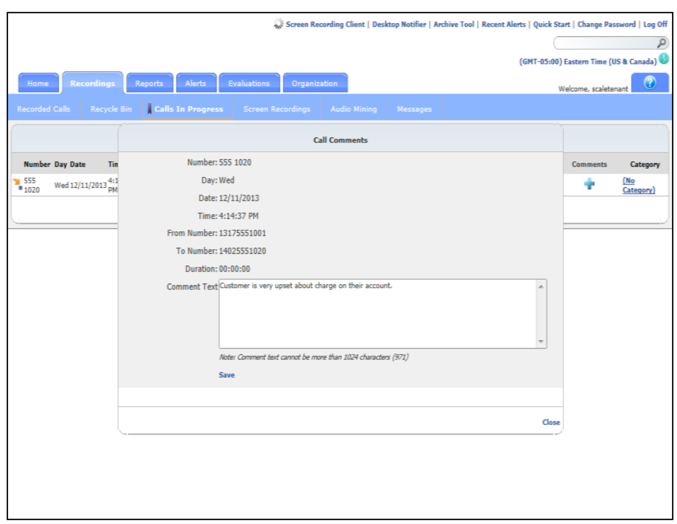


2. Select a call and click on the  (Add Comment) button that corresponds to that call.

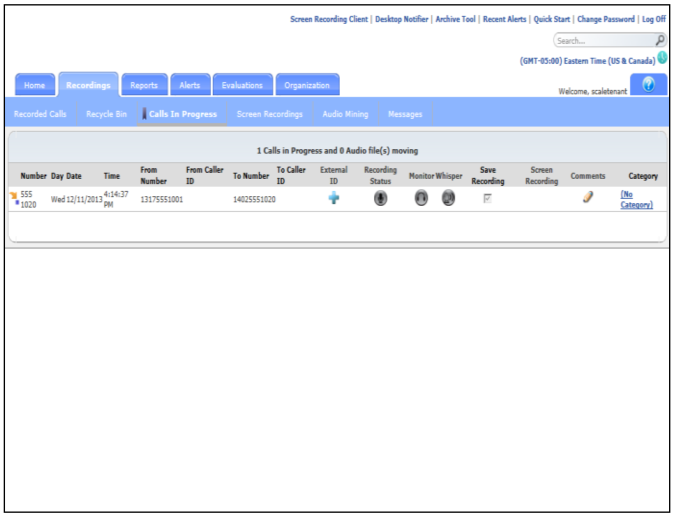


3. Enter the following information:
   - Comment – **Customer is very upset about charge on their account.**

Note: Comment text cannot be greater than 1024 characters.

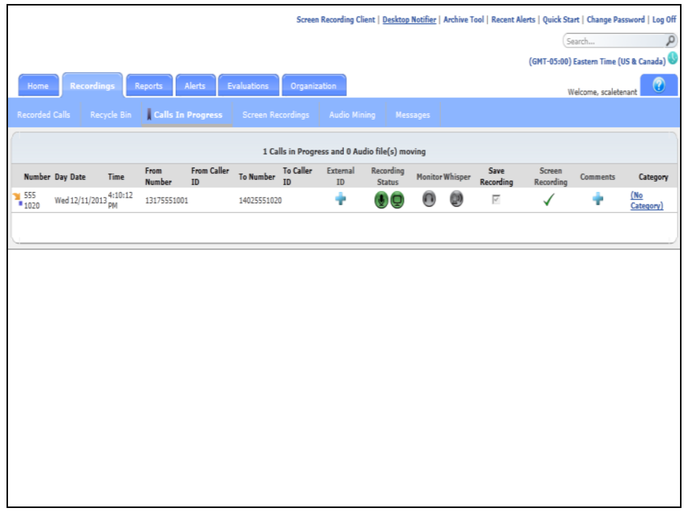


4. Click **Save**.

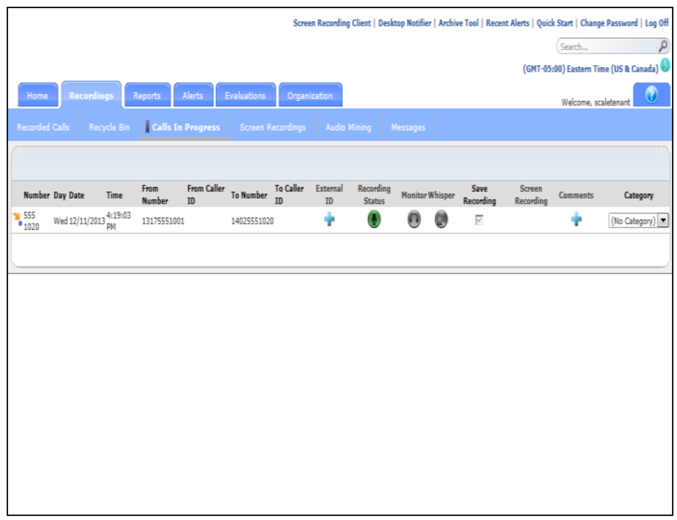


Example: Categorizing a call in progress

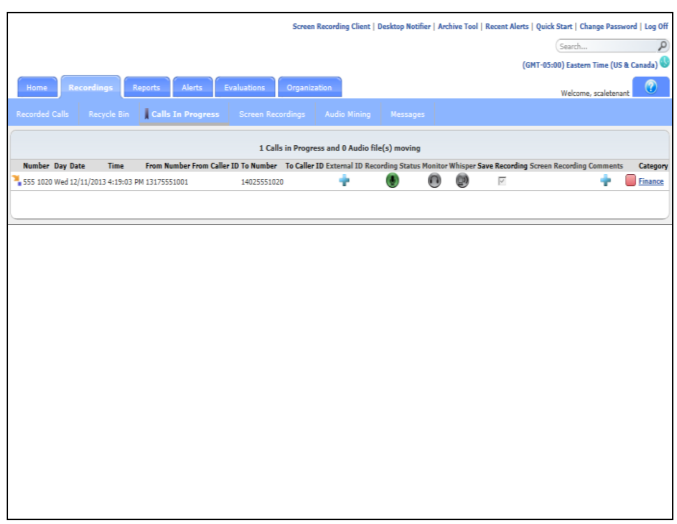
5. Click the **Recordings** tab and select **Calls in Progress** to ensure that you are looking at the list of calls in progress.



6. Select the **Category** link that corresponds to the call you wish to categorize.



7. Select a category from the drop down list.



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Screen Recordings

Screen recording captures the call handler's desktop and records the actions taken by them in order to satisfy their customer call. This is useful for future training, review by the manager, or documentation purposes. In order to better manage this screen, column headers that appear in bold lettering 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. You can also determine how many screen recordings to display on the page by selecting a new value from the Results Per Page drop down list. The following information is displayed on the Screen Recording screen:

- Employee Name – the name of the employee or call handler whose screen was recorded
- Day – the day of the week the call took place
- Date – the actual date the call took place
- Time – the time the call originated
- Duration – the length of the call
- Related Calls – identifies whether or not there is a recording associated with the call and allows you to play the associated recording
- Recording – allows the user to play the actual screen recording
- Export Video – allows the user to export the screen recording as a video
- Download – allows the user to download individual screen recordings as a zipped files but without the audio file
- MD5 – identifies whether or not the screen recording has been hashed using MD5 fingerprinting, thus ensuring that the screen recording has not been tampered with and satisfying regulatory requirements
- Archive - allows you to view the file path of a particular screen recording

Related calls display any recorded calls that correspond to a screen recording. The dialog quickly identifies the day, date, and time; from number; from caller ID; to number, the duration of the call; and the recording. To view and play related calls select the (Related Calls) button that corresponds to the recording for which you wish to view and/or play a recorded call. When the Related Calls dialog is displayed, click on the (Recording) button to listen to the related call. Your default media player will open and begin playing the recorded call file (MP3 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.

When numbers are assigned to Users, the default setting is to record all screen activity that is made from or to those numbers. This setting can be changed to do not record by the Group Administrator. If the default setting has been preserved for a number, a green checkmark will appear under the Screen Recording column on the Calls in Progress screen. Once a screen recording is complete, a Recording button will appear under the Recording column on the Screen Recording screen indicating there is a screen recording file for that particular call.

Note: Group Administrators will see screen recordings for all extensions assigned to Users that they have created.

To play a screen recording, click the (Screen Recording) button that corresponds to the recording that you want to play. Click the Play button to begin playing the recording.

Note: If you do not have the required Java plug in installed, a dialog window will appear first and prompt you to install the plug in.

Another useful function included in this application is the ability to export screen recordings into a CSV file. You can export one, multiple, or all screen recordings. There are two types of exports in screen recording:

- Export - exports the details of the screen recording to a .csv file. This method is accessed by using the Export link at the top of the Recordings screen.
- Export Video - zips and exports the video as an .mp3 file. This method is accessed by using the individual Export Video links that correspond to specific screen recordings.

Exporting a screen recording as an .mp3 file is as simple as clicking the (Export Video) button that corresponds to the recording you wish to export. The expected result will either be a QuickTime view of the screen recording or a message notifying you that you will receive and email once the file has finished exporting.

To export a screen recording as a .csv file or to export all screen recordings, select the specific recordings by clicking in the corresponding option boxes or click in the upper most option box on the first page of the screen recordings. Select the Export link at the top of the Screen Recording page to download the screen recording details as a .csv file.

In addition to exporting and archiving, you also have the ability to download individual screen recordings as a zipped file from the Screen Recording and Recycle Bin tabs. Screen recordings are downloaded as .srf files without audio. To download a screen recording select the Download button that corresponds to the recording you wish to download.

MD5 is a technique used to ensure that a file has not been altered in any way. When the screen is recorded, we take an MD5 hash of it, outputting a string of random characters. The point is that if MD5 fingerprinting is applied to the same recording at a later point, it will create the same string of characters, unless the file has changed. If a different string of characters that don't match the original is created, you know the recording has been modified. The default is to hash all screen recordings. Hovering your mouse over the MD5 icon for a specific call will reveal the hash string. If you have the screen recording file downloaded or available in another location, click on the MD5 icon to open the Verify Recording dialog box. Upload the file to verify the file has not been tampered with.

Clicking on specific (Archive) button will display a list of ISO images that contain specific screen recordings. The ISO image will identify the user that archived the recording, the date and time, and the file path to where it was archived.

The Recycle Bin is intended to be a sort of "checks and balance" system when deleting screen recordings. When you delete a screen recording, it is placed into the Recycle Bin. The screen recordings remain in there until you permanently delete them from the application. If you accidentally delete a screen recording and it is still in the Recycle Bin you have to option to restore it to the Screen Recording tab. You also have the option to download any or all of the recordings in the Recycle Bin in order to store them for later use.

There will be times that you accidentally delete a screen recording, or have deleted a screen recording that actually must remain in the Screen Recordings tab. In these instances, you are able to recover a particular recording or recordings to the Screen Recordings tab as long as they have not been deleted from the Recycle Bin. To recover recordings, select the specific recording(s) you wish to recover by clicking in the corresponding option box to the left of the Number column. Select the Recover Selected Recordings link at the top or bottom of the Recycle Bin page to restore the calls to the Screen Recordings tab.

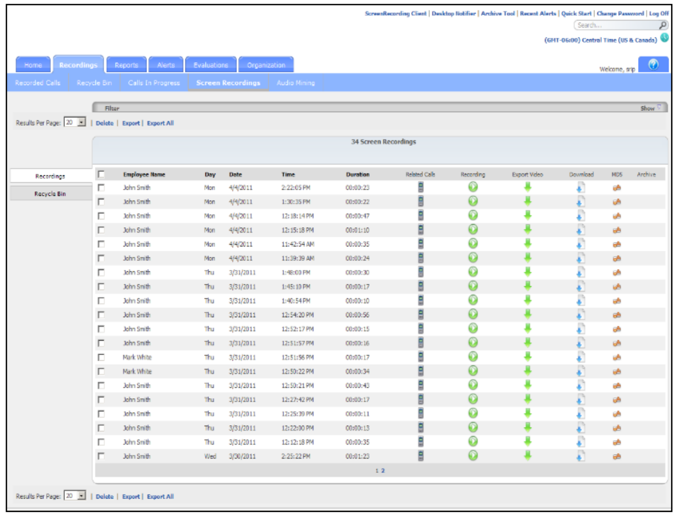
When it comes to deleting files permanently from the Recycle Bin, you have two options: delete selected files or empty the Recycle Bin in its entirety. To delete specific screen recordings from the Recycle Bin, select the recording(s) by clicking in the corresponding option box to the left of the Number column. Select the Delete Selected link at the top or bottom of the Recycle Bin page. The system displays a warning message asking if you would like to permanently delete the selected recording(s). **This is your last warning before the recording is permanently deleted**.

Since all screen recordings count against your allocated storage limit, it is good practice to empty your Recycle Bin from time-to-time. Before doing so, it would be reasonable to verify that all recordings in the Recycle Bin can be permanently deleted. Once they have been deleted from the Recycle Bin, they can no longer be recovered.

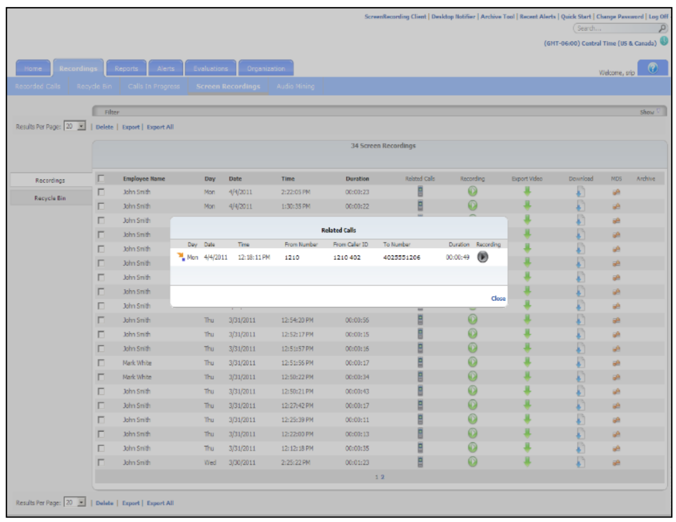
To empty the recycle bin in its entirety, select the Empty Recycle Bin link at the top or bottom of the Recycle Bin page. The system displays a warning message asking if you would like to permanently delete the recordings. **This is your last warning**.

Example: Viewing and playing a related call

1. Click the **Recordings** tab and select **Screen Recordings** to ensure that you are looking at the list of screen recordings.



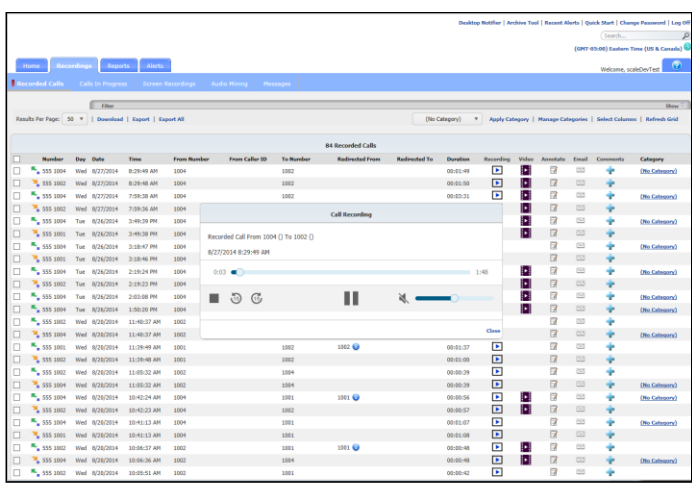
2. Select the (Related Calls) button that corresponds to the recording for which you wish to view and/or play a recorded call.



3. Select the (Recording) button.

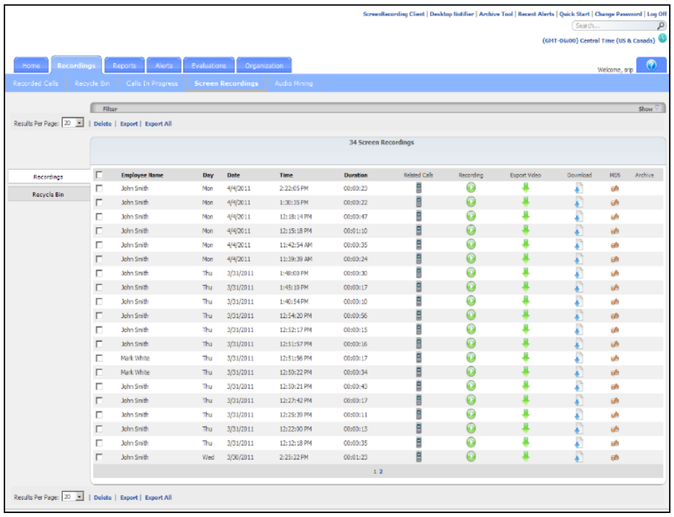
   Your default media player will open and begin playing the recorded call file (MP3 file).

   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 (see Appendix A for a list of supported features by media player). However, iTunes® will load the recorded call file in the library and you will have to



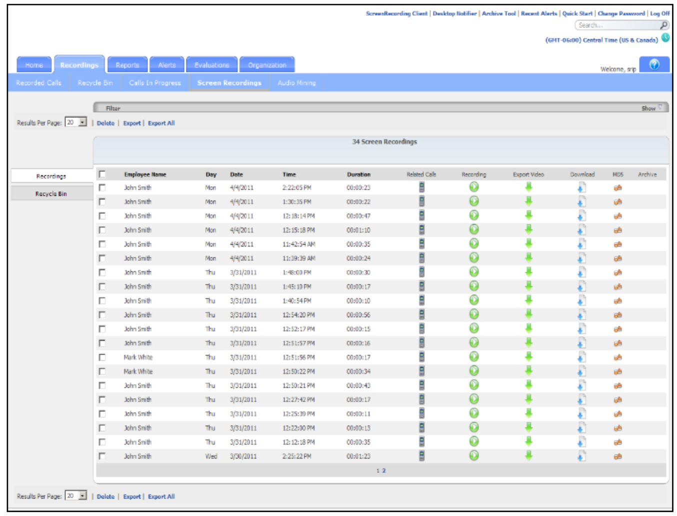
click play to begin listening to the file.

4. Click the browser’s **Back** button to return to the Recordings page.



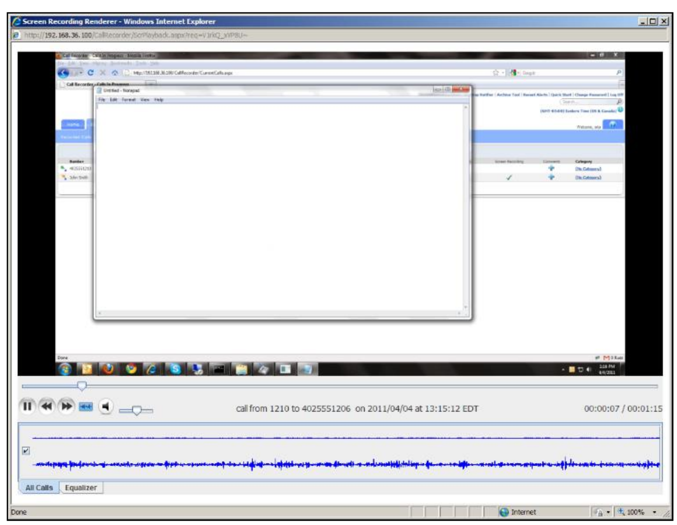
Example: Playing a screen recording

1. Click the **Recordings** tab and select **Screen Recordings** to ensure that you are looking at the list of screen recordings.

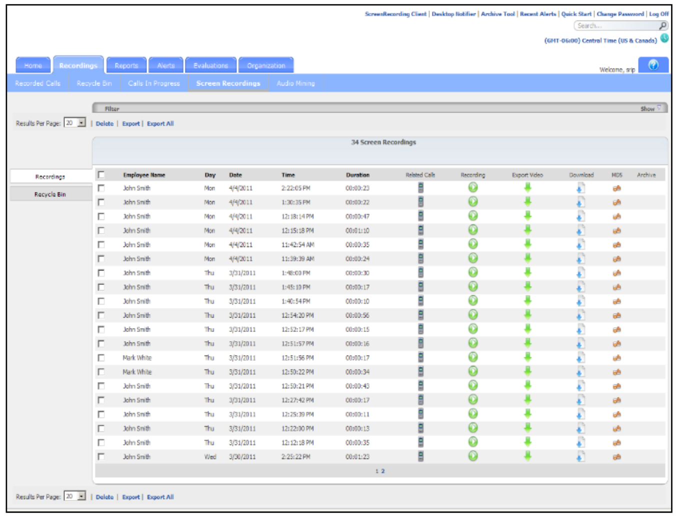


2. Select the  (Recording) button that corresponds to the recording that you want to play.

3. Click the **Play** button to begin playing the recording.

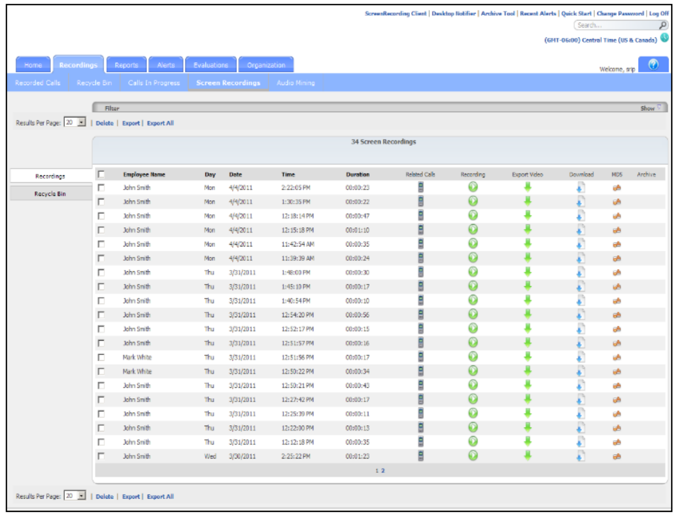


4. Click the ✖ in the right corner to close the Screen Recording Renderer dialog.



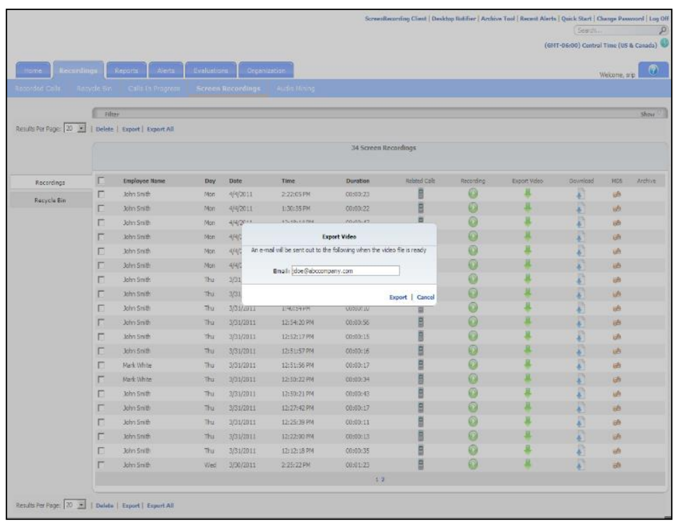
Example: Exporting a screen recording as an MOV file

1. Click the **Recordings** tab and select **Screen Recordings** to ensure that you are looking at the list of screen recordings.

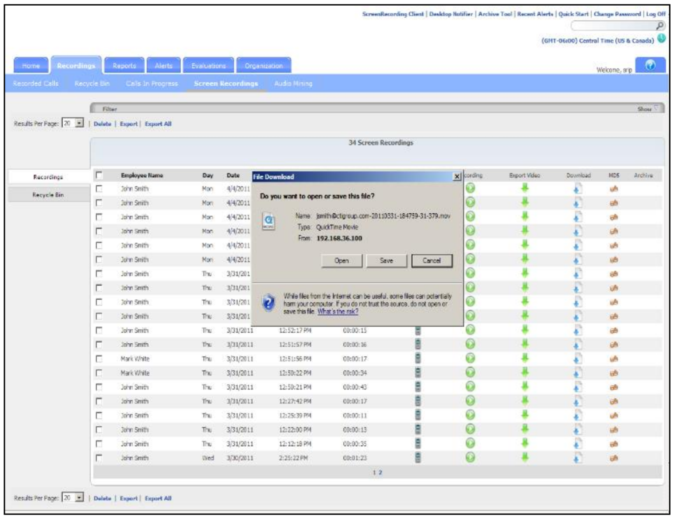


2. Select the (Export Video) button that corresponds to the recording that you want to export.

3. Since some screen recording files are large and can not only take time to download but slow down other resources, one of the following will occur:

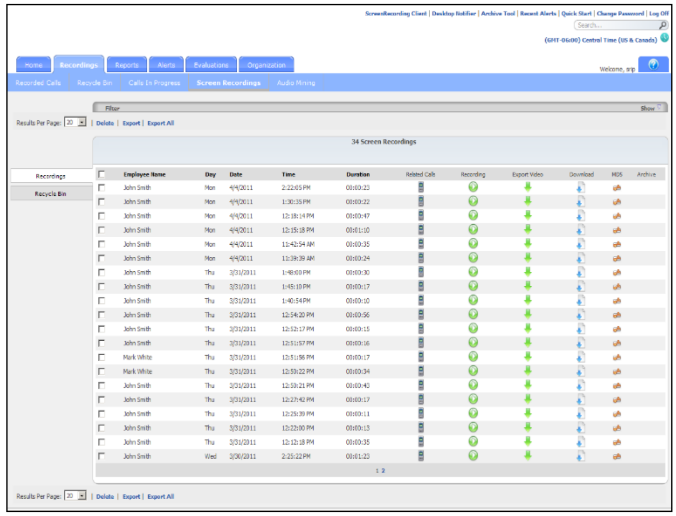


   - An Export Video dialog box will appear notifying you that an email will be sent with a link to the video when it has finished downloading. Enter the **Email** address to where you want the email sent and click **Export**.
   - A QuickTime dialog box will appear asking if you would like to open or save the video. Choose **Open** and then click the **Play** button.

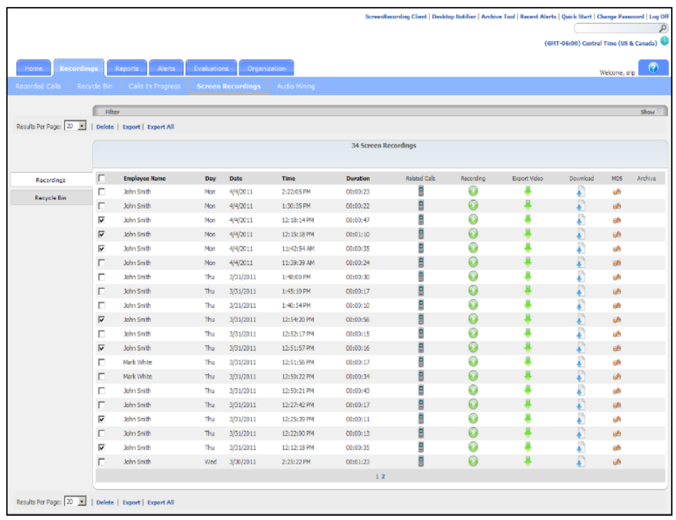


Example: Exporting a screen recording details as a .csv file

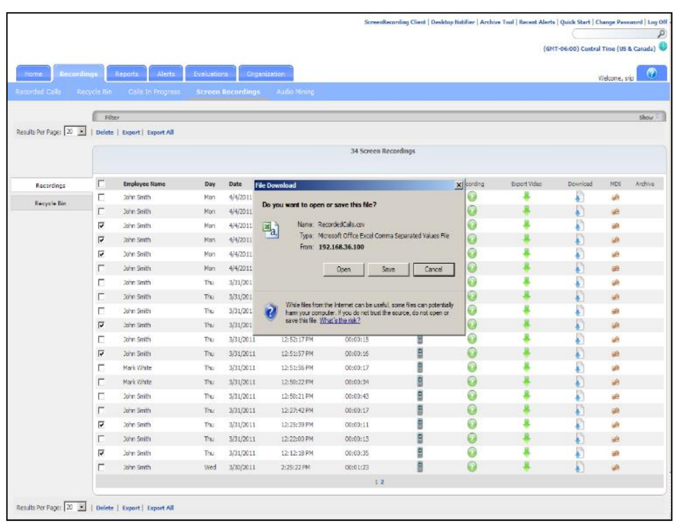
1. Click the **Recordings** tab and select **Screen Recordings** to ensure that you are looking at the list of screen recordings.



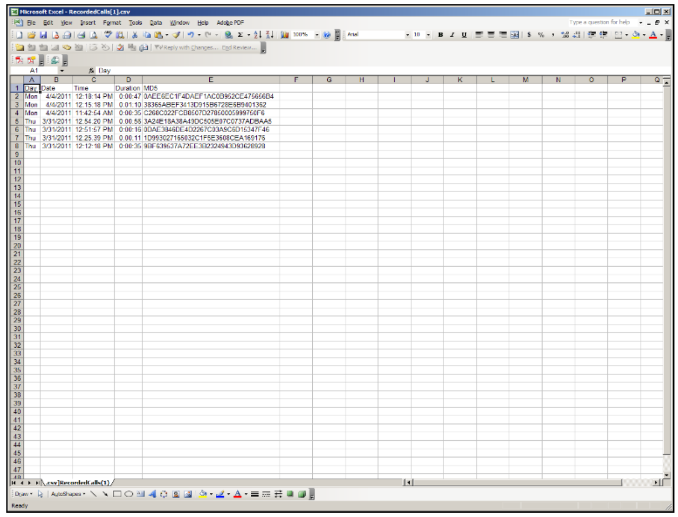
2. Select the screen recordings you wish to export by clicking in the corresponding option box to the left of the Number column.



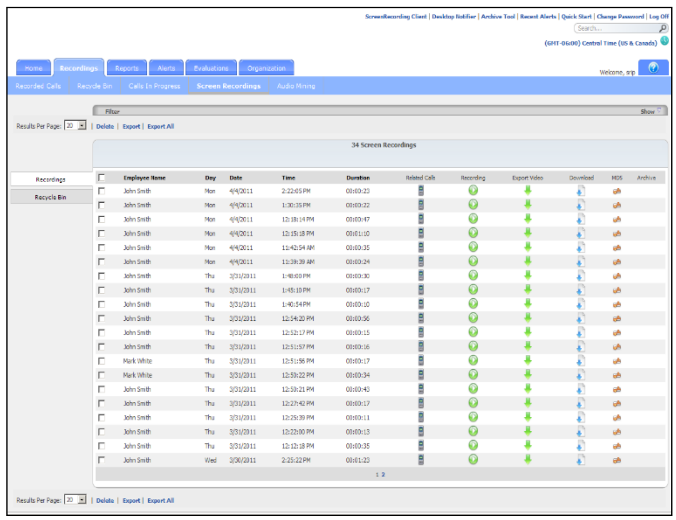
3. Select the **Export** link at the top of the Recording page.



4. Click **Open**.

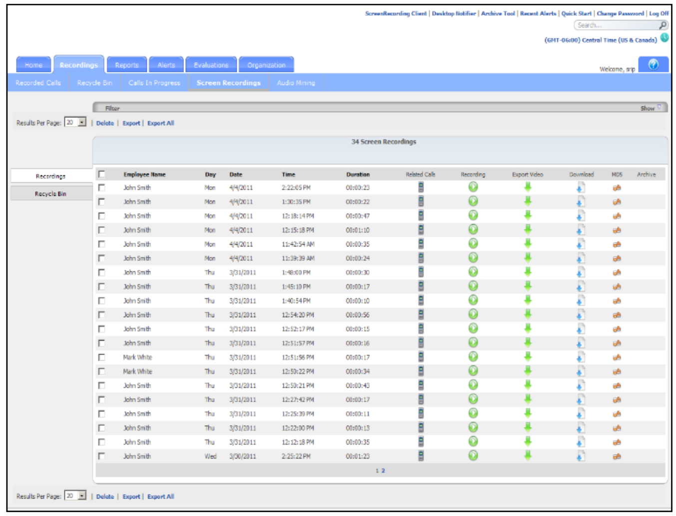


5. Click the  in the right corner of the RecordedCalls[1].csv window.

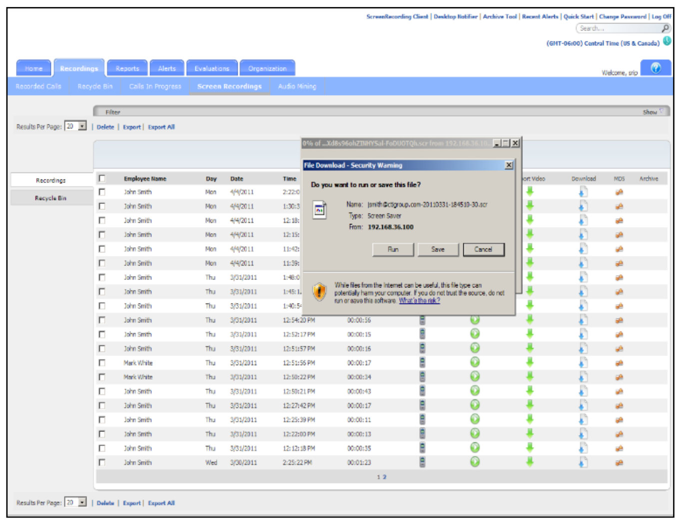


Example: Downloading a screen recording

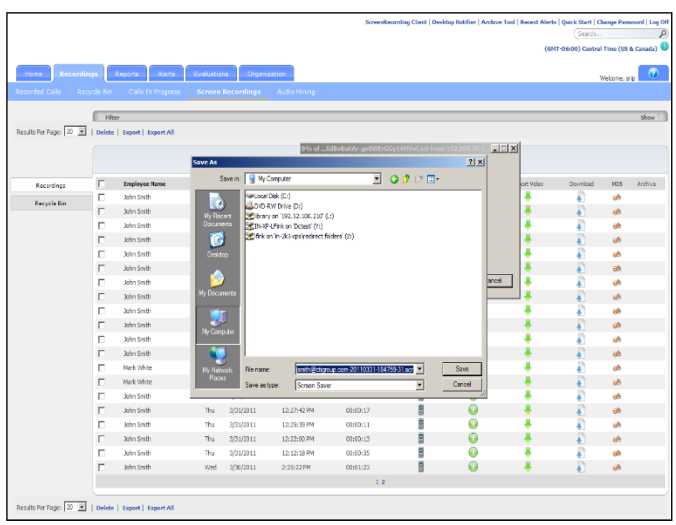
1. Click the **Recordings** tab and select **Screen Recordings** to ensure that you are looking at the list of screen recordings.



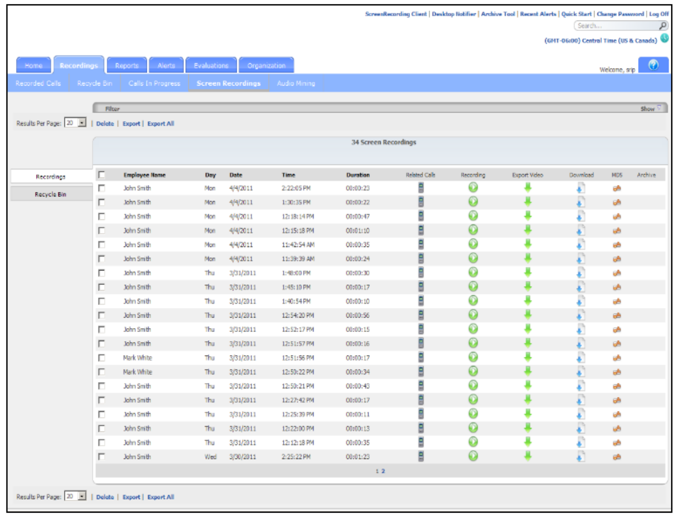
2. Select the  (Download) button that corresponds to the recording that you want to download.



3. Select **Save**.



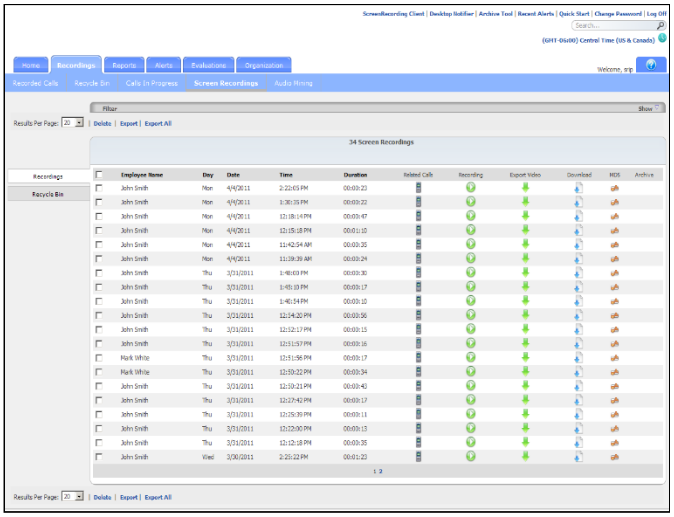
4. Browse to the location you wish to save the downloaded file and click **Save**.



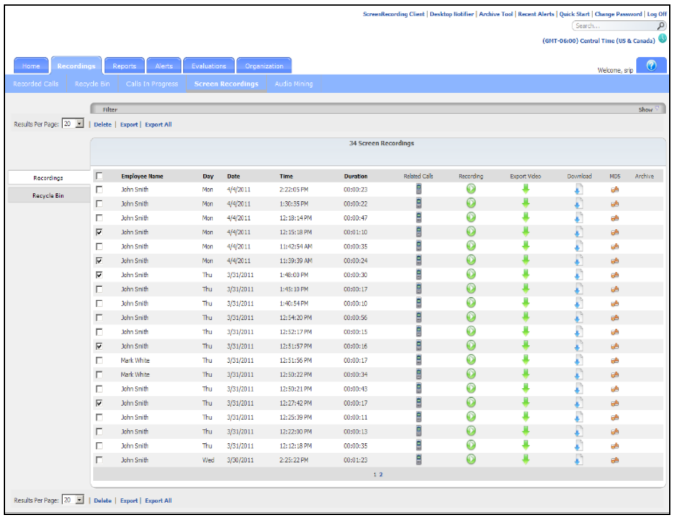
Example: Deleting a screen recording

Note: The screen recording will appear on both the Screen Recordings and Recycle Bin tabs. The screen recording will not be deleted until it is deleted from the Recycle Bin. A copy of the screen recording remains in the Screen Recordings tab.

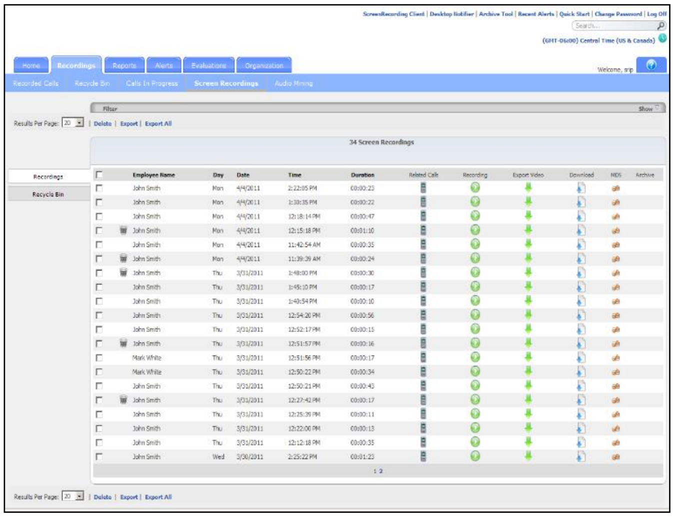
1. Click the **Recordings** tab and select **Screen Recordings** to ensure that you are looking at the list of screen recordings.



2. Select the screen recording(s) you wish to delete by clicking in the corresponding option box to the left of the Number column.

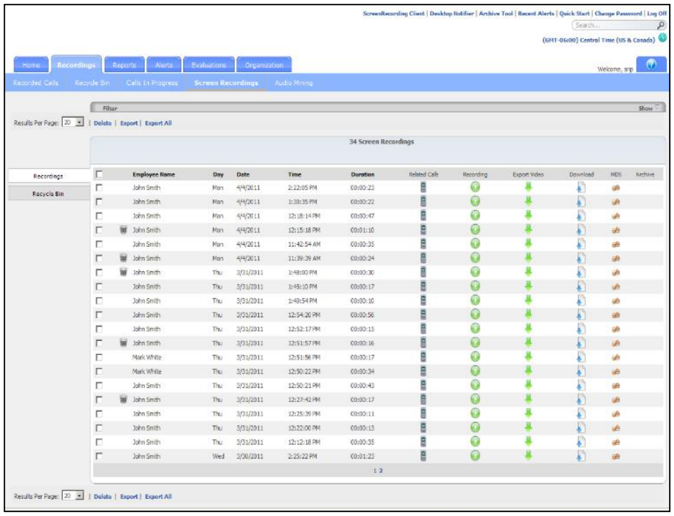


3. Select the **Delete** link at the top or bottom of the Recordings page. Notice that a  (Recording in Recycle Bin) icon appears next to the deleted calls indicating that the calls are now in the Recycle Bin.

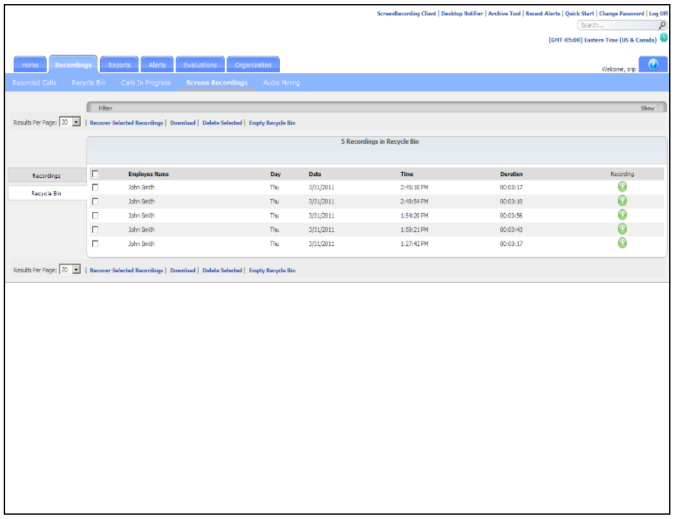


Example: Recovering selected screen recordings

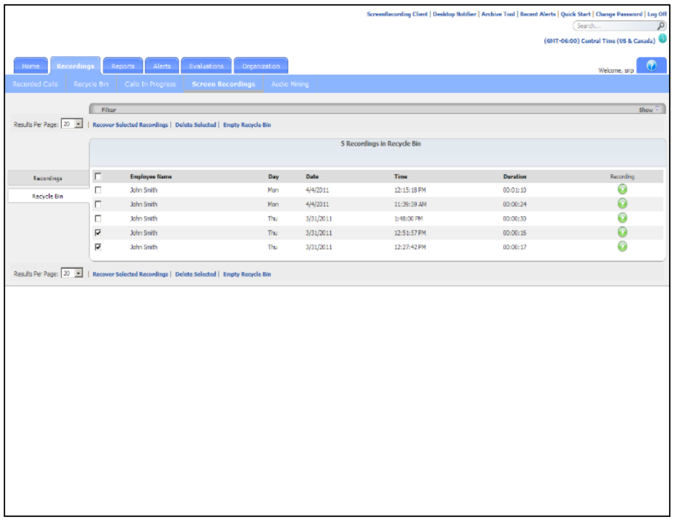
1. Click the **Recordings** tab and select **Screen Recordings** to ensure that you are looking at the list of screen recordings.



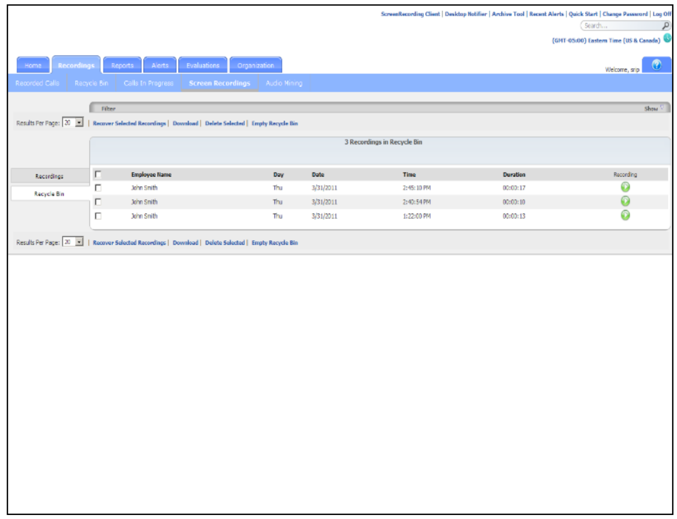
2. Click the **Recycle Bin** tab and select **Screen Recordings** to ensure that you are looking at the list of deleted screen recordings.



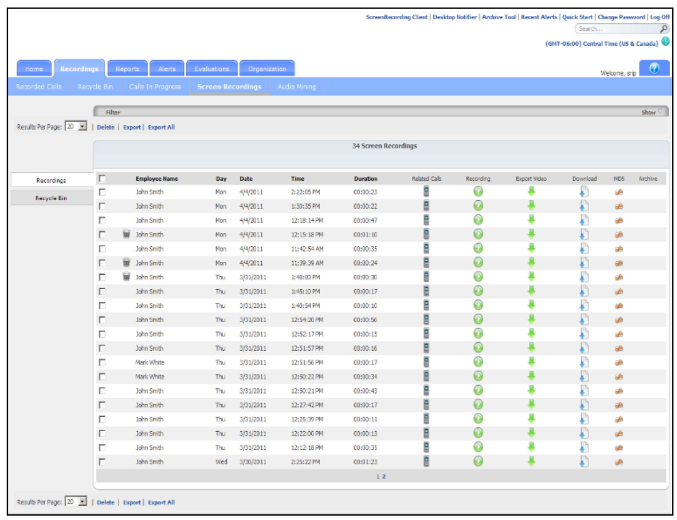
3. Select the screen recording(s) you wish to recover by clicking in the corresponding option box to the left of the Number column.



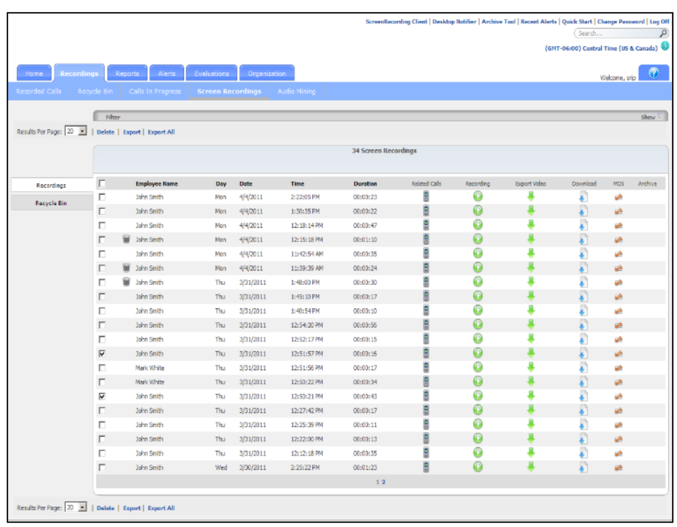
4. Select the **Recover Selected Recordings** link at the top or bottom of the Recycle Bin tab.



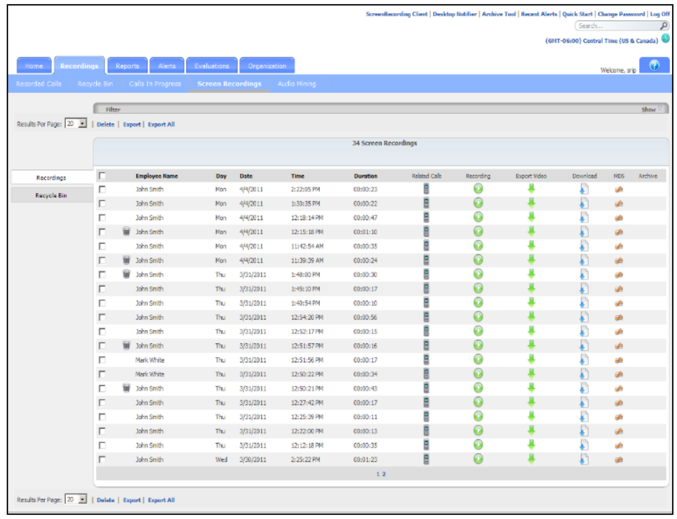
5. Click the **Screen Recordings** tab.



6. Select the recovered screen recordings by clicking in the corresponding option box to the left of the Number column.

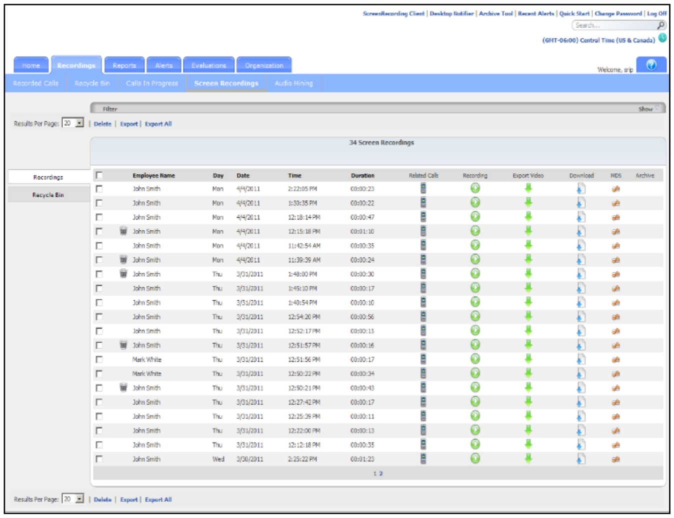


7. Select the **Delete** link at the top or bottom of the Recordings page. Notice that a (Calls in Recycle Bin) icon appears next to the deleted calls indicating that the calls are now in the Recycle Bin.

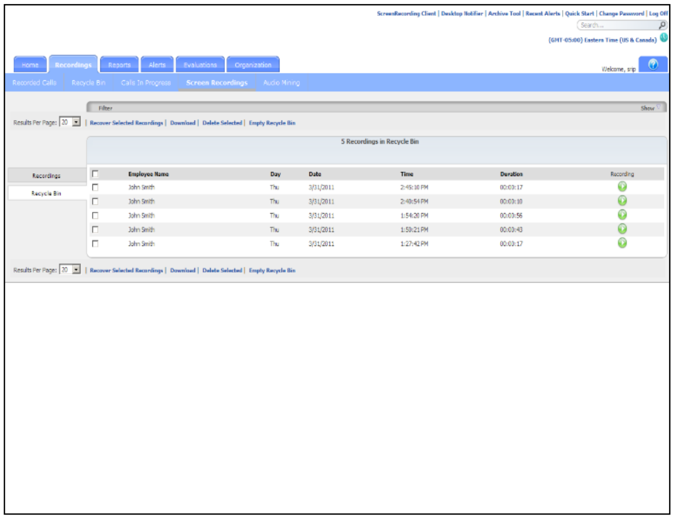


Example: Deleting screen recordings – permanently

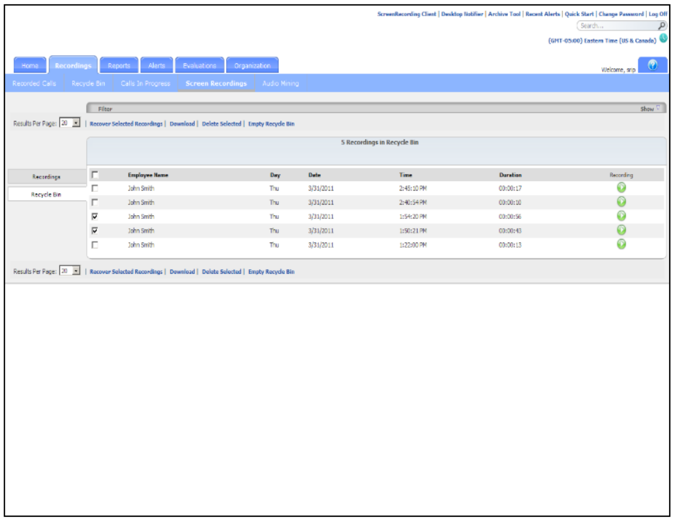
1. Click the **Recordings** tab and select **Recycle Bin**.



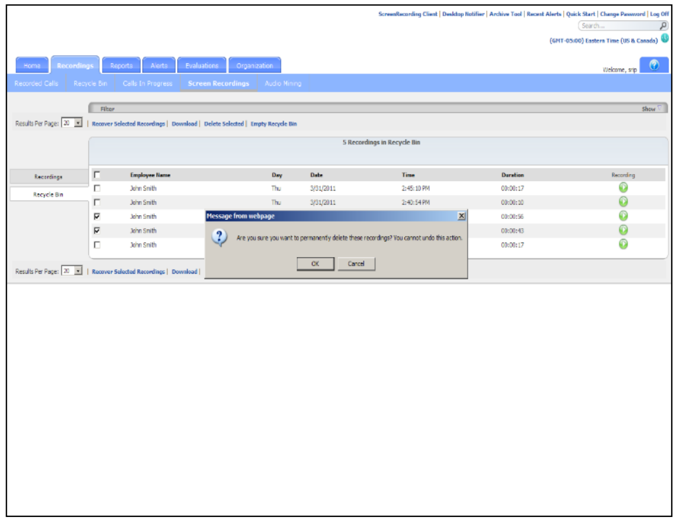
2. Click the **Screen Recordings** tab to ensure that you are looking at the list of deleted screen recordings.



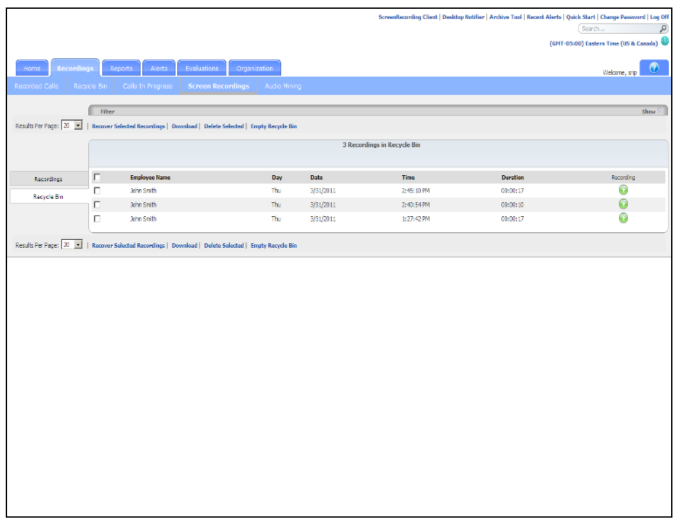
3. Select the screen recording(s) you wish to delete by clicking in the corresponding option box to the left of the Number column.



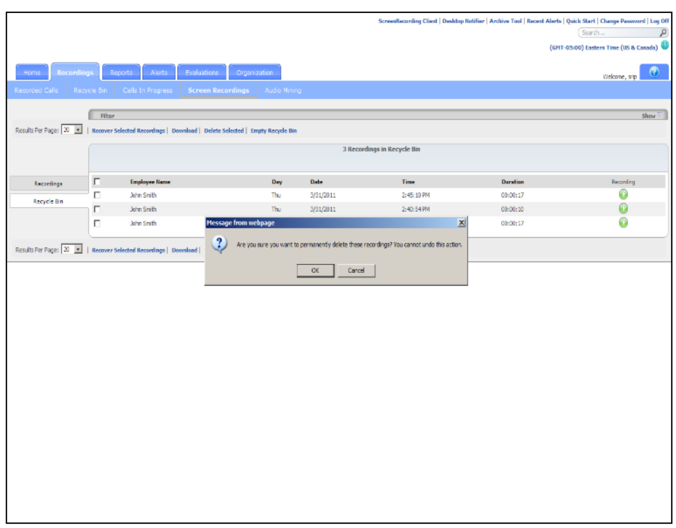
4. Select the **Delete Selected** link at the top or bottom of the Recycle Bin page.



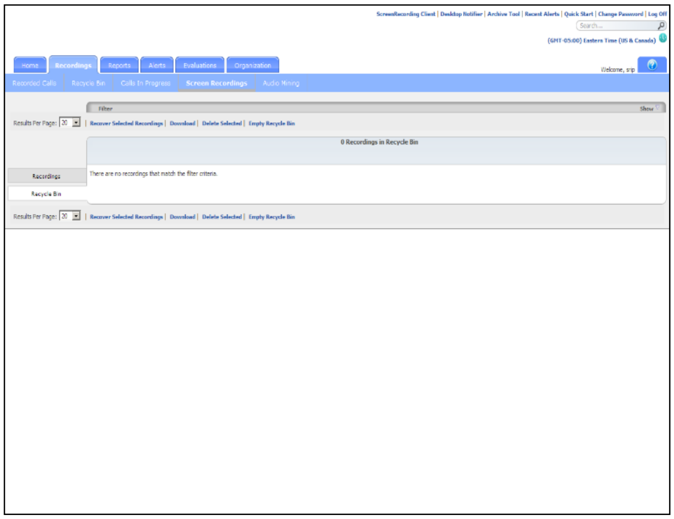
5. Click **OK**.



6. Select the **Empty Recycle Bin** link at the top or bottom of the Recycle Bin page.



7. Click **OK**.



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Audio Mining

Audio mining allows the user to enter key terms and phrases (speech packs) that the system searches recorded calls for and presents the results (phrases) in order of relevance. When the recorded call terminates, the system examines each call phonetically and records the phonetic patterns. The phonetic patterns are matched to the search terms or phrases and presented to the user.

Audio mining is only available to Groups and Subscribers that have been allocated the Audio Mining Basic and/or Audio Mining Advanced feature(s). The Audio Mining Basic feature only returns active speech packs with a maximum threshold of 25 phrases. Speech packs that exceed the 25 phrase maximum threshold are considered advanced speech packs and are only available if the Audio Mining Advanced feature is allocated. While it is permitted, having both Audio Mining Basic and Audio Mining Advanced assigned will require two feature licenses.

Note: If only Audio Mining Basic is allocated and the speech pack has more than 25 phrases, no results will be returned.

There are two phases to audio mining: creating and releasing the speech packs and assigning the released audio mining packs as a filter to the recorded calls.

The Audio Mining dashboard provides summary statistics about matched calls. The following information is available from the Audio Mining dashboard:

- Audio Mining Pack Trends - displays the audio mining packs that matched calls, for a specific period of time
- Audio Mining Pack Statistics - identifies the percentage of calls and actual call count that match the audio mining pack and the average, maximum, and minimum duration of those calls
- Top 10 Phrase Statistics - displays the top 10 phrase statistics based on the highest number of number of times the phrase was found in a call as well as the average, maximum, and minimum confidence scores
- First Call Resolution - identifies the number of follow up calls that were made in order to match the audio mining pack
- Call Handler Trends by Pack - displays the number of audio mining packs that matched a call, by call handler
- Pack Correlation - identifies the average number of times an audio mining pack matches a call

In order for the Audio Mining feature to work, users must add and release audio mining packs. Once an audio mining pack is added and released, it will then be available from the filtering tab to assign to recorded calls.

Note: The system default is 3 audio mining packs per Group Administrator. Therefore, any users that are under that Group Administrator must share the default limit of 3 audio mining packs.

To create a new audio mining pack, begin by selecting the (Add) button. The audio mining pack appears under the hierarchy and the New Audio Mining Pack dialog appears. Enter a more meaningful name for the audio mining pack and click Save. Click on Default (Or Operation) located under your new audio mining pack and enter or select the following information:

- Operation - this is an And or Or clause that defines the search criteria

  Note: The And operation supports two modes: any order and sequential matches. The default mode is any order. For a sequential match to work, the search must be successful, within a specific and configurable time proximity, and within the order as entered in the Operation.

- Operation Name - enter a meaningful name for the operation

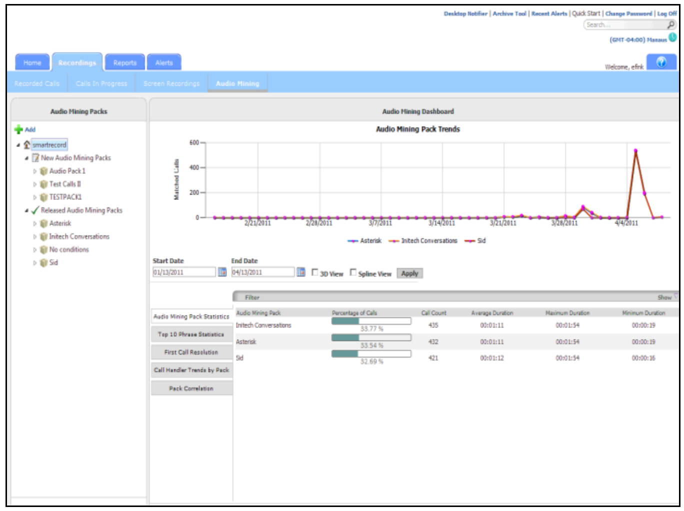
If applicable click the Add And (Match All) Operation or Add Or (Match One) Operation link(s) to add additional operations to the audio mining pack. Or, click Add Phrase to add a phrase to search for. Click Save.

In order to apply the audio mining pack to recorded calls and return results, it must first be released in the system. Release an audio mining pack by selecting the specific pack and clicking the ✓ (Release) button. The audio mining pack will appear under the Released Audio Mining Packs section of the hierarchy.

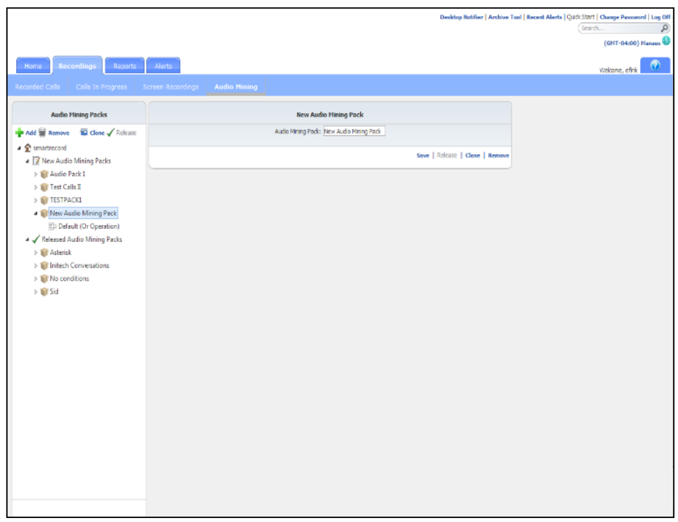
Once audio mining packs are released, they become available as a filter under Recorded Calls. This is where users apply an audio mining pack to the recorded calls in order to return the desired search results. To apply an audio mining pack to a recorded call as a filter, click on the Recordings tab and select Recorded Calls. Expand the Filter toolbar by clicking once on it. Click on the Filter toolbar to expand it and select the By Audio Mining Pack tab. Select the audio mining pack from the Audio Mining pack drop down list. This is the audio mining pack that will be applied to the recorded calls. If applicable, enter the minimum confidence score that you would like to apply to the filter. The only return calls which have been searched and do not match the audio mining pack option will return the recorded calls that do not have the word and/or phrase contained in the selected audio mining pack. Click Apply Changes. An icon will appear under the Audio Mining tab for each recorded call that matched the criteria. A number will appear to the right of the icon displaying the Maximum Confidence score for the returned results. Click on the Audio Mining icon to view the results of the search.

Example: Creating a new audio mining pack

1. Click the **Recordings** tab and select **Audio Mining** to ensure that you are looking at the list of audio mining packs.

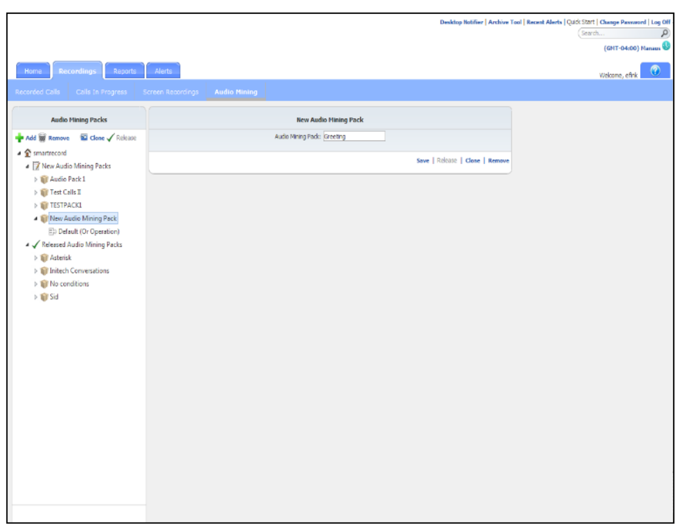


2. Select the (Add) button.

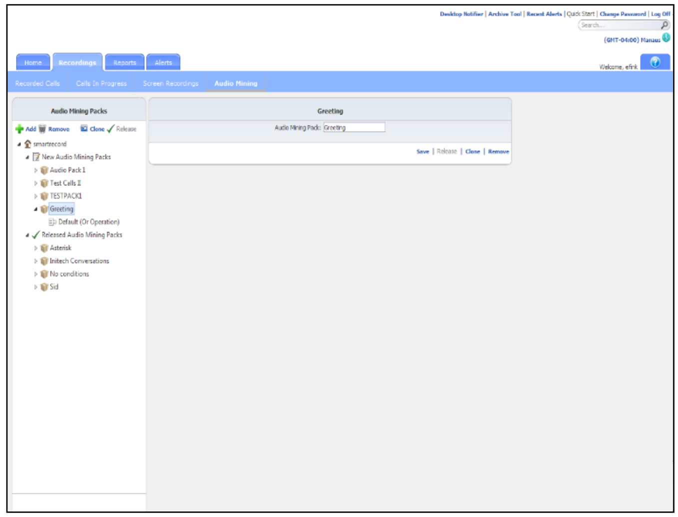


3. Enter or select the following information:

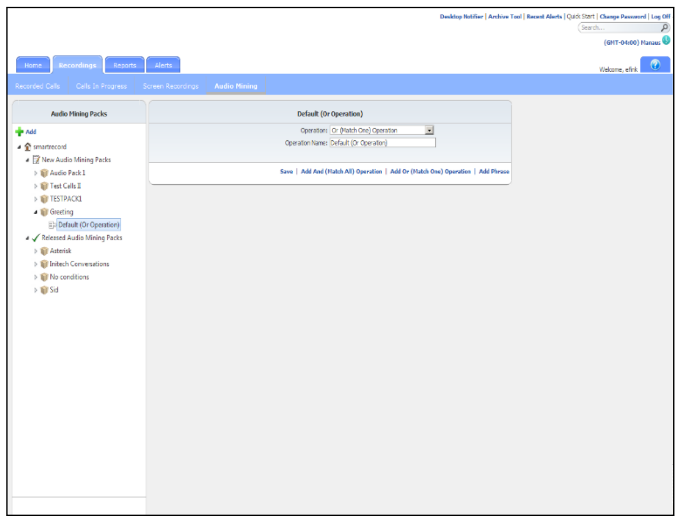
    - Audio Mining Pack - **Greeting**



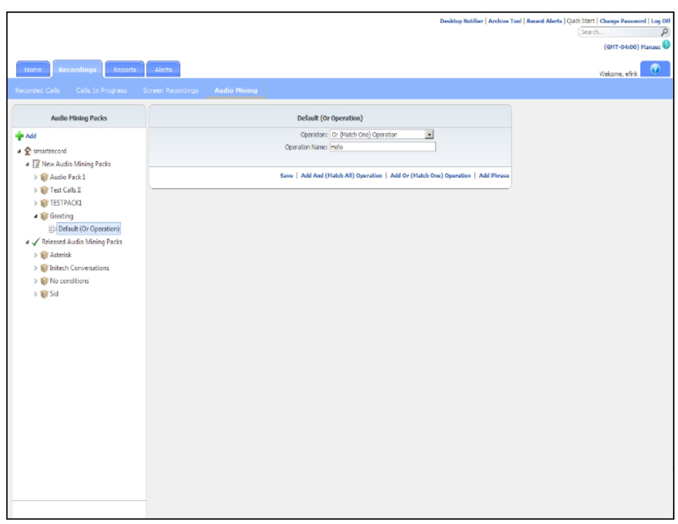
4. Click **Save**.



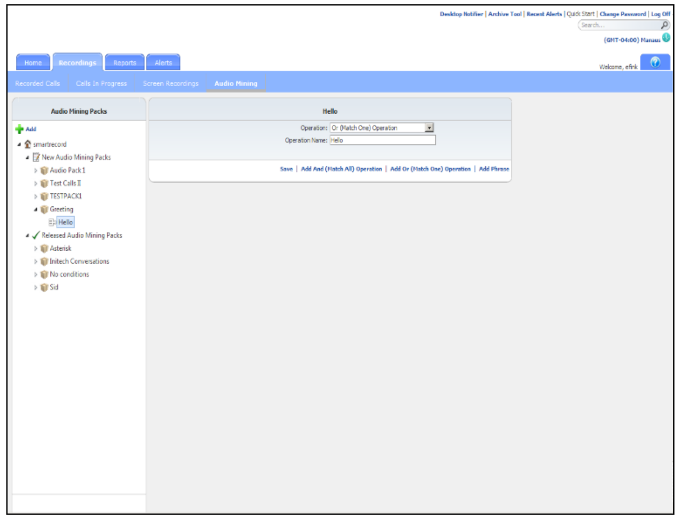
5. Click on **Default (Or Operation)** located under your new audio mining pack.



6. Enter or select the following information:
   - Operation Name - **Hello**

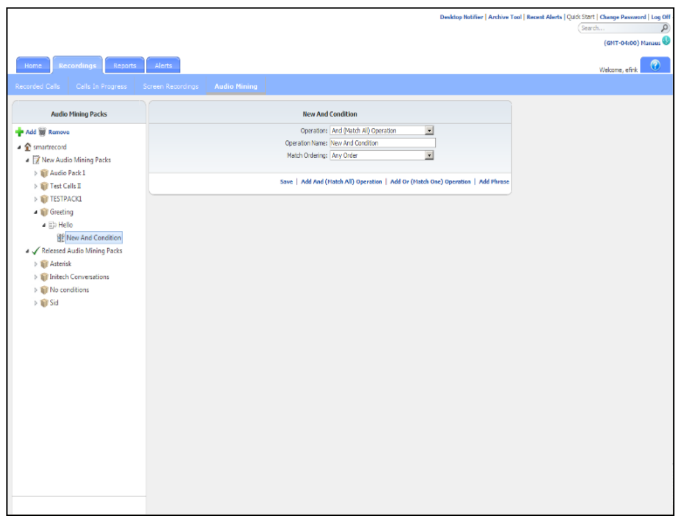


7. Click **Save**.



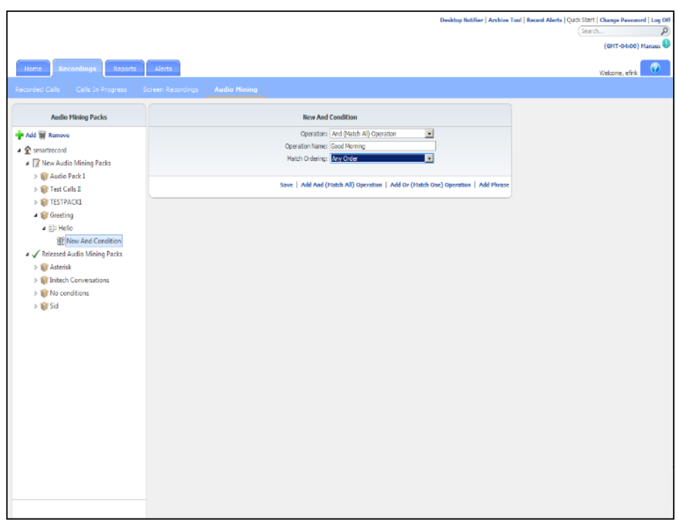
8. Click on **Add And (Match All) Operation**.

   Note: New operations can appear at the parent level or under any existing operation level in the audio mining pack. Depending on where you want it to appear, you may have to select a new level first.

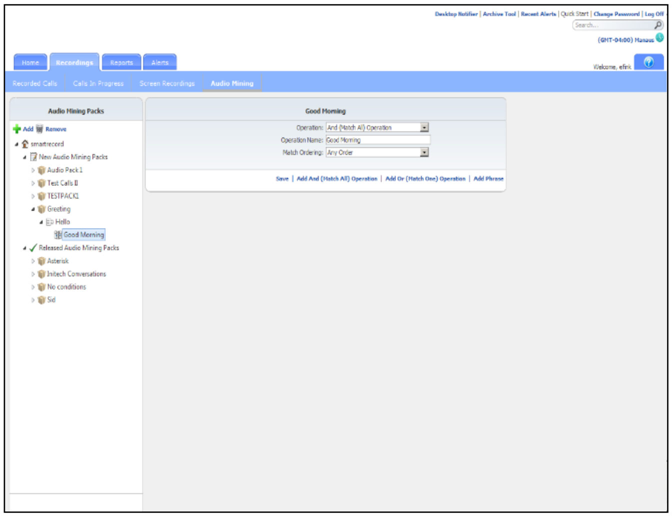


9. Enter or select the following information:

   - Operation Name – **Good Morning**
   - Match Ordering – **Any Order**

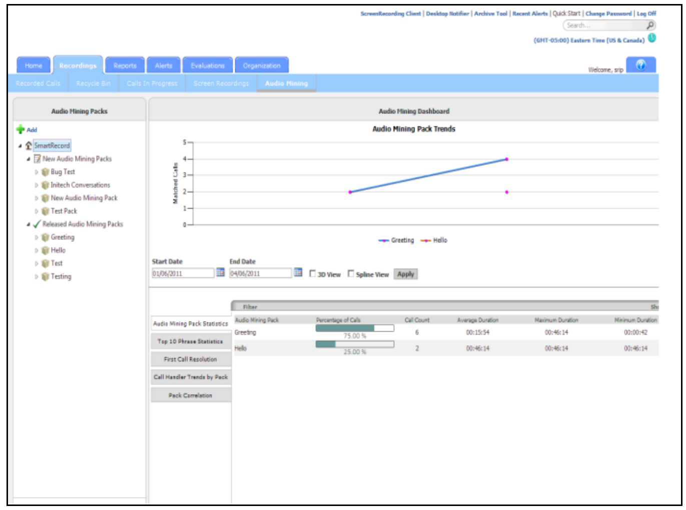


10. Click **Save**.

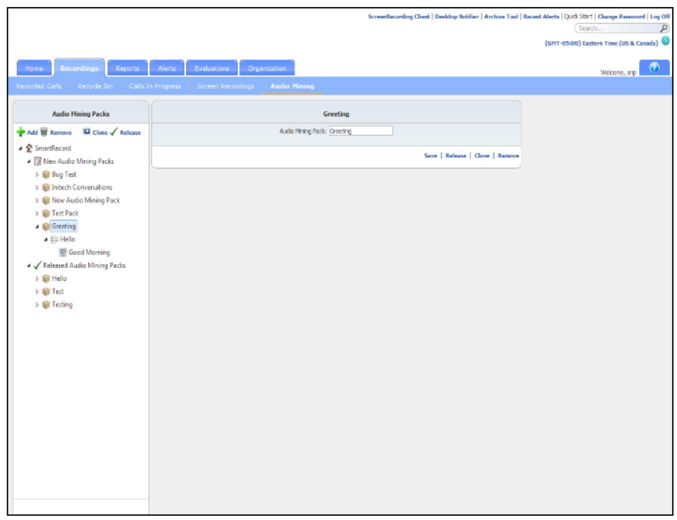


Example: Cloning an audio mining pack

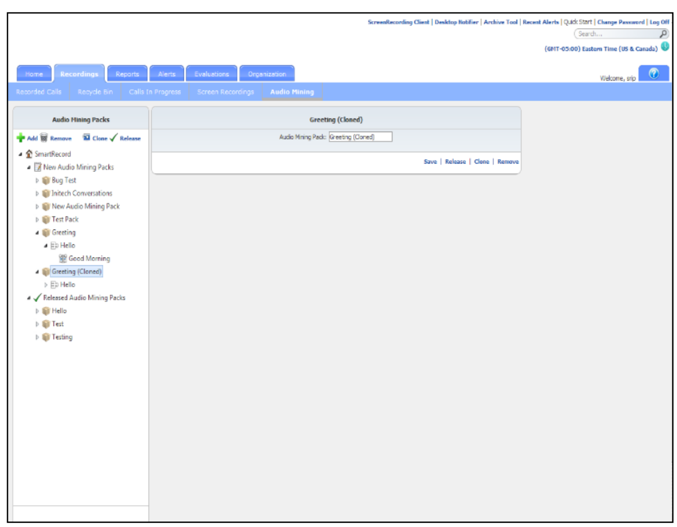
1. Click the **Recordings** tab and select **Audio Mining** to ensure that you are looking at the list of audio mining packs.



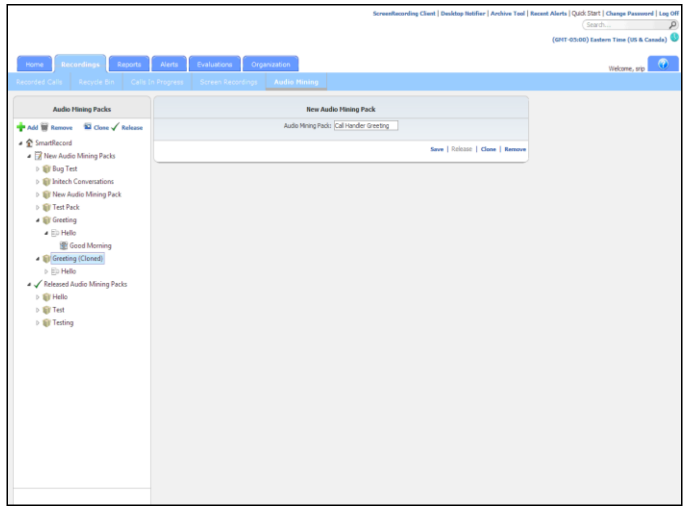
2. Select the audio mining pack that you want to clone by clicking on it in the hierarchy tree.



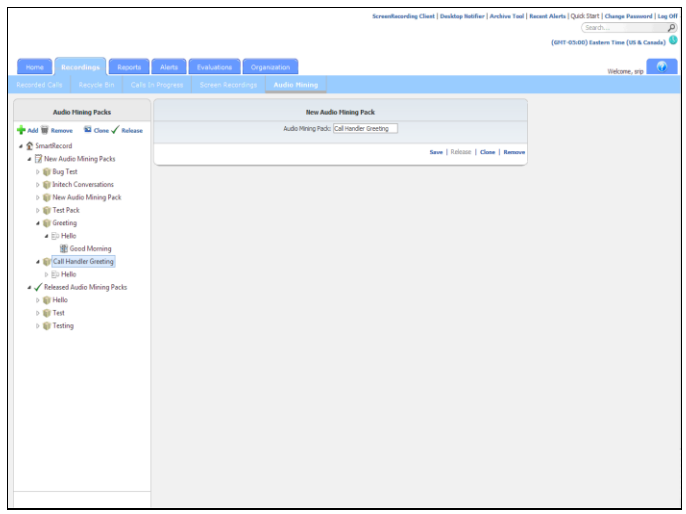
3. Select the (Clone) button or Clone link.



4. Enter or select the following information:
   - Operation Name – **Call Handler Greeting**

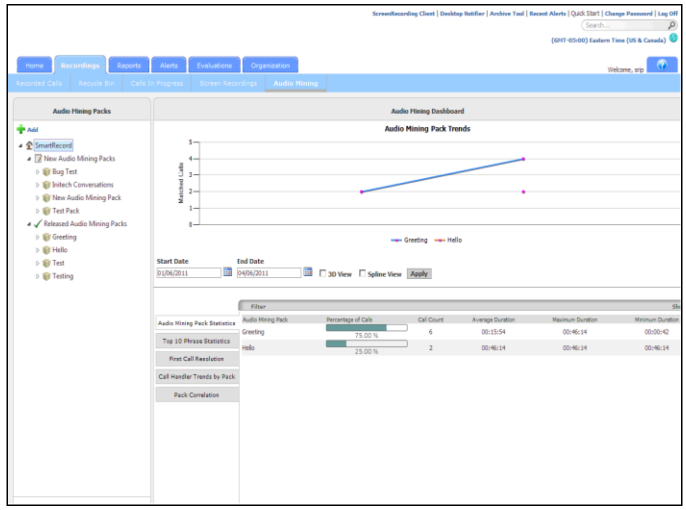


5. Click **Save**.

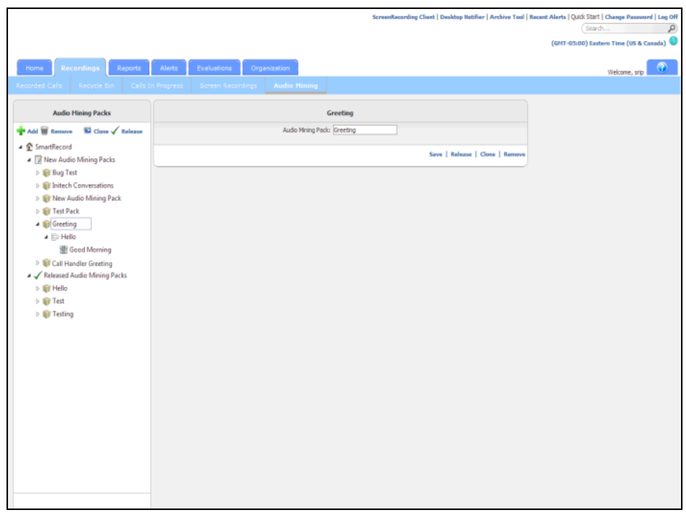


Example: Releasing an audio mining pack

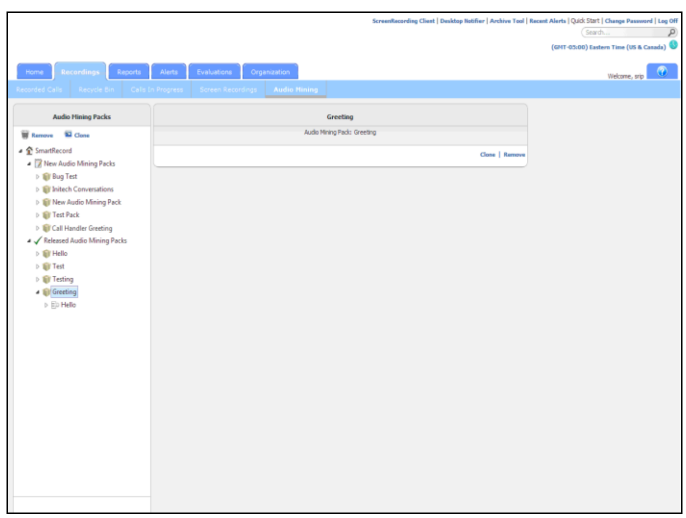
1. Click the **Recordings** tab and select **Audio Mining** to ensure that you are looking at the list of audio mining packs.



2. Select the audio mining pack that you want to release by clicking on it in the hierarchy tree under New Audio Mining Packs.

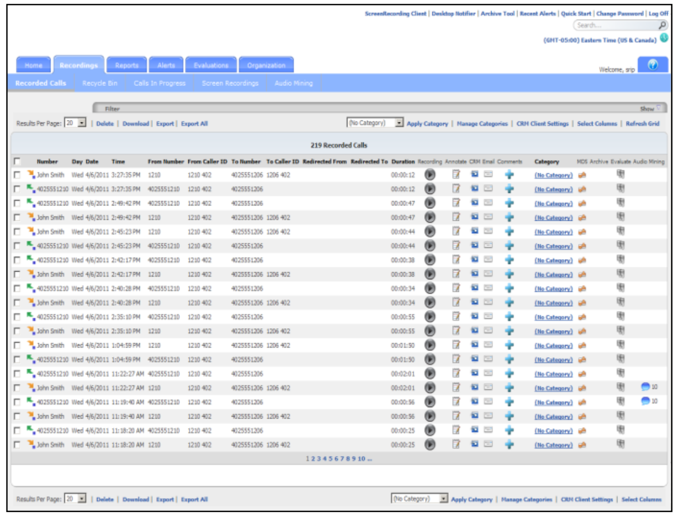


3. Select the (Release) button or click the Release link.

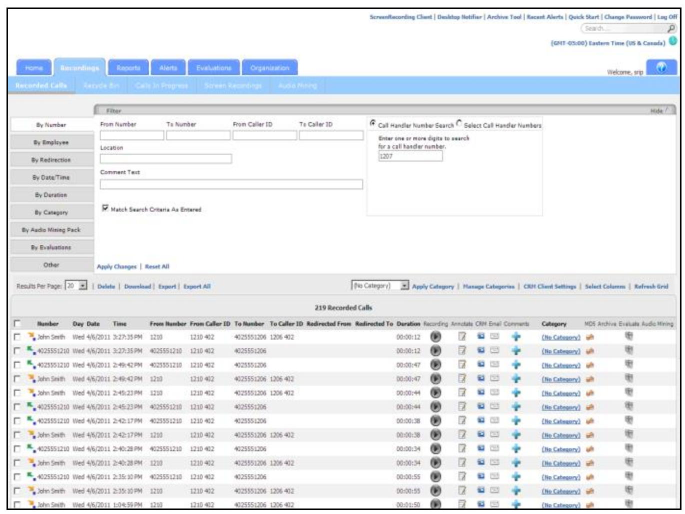


Example: Applying an audio mining pack

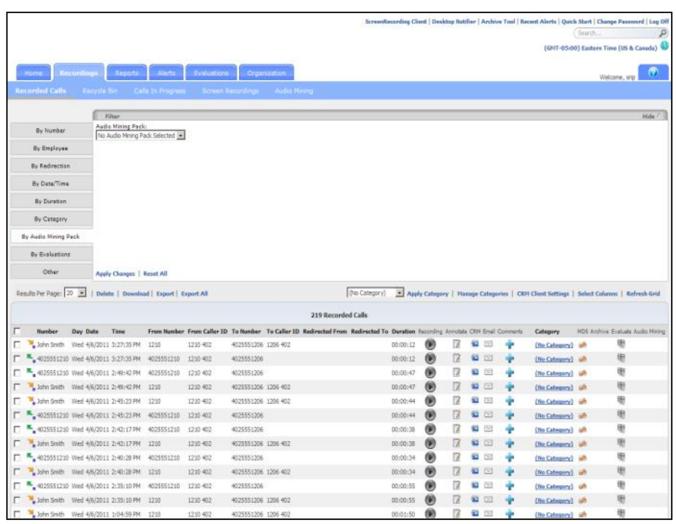
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



2. Click on the **Filter** toolbar to expand it.

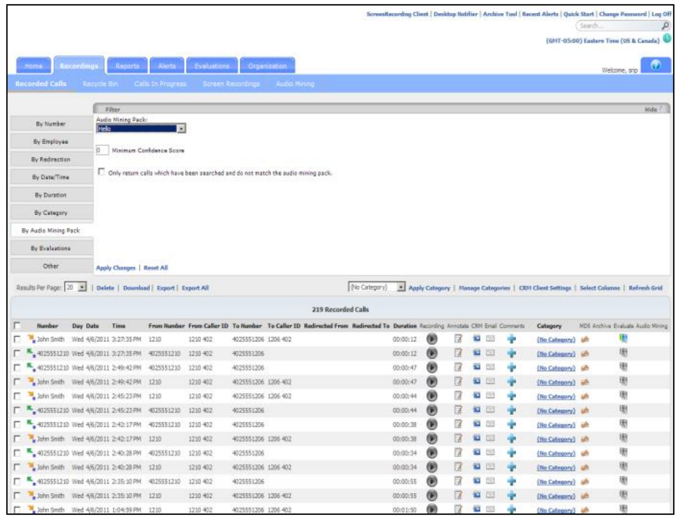


3. Select the **By Audio Mining Pack** tab.

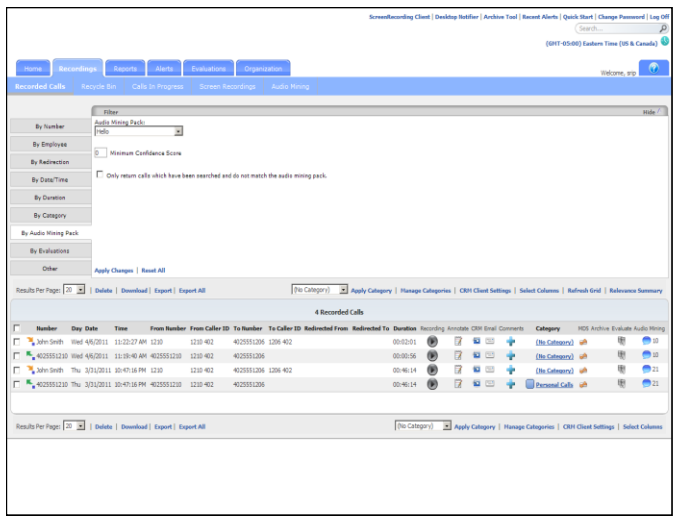


4. Enter or select the following information:

    - Audio Mining Pack – **Greeting (or any other that shows up in the list)**

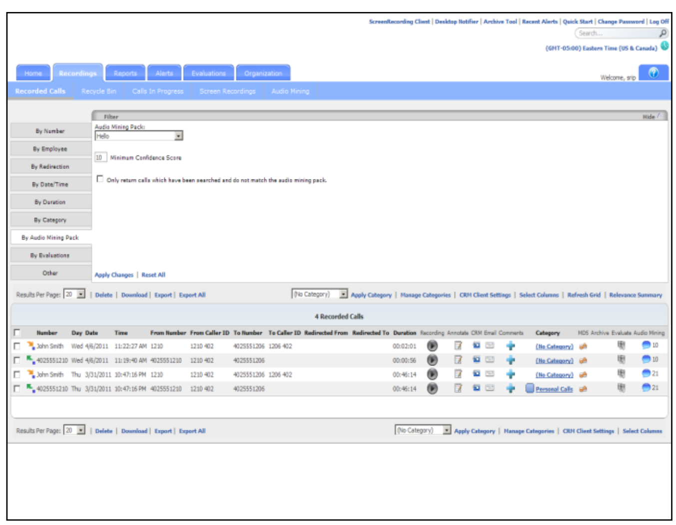


5. Click **Apply Changes**.

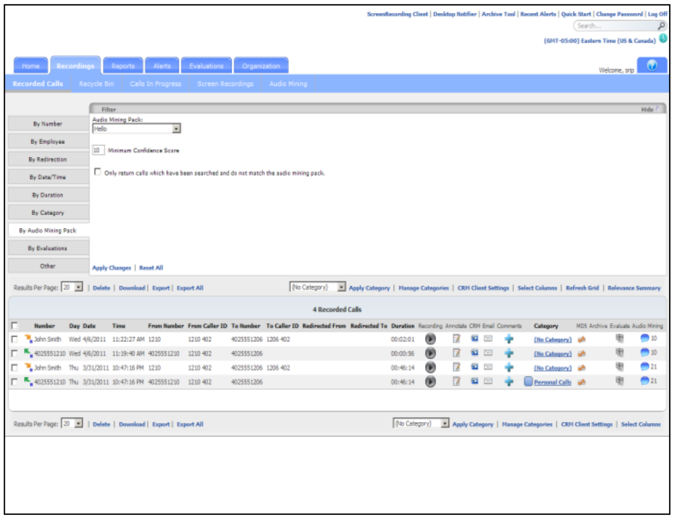


6. Enter or select the following information:

    - Minimum Confidence Score - **10**

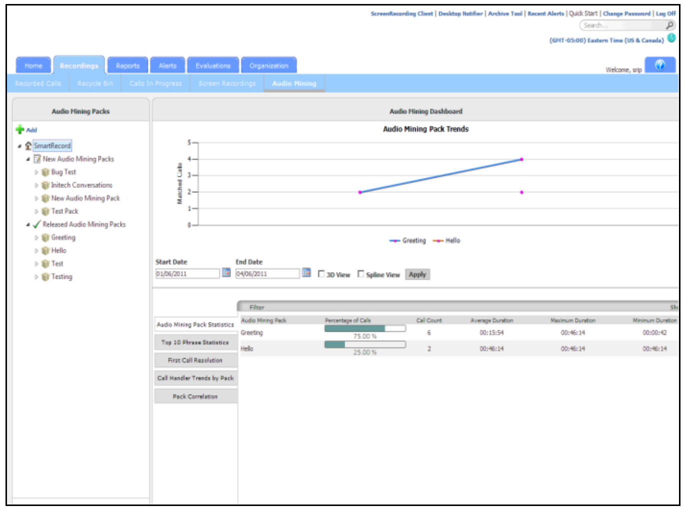


7. Click **Apply Changes**.



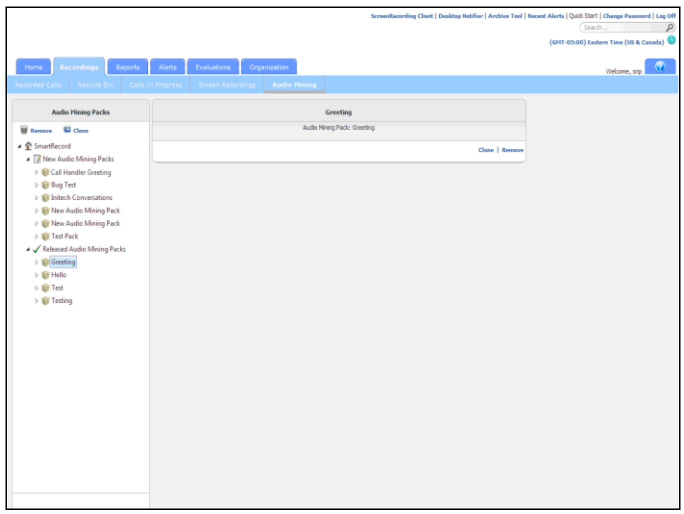
Example: Deleting an audio mining pack

1. Click the **Recordings** tab and select **Audio Mining** to ensure that you are looking at the list of audio mining packs.

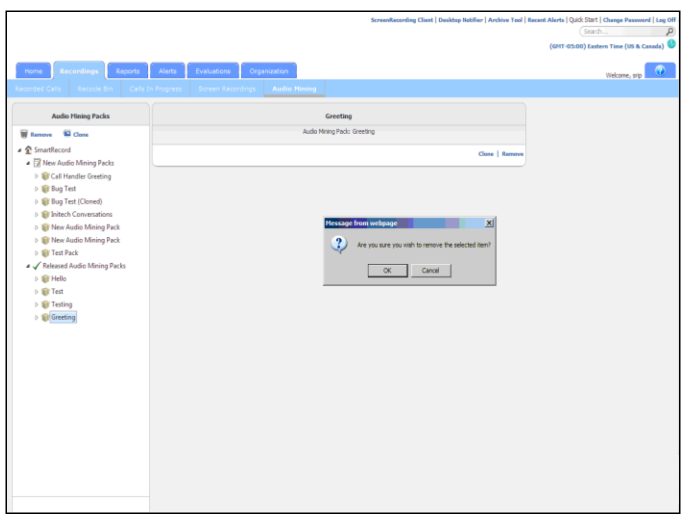


2. Select the audio mining pack that you want to delete by clicking on it in the hierarchy tree.

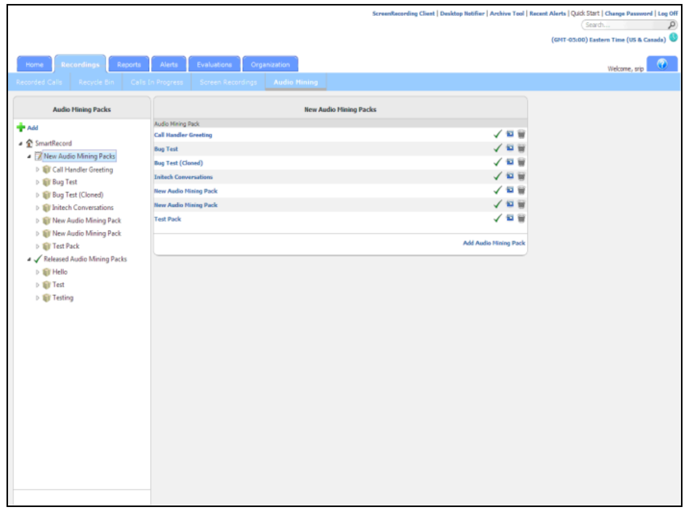
Note: Both new and released audio mining packs can be deleted from the hierarchy tree.



3. Select the  (Remove) button or click the Remove link.



4. Click **OK**.


ScreenRecording Client | Desktop Notifier | Archive Tool | Recent Alerts | Quick Start | Change Password | Log Off
Search...
(GMT-05:00) Eastern Time (US & Canada)
Home
Recordings
Reports
Alerts
Evaluations
Organization
Welcome, srip
Recorded Calls
Recycle Bin
Calls In Progress
Screen Recordings
Audio Mining
Audio Mining Packs
Add
SmartRecord
New Audio Mining Packs
Call Handler Greeting
Bug Test
Bug Test (Cloned)
Initech Conversations
New Audio Mining Pack
New Audio Mining Pack
Test Pack
Released Audio Mining Packs
Hello
Test
Testing
New Audio Mining Packs
Audio Mining Pack
Call Handler Greeting
Bug Test
Bug Test (Cloned)
Initech Conversations
New Audio Mining Pack
New Audio Mining Pack
Test Pack
Add Audio Mining Pack

Messages

When logged in as the Group Administrator, the Messages screen displays all completed SMS/MMS recordings for all Users that have been created by you. 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 Messages screen:

- Number – the number or description associated with the message
- Message – displays a preview of the message content (messages in green are outbound and messages in white are inbound)
- Day – the day of the week the message occurred
- Date – the actual date the message occurred
- Time – the time the message originated
- From Number – the originating number
- From Name – displays the name or number of the person that originated the message, if caller ID is available
- To Number – the terminating number
- CRM – allows the user to upload messages to an interfaced CRM systems such as Sugar and Salesforce.com through the standard API
- Email – allows the user to email a recorded message
- Comments – any comments associated with the recorded message
- Category – allows the user to categorize messages into areas unique to their business (for example: geographic region or customer satisfaction)

If there are any attachments associated with a message, the Attachments ( ) icon appears under the Message colulmn. Click the icon to view a list of attachments or to download an attachment. Additionally, if there are any messages "related" to this particular message, they are available by clicking on the Related Messages ( ) icon. Users are able to download or email messages from the Related Messages dialog.

When numbers are assigned to Users, the default setting is to record and retain all messages 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 messages are being recorded and retained, the message preview will appear under the Message column. To view the message, click the message file bubble. To view any related messages, click the Related Messages link.

Note: Group Administrators will see message for all numbers assigned to Users they have created.

You have the option to upload messages from the Messages tab to a CRM application. This functionality allows you to connect the recording system with CRM applications such as Sugar or Salesforce.com to upload message files.

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 message to a CRM, select CRM Client Settings link. The CRM Client Settings link can be accessed from the toolbar on the Messages 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 confirmation 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 message that you want to upload.

Note: The number of the message 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 associate the message with does not appear, enter new criteria in the CRM Search field and click Search. If multiple contacts, accounts, or cases are returned, deselect the ones you don't need by clicking in the option boxes to remove the checkmark. Enter a subject and a note about the message and click Archive to CRM.

Additionally, situations will occur where you need to send a specific message to a person that may not have access to the application or just for emphasis. In these instances, you have the ability to email the message to that recipient. To send a message file via email, select the (Email button) that corresponds to the message that you want to send. A new email page will open with the message link displayed in the text area. Select your recipients and send the email.

Note: There will not be an email option for any messages that have been deleted.

From the Messages screen you can also add comments to a message. A (Add Comment button) indicates there are currently no comments associated with the corresponding message. A button indicates there are currently comments associated with the corresponding message. To add comments to a message, 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 button.

The ability to create categories for messages is beneficial to call handlers and managers, allowing them to categorize messages into areas unique to their business (for example: geographic region or customer satisfaction). Users are then able to filter calls or run reports based upon these call categories. Multiple categories can be assigned to a message file. Click on the Category link and select the specific category from the drop down list. Repeat this as necessary for each category you wish to apply to a message file.

Note: Categories are specific to the user. Therefore, the categories that you create and assign to your message files cannot be seen by other users.

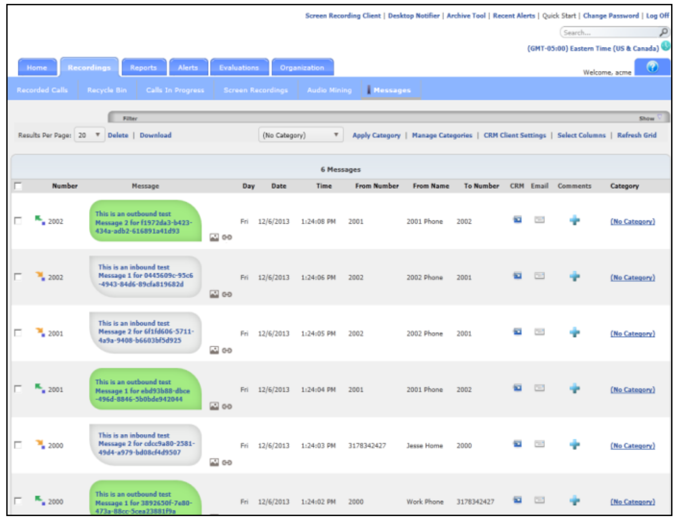
Number, Employee, Date/Time, Category, or Other (or a combination of all) filters located below the Recorded Calls, Recycle Bin, Calls in Progress, Screen Recordings, and Messages navigation tabs can be applied to the screen to assist in searching and displaying only the information pertinent to your current needs. Select the filter you wish to apply by clicking on Filter and then selecting the Number, Employee, 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.

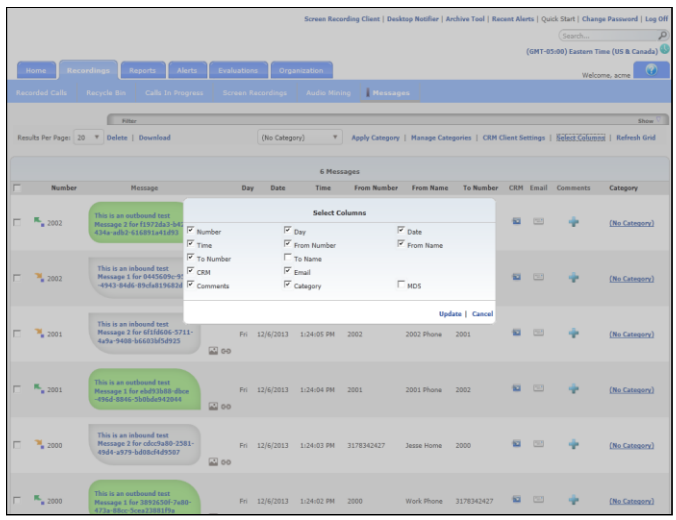
Note: You do not have the option to filter by category under the Reports tab.

Example: Managing the Messages tab columns

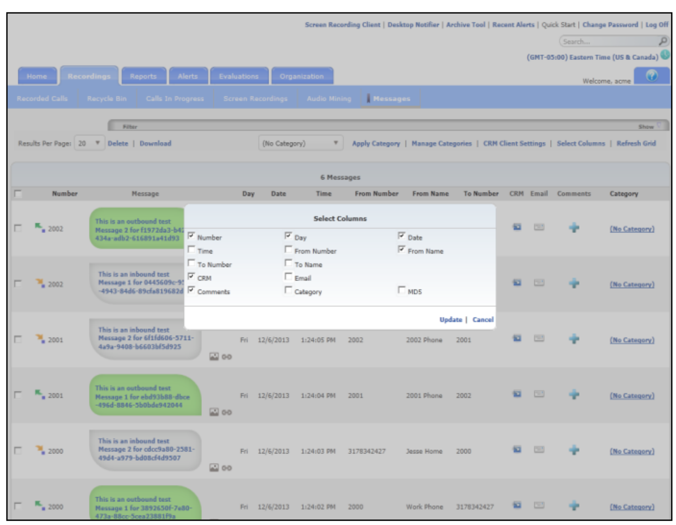
1. Click the **Recordings** tab and select **Messages** to ensure that you are looking at the list of message files.



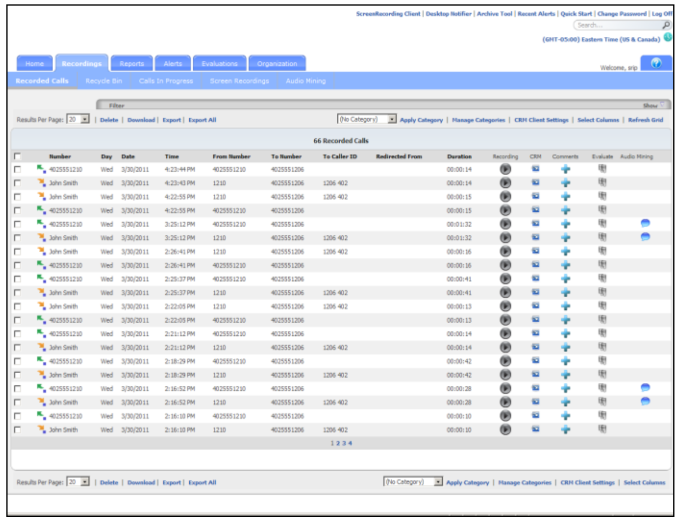
2. Select the **Select Columns** link at the top or bottom of the Recorded Calls page.



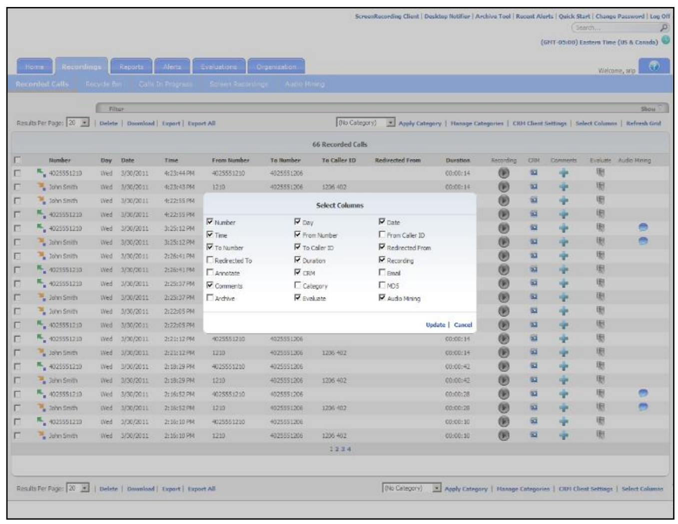
3. Select the following option boxes (this action will either insert or remove a check mark from the option box):
   - **Time**
   - **To Number**
   - **Category**
   - **From Number**
   - **Email**



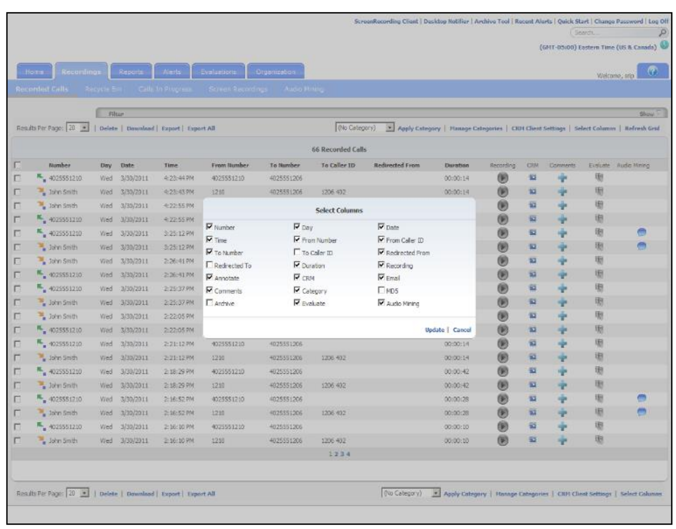
4. Select the **Update** link.



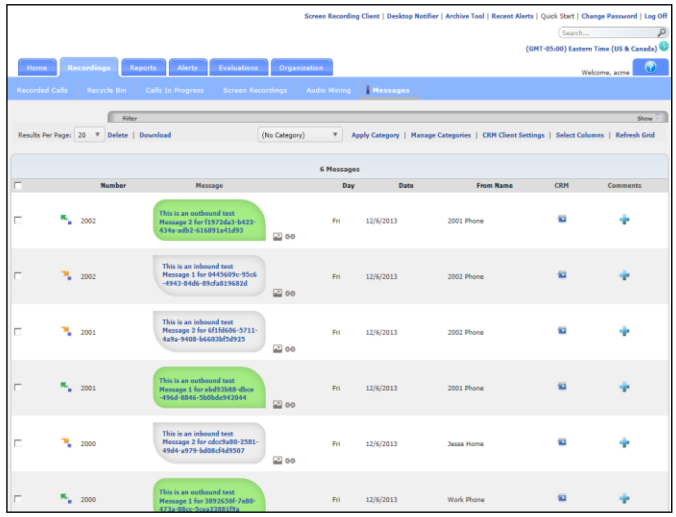
5. Select the **Select Columns** link at the top or bottom of the Recorded Calls page.



6. Select the following option boxes (this action will either insert or remove a check mark from the option box):
   - **Annotate**
   - **To Caller ID**
   - **Category**
   - **From Caller ID**
   - **Email**

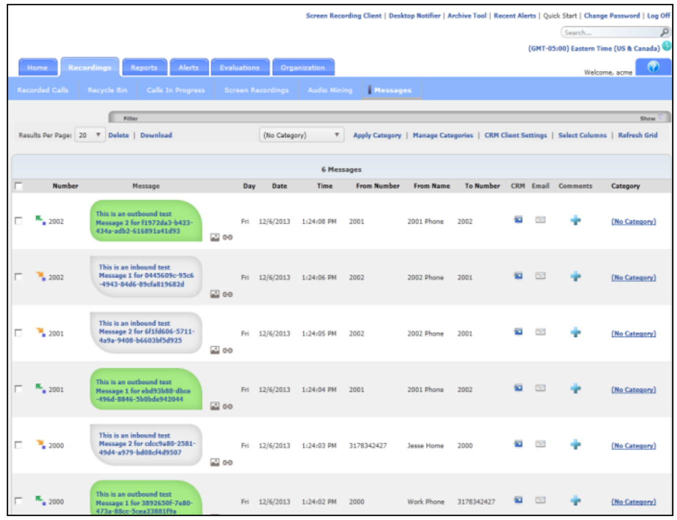


7. Select the **Update** link.

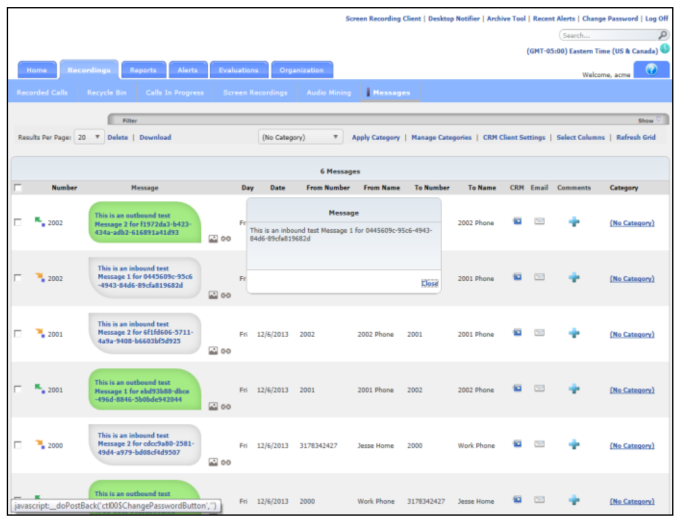


Example: Viewing messages & message attachments

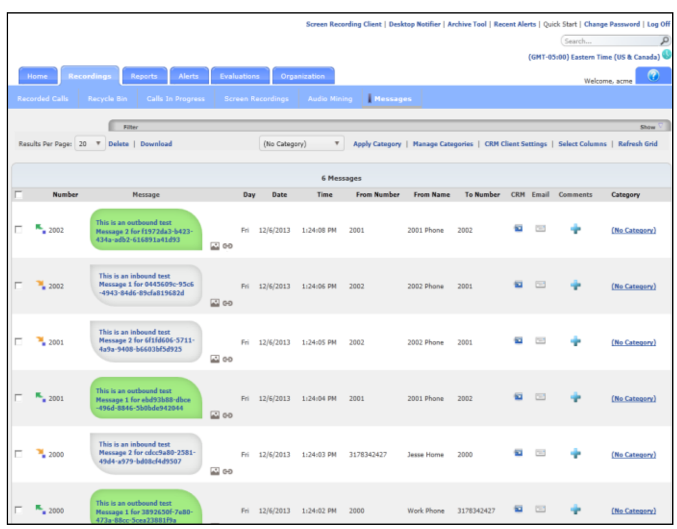
1. Click the **Recordings** tab and select **Messages** to ensure that you are looking at the list of message files.



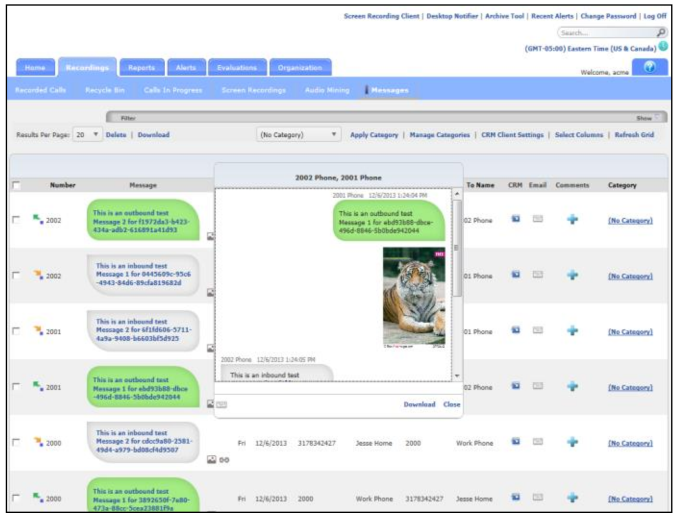
2. Select a message file and click on the message preview.



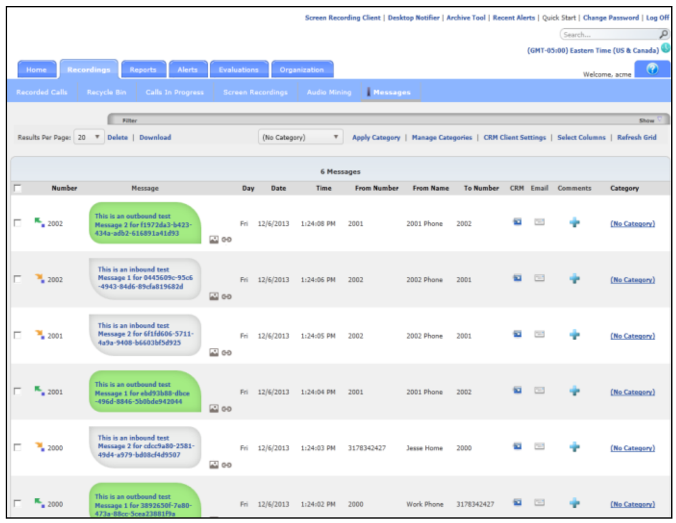
3. Click **Close** to return to the Messages screen.



4. Select a message file and click on the Related Messages (🔗) icon.



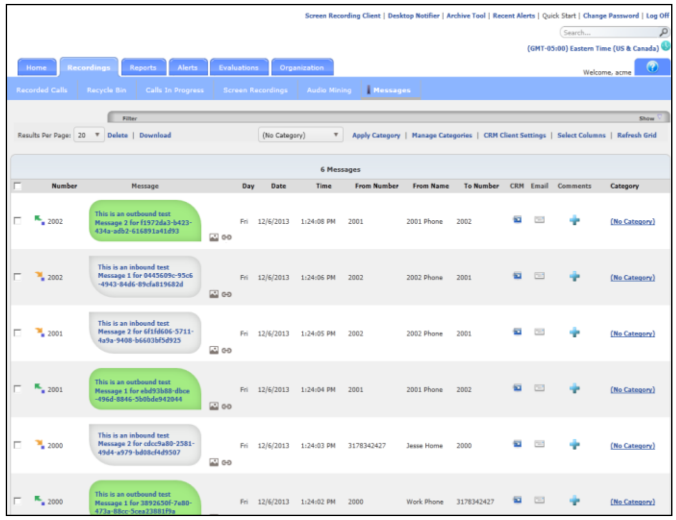
5. Click **Close** to return to the Messages screen.



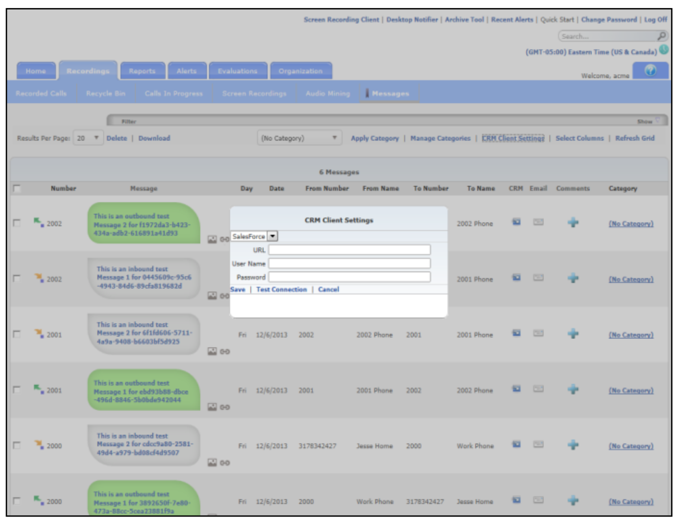
Example: Uploading a message files to a CRM

Note: If your company does not interface with a CRM application, this use case will not apply.

1. Click the **Recordings** tab and select **Messages** to ensure that you are looking at the list of message files.

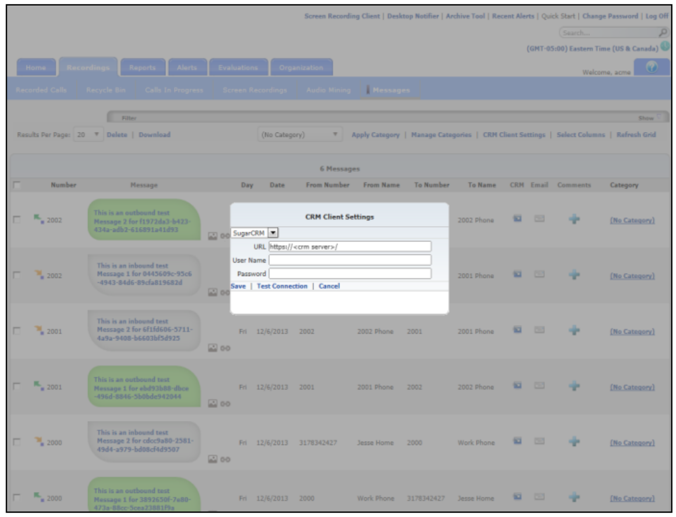


2. Click on the **CRM Client Settings** link found at the top or bottom of the Messages tab.



3. Select a CRM application from the drop down list.

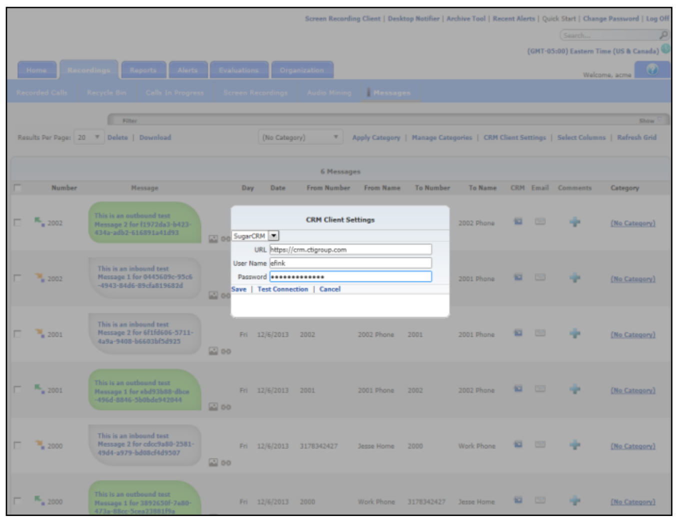
   Note: You can only have one active connection to a CRM application at a time. If you want to log into another CRM application, click CRM Client Settings, select the CRM application, and enter the credentials.



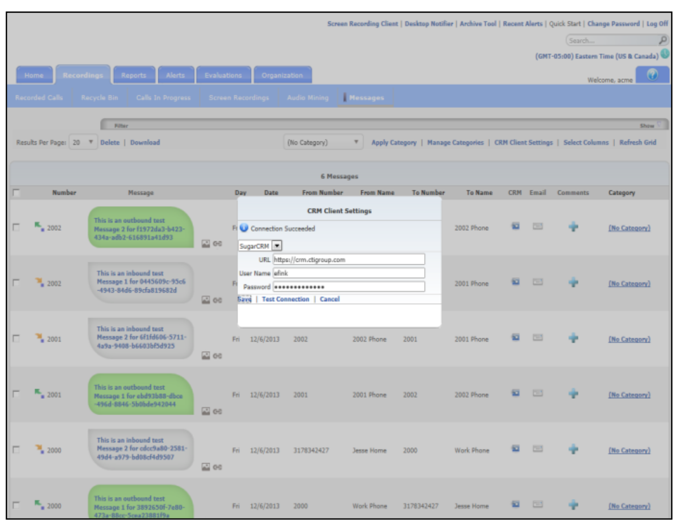
4. Enter or select the following information:

   - URL – **the URL where the CRM application is located**
   - User Name – **your user name used to access the CRM application**
   - Password – **your password used to access the CRM application**

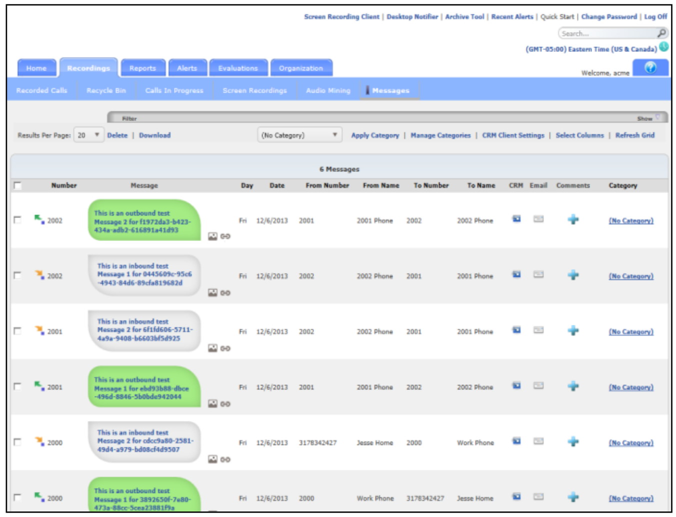
   Note: Once you have performed steps 3 & 4 the first time, you will not be asked to enter the information again.



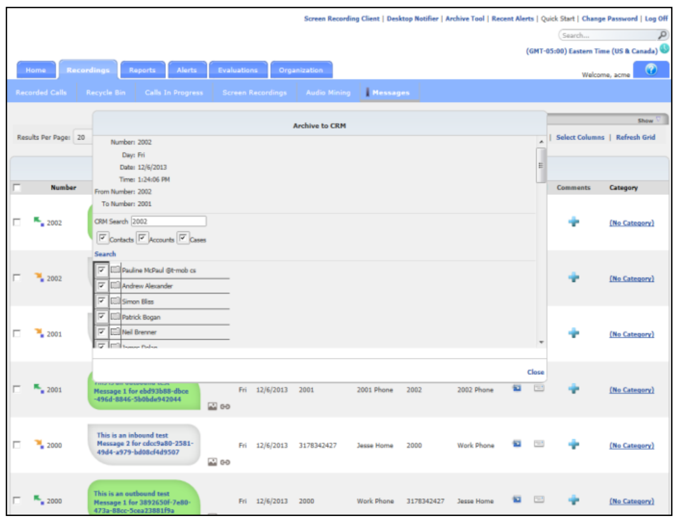
5. Click **Test Connection**.



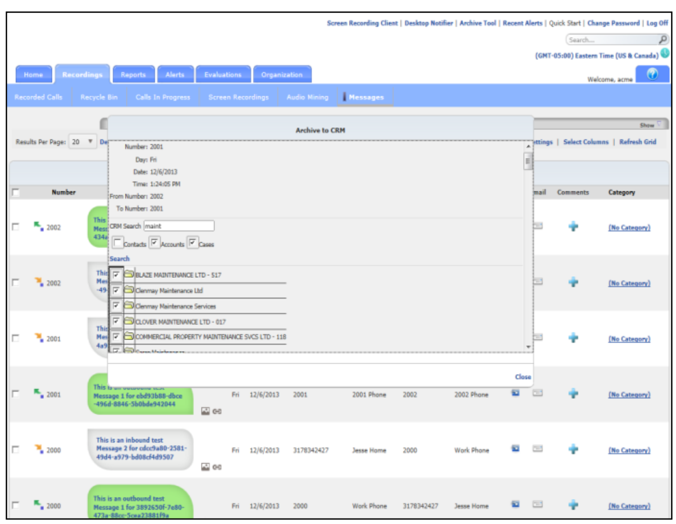
6. Click **Save** to save your credentials.



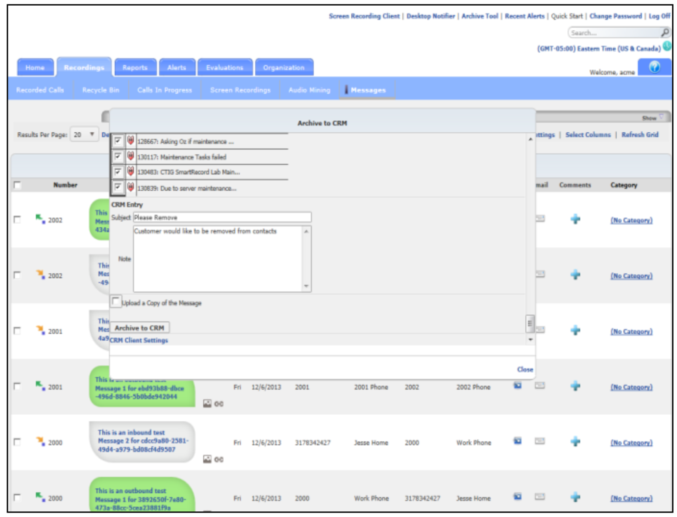
7. Select a message and click on the (CRM) button that corresponds to that message.



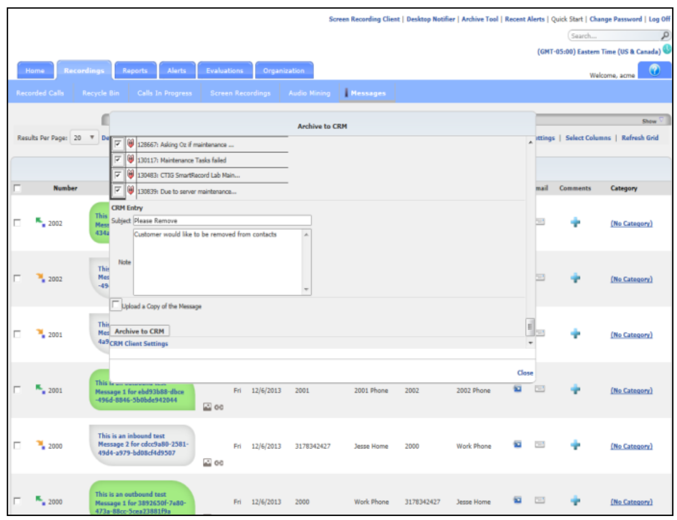
8. If applicable, enter new search criteria in the CRM Search field. Select or deselect Contacts, Accounts, or Cases depending on what you are searching for. Click **Search**.



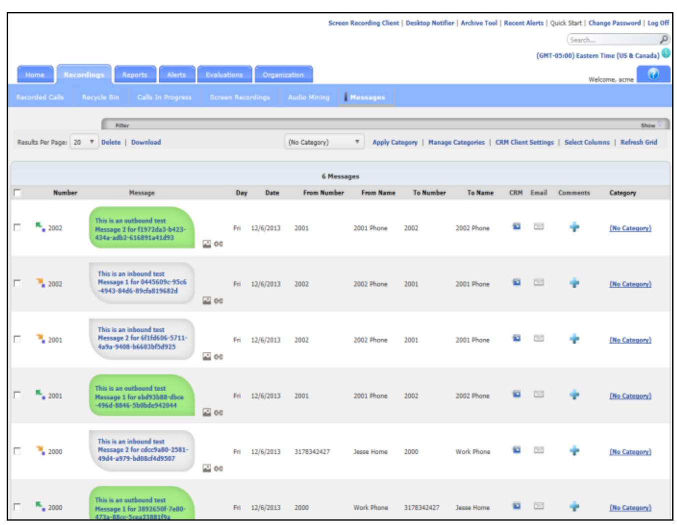
9. Enter the following information:
    - Subject – **Please Remove**
    - Note – **Customer would like to be removed from contacts**



10. Select **Archive to CRM**.

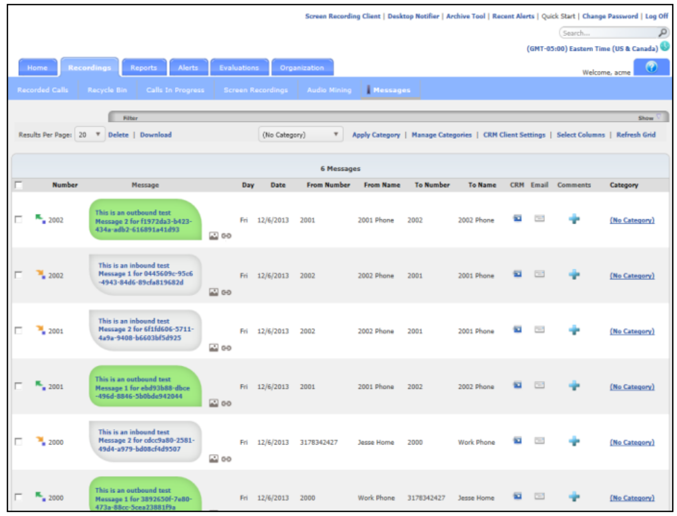


11. Select the **Close** link to close the CRM dialog box.

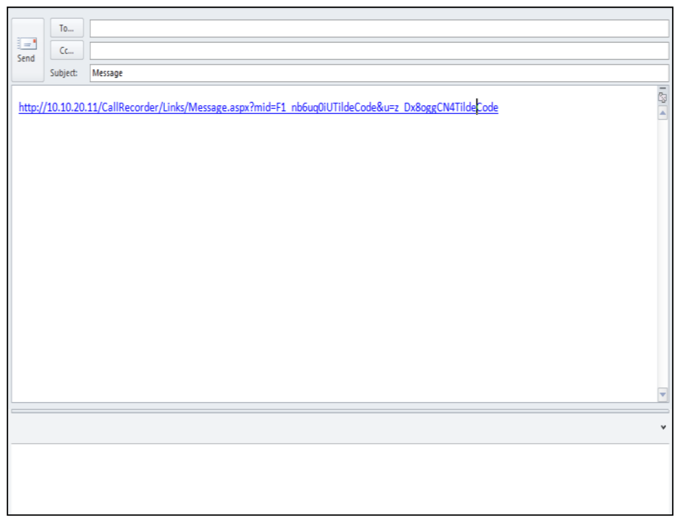


Example: Emailing a message

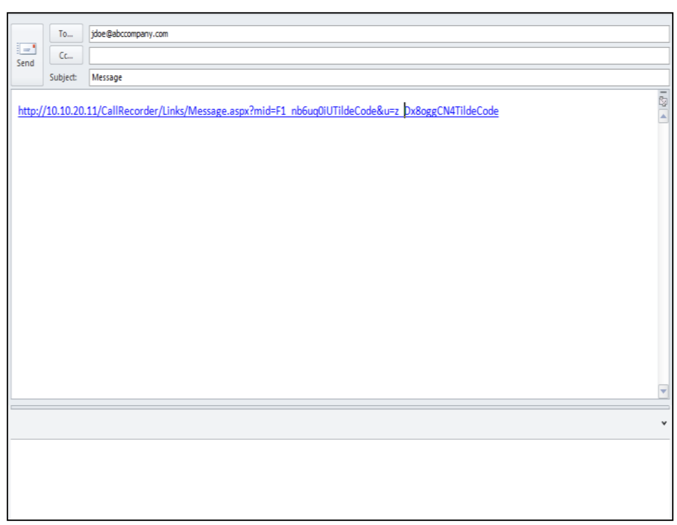
1. Click the **Recordings** tab and select **Messages** to ensure that you are looking at the list of message files.



2. Select a message and click on the (Email) button that corresponds to that message.



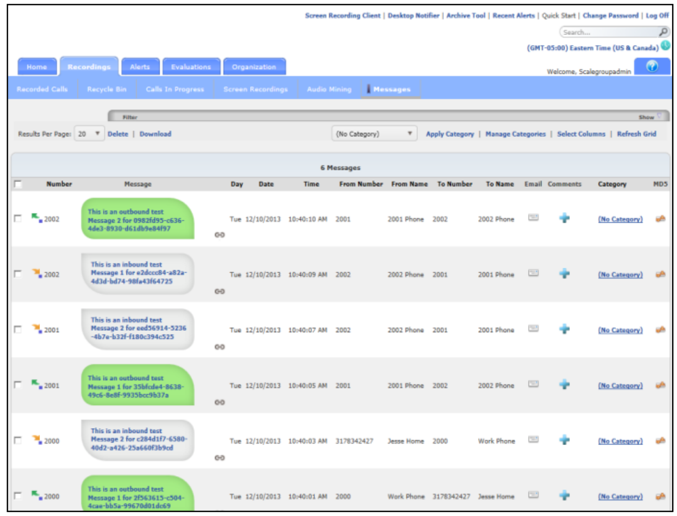
3. Enter the email address(es) of the person(s) to which you wish to send the message.



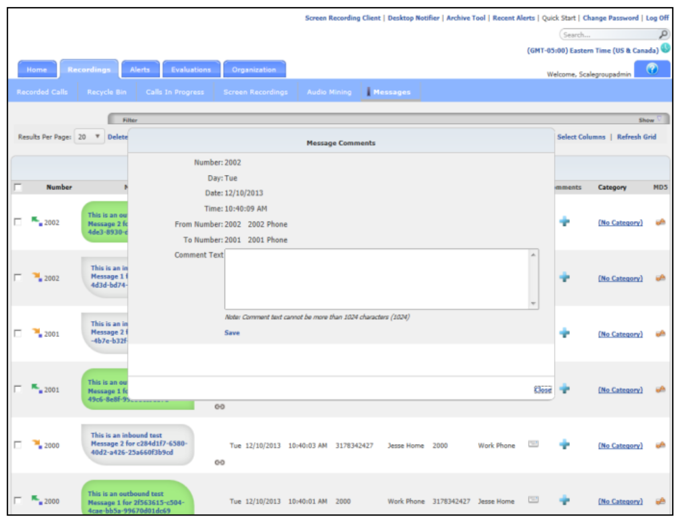
4. Click **Send**.

Example: Adding comments to a message file

1. Click the **Recordings** tab and select **Messages** to ensure that you are looking at the list of message files.



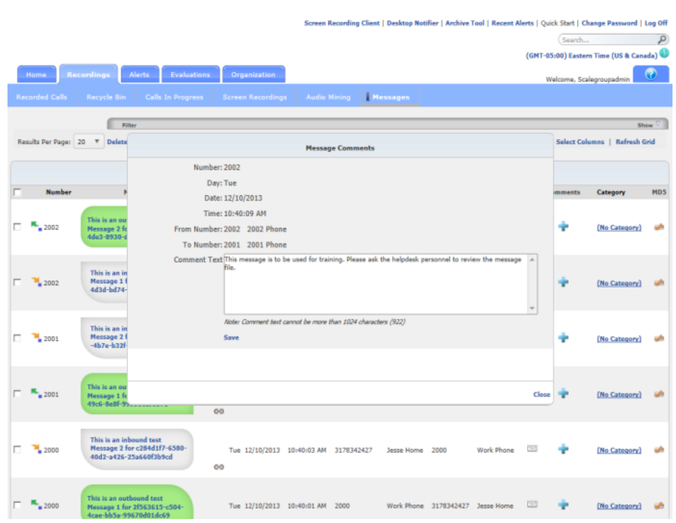
2. Select a message and click on the  (Add Comment) button that corresponds to that message.



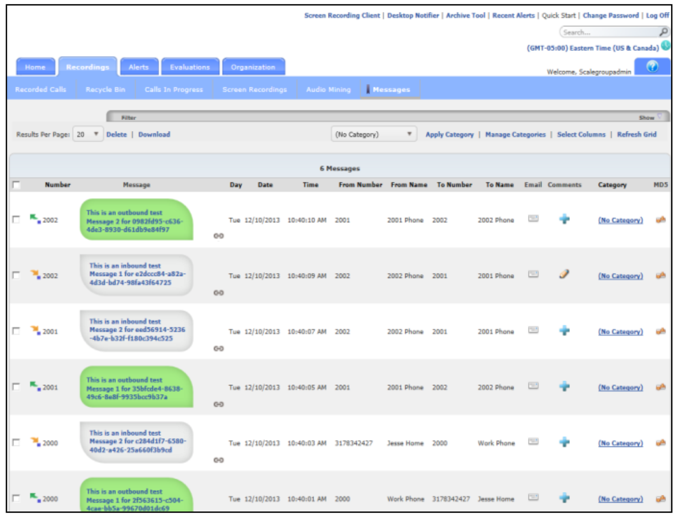
3. Enter the following information:

   - Comment – **This message is to be used for training. Please ask the helpdesk personnel to review the message file.**

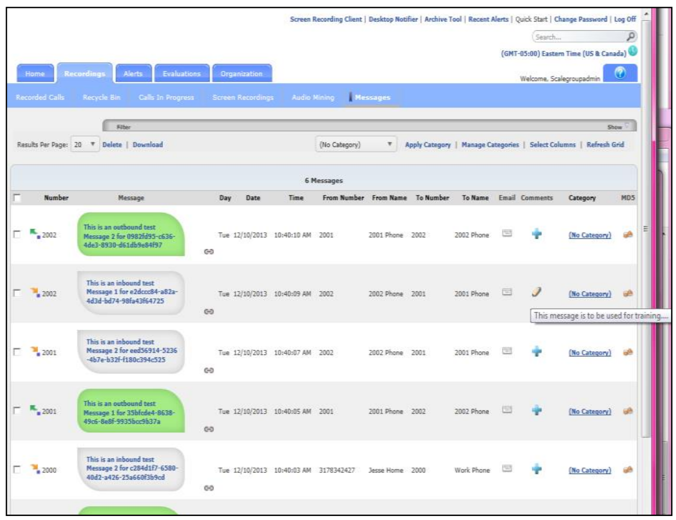
Note: Comment text cannot be greater than 1024 characters.



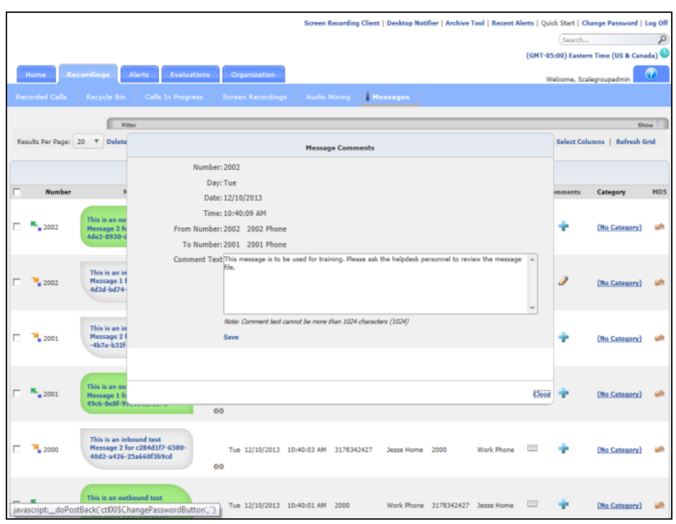
4. Click **Save**. Notice that the Add Comment button has changed to a button indicating that there is a comment associated with this message.



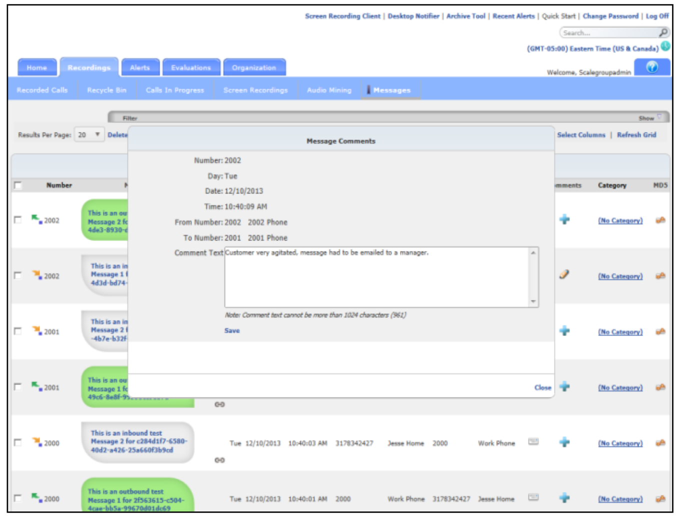
5. Position your mouse pointer over the button. Notice that part of the comment is displayed as a tooltip.



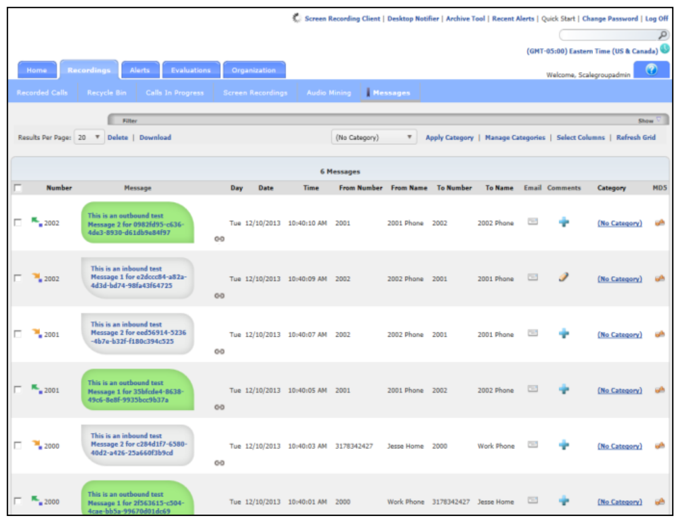
6. Click on the button.



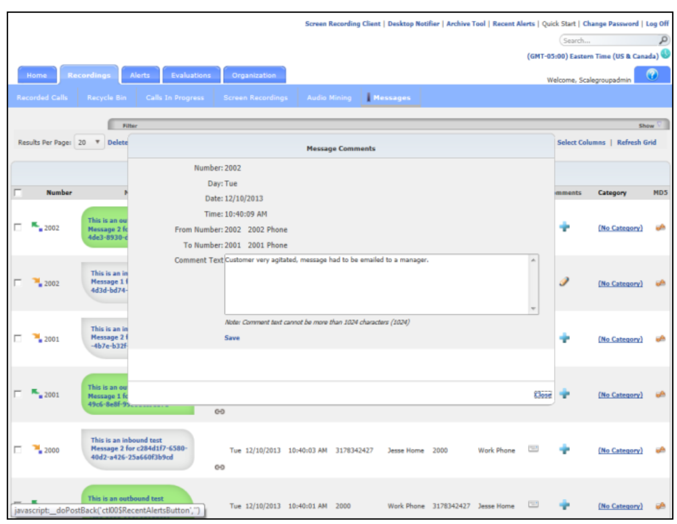
7. Review the comment, select it, and enter the following:
   - Comment – **Customer very agitated, message had to be emailed to a manager.**



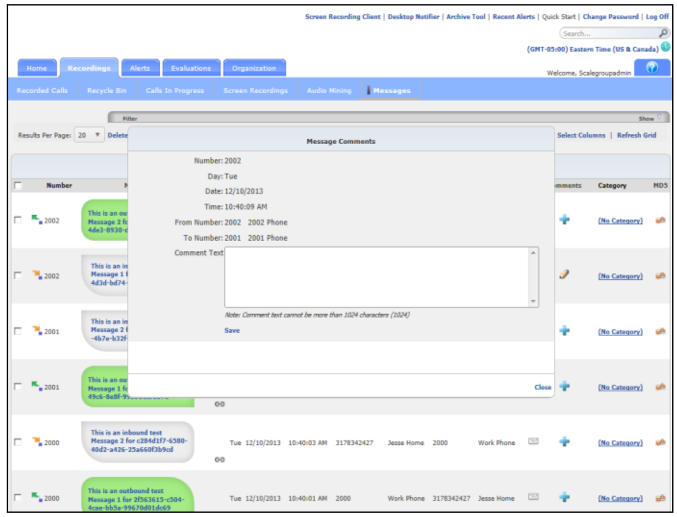
8. Click **Save** to save your changes.



9. Click on the button.

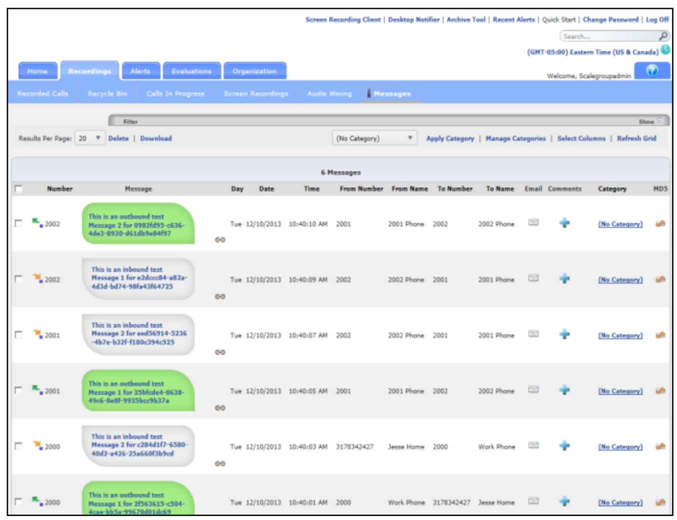


10. Delete the comment from the Comment field by selecting it and clicking the Delete button on your keyboard.



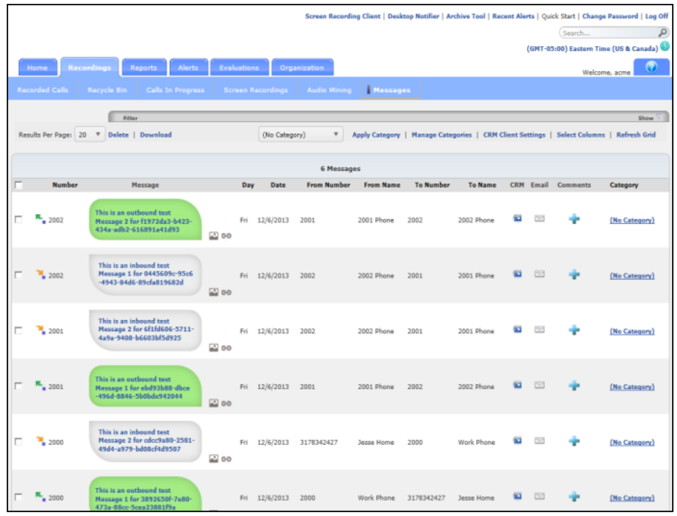
11. Click **Save** to save your changes.

    Notice that the  button has changed back to the Add Comment button.

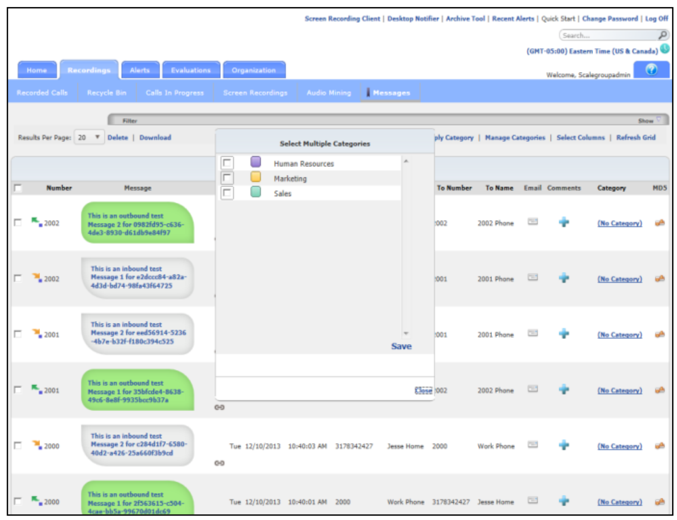


Example: Categorizing a message

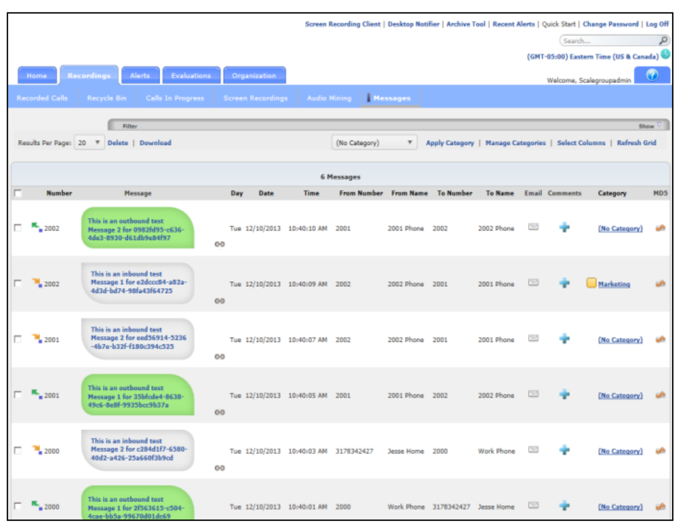
1. Click the **Recordings** tab and select **Messages** to ensure that you are looking at the list of message files.



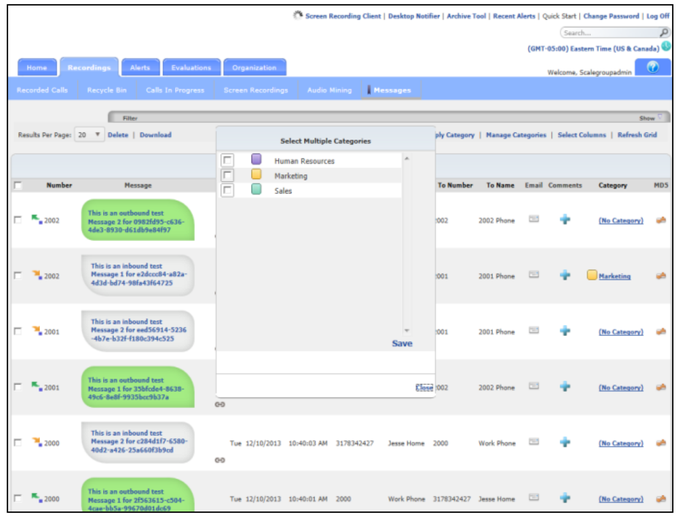
2. Select the **Category** link that corresponds to the message that you wish to categorize.



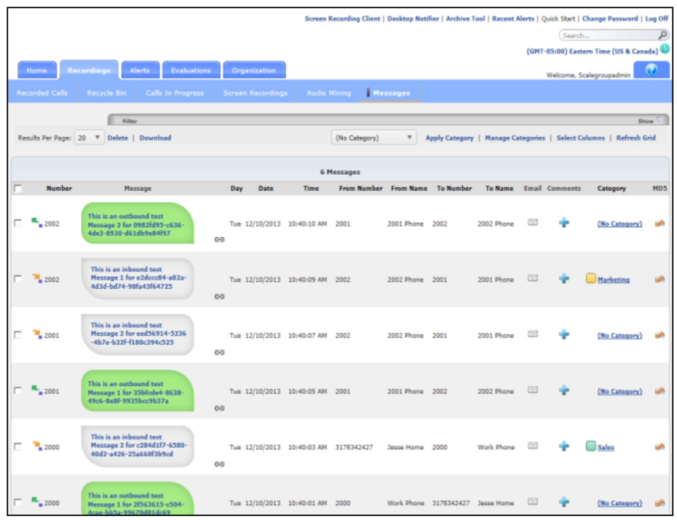
3. Select one category to apply to the message by clicking in the corresponding option box and click **Save**.



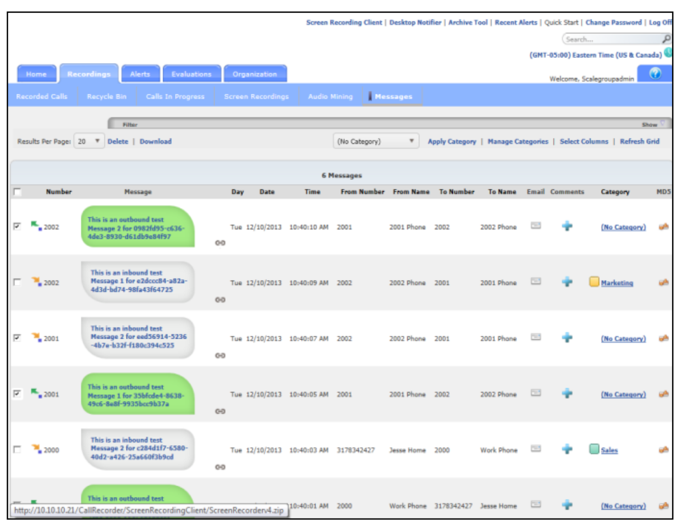
4. Select the **Category** link that corresponds to another message that you wish to categorize.



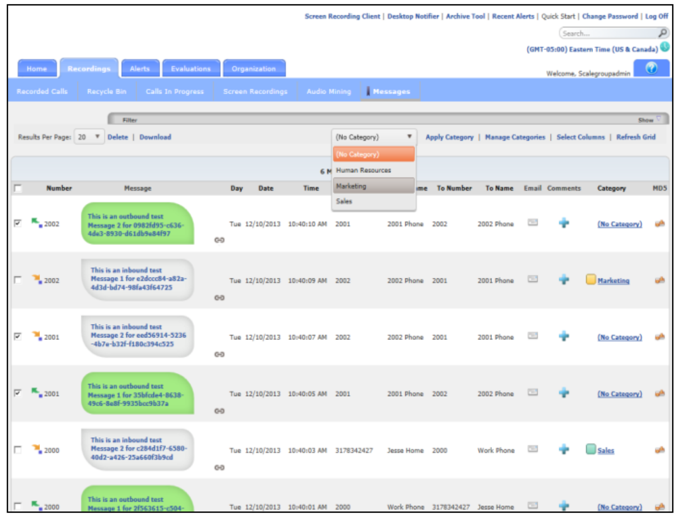
5. Select several categories to apply to the message by clicking in the corresponding option boxes and click **Save**.



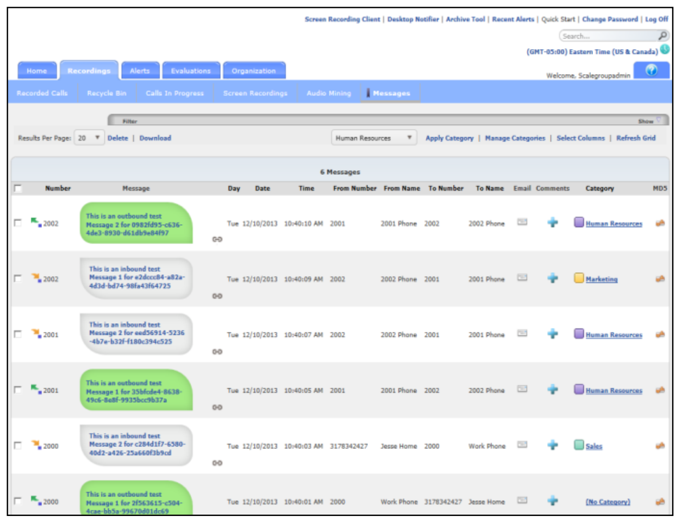
6. Select two or three message option boxes (located to the left of the Number column).



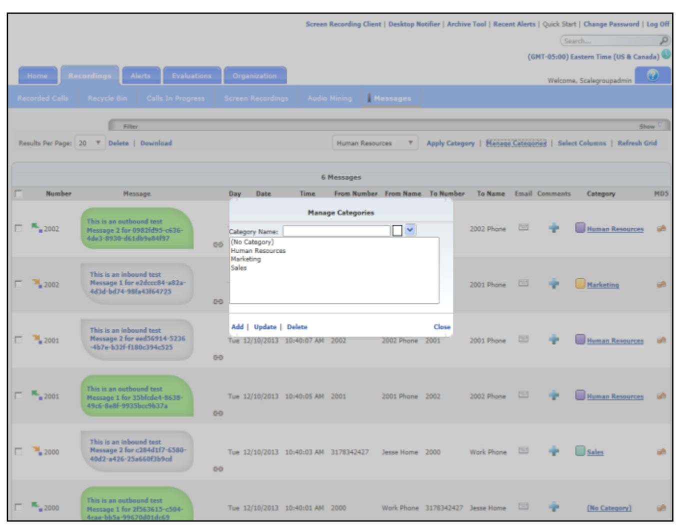
7. Select the category you wish to apply from the drop down list found at the top or bottom of the Messages page.



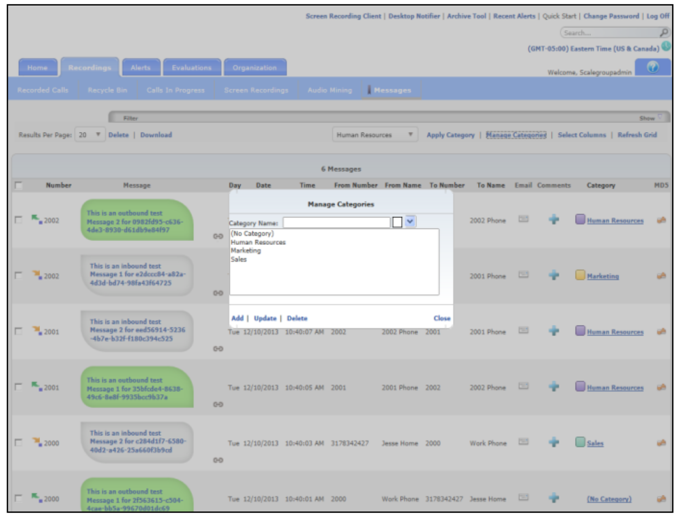
8. Select the **Apply Category** link.



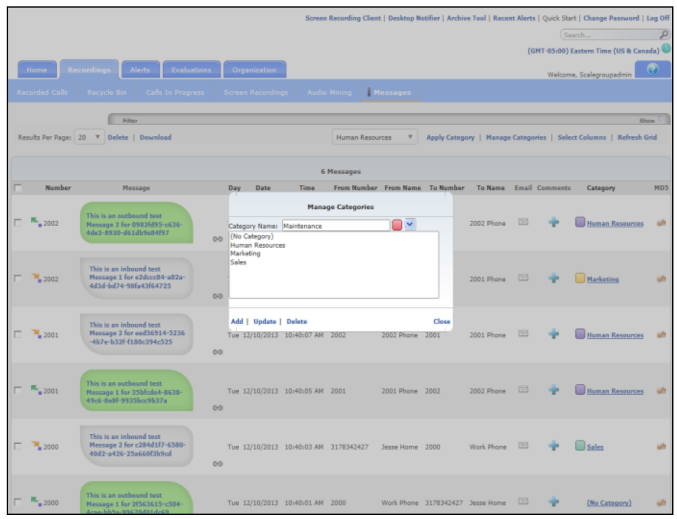
9. Select the **Manage Categories** link.



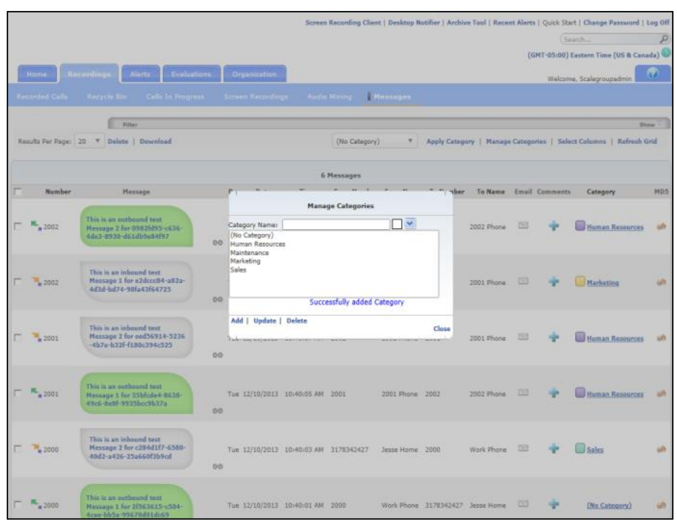
10. Enter the following:
    - Category Name – **Maintenance**



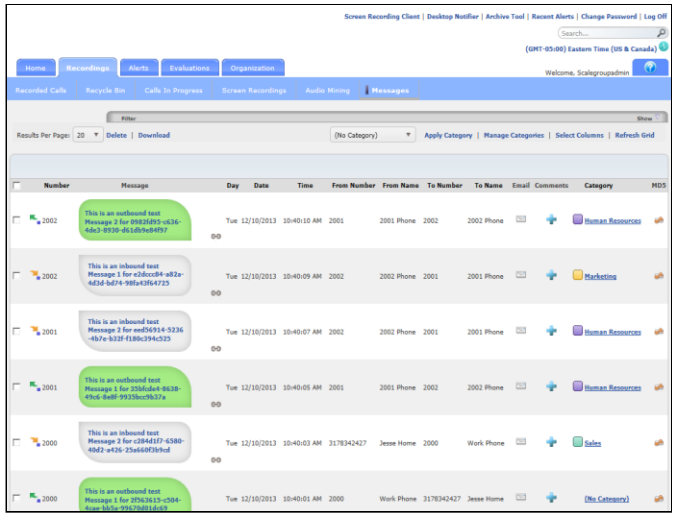
11. Select the drop down arrow to the right of the Category Name field and select the color red.



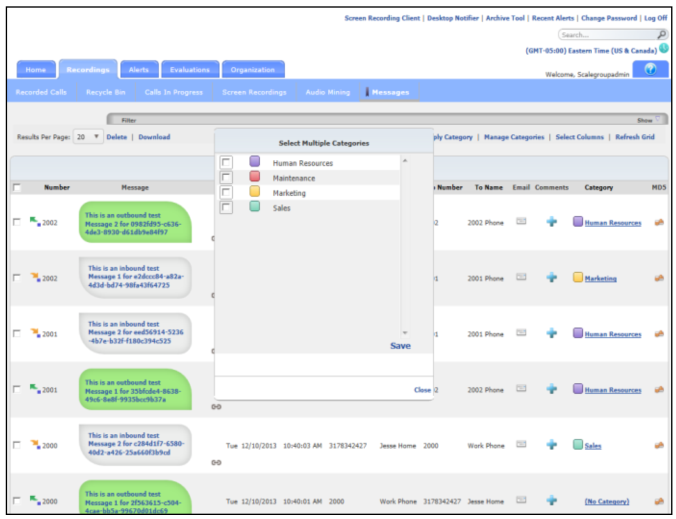
12. Select the **Add** link.



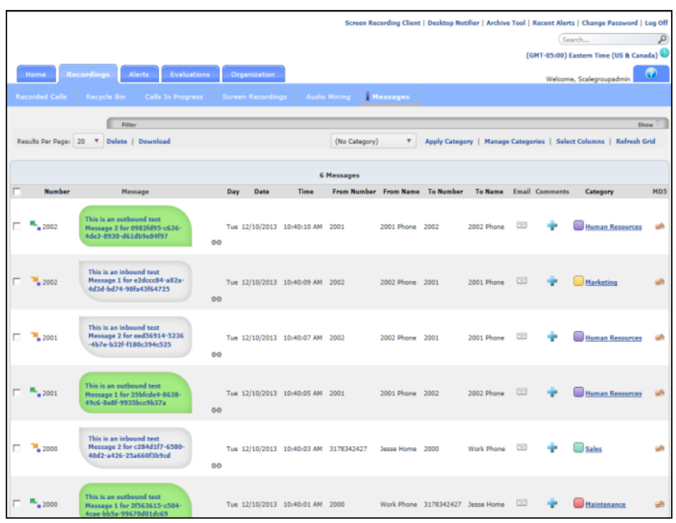
13. Select the **Close** link to close the Manage Categories dialog box.



14. Select the **Category** link that corresponds to a message that is not already categorized.



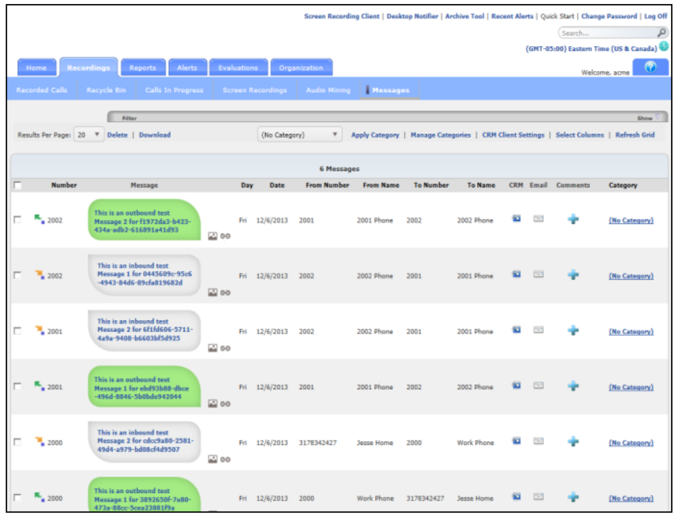
15. Select the **Maintenance** category that we just added by clicking in the corresponding option box and click **Save**.



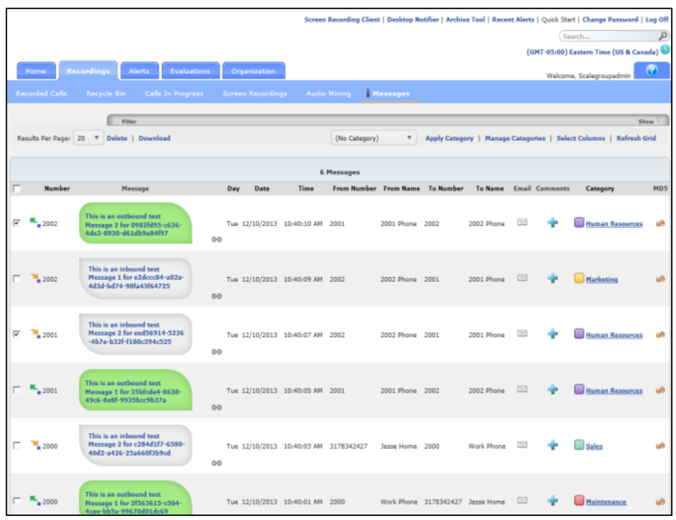
Example: Deleting a message

Note: The message file will appear on both the Messages and Recycle Bin tabs. The message file will not be deleted until it is deleted from the Recycle Bin.

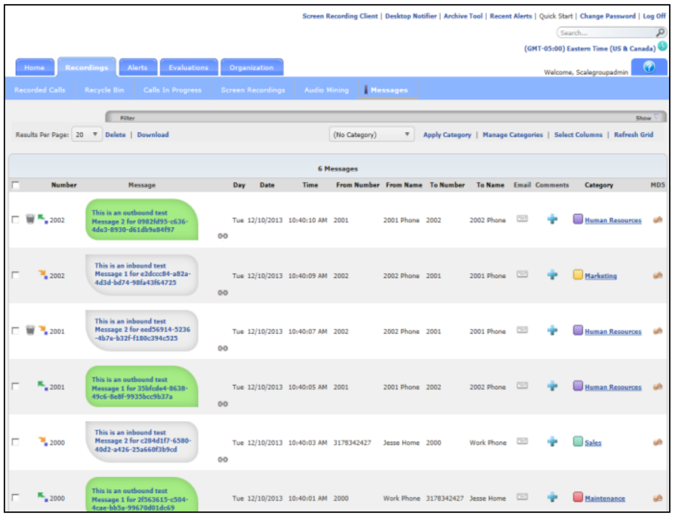
1. Click the **Recordings** tab and select **Messages** to ensure that you are looking at the list of message files.



2. Select the message(s) you wish to delete by clicking in the corresponding option box to the left of the Message column.

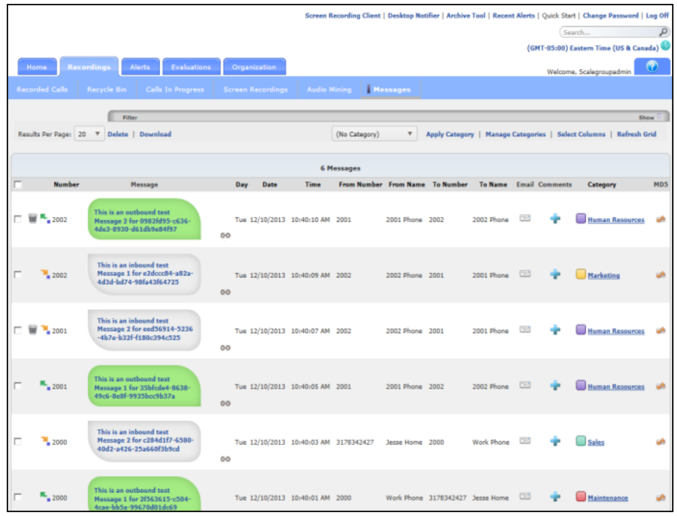


3. Select the **Delete** link at the top or bottom of the Messages page. Notice that a (Calls in Recycle Bin) icon appears next to the deleted messages indicating that the messages are now in the Recycle Bin.

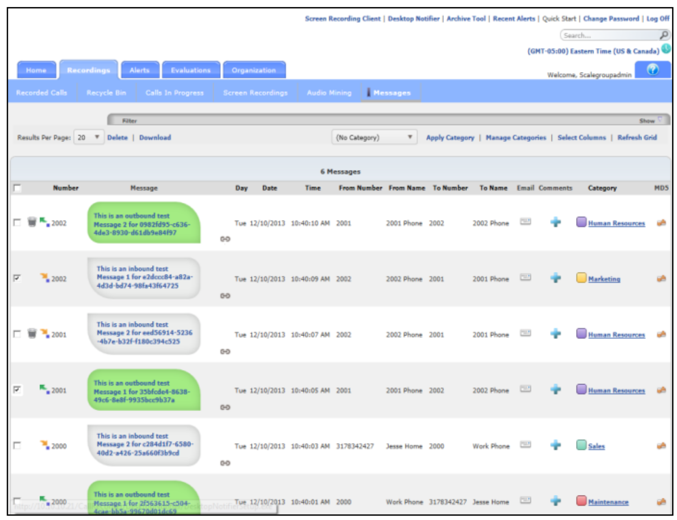


Example: Downloading a message

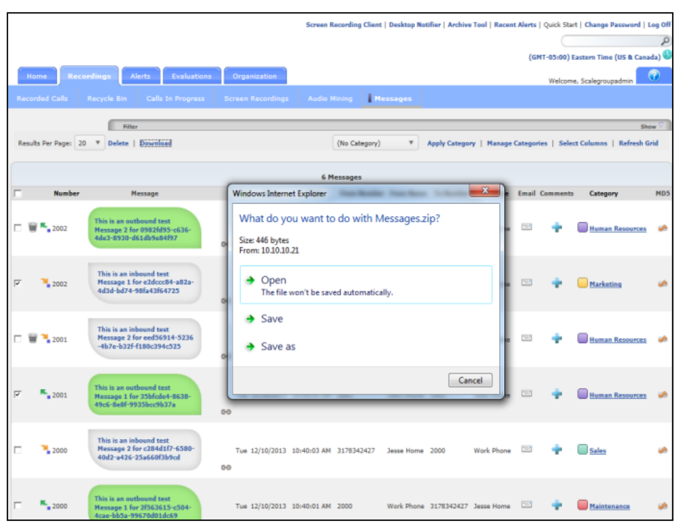
1. Click the **Recordings** tab and select **Messages** to ensure that you are looking at the list of message files.



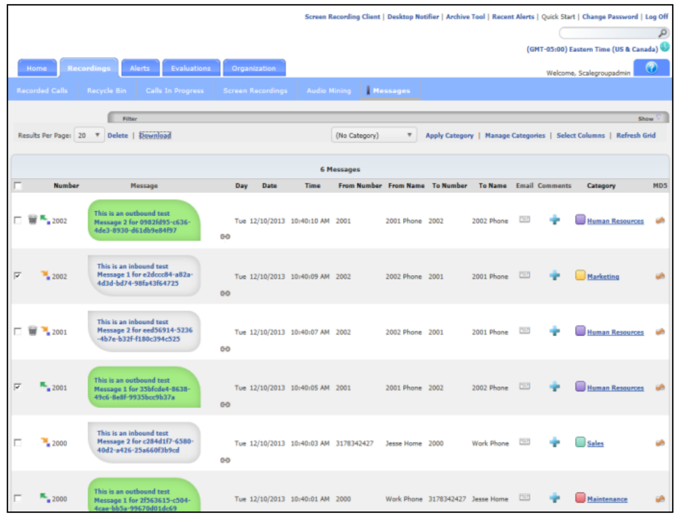
2. Select the messages you wish to download by clicking in the corresponding option box to the left of the Number column.



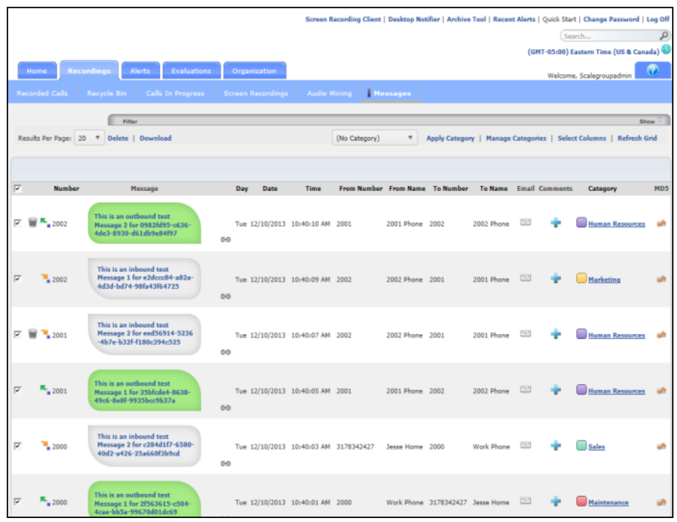
3. Select the **Download** link at the top or bottom of the Messages page.



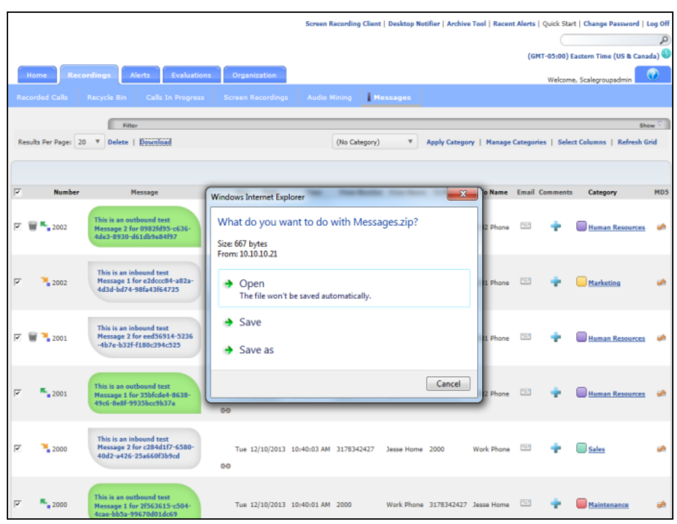
4. Normally you would choose to extract the files and save them to the location of your choice. For the purposes of this example, click the X in the right corner of the Messages.zip dialog box.



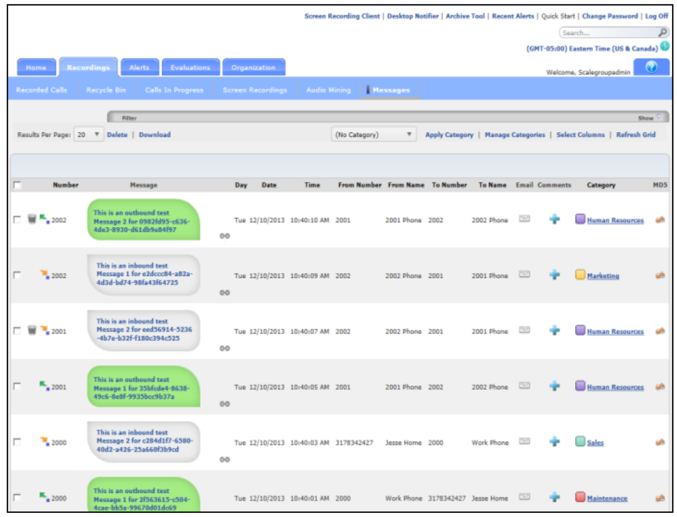
5. Click in the option box that is located to the left of the Number column, in the header to select all message files.



6. Select the **Download** link at the top or bottom of the Messages page.



7. Normally you would choose to extract the files and save them to the location of your choice. For the purposes of this example, click the  in the right corner of the RecordedCalls.zip dialog box.



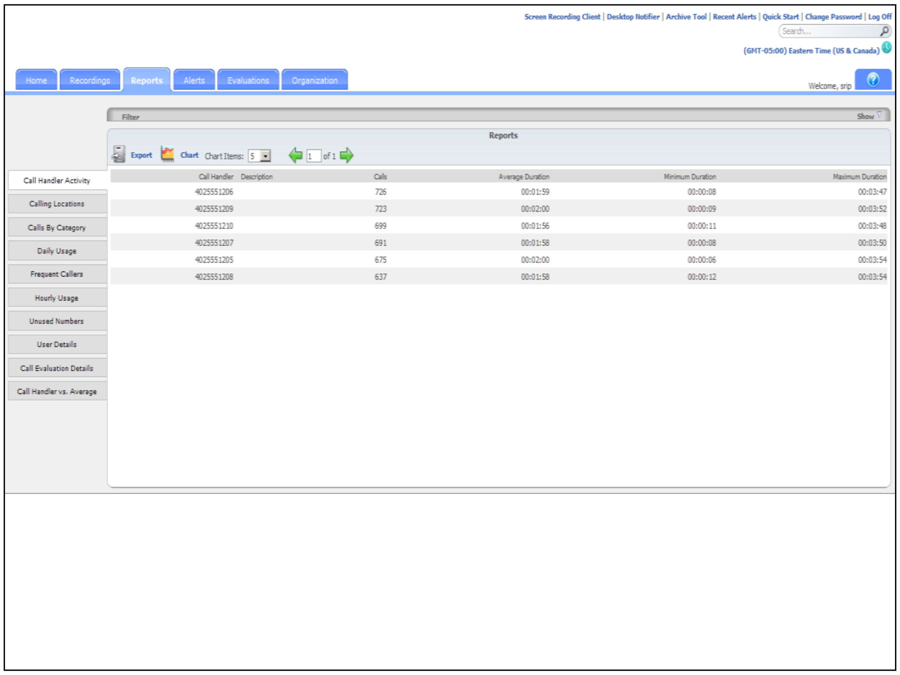
Reports

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 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. An end user's access to reports is determined at the Group level under Application Features.

Note: The Reports tab may or may not be available depending on whether or not the Reporting Feature Application was selected in the Administrative portal. Additionally, the number of reports available from this tab may fluctuate depending on which Application Features were selected in the Administrative portal.

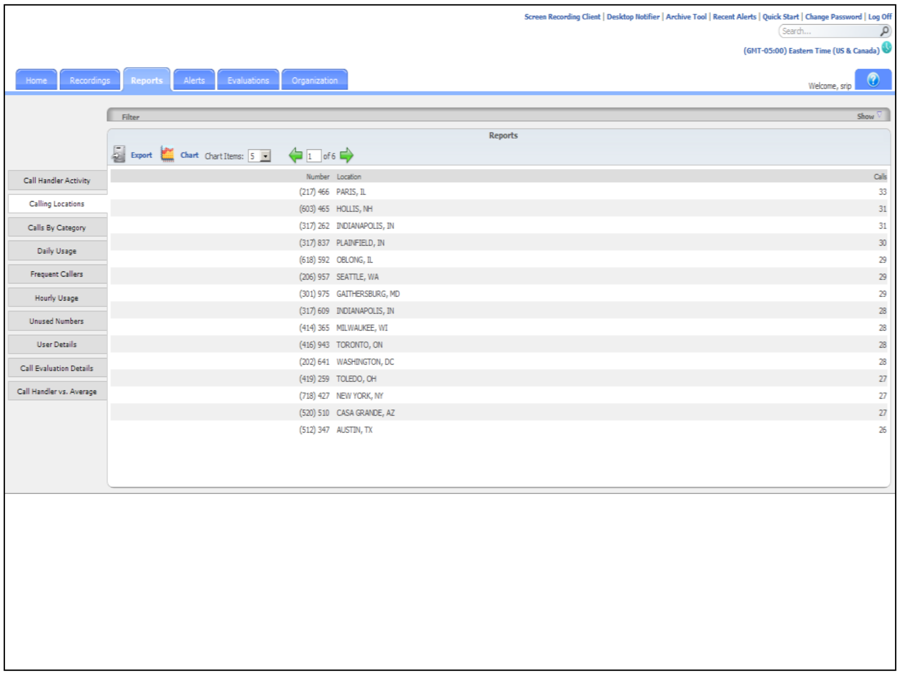
Example: Call Handler Activity

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.



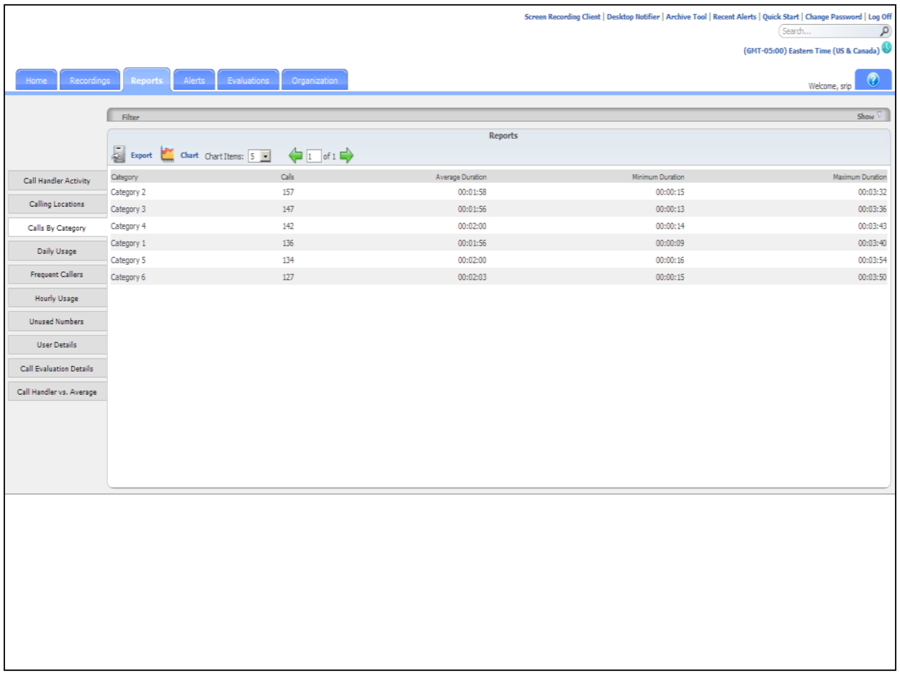
Example: Calling Locations

The Calling Locations report displays 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.



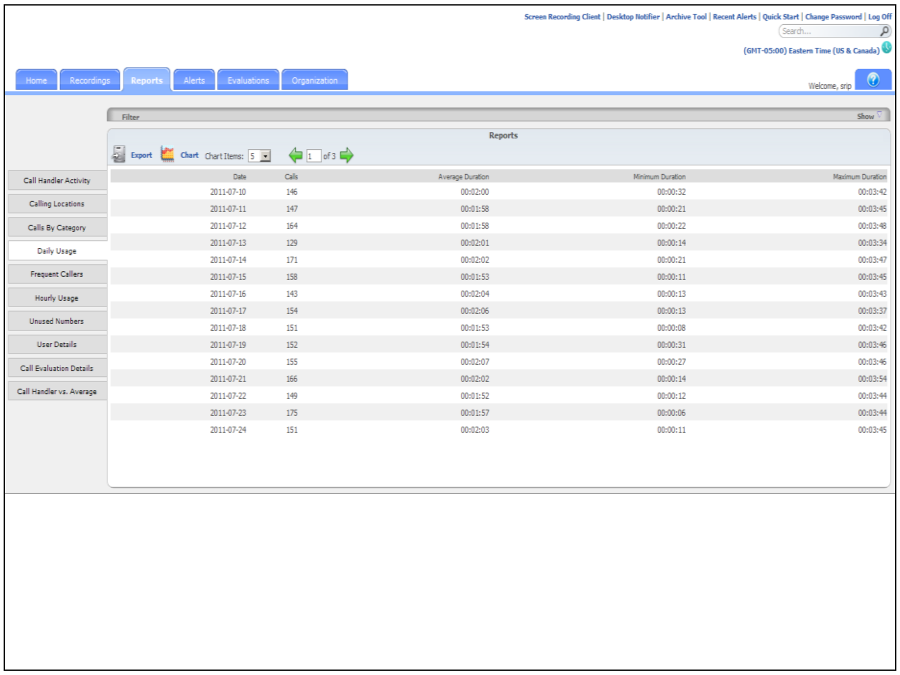
Example: Calls by Category

The Calls by Category report displays 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.



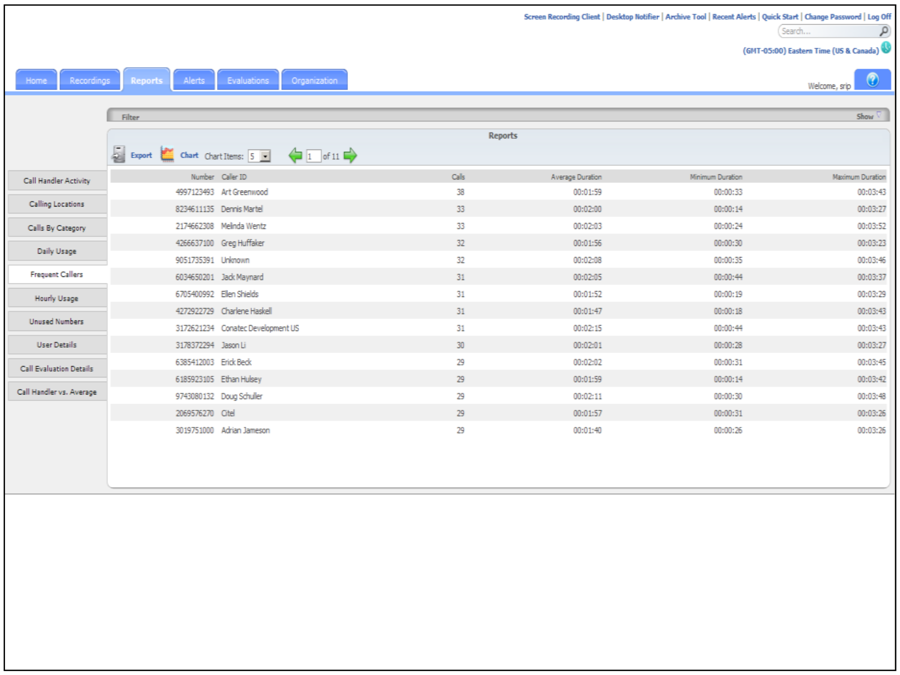
Example: Daily Usage

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.



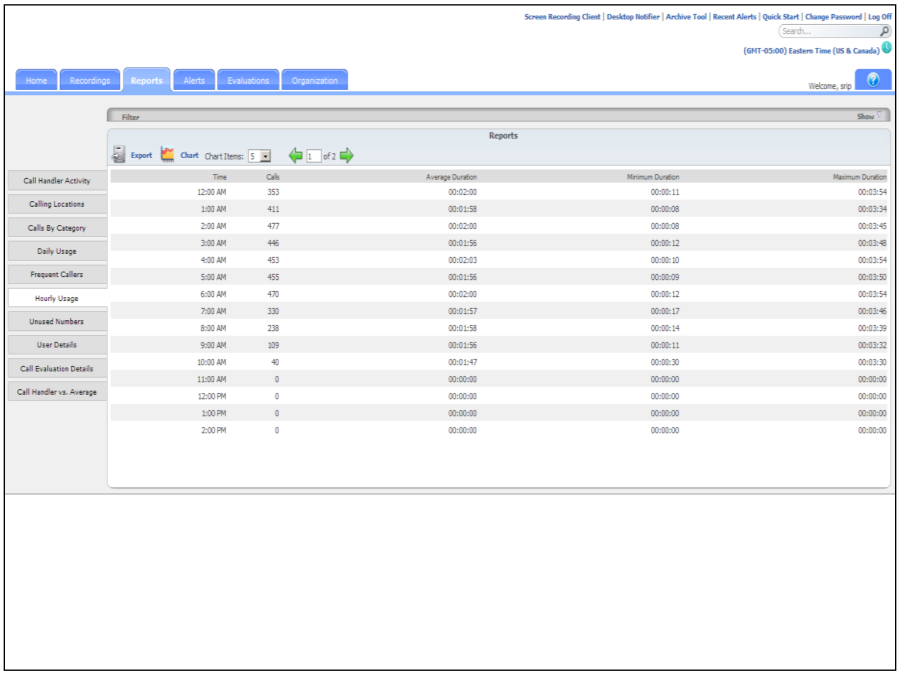
Example: Frequent Callers

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.



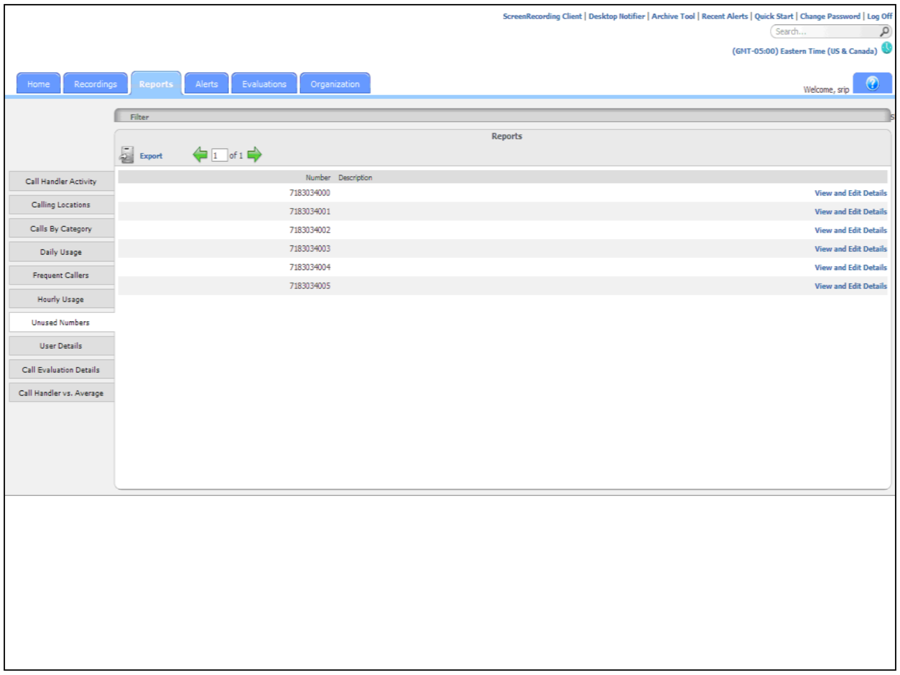
Example: Hourly Usage

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.



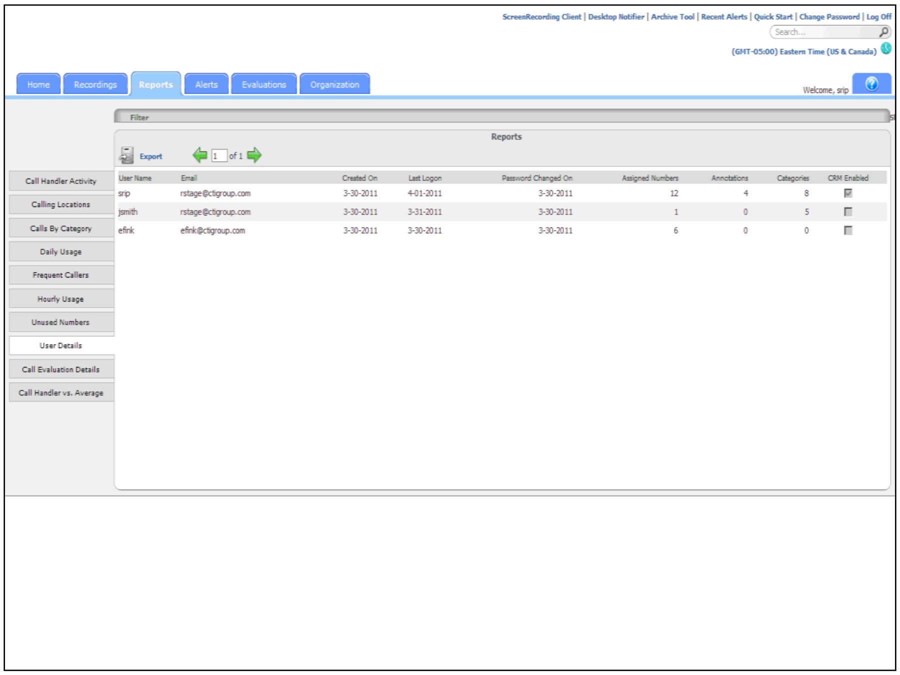
Example: Unused Numbers

The Unused Numbers report identifies numbers that have had no usage. The Unused Numbers report is text format only. However, you are able to click on the View and Edit Details link in the report to go directly to the numbers page. The report displays the number and description.



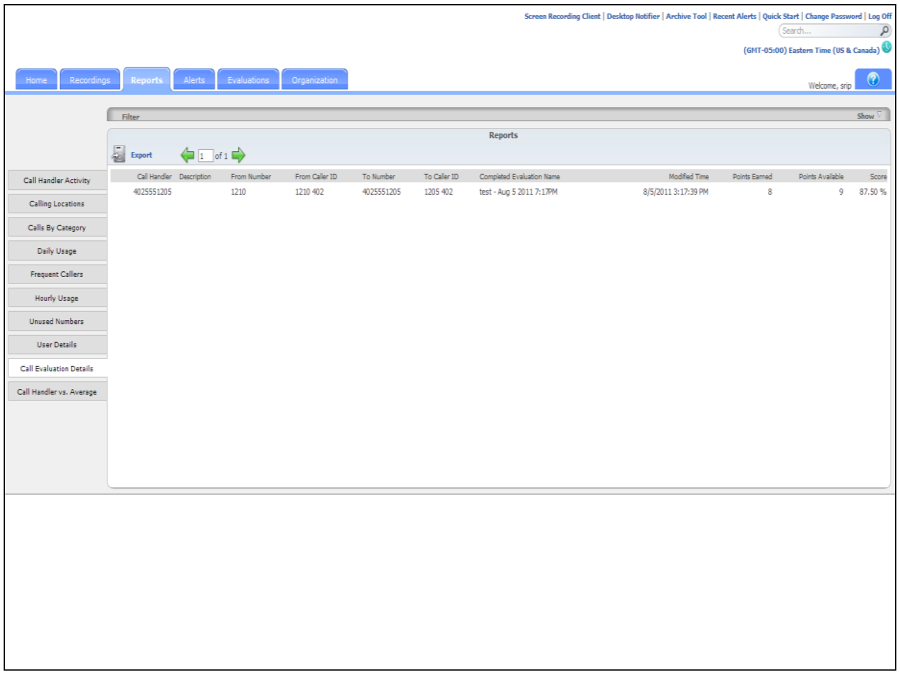
Example: User Details

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.



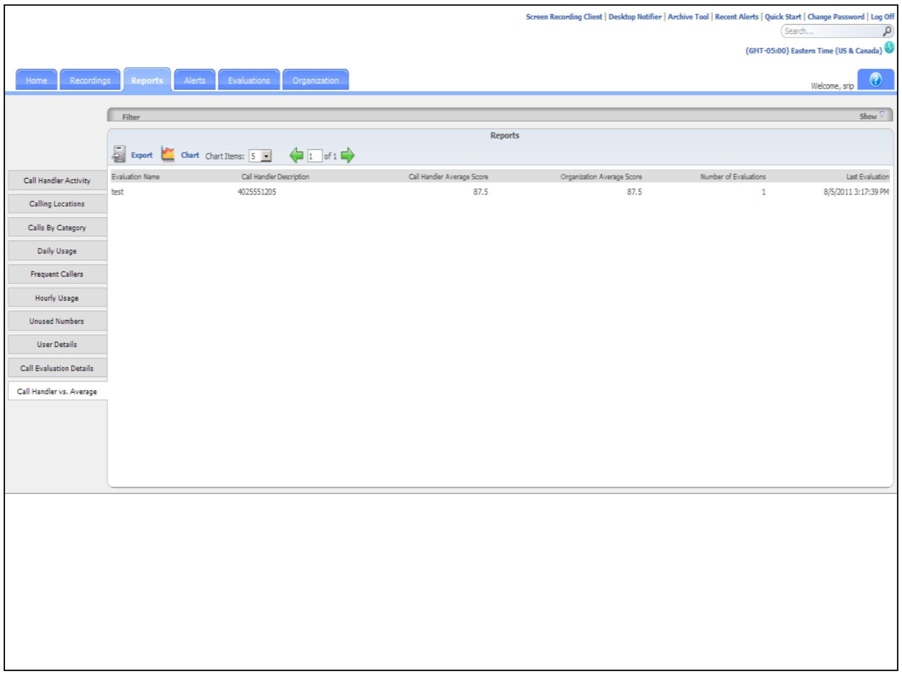
Example: Call Evaluation Details

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.



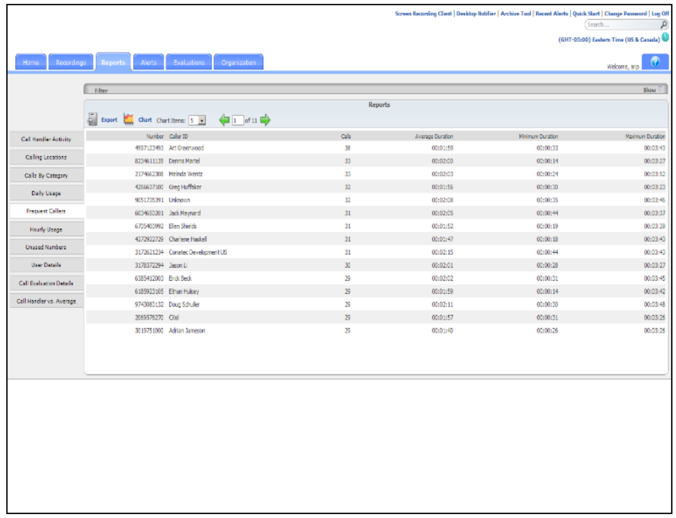
Example: Call Handler vs. Average

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.

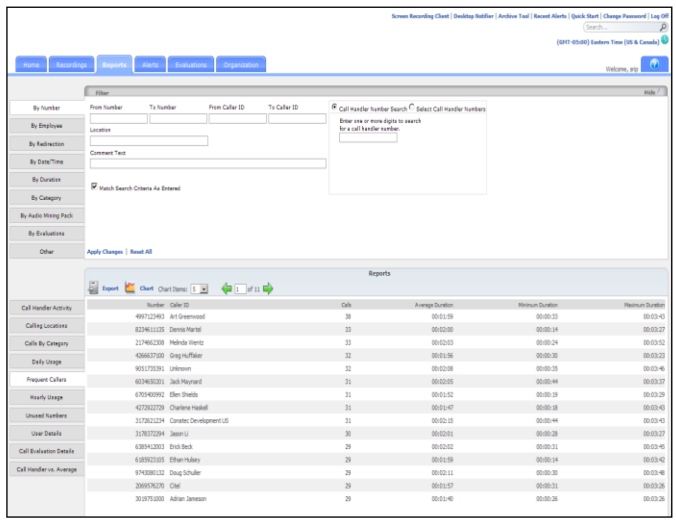


Example: Filtering a report

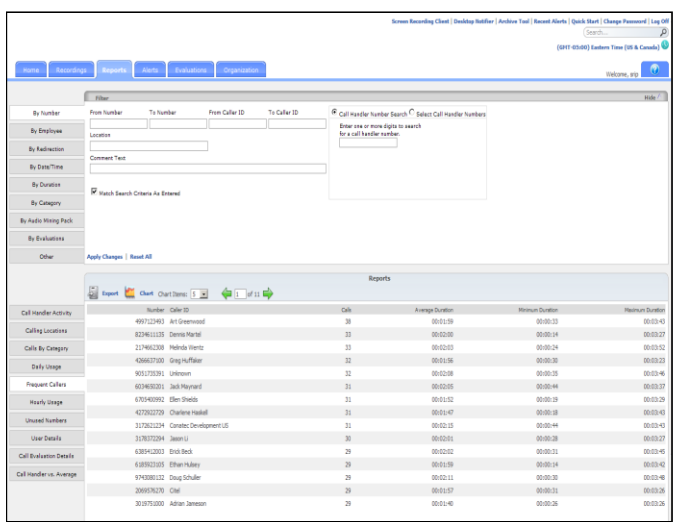
1. Click on the **Frequent Callers** tab.



2. Click on the **Filter** toolbar to expand it.

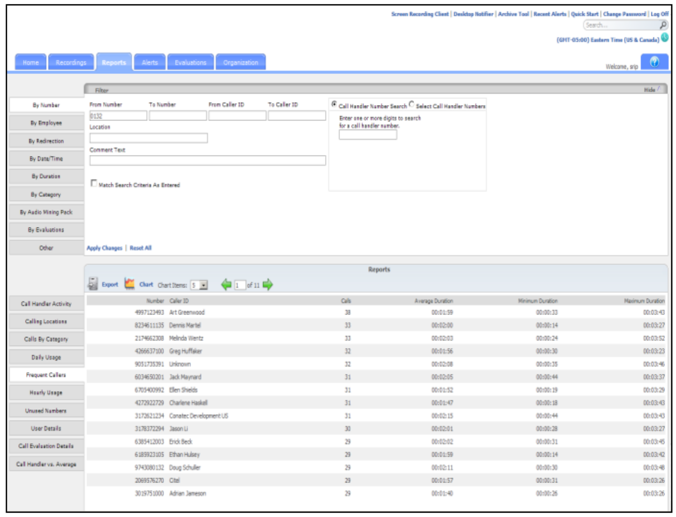


3. If it isn't already selected, select the **By Number** tab.

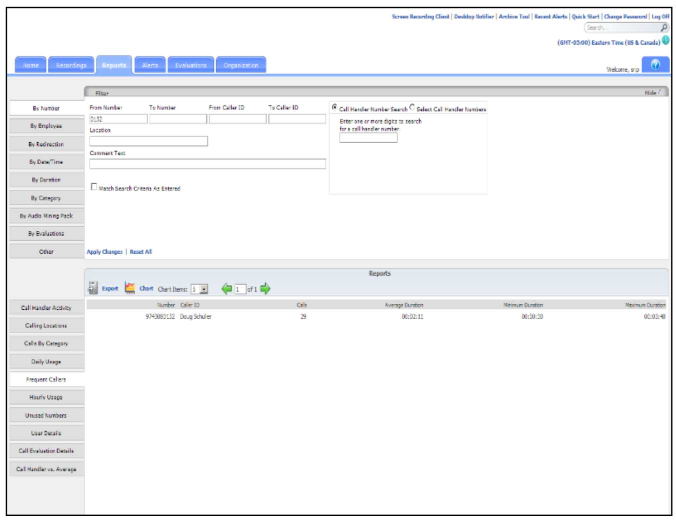


4. Enter the following information:

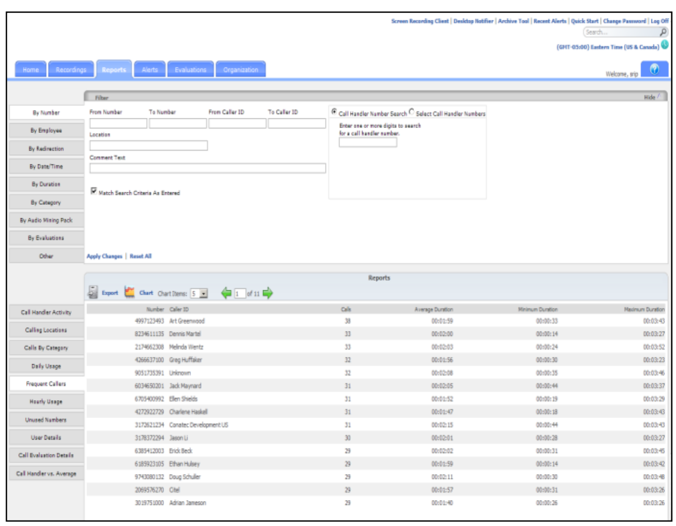
    - From Number – **enter a number that appears under the Number column of the report.**



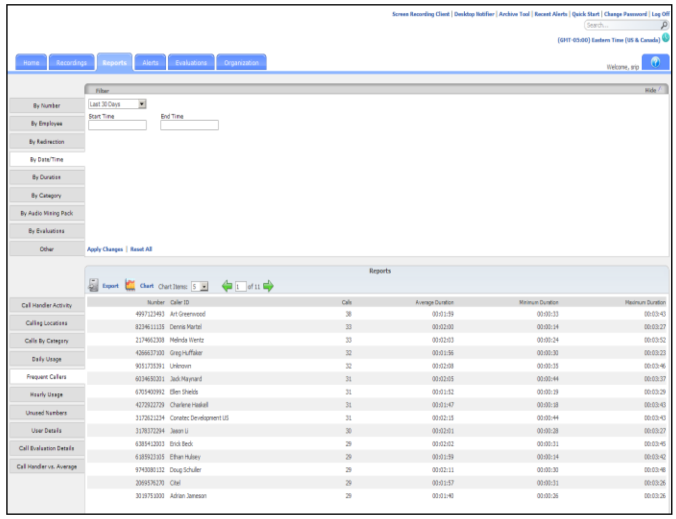
5. Click **Apply Changes** to apply the filter to the report.



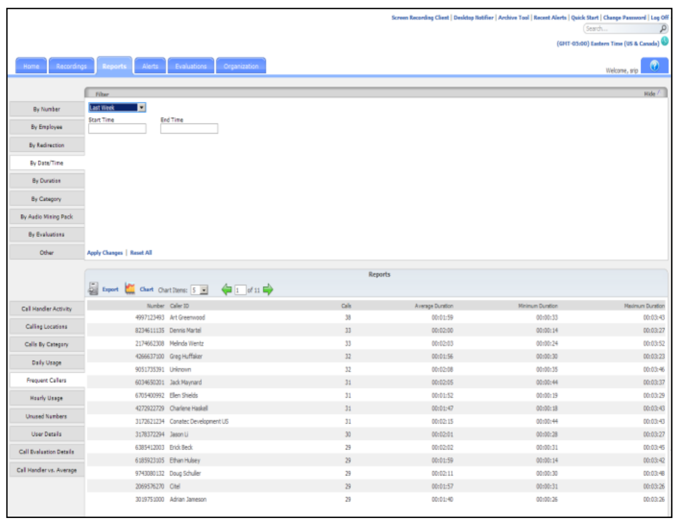
6. Click **Reset All** to remove the filter from the report.



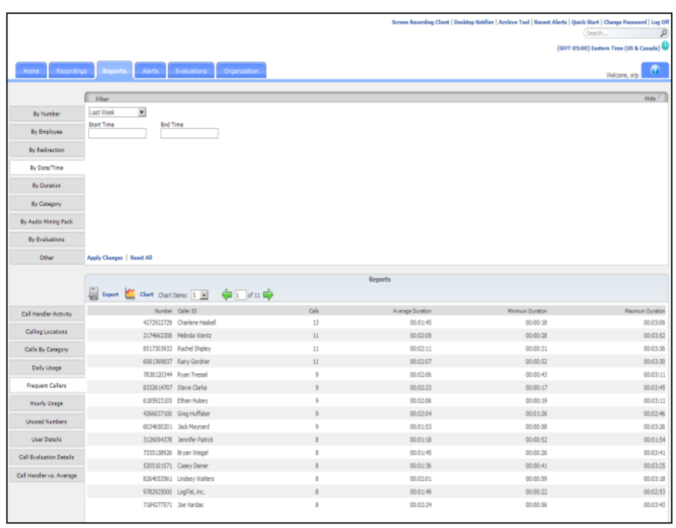
7. Select the **By Date/Time** filter tab.



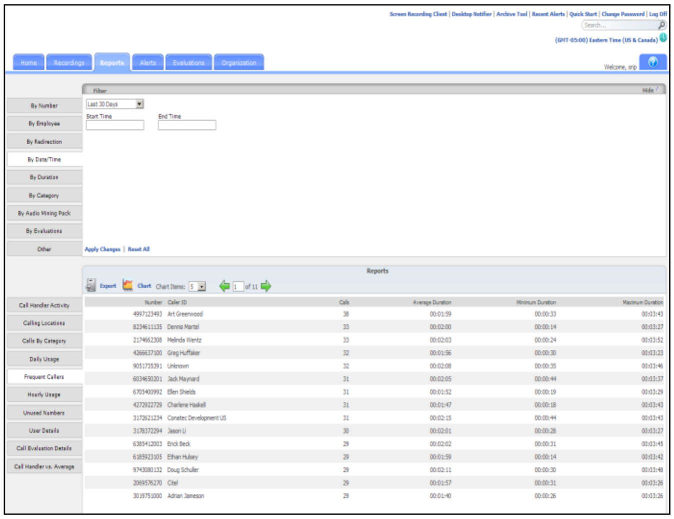
8. Select **Last Week** from the drop down list.



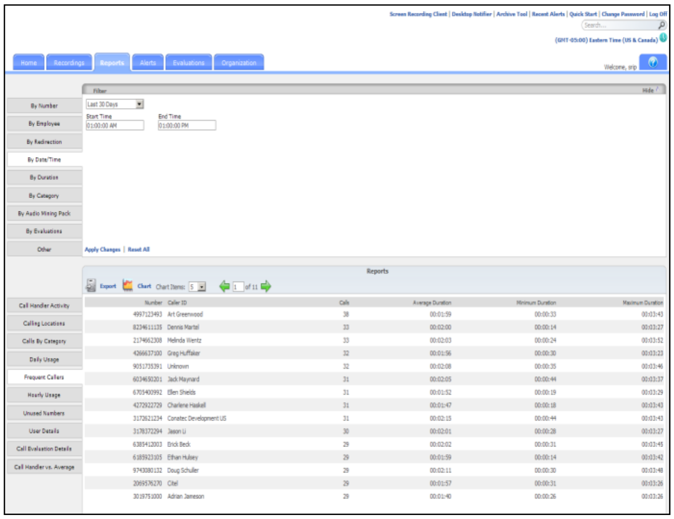
9. Click **Apply Changes** to apply the filter to the report.



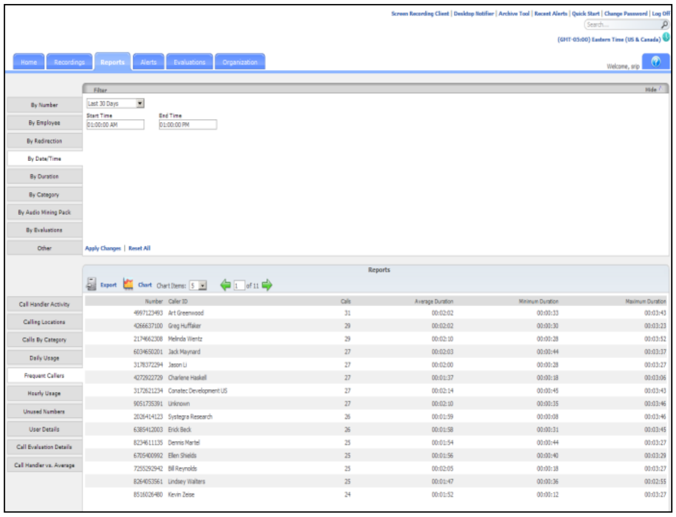
10. Click **Reset All** to remove the filter from the list of Recorded Calls.



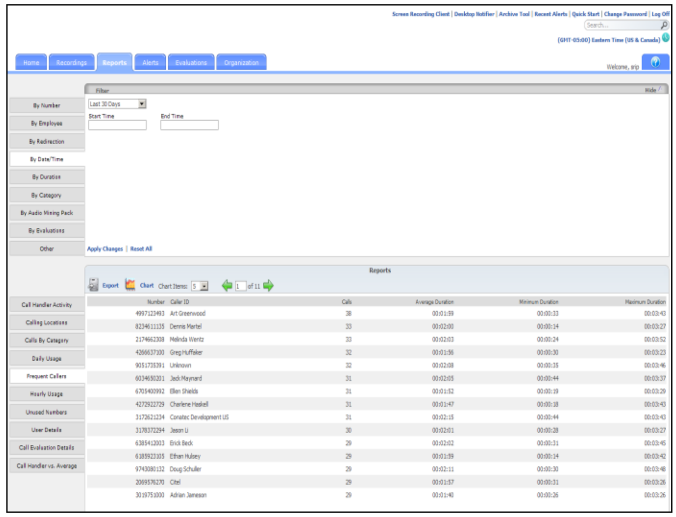
11. Select the following information:
    - From – **01:00:00 a.m.**
    - To – **01:00:00 p.m.**



12. Click **Apply Changes** to apply the filter to the report.

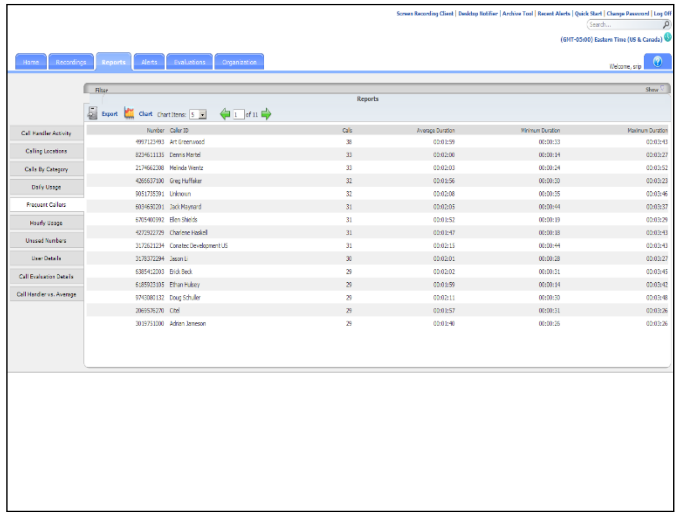


13. Click **Reset All** to remove the filter from the list of Recorded Calls.

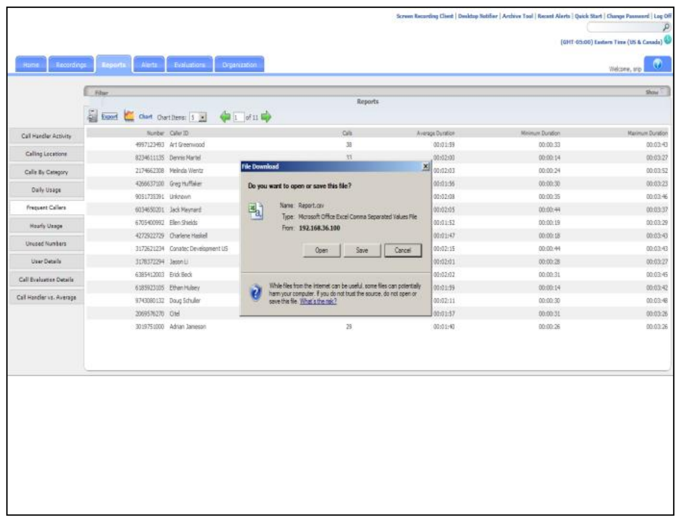


Example: Exporting reports

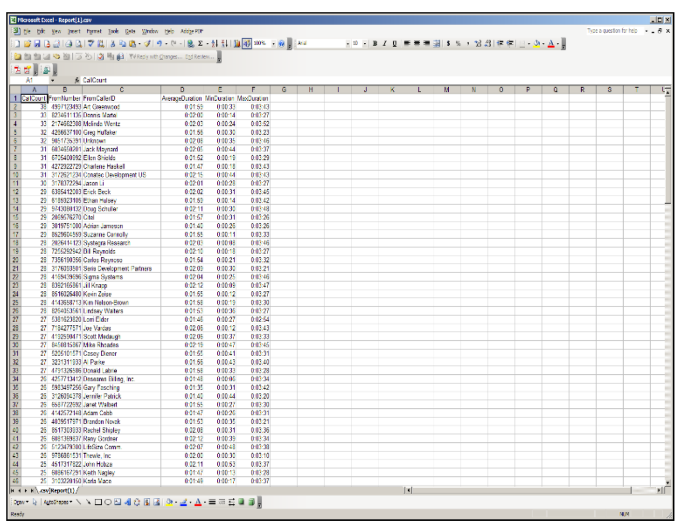
1. Click on the **Frequent Callers** tab.



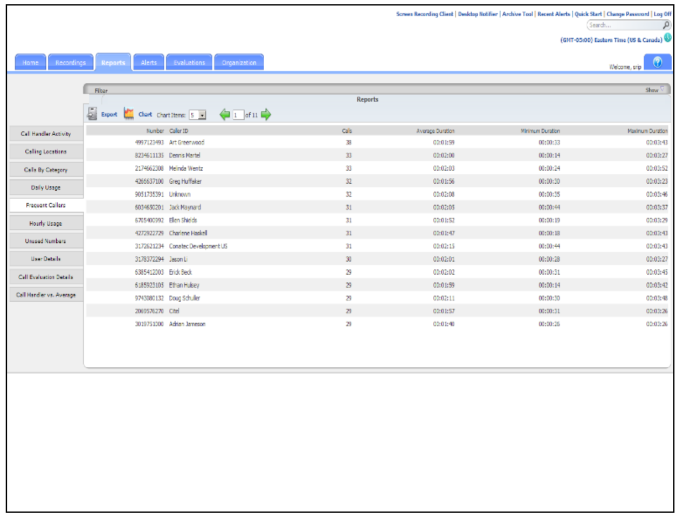
2. Click the **Export** button.



3. Select **Open**.



4. Click the ✕ in the right corner of the Report.csv window.



Alerts

Do you wish that you could be alerted to any emergency, long duration, international, etc., calls made from within your organization? You can create Alerts based on specific call conditions. 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/emailing 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. 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.

- Alert on any day – the alert will run every day that remains active.
- Days of Week – 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.
- Date – Enter a specific call date. The alert will only run on this call date.
- Date Range – Enter a start and end date. The alert will only run during this date range.

Note: You can select multiple criteria such as Days of the Week and a Date Range.

Enter or select the following:

- Start Time – if applicable, select the start time the Alert should begin running on the selected day(s).
- End Time – if applicable, select the end time that the Alert should stop running on the selected day(s).
- Time Zone – select a time zone that you wish to apply to the alert.
- From Caller ID – defines the originating caller ID or partial originating caller ID on which to alert.
- To Caller ID – defines the terminating caller ID or partial terminating caller ID on which to alert.
- From Number – defines the originating number or partial originating number on which to alert.
- To Number – defines the dialed number or partial dialed number on which to alert.
- Redirected From – defines the number of the person or group transferring the call.
- Redirected To – defines the number to which the call was transferred.
- Location – defines the location or partial location on which to report.
- DTMF Digits – (only appears when Call Terminated 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.
- End Clip DTMF Digits – (only appears 1) when Call Terminated event type is selected and 2) when Clip is selected above) identifies the DTMF digits used to end the on demand alert clip.
- DTMF Tolerance – (only appears when Call Terminated 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.

- Audio Mining Pack - (only appears when Call Terminated event type is selected) allows the user to identify and alert on a specific audio mining pack.
- Minimum Confidence - (only appears when Call Terminated event type is selected) allows the user to identify and alert on the minimum confidence when alerting on audio mining packs.
- Add a Category – 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 Recorded Calls tab when the alert is fired.
- Add a Comment – 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 Recorded Calls tab when the alert is fired.

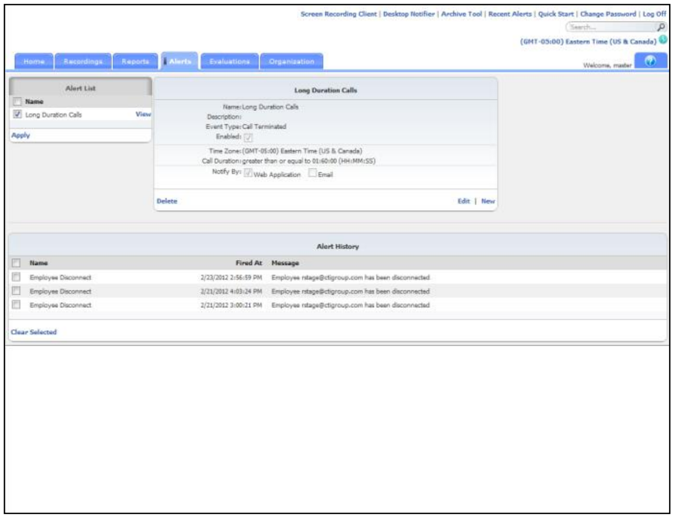
Note: The From Caller ID, To Caller ID, From Number, To Number, and Location fields must be at least 3 characters long.

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.

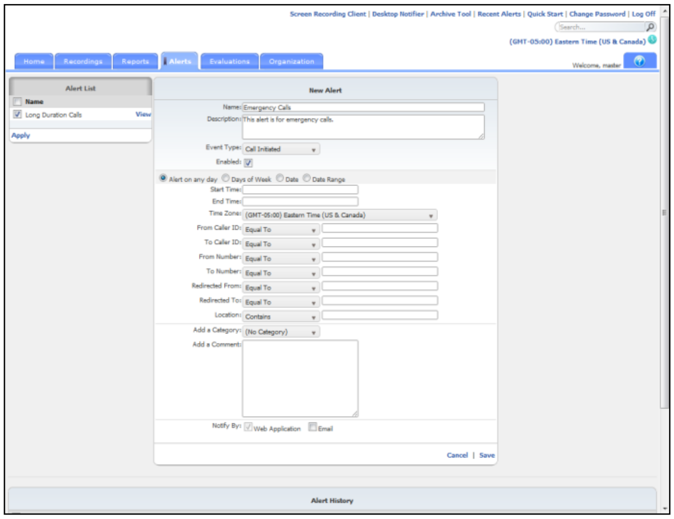
The Alerts dialog box displays a list of alerts that have occurred under the Alerts History section. You can clear the Alert History by selecting the alert(s) and clicking the Clear Selected link. You can also view a list of recent alerts by clicking on the Recent Alerts link located at the top of the application page.

Example: Creating an alert

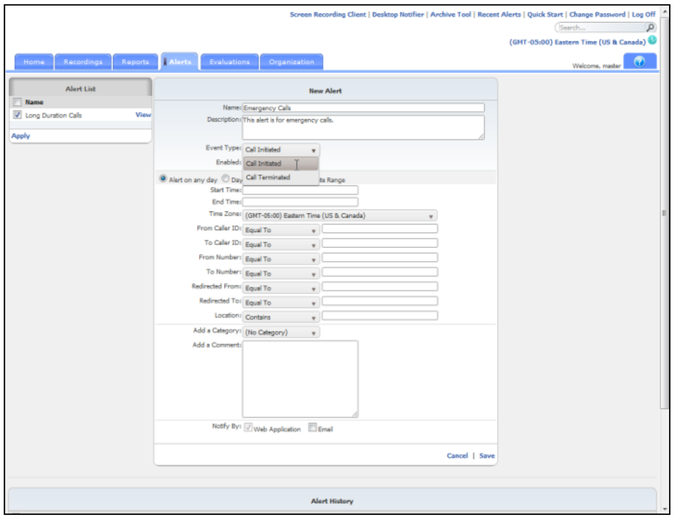
1. Click the **Alerts** tab.



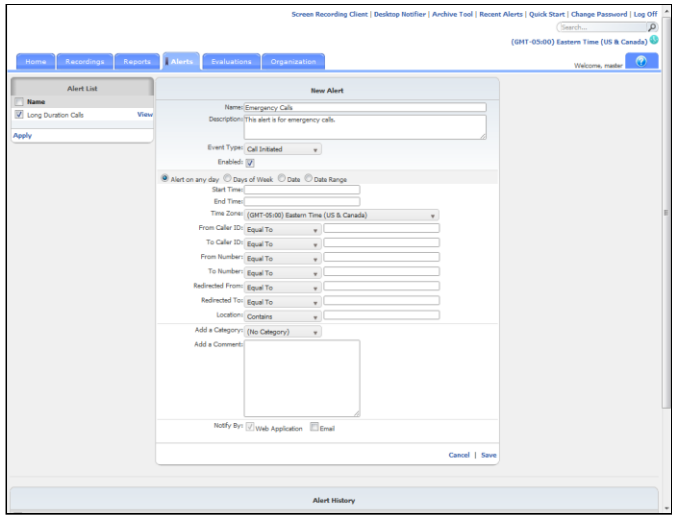
2. If applicable, click **New**. Enter the following information:
   - Name – **Emergency Calls**
   - Description – **This alert is for emergency calls.**



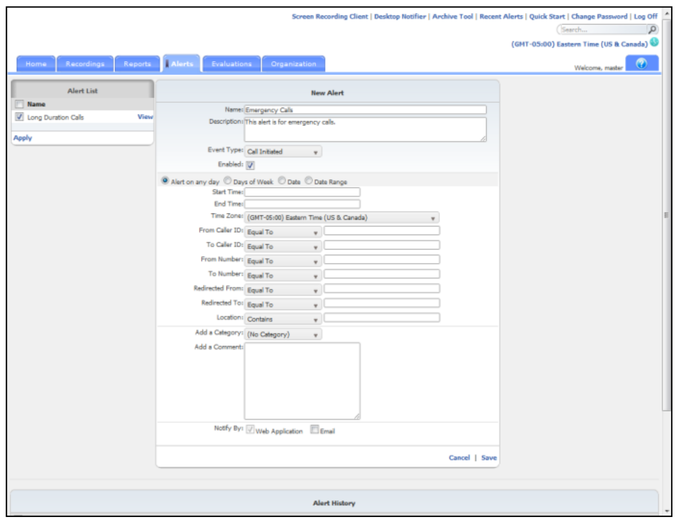
3. Select the following:
   - Event Type - **Call Initiated**



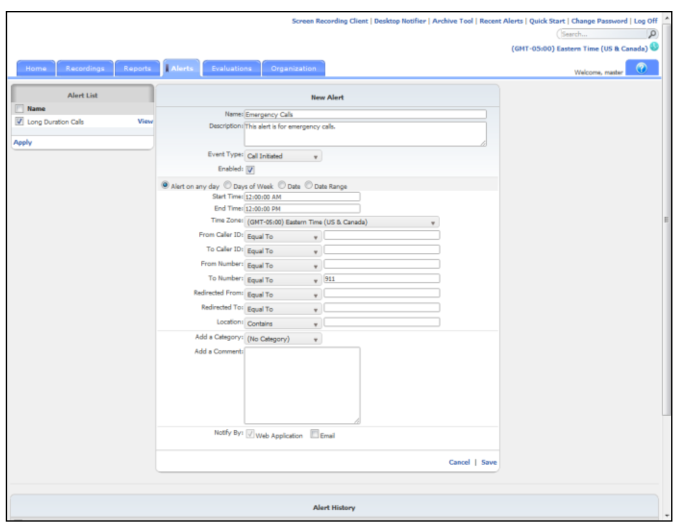
4. If it isn't already selected, click in the **Enabled** option box.



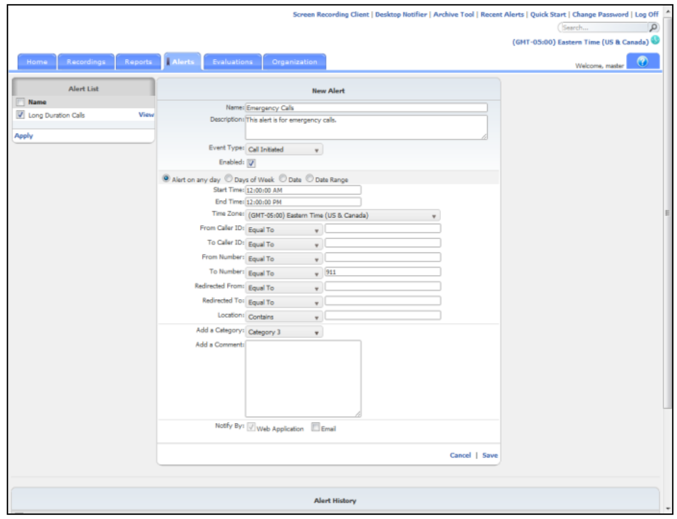
5. If it isn't already selected, click in the **Alert on any day**.



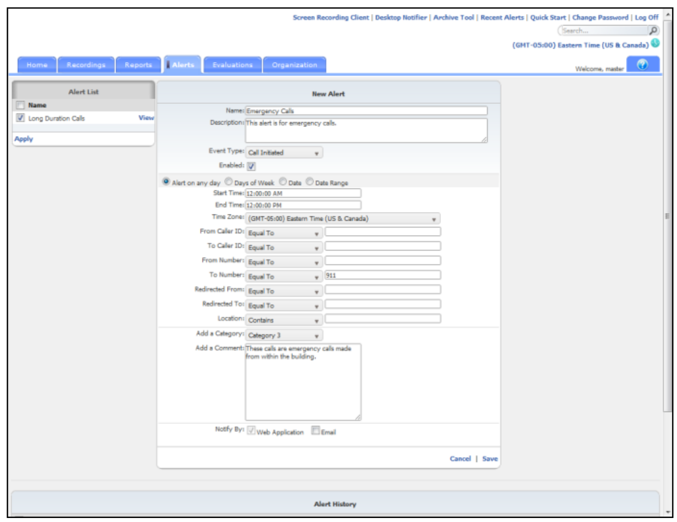
6. Enter or select the following information:
   - Start Time – **12:00:00 a.m.**
   - End Time – **12:00:00 p.m.**
   - Time Zone – **(GMT -05:00) Eastern Time (US & Canada)**
   - To Number – **Equal To 911**



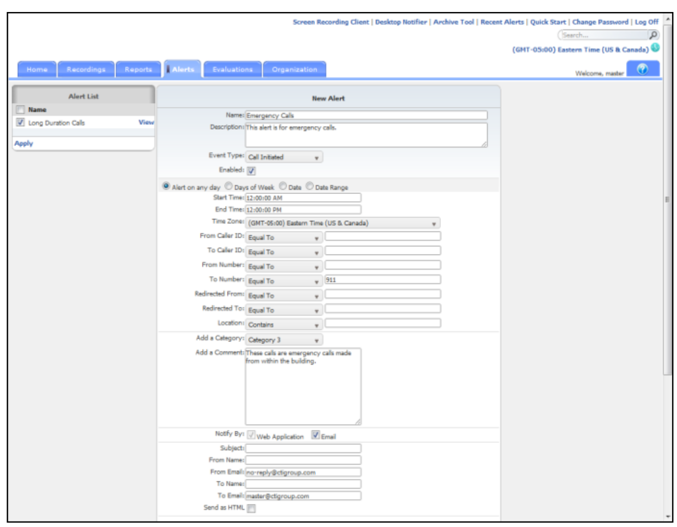
7. Select a category from the **Add a Category** drop down list.



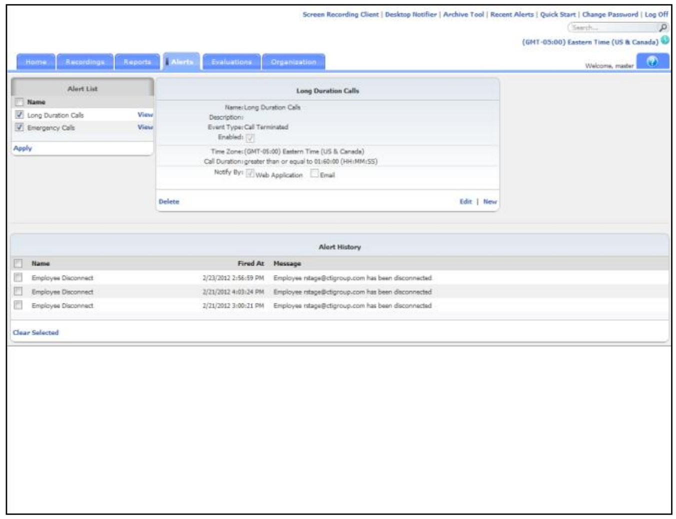
8. Enter the following information:
   - Add a Comment – **These calls are emergency calls made from within the building.**



9. Select **Email** by clicking in the option box.



10. Select **Save**.

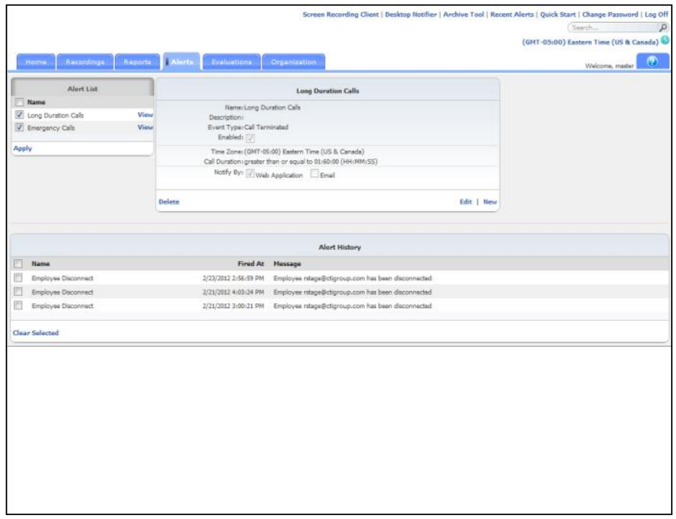


Example: Creating an on demand alert

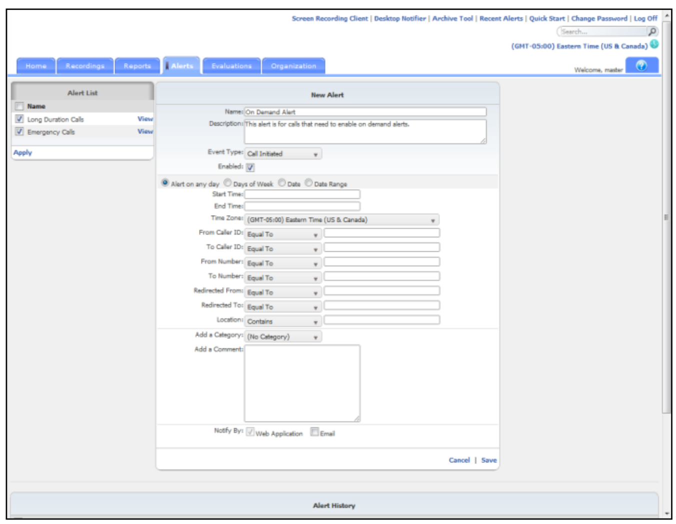
There are two types of on demand alerts: on demand clip alerts and general on demand alerts. Clip alerts will record only a portion of the call identified by the DTMF start and end digits. General on demand alerts record the entire conversation but are initiated when the DTMF digits are entered.

Note: The on demand alert feature is not available to all switch types.

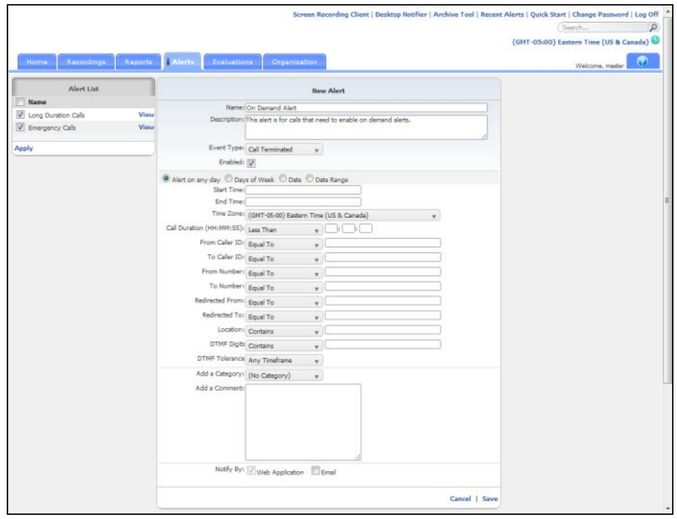
1. Click the **Alerts** tab.



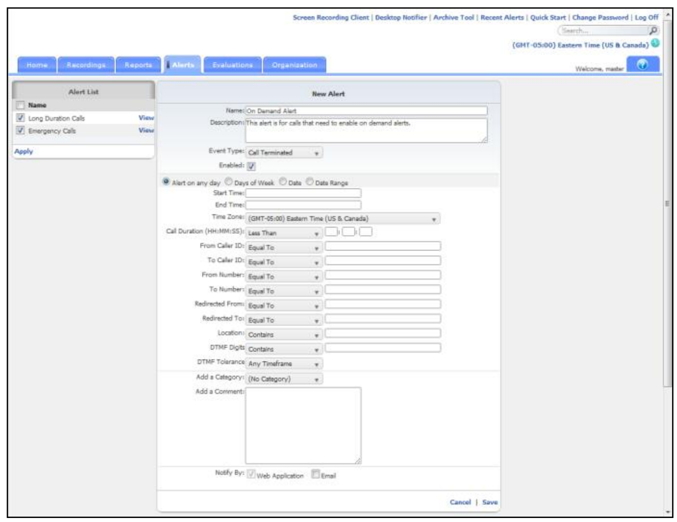
2. If applicable, click **New**. Enter the following information:
   - Name – **On Demand Alert**
   - Description – **This alert is for calls that need to enable on demand alerts.**



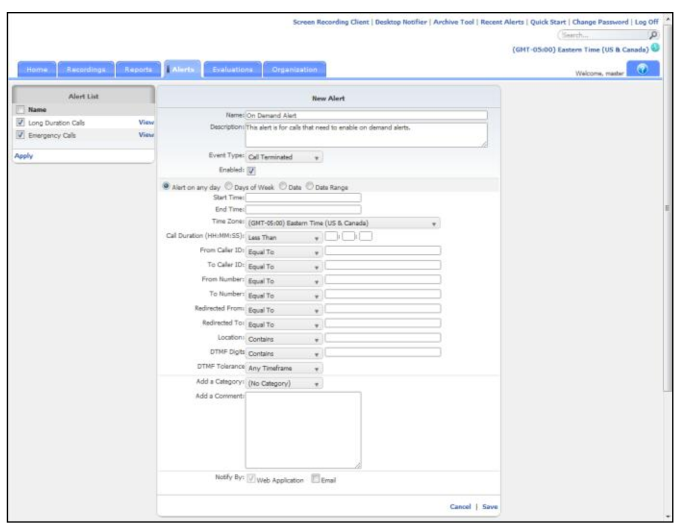
3. Select the following:
   - Event Type - **Call Terminated**



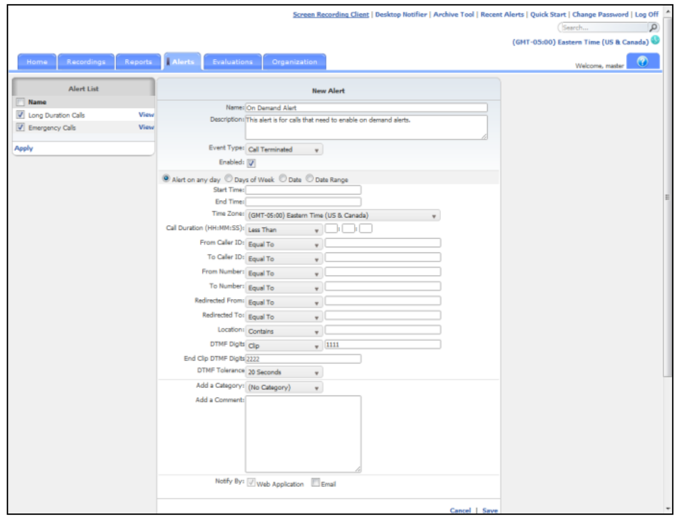
4. If it isn't already selected, click in the **Enabled** option box.



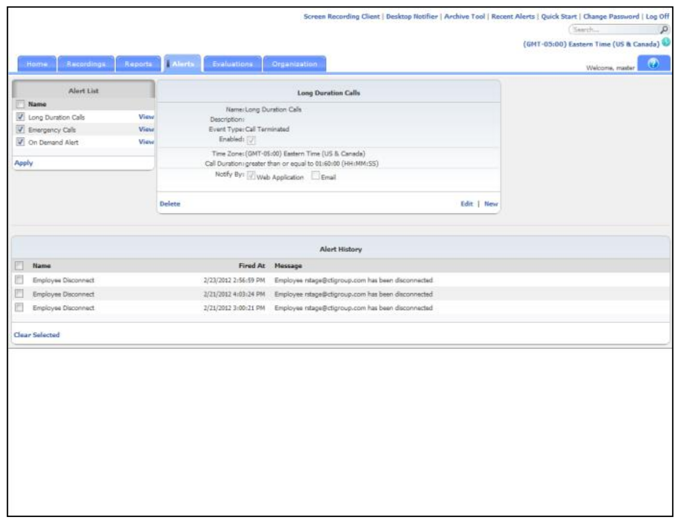
5. If it isn't already selected, click in the **Alert on any day**.



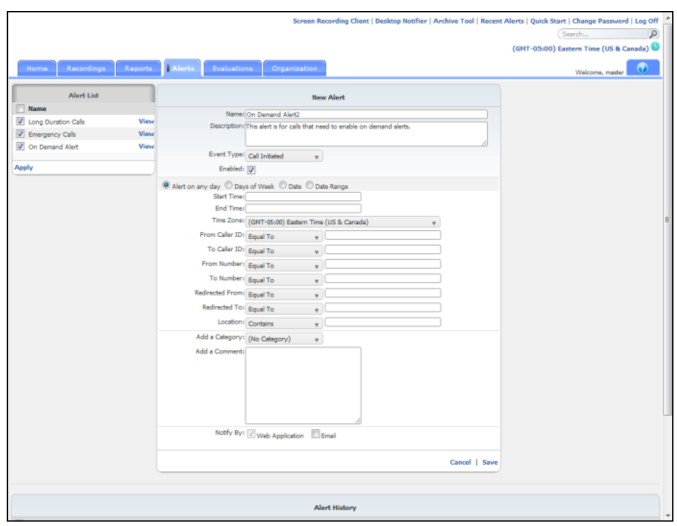
6. Enter or select the following information:
   - DTMF Digits – **Clip**
   - DTMF Digits – **1111**
   - End Clip DTMF Digits – **2222**
   - DTMF Tolerance – **20 seconds**



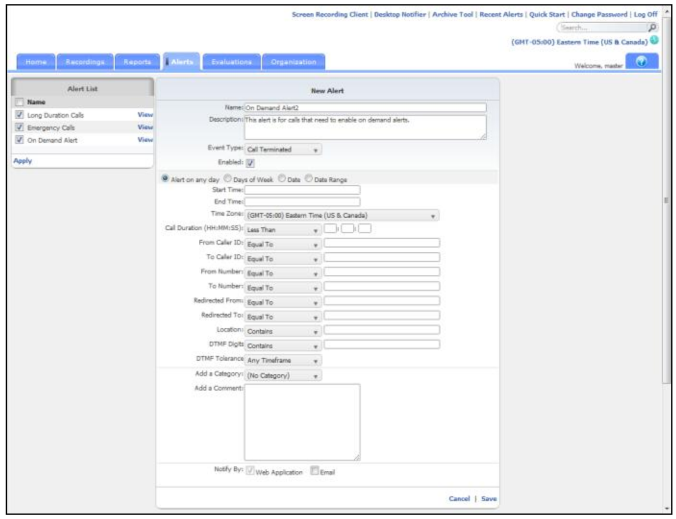
7. Select **Save**.



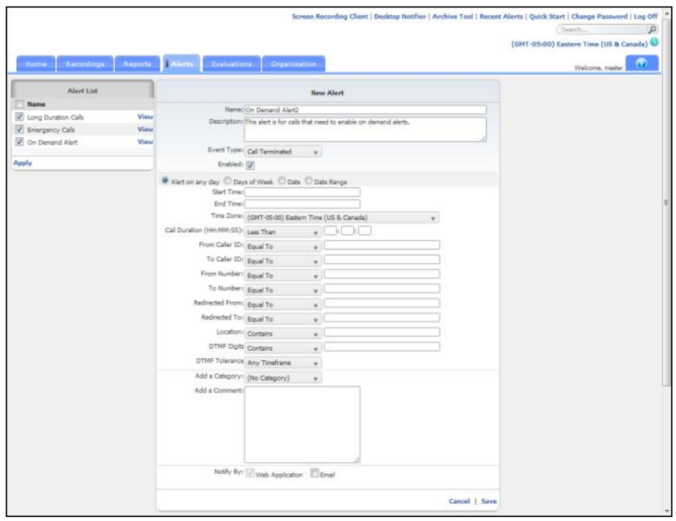
8. Click **New**. Enter the following information:
   - Name – **On Demand Alert2**
   - Description – **This alert is for calls that need to enable on demand alerts.**



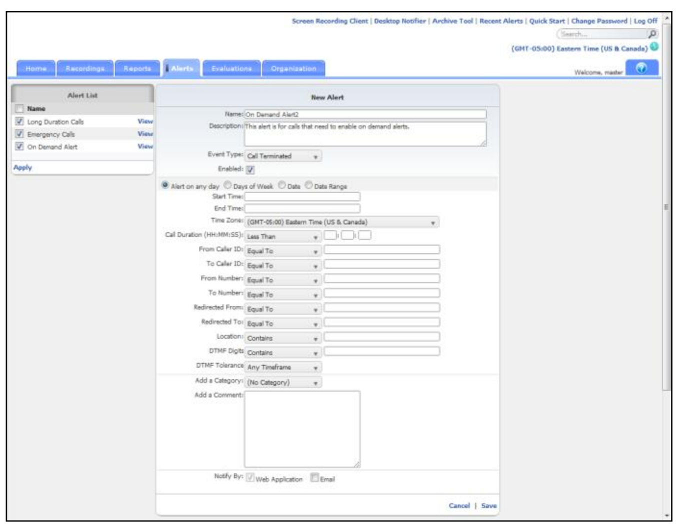
9. Select the following:
   - Event Type - **Call Terminated**



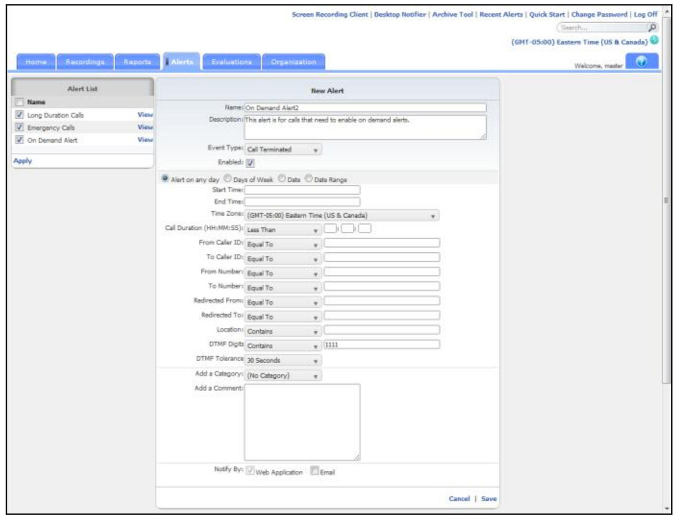
10. If it isn't already selected, click in the **Enabled** option box.



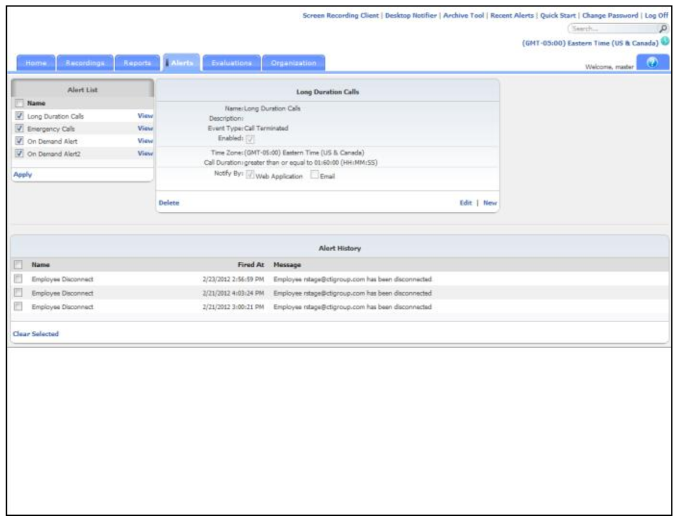
11. If it isn't already selected, click in the **Alert on any day**.



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

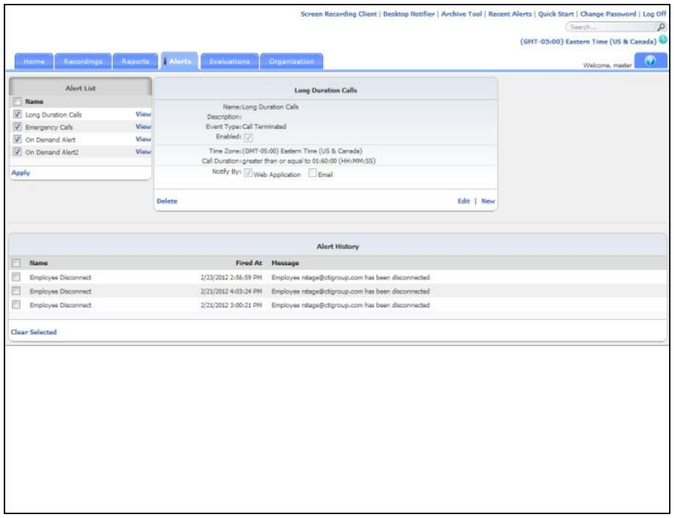


13. Select **Save**.

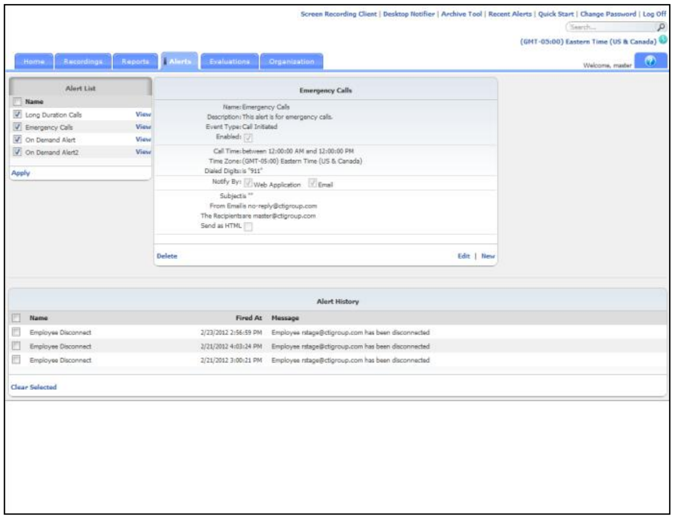


Example: Editing an alert

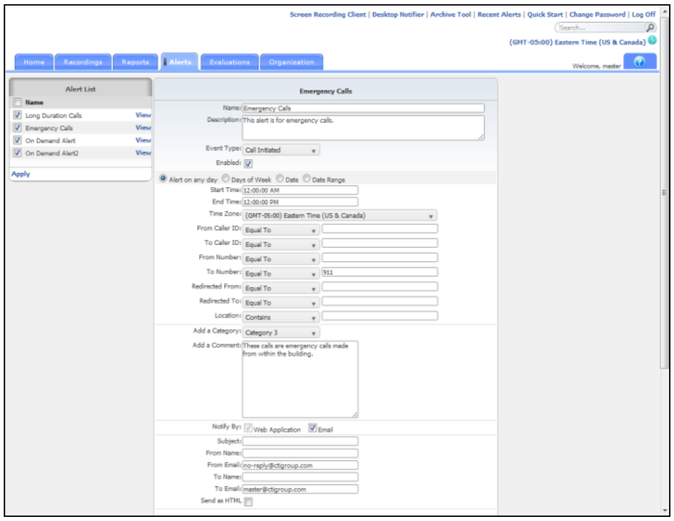
1. Click the **Alerts** tab.



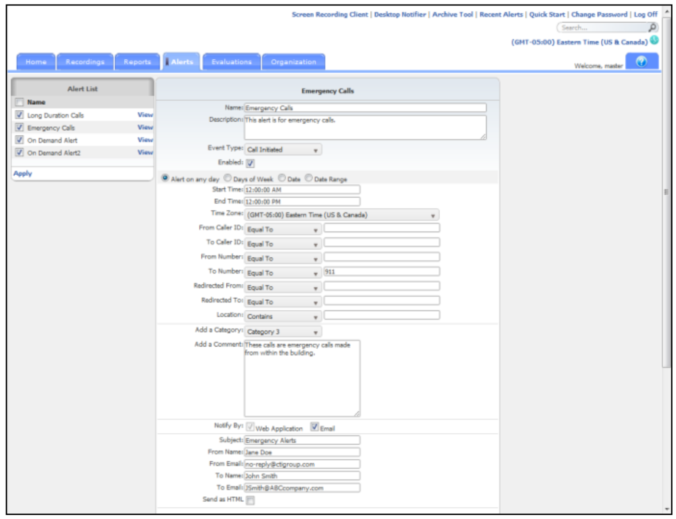
2. Select the Emergency Calls alert **View** link from the Alert List.



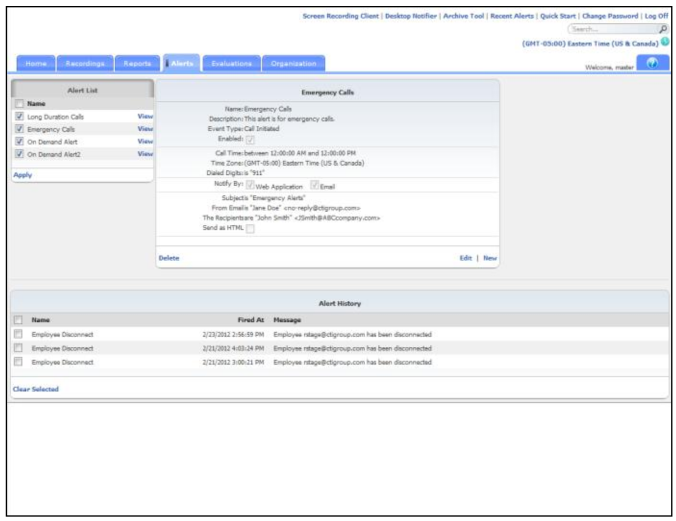
3. Select the **Edit** link.



4. Enter the following information:
    - Subject – **Emergency Alerts**
    - From Name – **enter your name**
    - To Name – **Andrea**
    - To Email – **ahash@abccompany.com**



5. Select **Save**.

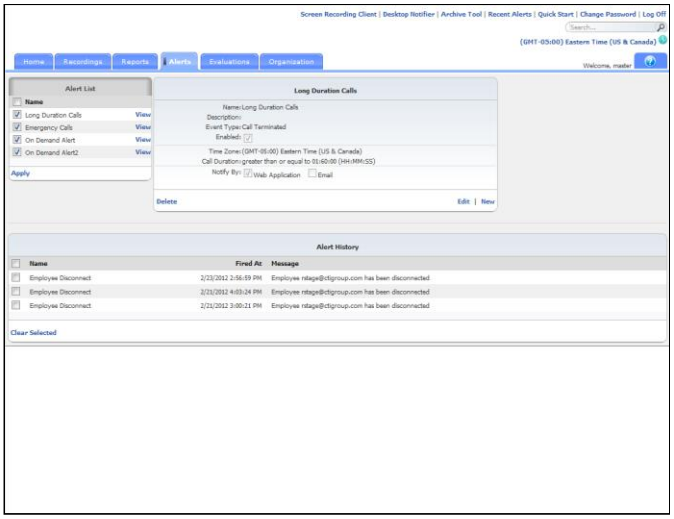


Example: Enabling and disabling an alert

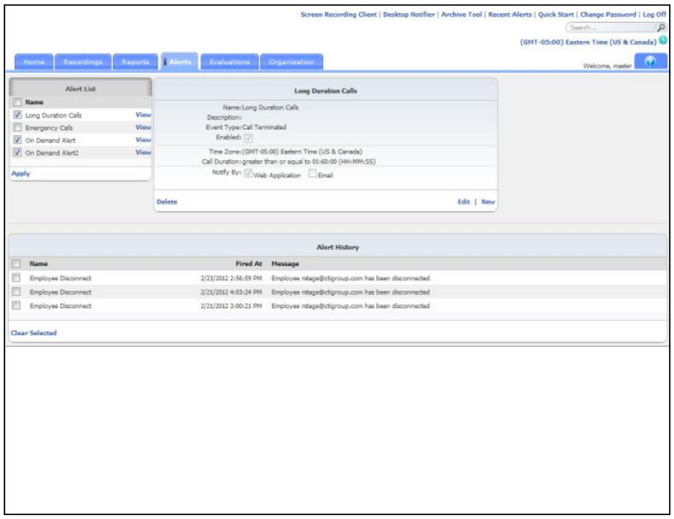
The obvious reason that an alert may be inactive is that it is no longer being used. Another less obvious reason, an alert is temporarily inactivated by an Administrator because it was causing too many emails to be sent out, potentially causing congestion on the email server. Since alerts can be reused, they should not always be deleted.

Note: If an alert was temporarily inactivated because too many emails were being generated, the alert should be edited before it is reactivated.

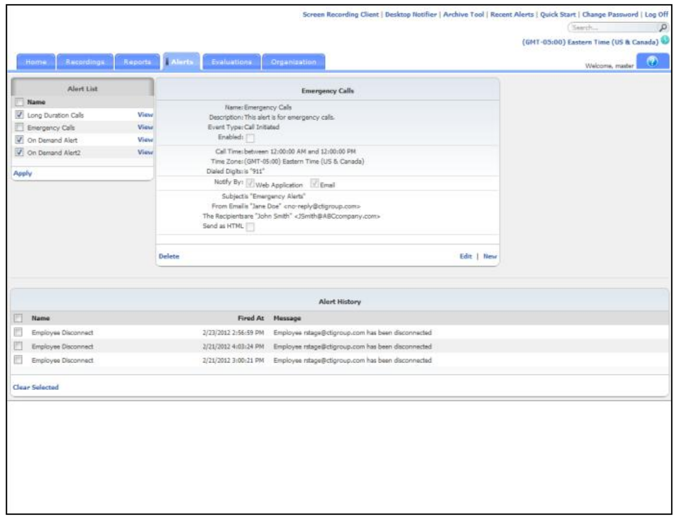
1. Click the **Alerts** tab.



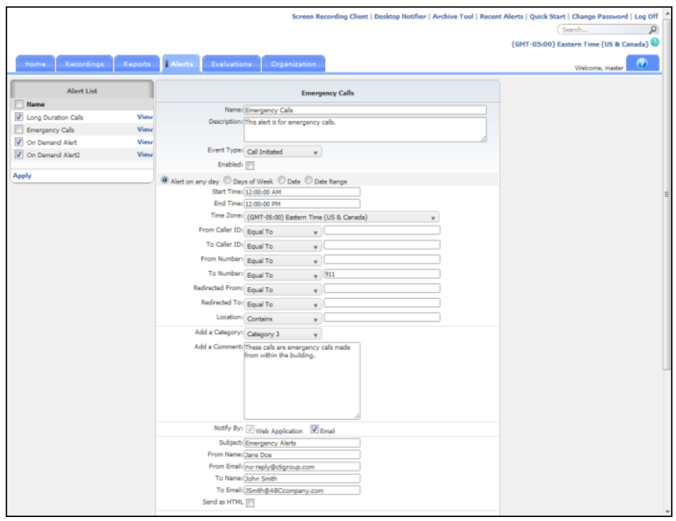
2. Click in the option box that corresponds to the Emergency Calls alert found under the **Alert List**.



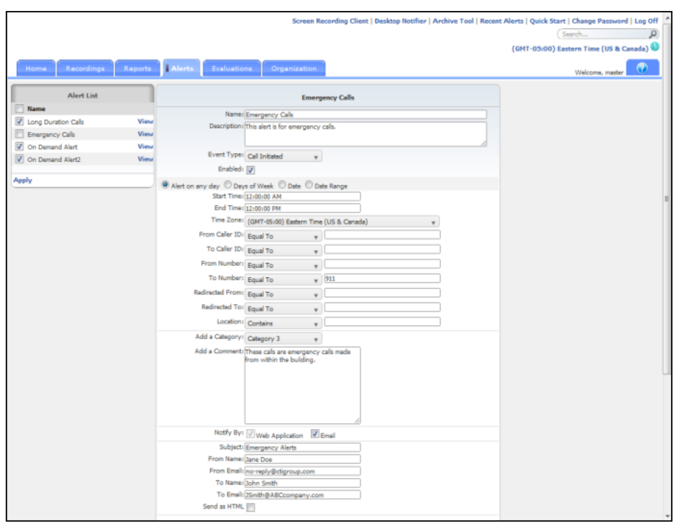
3. Select **Apply**.



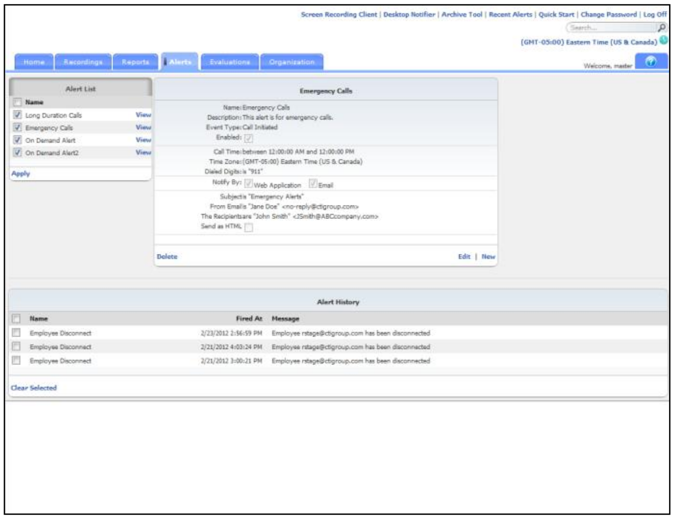
4. Select **Edit**.



5. Click in the Emergency Calls alert **Enabled** option box.

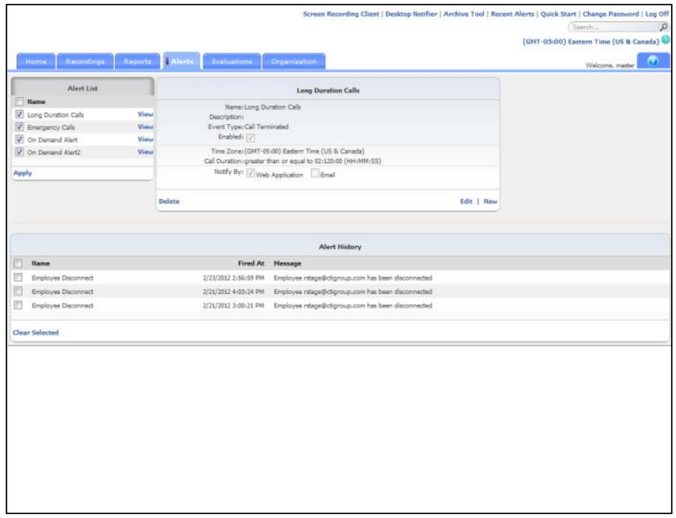


6. Select **Save**.

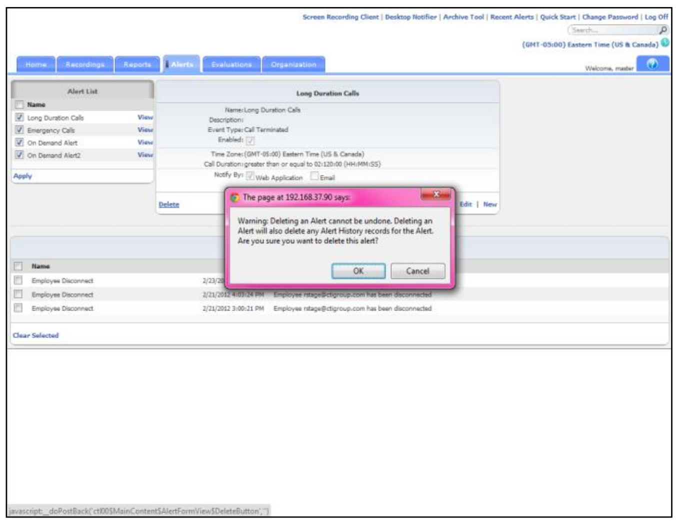


Example: Deleting an alert

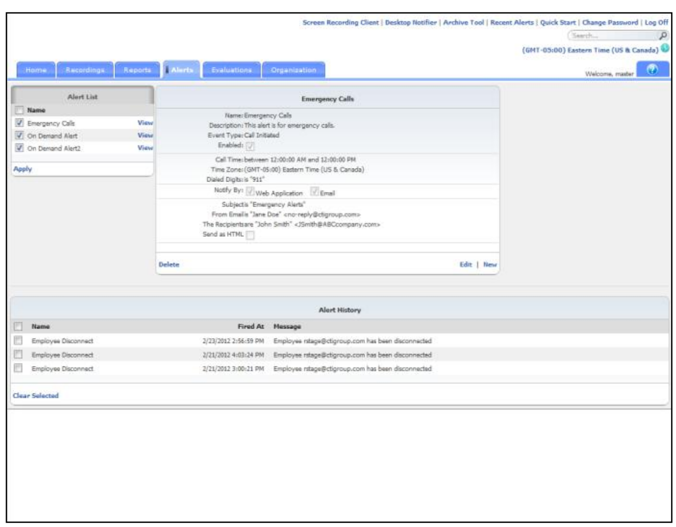
1. Click the **Alerts** tab.



2. Select **Delete**.



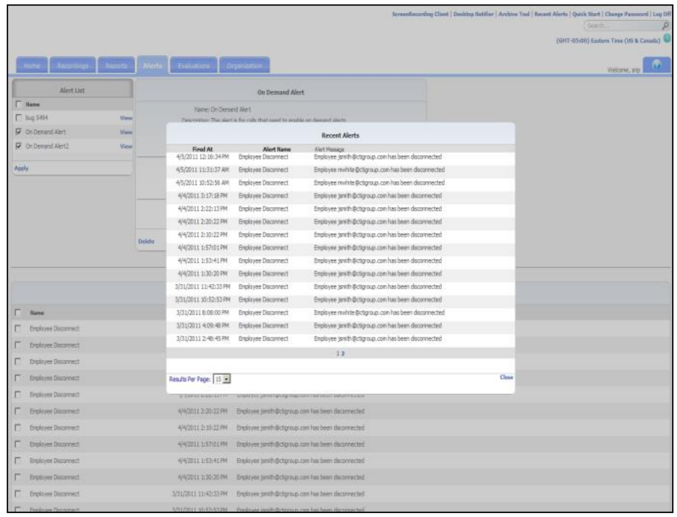
3. Select **OK**.



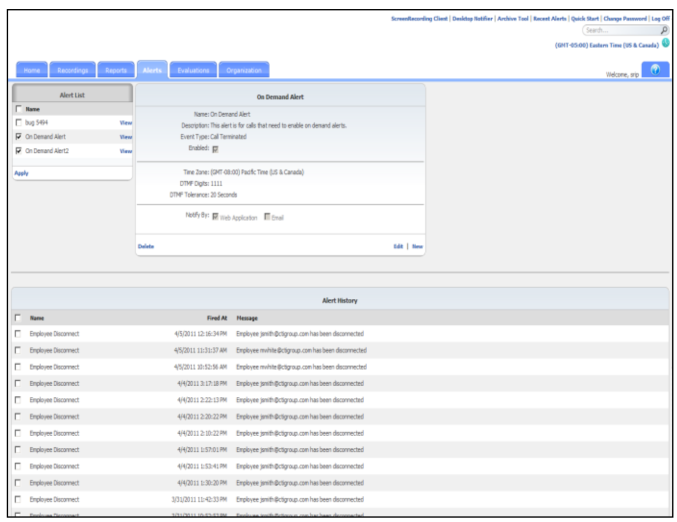
Example: Recent alerts

You can view up to 20 of the most recent alerts by clicking on the Recent Alerts link on the top right side of the end user application window. The default view is to show 15 recent alerts, however, you can change the default by clicking on the Results Per Page drop down and selecting from the available options. While you have this dialog box open, you will be notified of any new alerts. New alerts will first appear at the bottom of the dialog box and if you are using IE you will also hear a chime.

1. Select the **Recent Alerts** link.



2. Select **Close**.



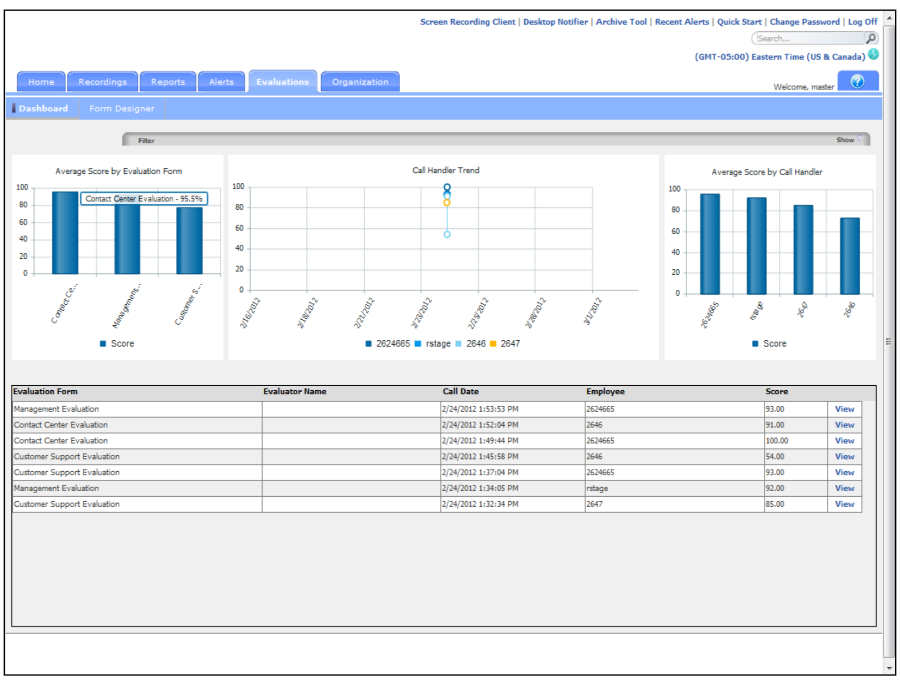
Evaluations

The Evaluation tab provides managers of phone based teams with the functionality to easily create evaluations that can be applied to recordings 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:

- Average Score by Evaluation Form - displays the top 5 most used evaluation forms sorted by average score
- Call Handler Trend - displays the top 10 most evaluated call handlers over time
- Call Handler Average - displays the average score, by call handler, over the selected date range
- Call Evaluation Grid - displays information for each completed evaluation, by call handler. The grid is sortable by clicking on the headings. The default sort order is by evaluation date/time. The name of the evaluation, the evaluator, the date the evaluation was completed, and the call handler that was evaluated, and the overall score they received are all displayed in the Call Evaluation Grid. The View link takes you to the completed evaluation to view the results.



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.

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 you own list of options, click Add Option, enter the Option information (for example: very polite, extremely polite, etc.), and assign a score to the option. Save your work and continue adding questions and options as necessary to finish creating the evaluation.

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. If necessary, make any necessary additions or deletions to the template, including giving it a more meaningful name, and click Save.

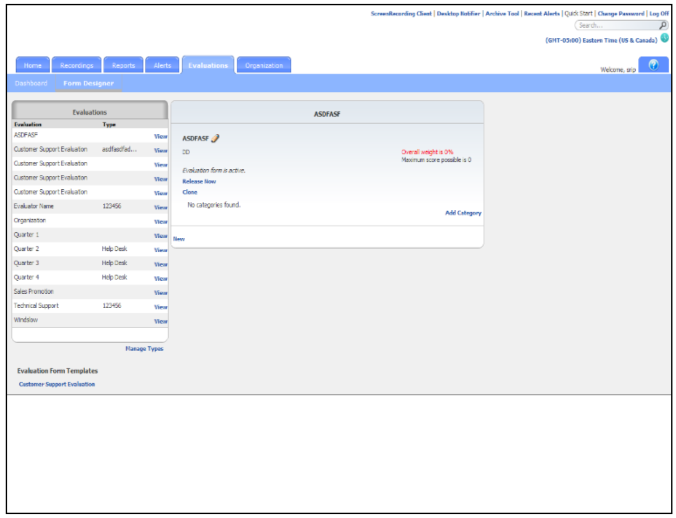
If there isn't a template that meets your needs, odds are that one of the already created evaluations could. In that case, you can clone that evaluation and then make the necessary changes. Select the specific evaluation you wish to clone and select Clone. Make any necessary additions or deletions, including giving it a more meaningful name and click Save.

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 form the Form Designer tab. Select the evaluation you wish to release by clicking the View link. Select Release Now and OK to the confirmation message.

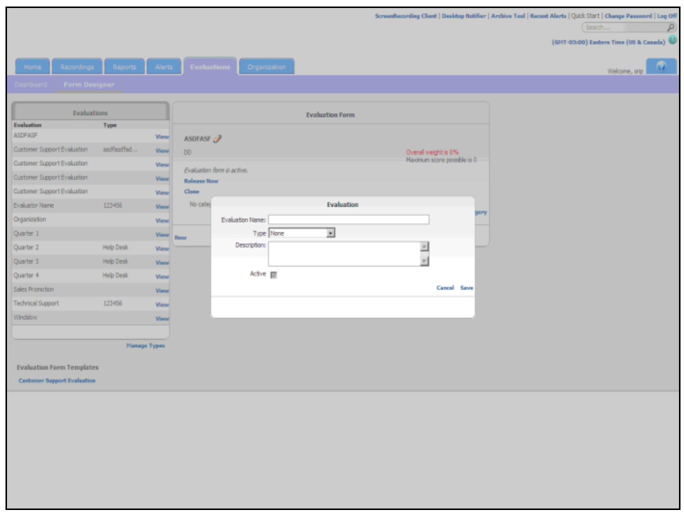
Since the list of evaluations can potentially get very large, you have the ability to apply an evaluation type to specific or all evaluations to essentially "categorize" them. To create a new evaluation type, click on the Form Designer tab and select the Manage Types link. Simply enter the name of the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

Example: Creating a new evaluation

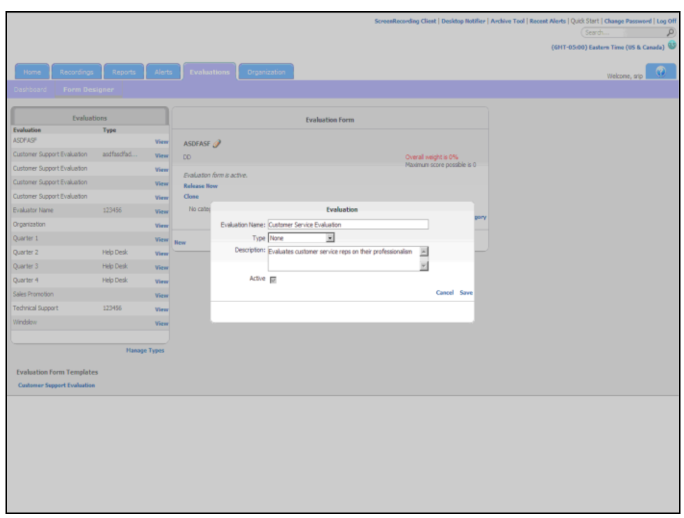
1. Click the **Evaluations** tab and select **Form Designer**.



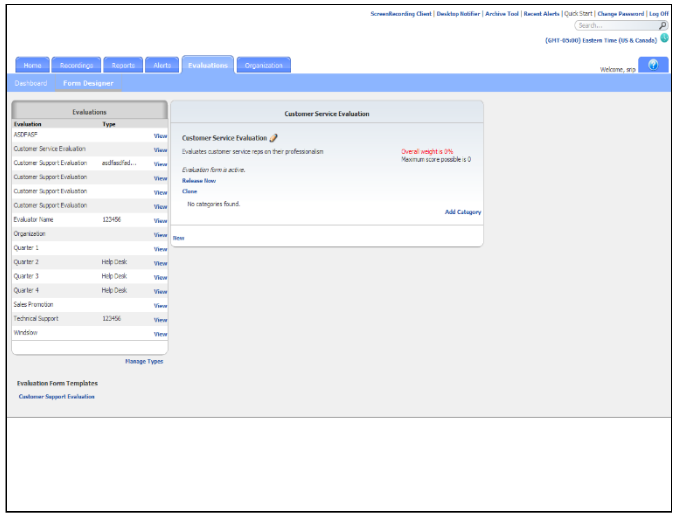
2. Select **New**.



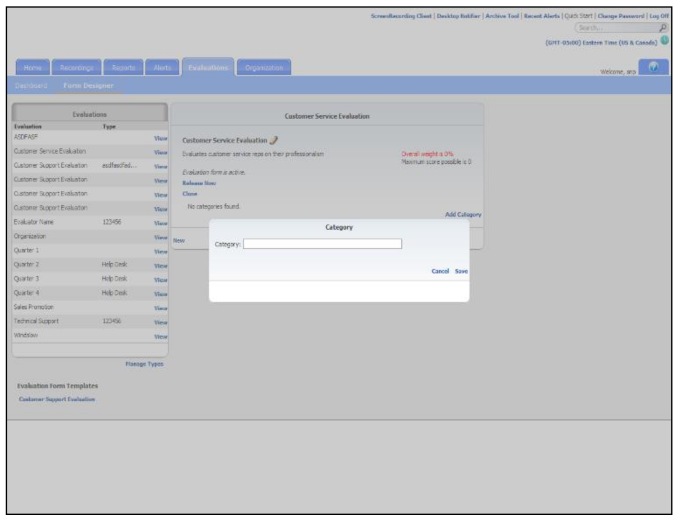
3. Enter or select the following information:
   - Evaluation Name – **Customer Service Evaluation**
   - Description – **Evaluates customer service reps on their professionalism**



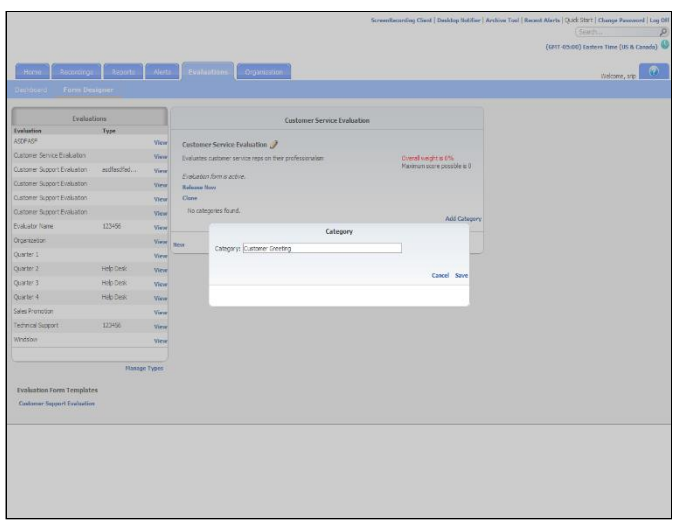
4. Click **Save**.



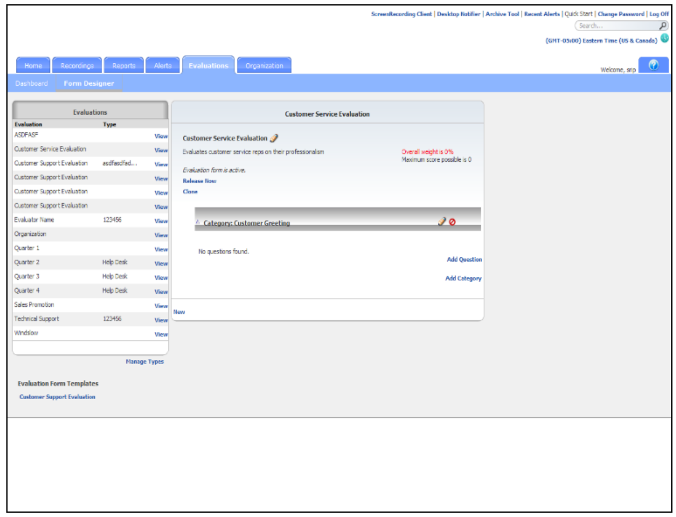
5. Select **Add Category**.



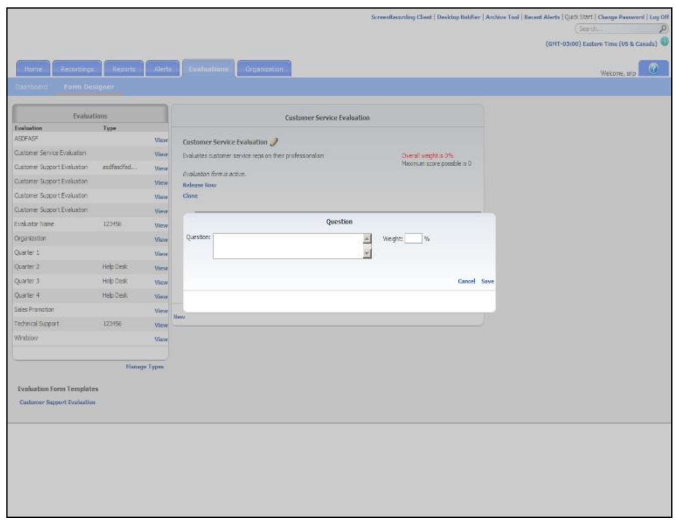
6. Enter or select the following information:
   - Category – **Customer Greeting**



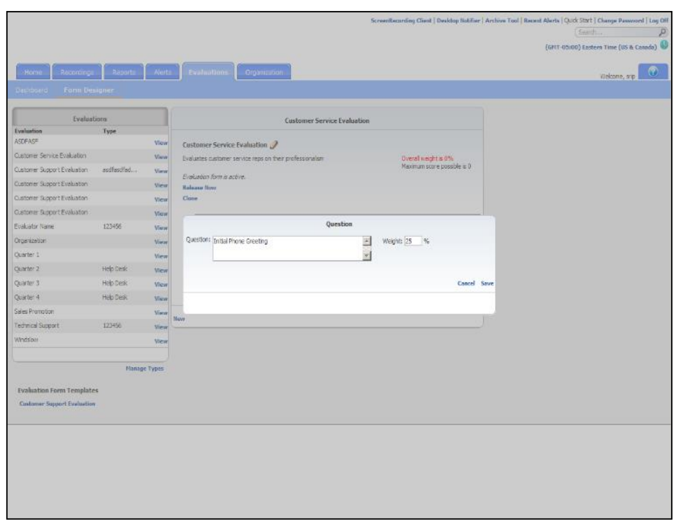
7. Click **Save**.



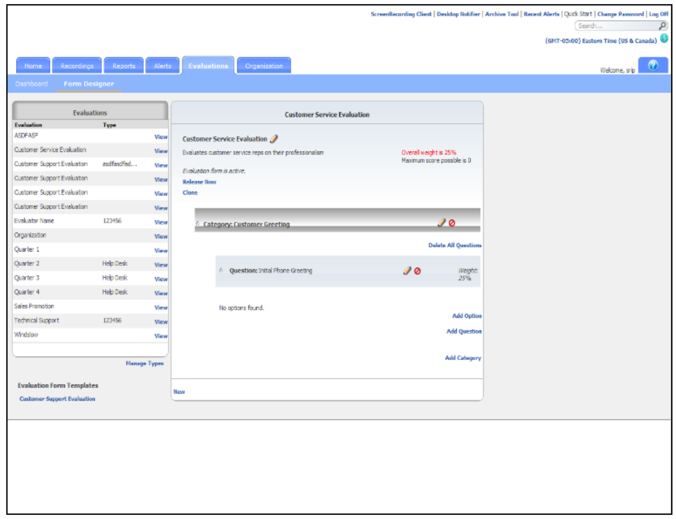
8. Select **Add Question**.



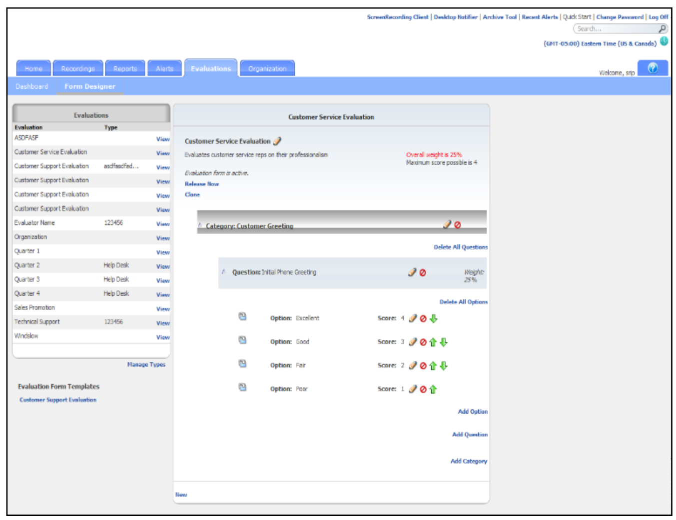
9. Enter or select the following information:
   - Question – **Initial Phone Greeting**
   - Weight - **25**



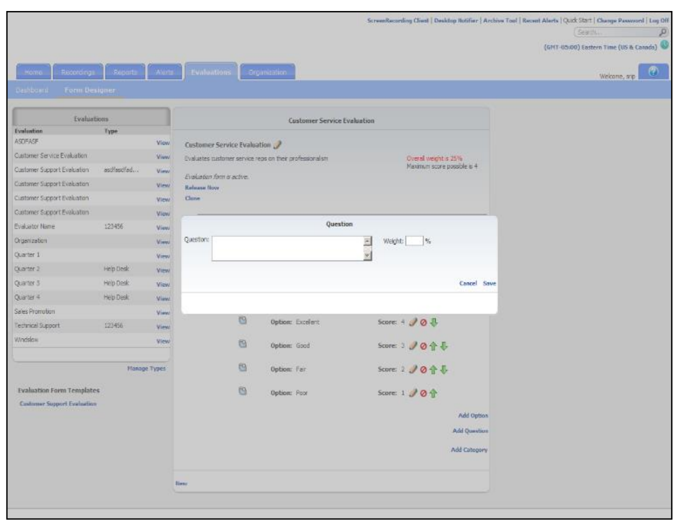
10. Click **Save**.



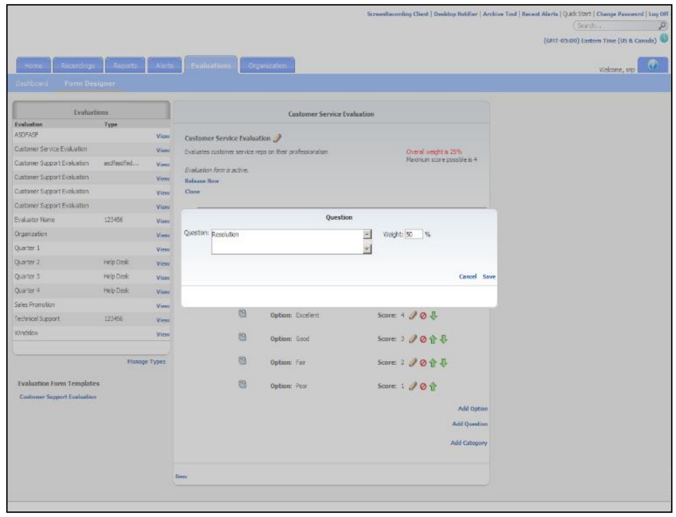
11. Hover over the **Add Option** link and select the **Add Quality Options** option.



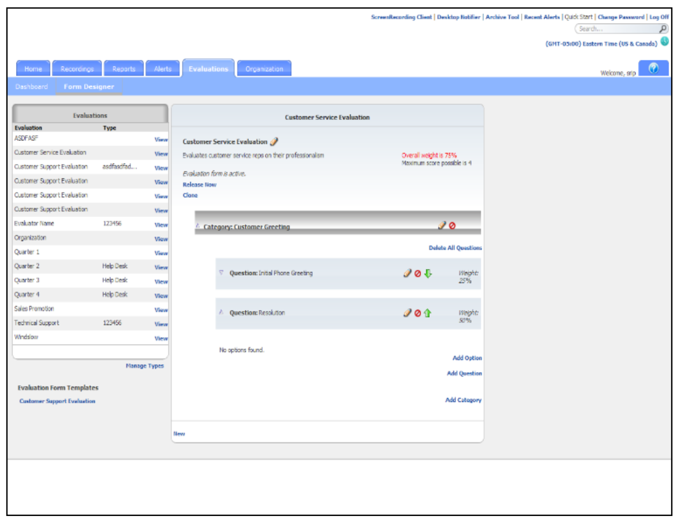
12. Select **Add Question**.



13. Enter or select the following information:
    - Question – **Resolution**
    - Weight – **50**

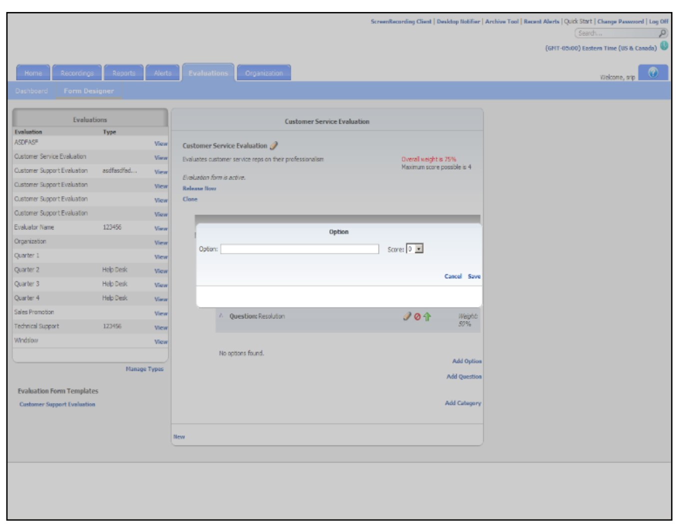


14. Click **Save**.

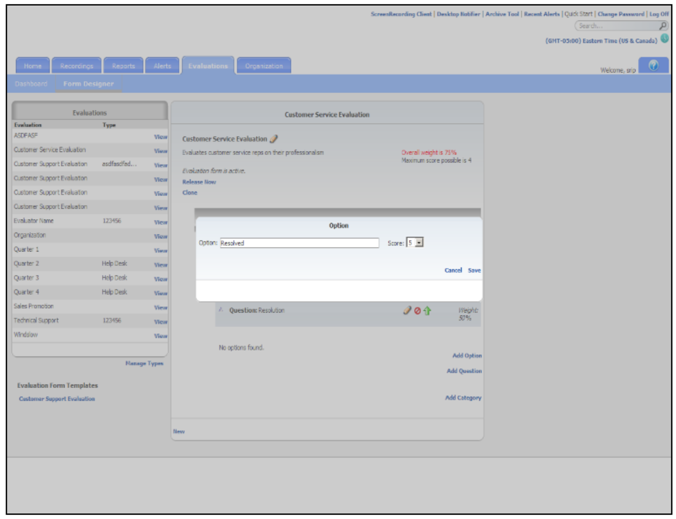


15. Click **Add Option** to create our own options.

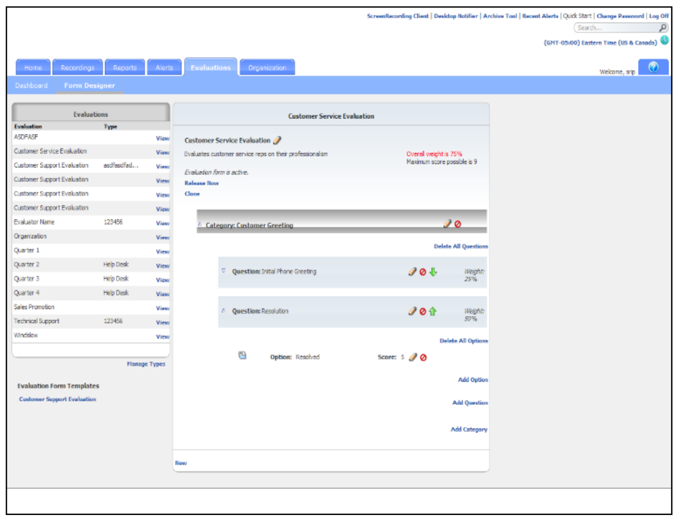
    Note: There cannot be more than five options under a question.



16. Enter or select the following information:
    - Option – **Resolved**
    - Score - **5**

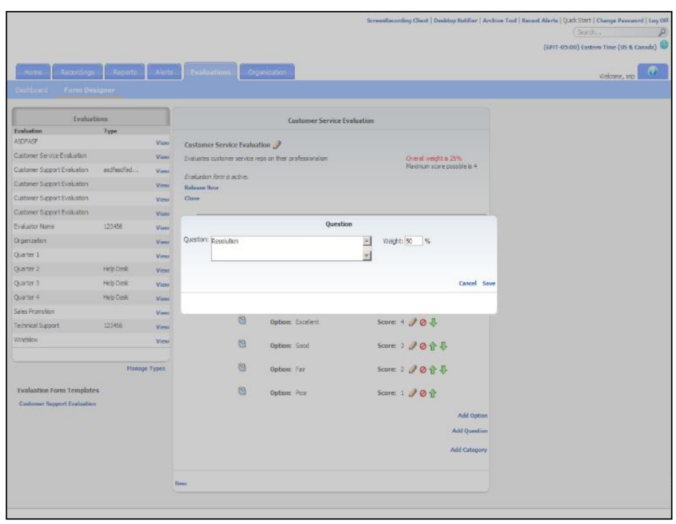


17. Click **Save**.

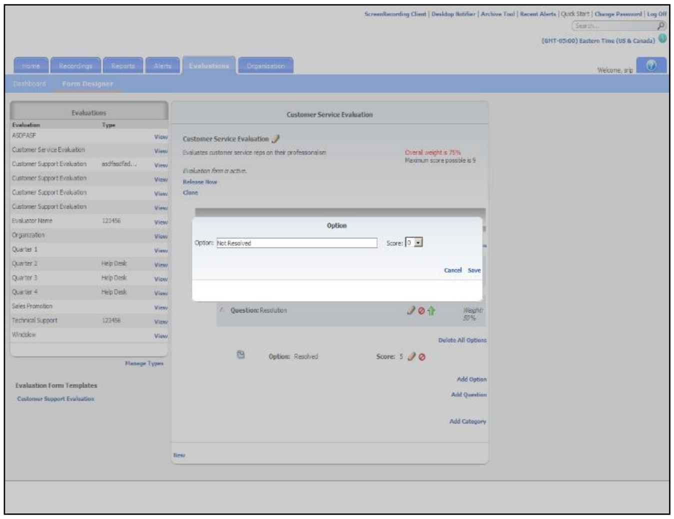


18. Click **Add Option** to create our own options.

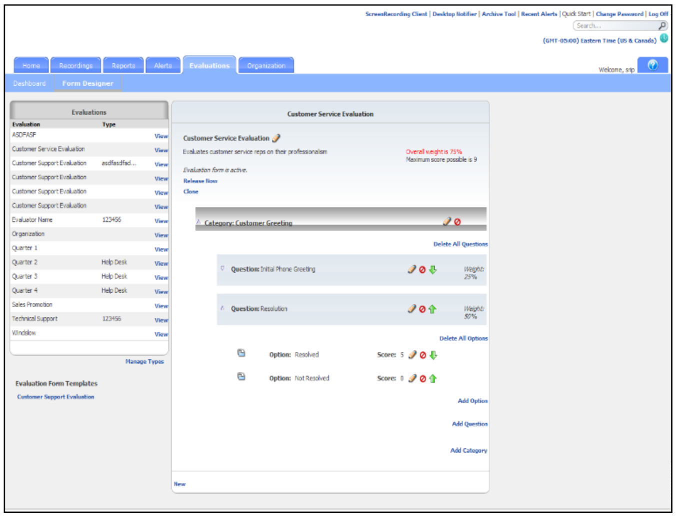
> **Note:** There cannot be more than five options under a question.



19. Enter or select the following information:
    - Option – **Not Resolved**
    - Score - **0**

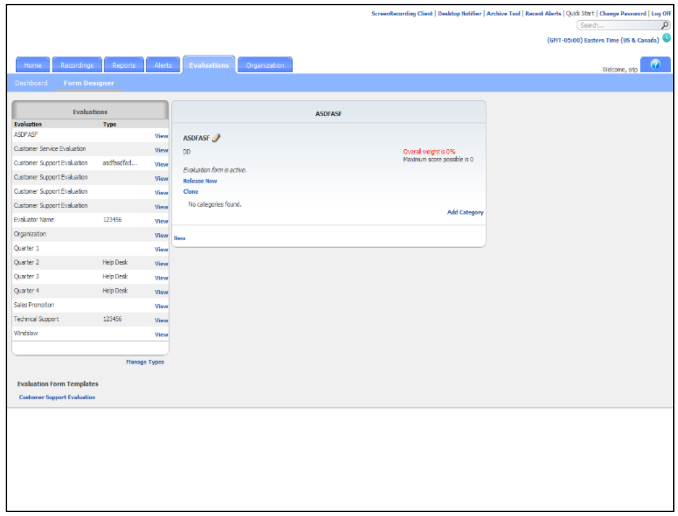


20. Click **Save**.

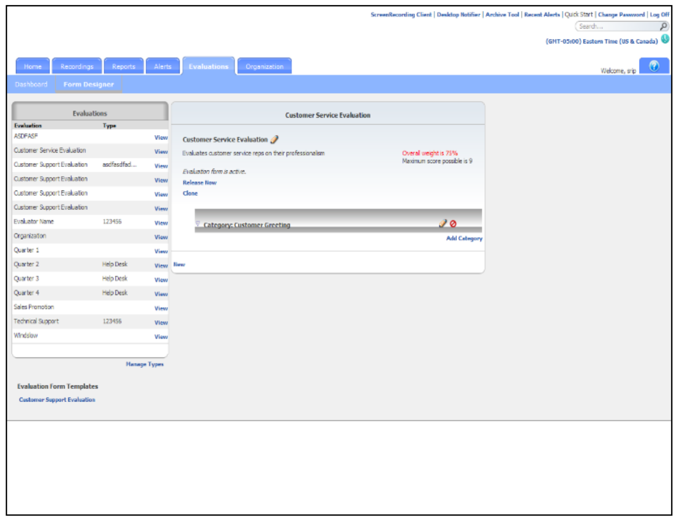


Example: Editing categories, questions, and options

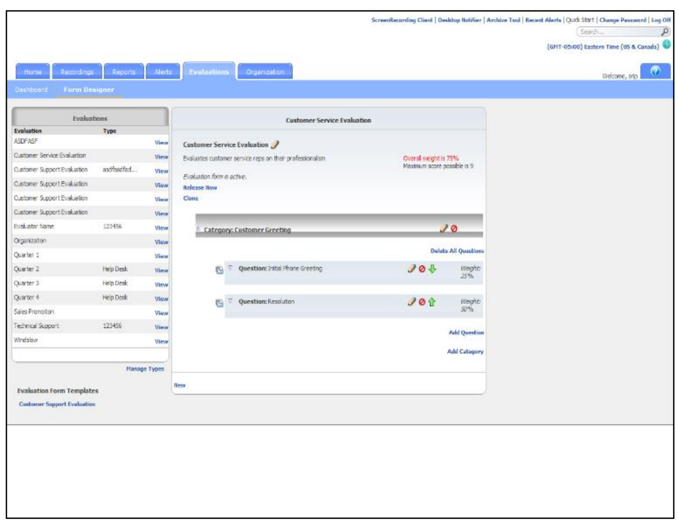
1. Click the **Evaluations** tab and select **Form Designer**.



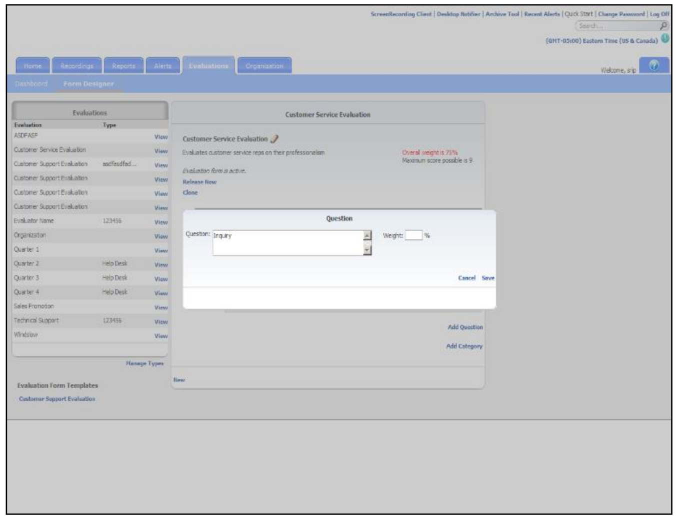
2. Select **Customer Service Evaluation** from the Evaluations list and click **View**.



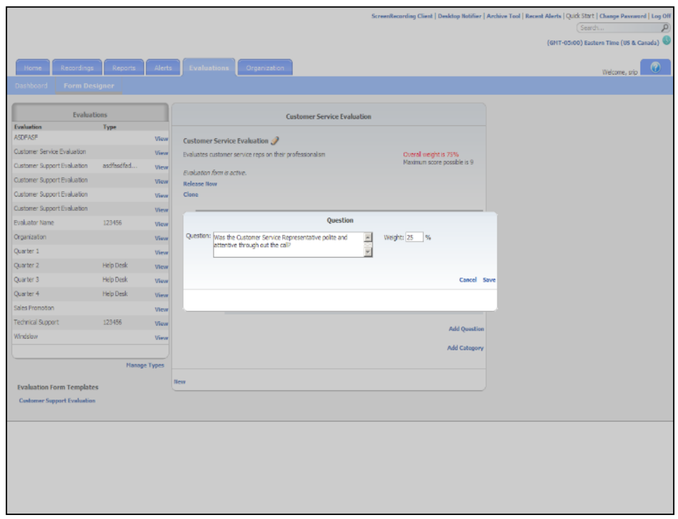
3. Click on the **Customer Greeting** category heading.



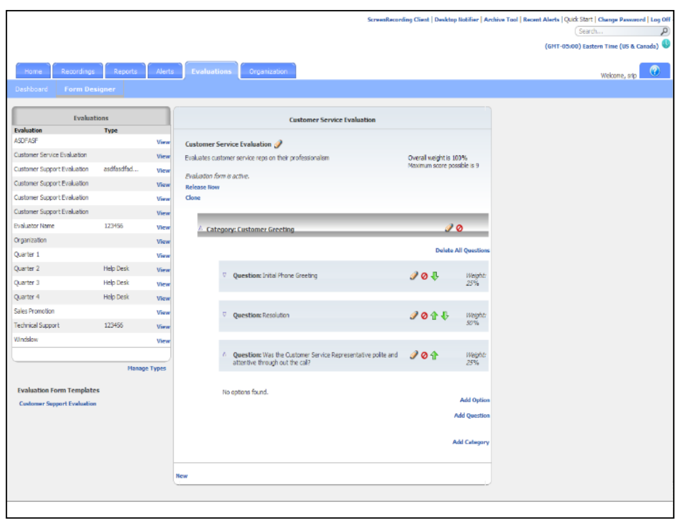
4. Select **Add Question**.



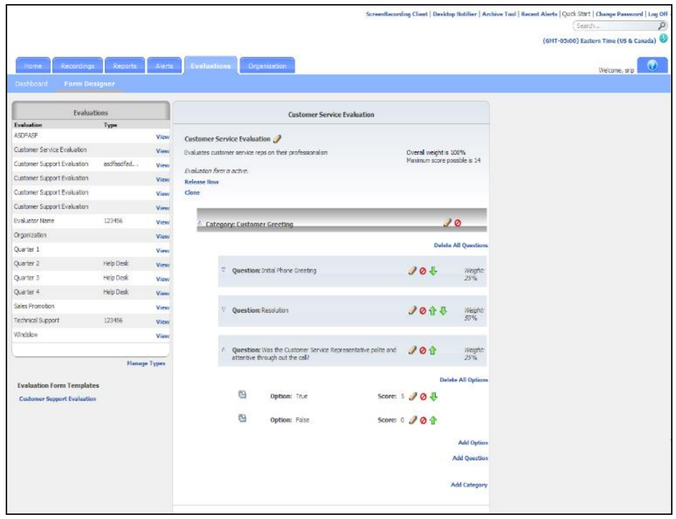
5. Enter or select the following information:
   - Question – **Was the Customer Service Representative polite and attentive through out the call?**
   - Weight – **25**



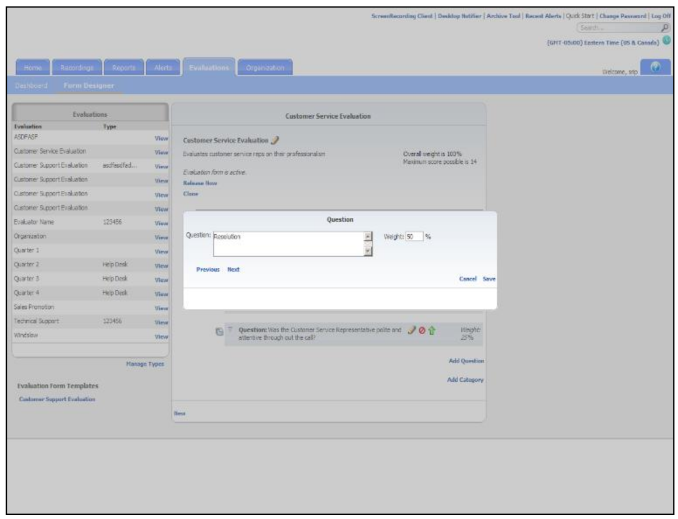
6. Click **Save**.



7. Hover over the **Add Option** link and select the **Add True False Options** option.

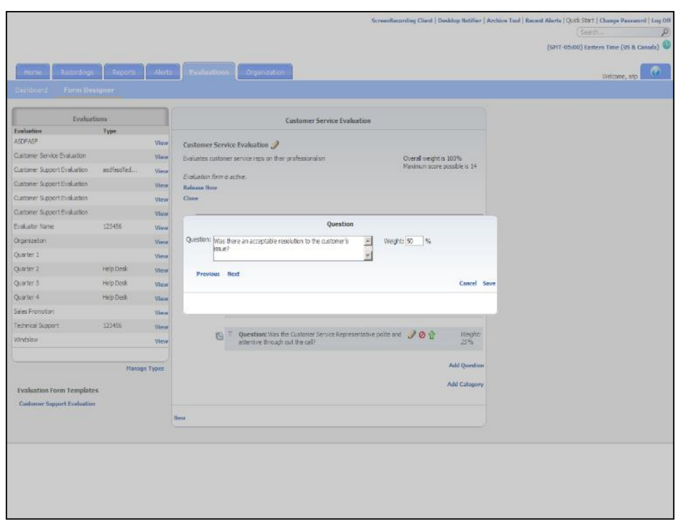


8. Select the (Edit) button that corresponds to the Resolution question heading.

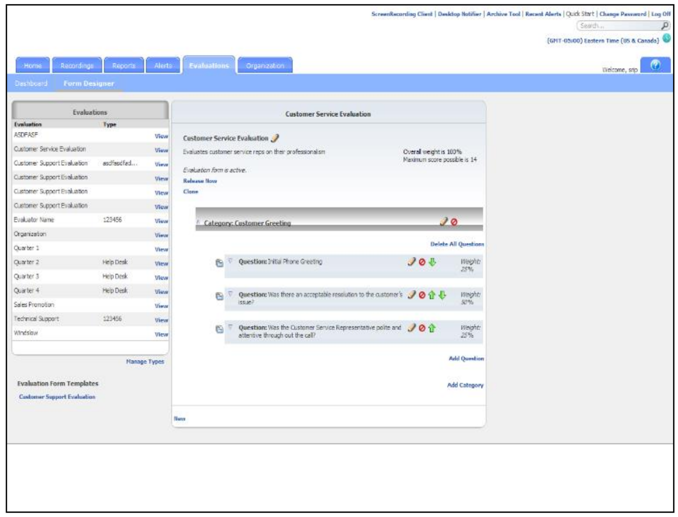


9. Enter or select the following information:

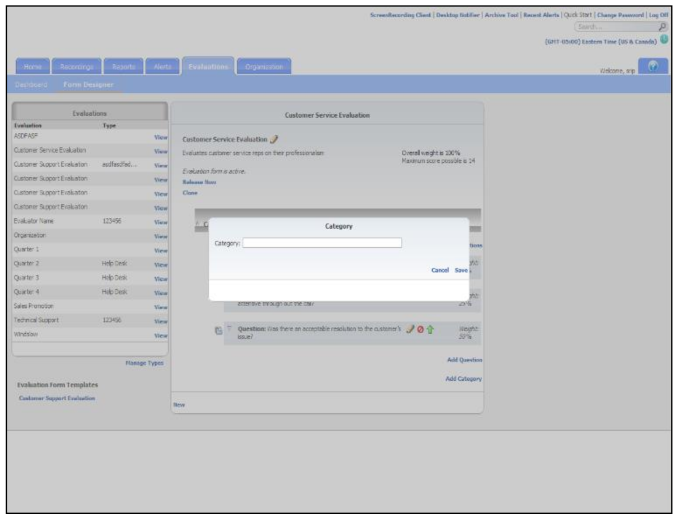
   - Question – **Was there an acceptable resolution to the customer's issue?**



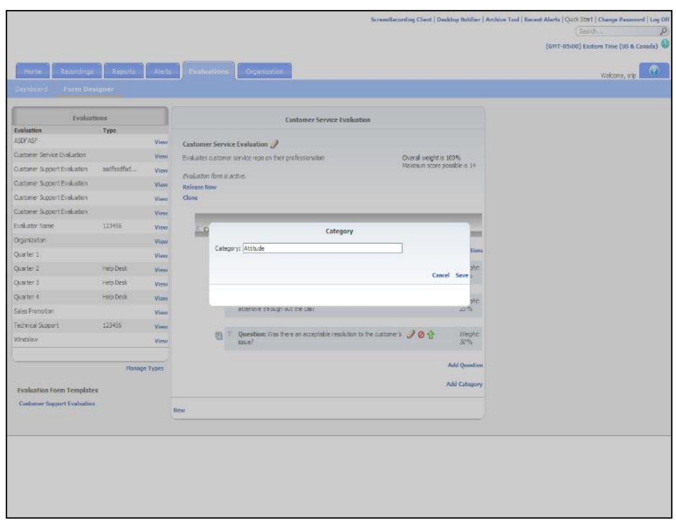
10. Click **Save**.



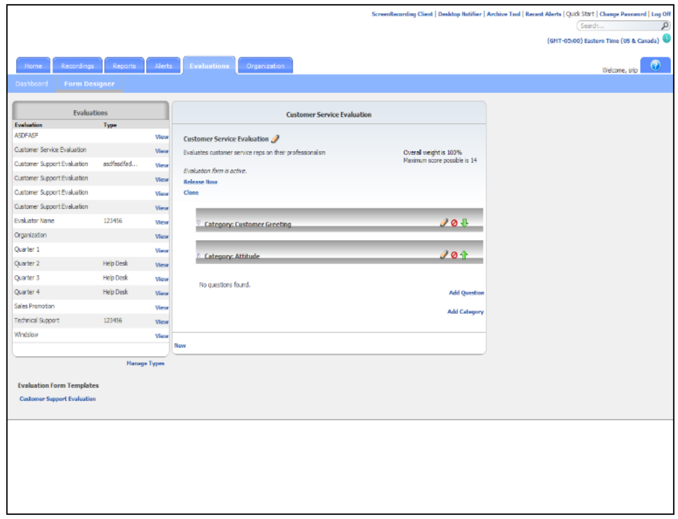
11. Select **Add Category**.



12. Enter or select the following information:
    - Category – **Attitude**

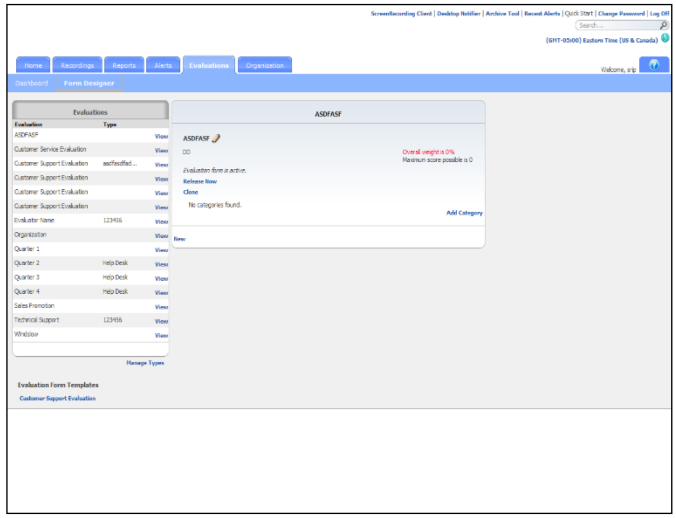


13. Click **Save**.

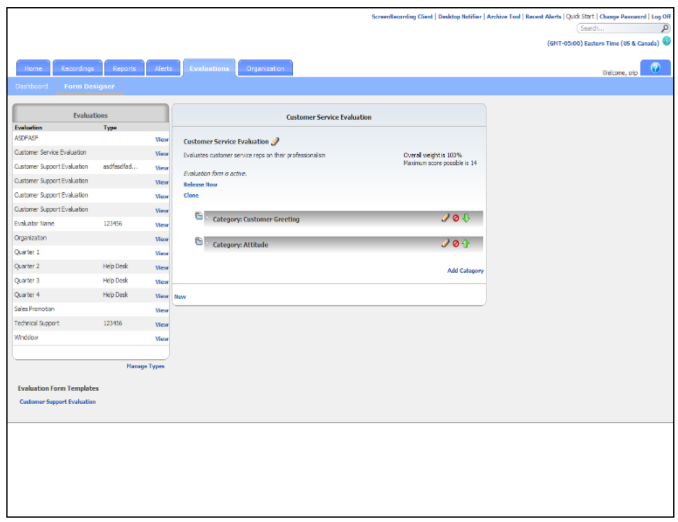


Example: Moving categories, questions, and options

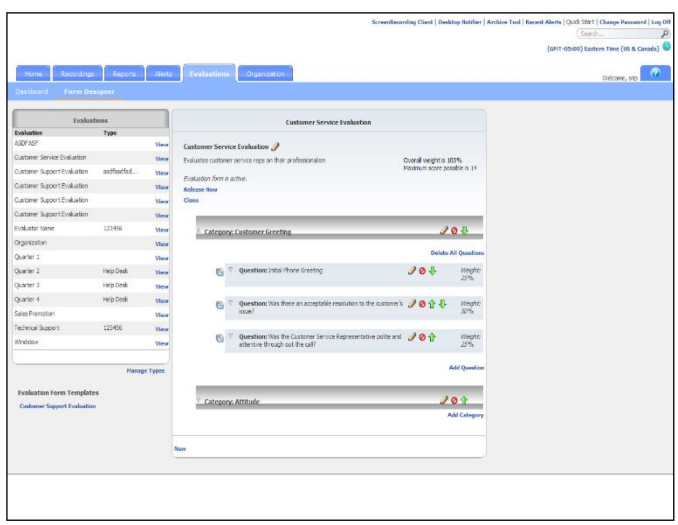
1. Click the **Evaluations** tab and select **Form Designer**.



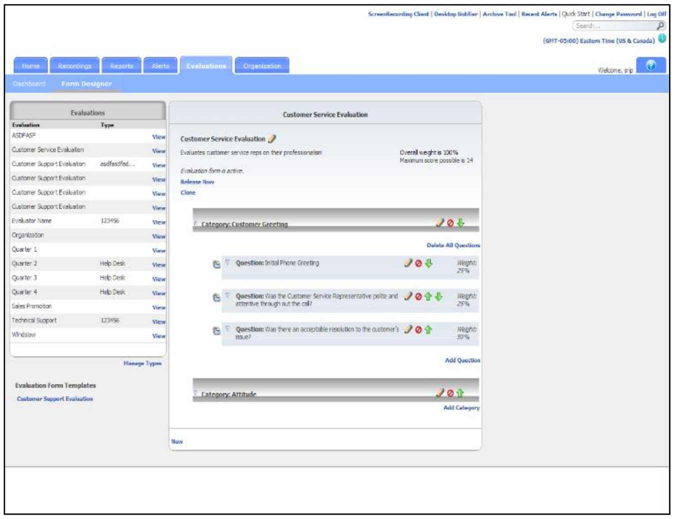
2. Select **Customer Service Evaluation** from the Evaluations list and click **View**.



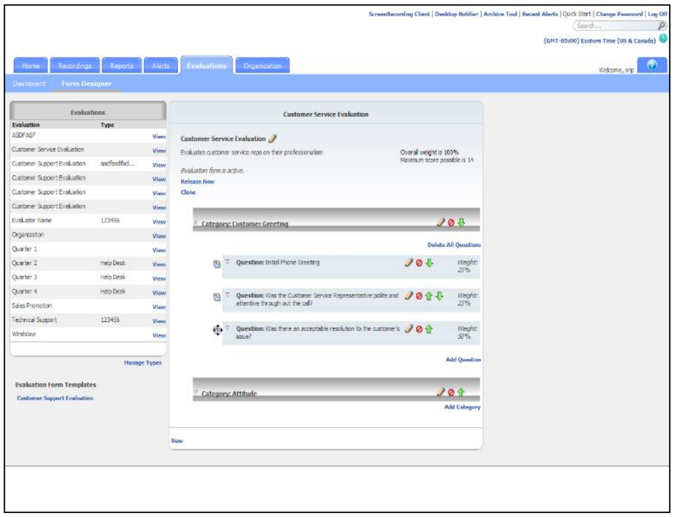
3. Click on the **Customer Greeting** category heading.



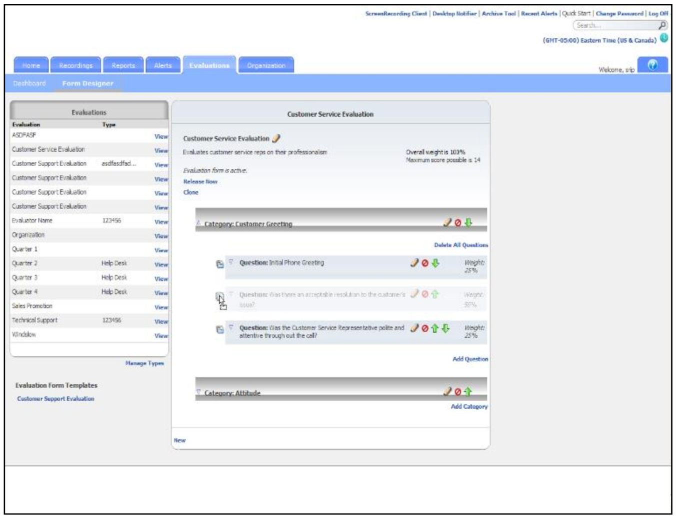
4. Click on the (Move Down) button that corresponds to the "Was there an acceptable resolution to the customer's issue," question.



5. Hover over the button that corresponds to the "Was there an acceptable resolution to the customer's issue," question.

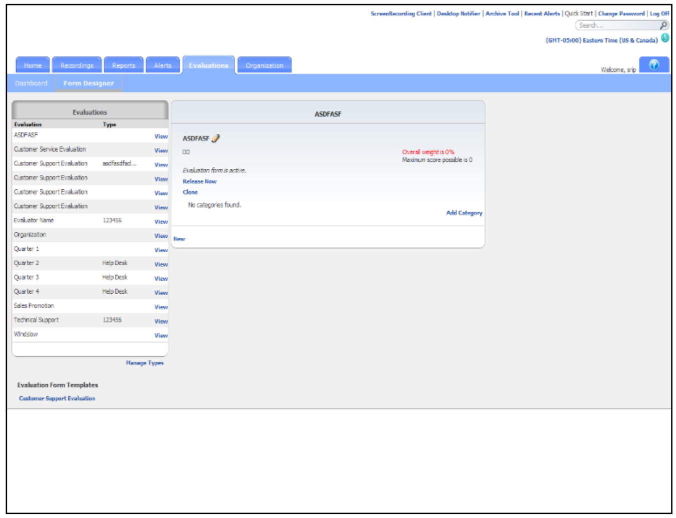


6. While holding the mouse down, drag-and-drop the option back to its original position.

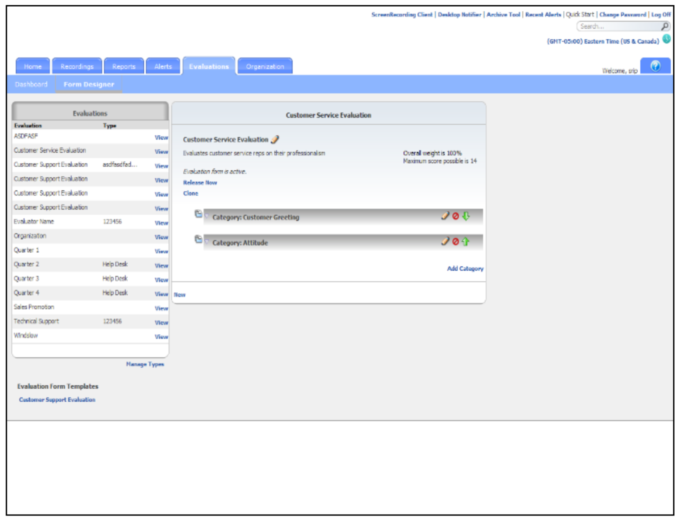


Example: Deleting categories, questions, and options

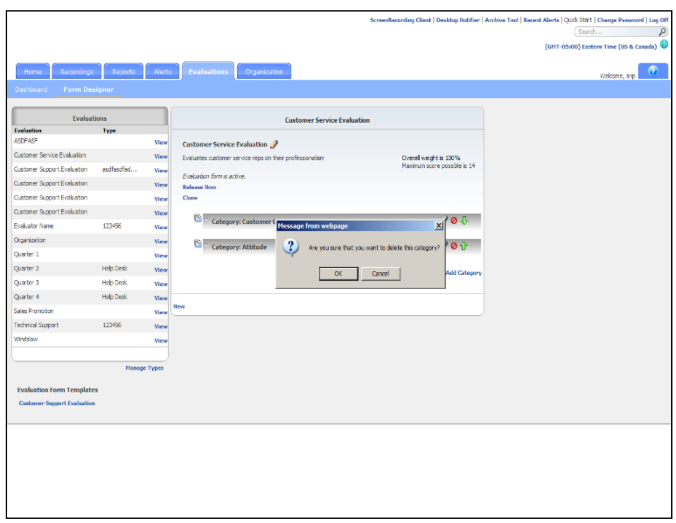
1. Click the **Evaluations** tab and select **Form Designer**.



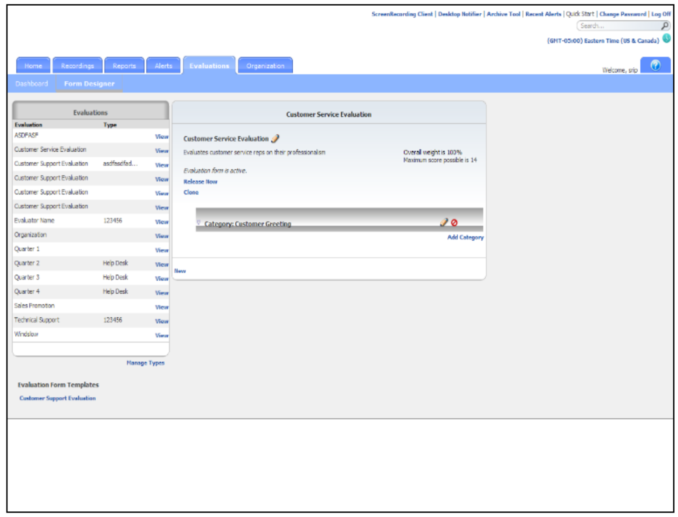
2. Select **Customer Service Evaluation** from the Evaluations list and click **View**.



3. Select the (Delete) button that corresponds to the Attitude category.

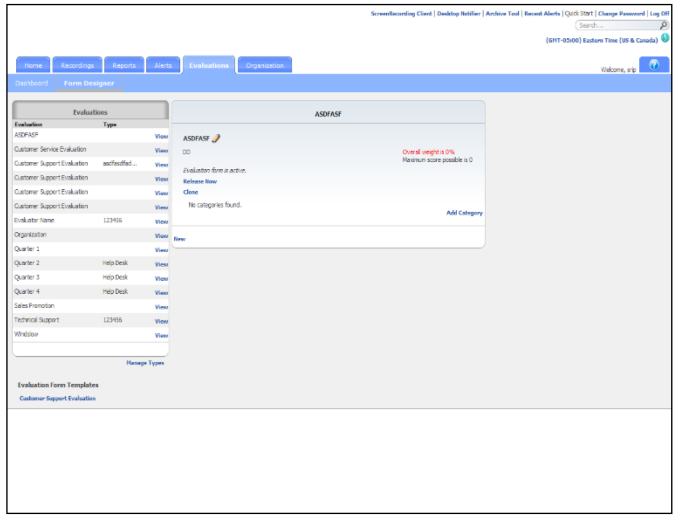


4. Click **OK**.

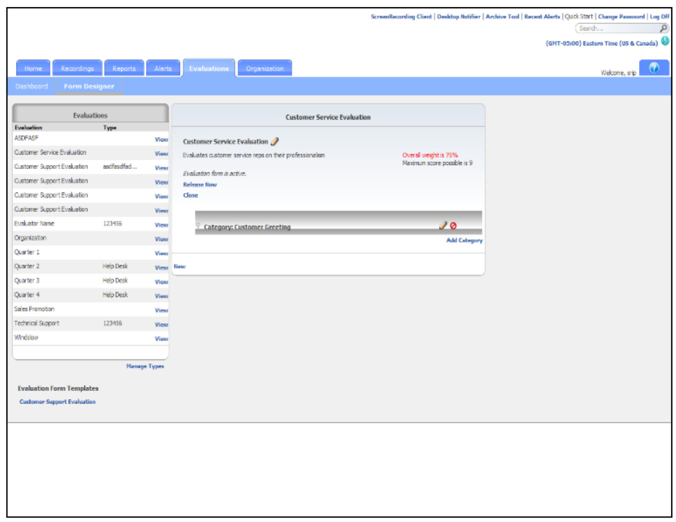


Example: Activating/Inactivating evaluations

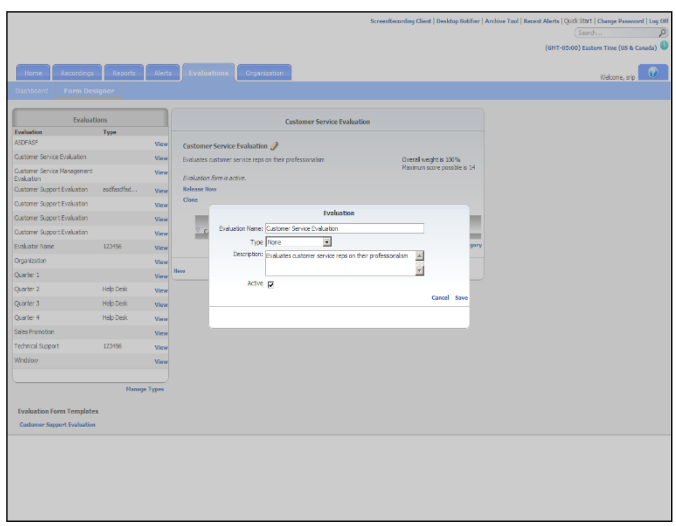
1. Click the **Evaluations** tab and select **Form Designer**.



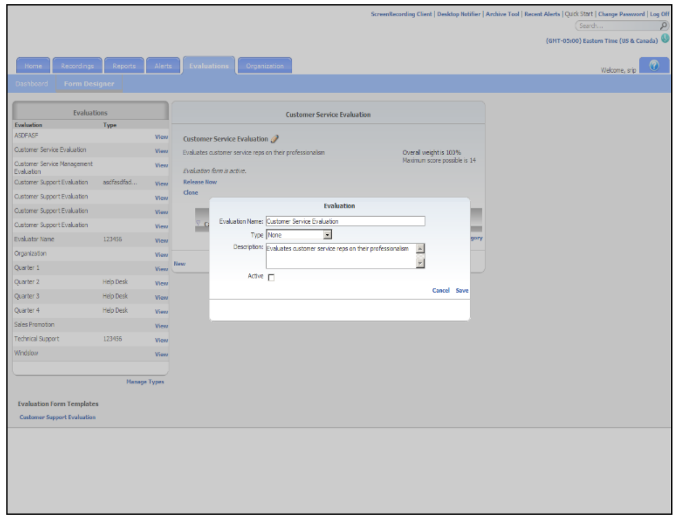
2. Select **Customer Service Evaluation** from the Evaluations list and click **View**.



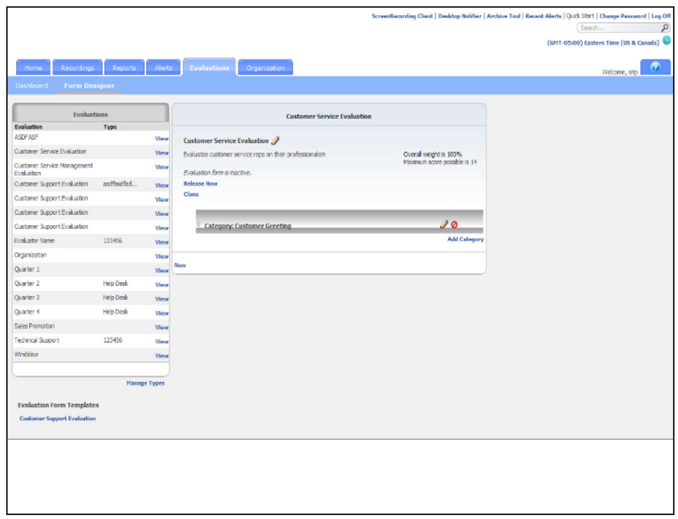
3. Select the  (Edit) button that corresponds to the Evaluation Name.



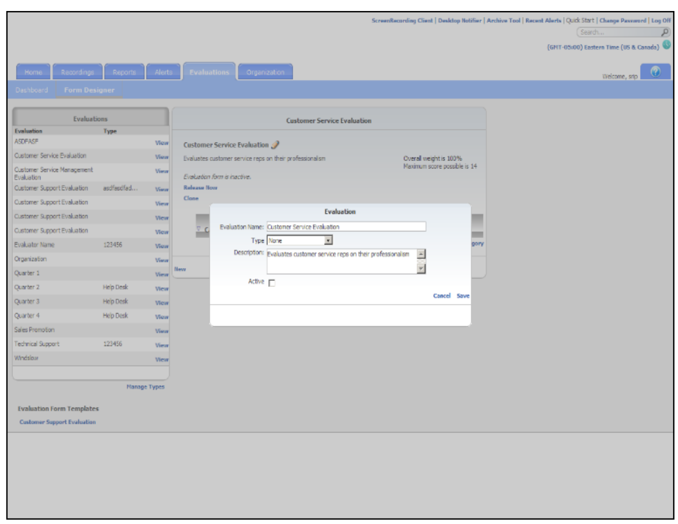
4. Click in the **Active** option box.



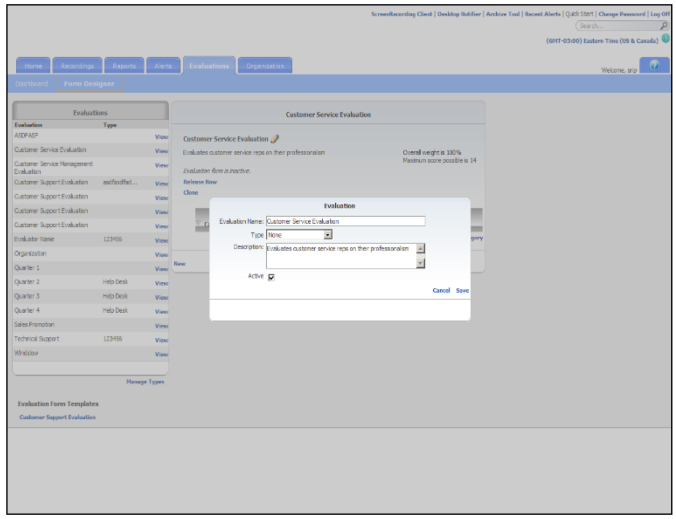
5. Click **Save**.



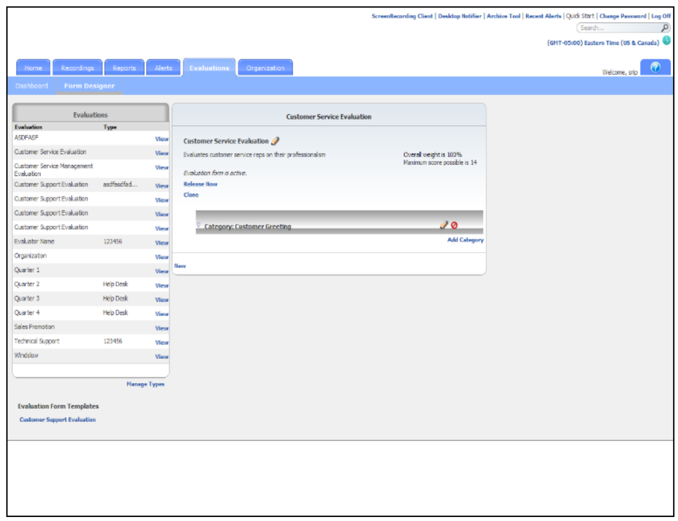
6. Select the (Edit) button that corresponds to the Evaluation Name.



7. Click in the **Active** option box.

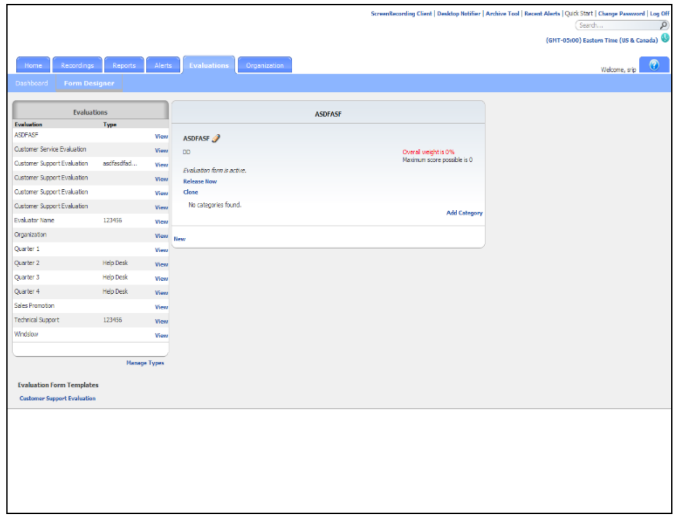


8. Click **Save**.

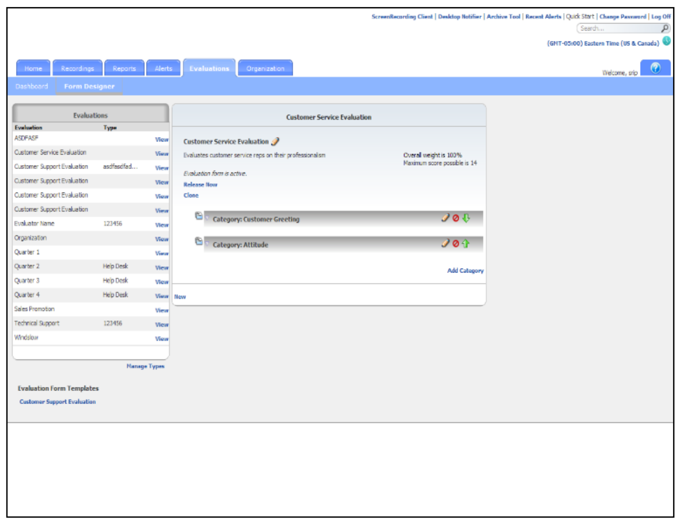


Example: Cloning an evaluation

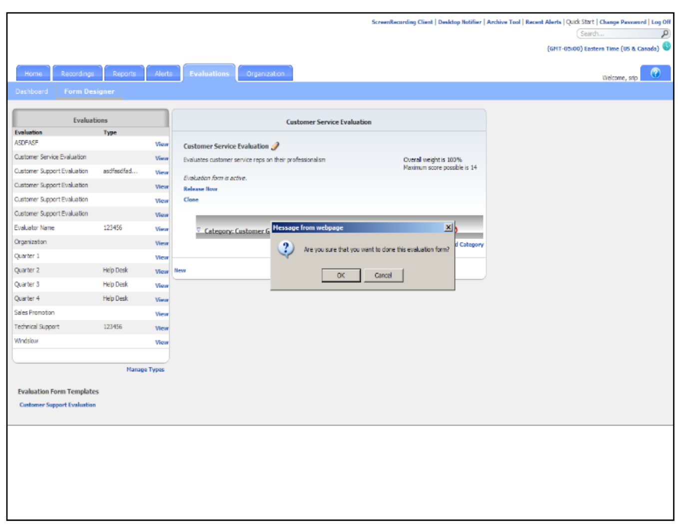
1. Click the **Evaluations** tab and select **Form Designer**.



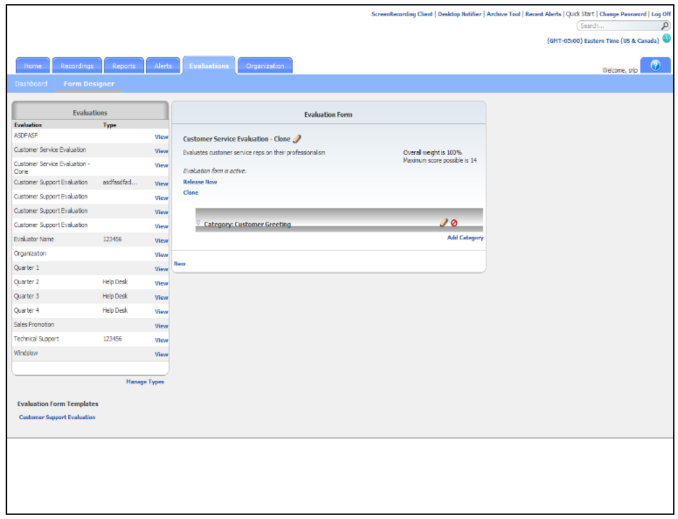
2. Select **Customer Service Evaluation** from the Evaluations list and click **View**.



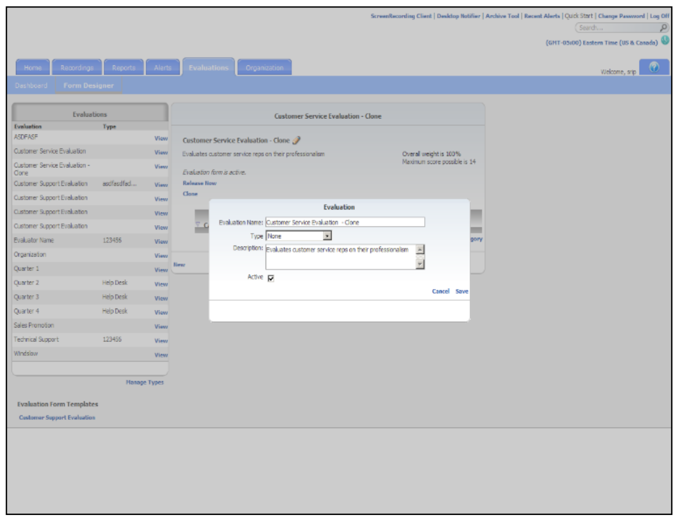
3. Select **Clone**.



4. Click **OK**.

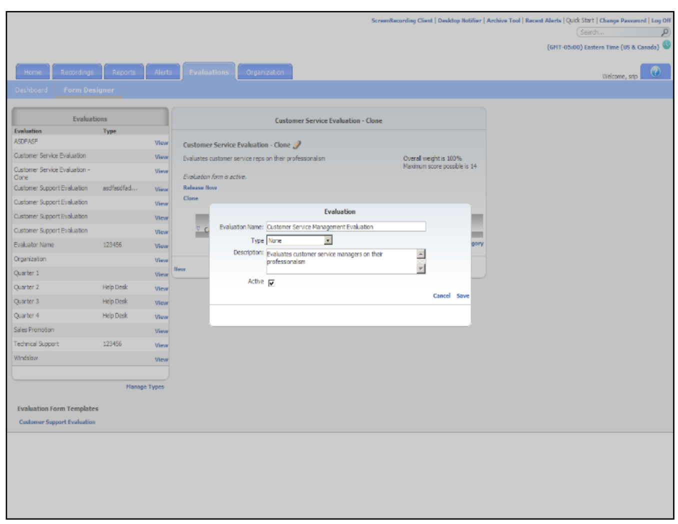


5. Select the (Edit) button that corresponds to the Evaluation Name.

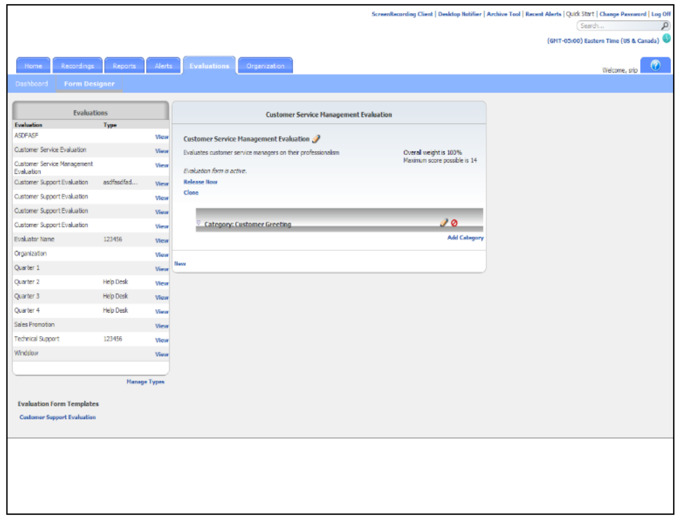


6. Enter or select the following information:

   - Evaluation Name - **Customer Service Management Evaluation**
   - Description - **Evaluates customer service managers on their professionalism**

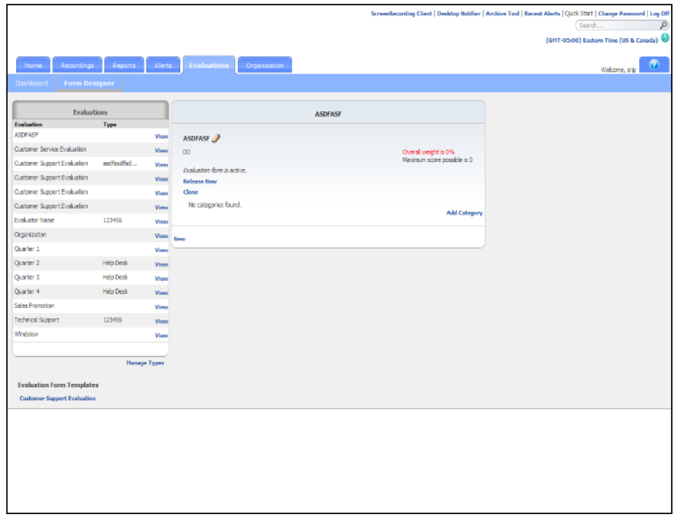


7. Click **Save**.

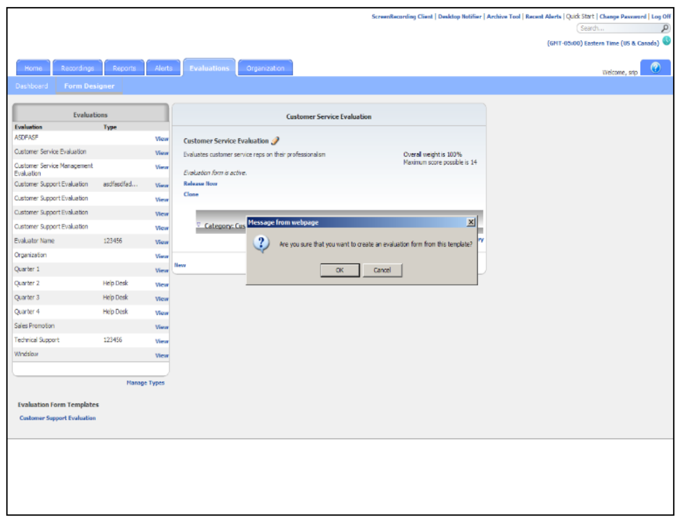


Example: Creating an evaluation from the Evaluation Form Templates

1. Click the **Evaluations** tab and select **Form Designer**.

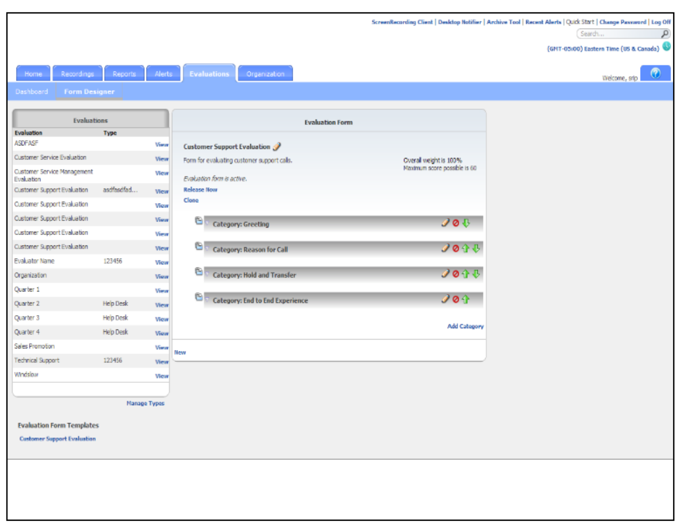


2. Select **Customer Support Evaluation** link from under the Evaluation Form Templates heading.



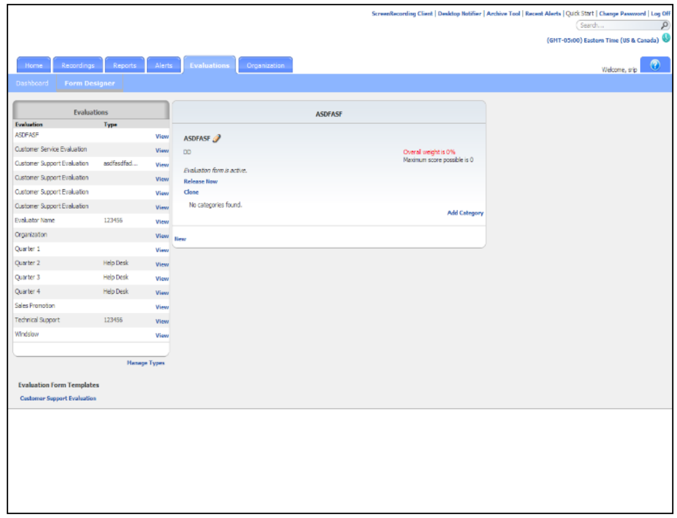
3. Click **OK**.

Note: You can edit, delete, and add to the name, categories, questions, and options to suit your needs.

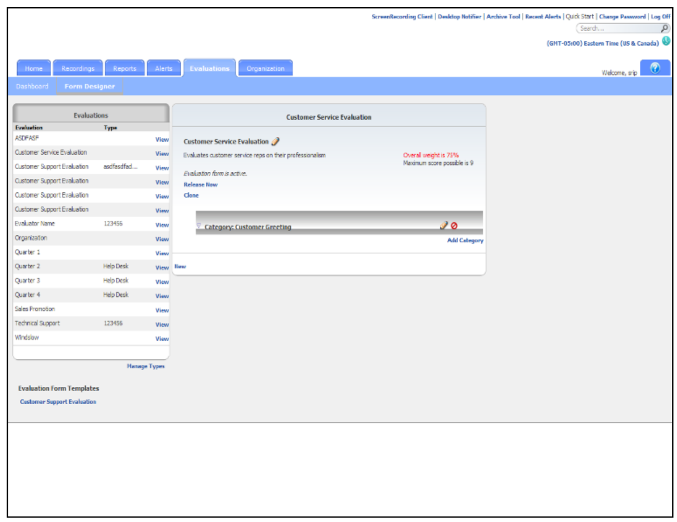


Example: Releasing an evaluation

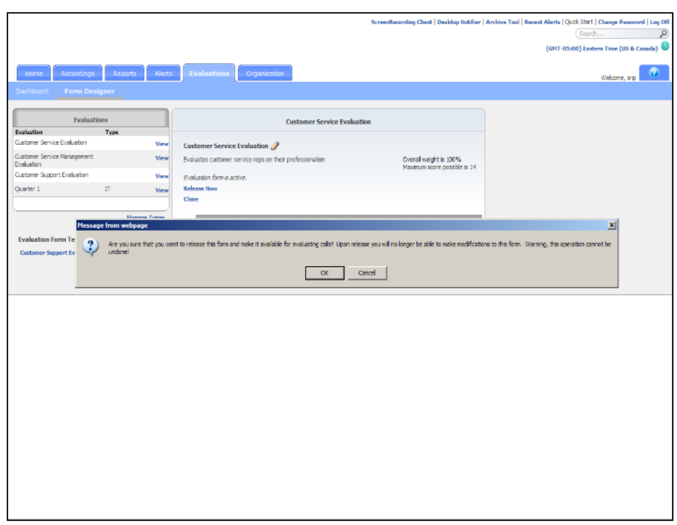
1. Click the **Evaluations** tab and select **Form Designer**.



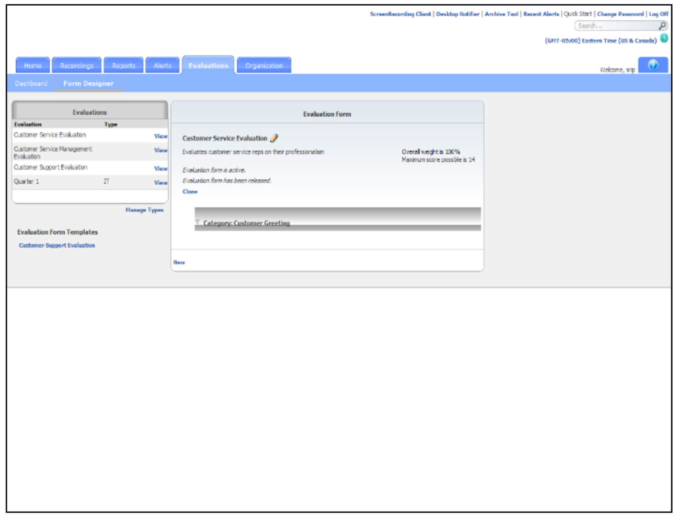
2. Select **Customer Service Evaluation** from the Evaluations list and click **View**.



3. Select **Release Now**.

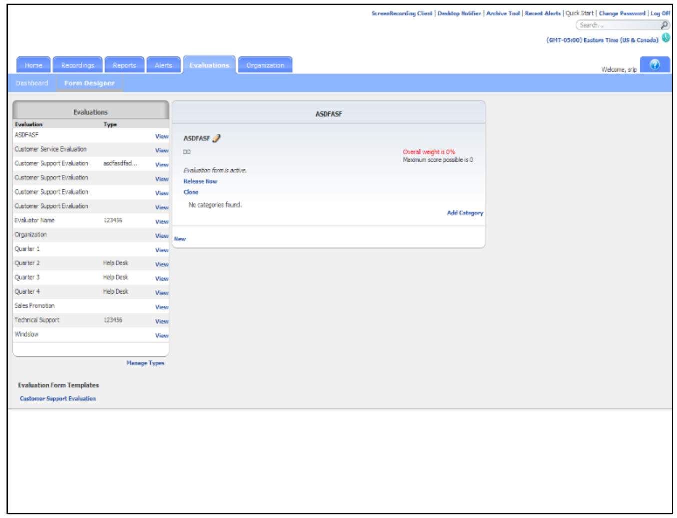


4. Click **OK**.

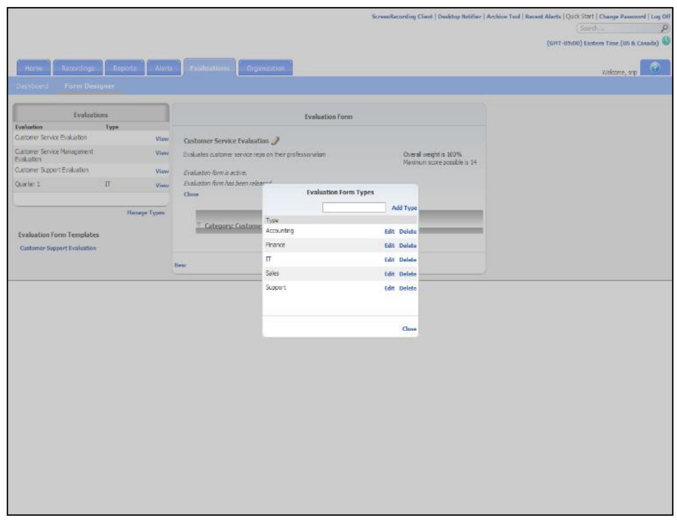


Example: Managing evaluation types

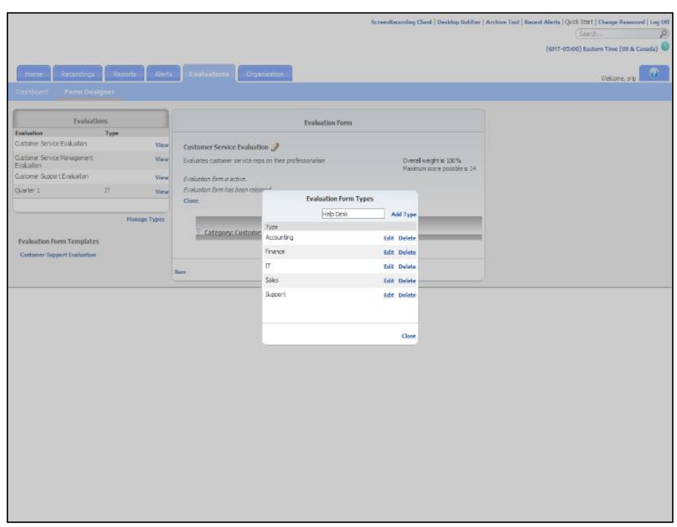
1. Click the **Evaluations** tab and select **Form Designer**.



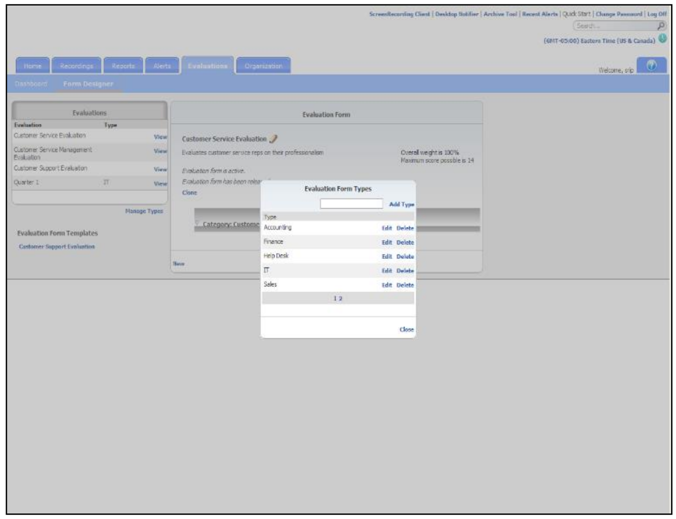
2. Select **Manage Types**.



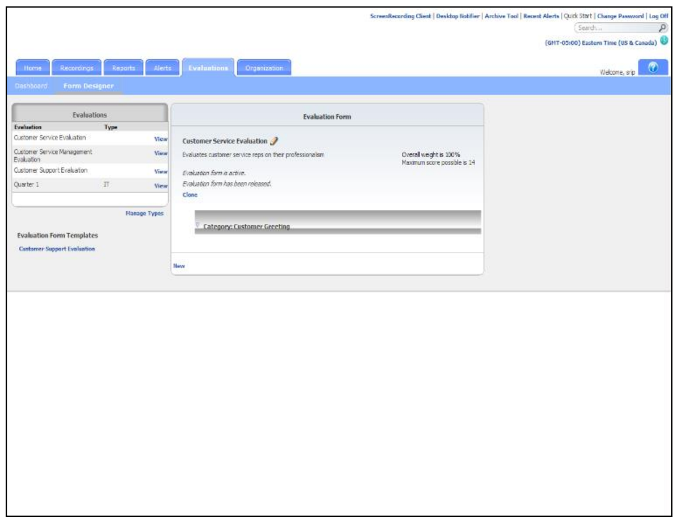
3. Enter or select the following information:
   - Type – **Help Desk**



4. Select **Add Type**.

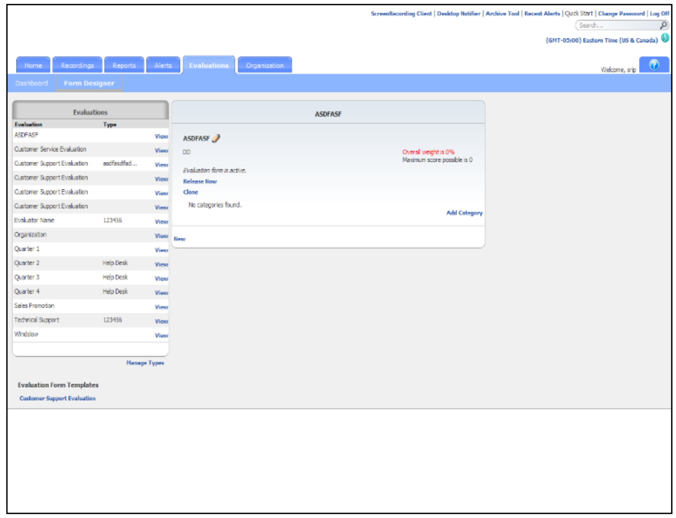


5. Click **Close**.

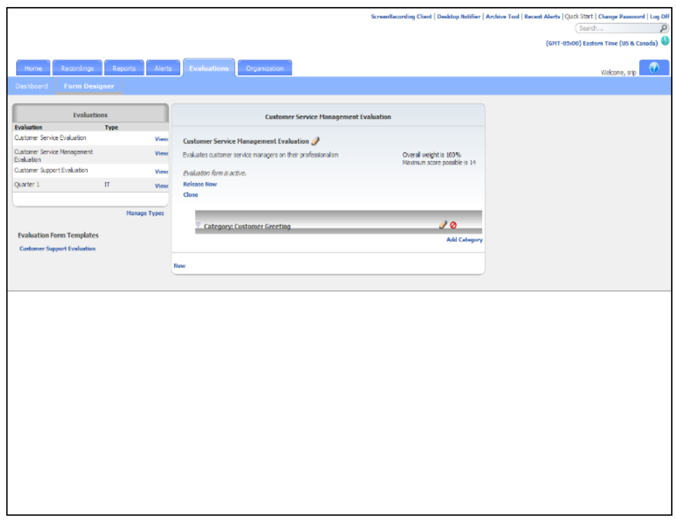


Example: Assigning evaluation types

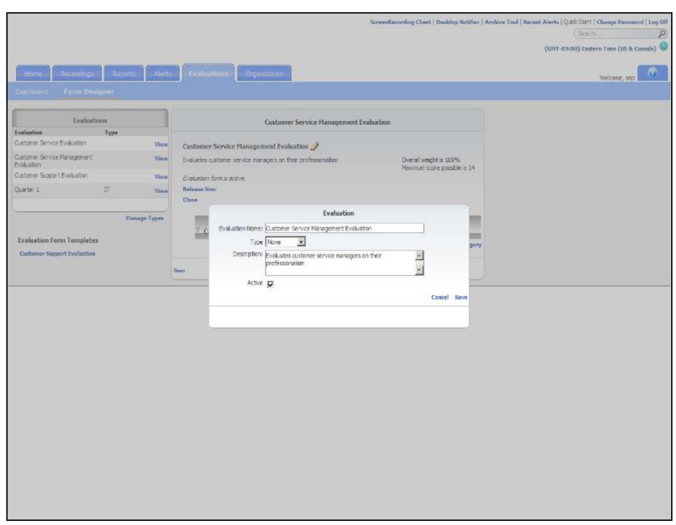
1. Click the **Evaluations** tab and select **Form Designer**.



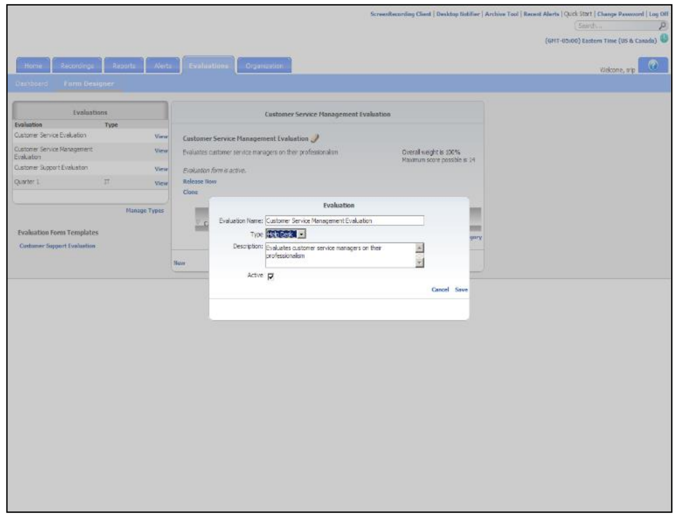
2. Select **Customer Service Management Evaluation** from the Evaluations list and click **View**.



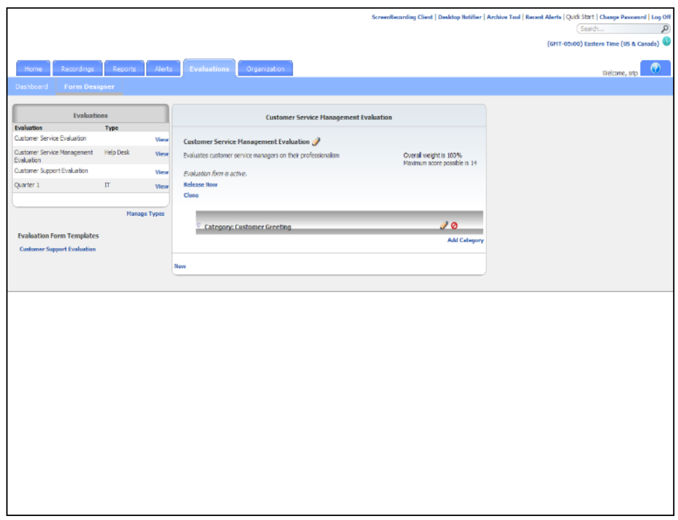
3. Select the (Edit) button that corresponds to the Evaluation Name.



4. Enter or select the following information:
   - Type – **Help Desk**

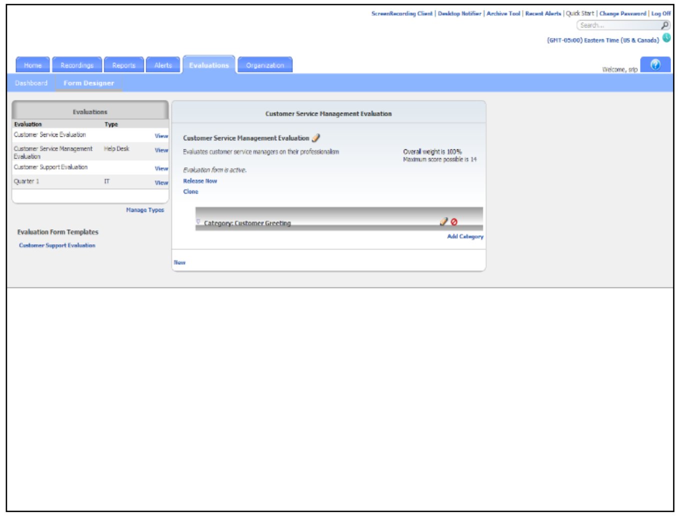


5. Click **Save**.

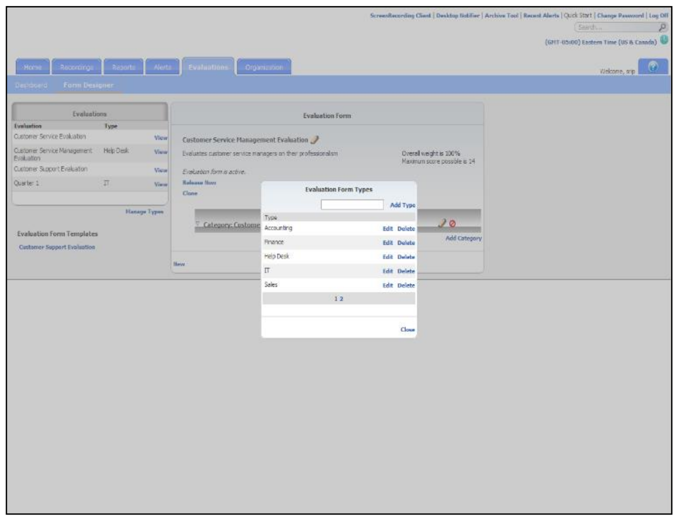


Example: Editing evaluation types

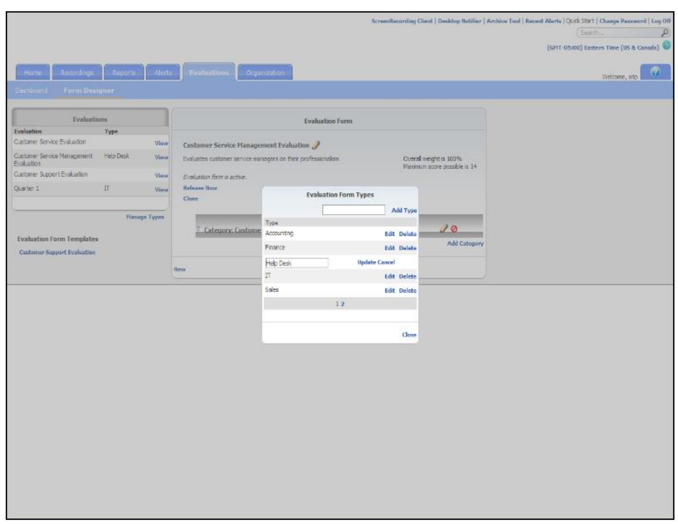
1. Click the **Evaluations** tab and select **Form Designer**.



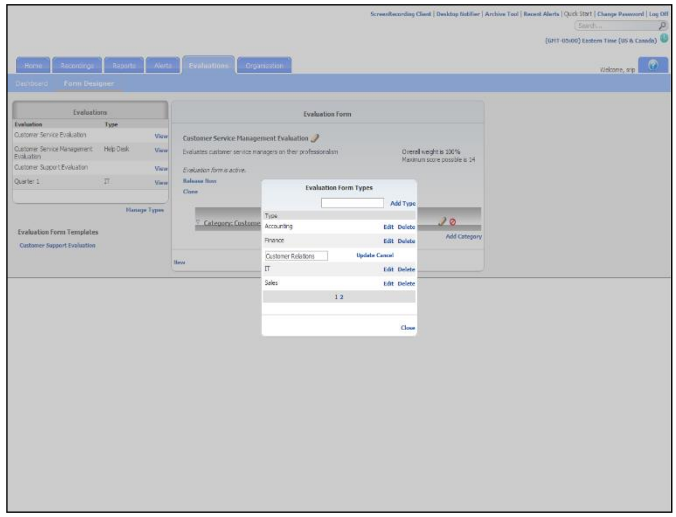
2. Select **Manage Types**.



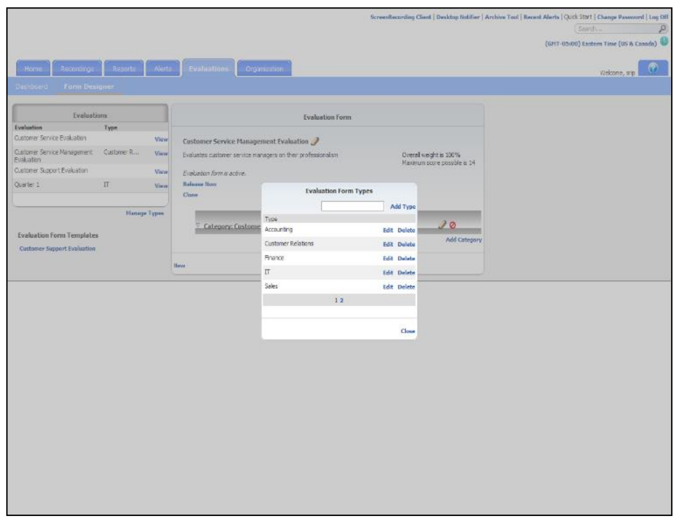
3. Select the Help Desk **Edit** link.



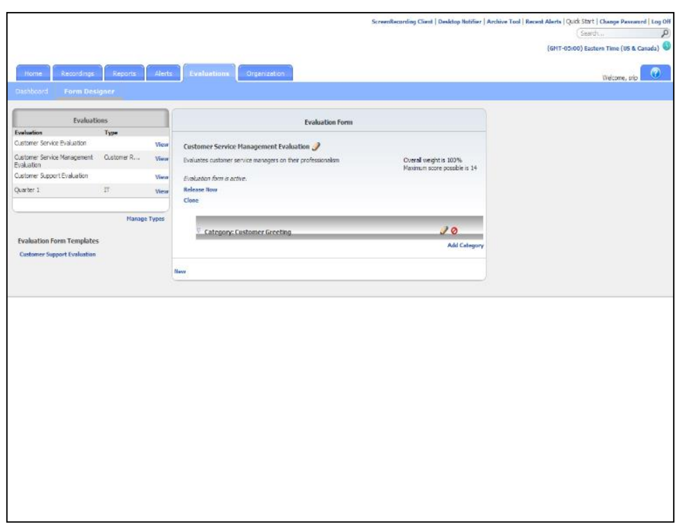
4. Enter or select the following information:
   - Type – **Customer Relations**



5. Click **Update**.

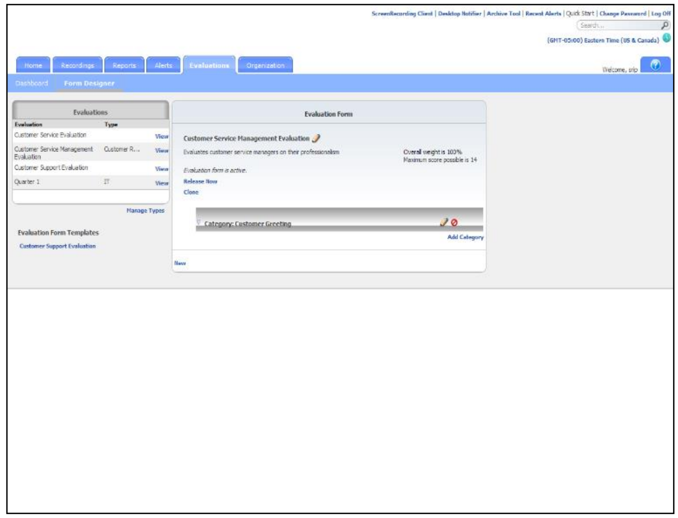


6. Click **Close**.

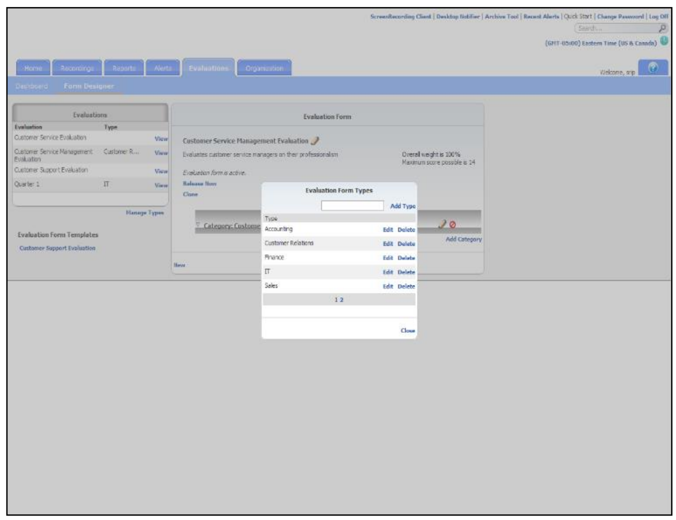


Example: Deleting evaluation types

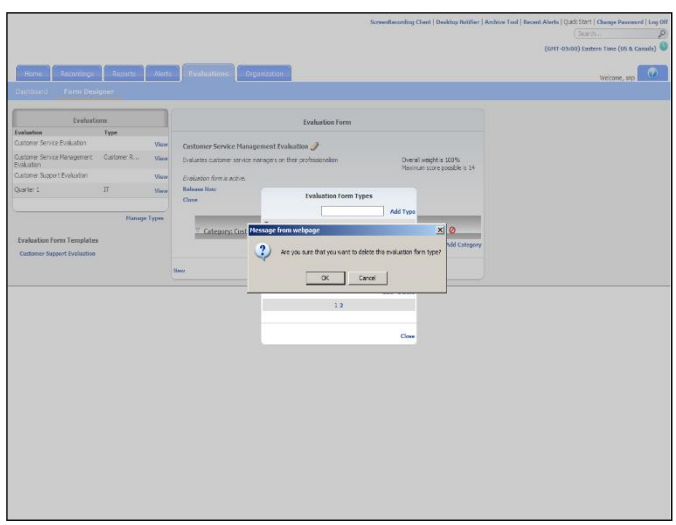
1. Click the **Evaluations** tab and select **Form Designer**.



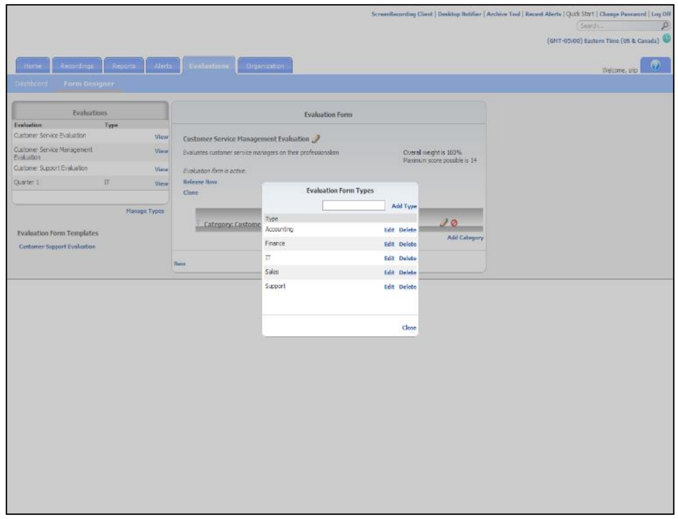
2. Select **Manage Types**.



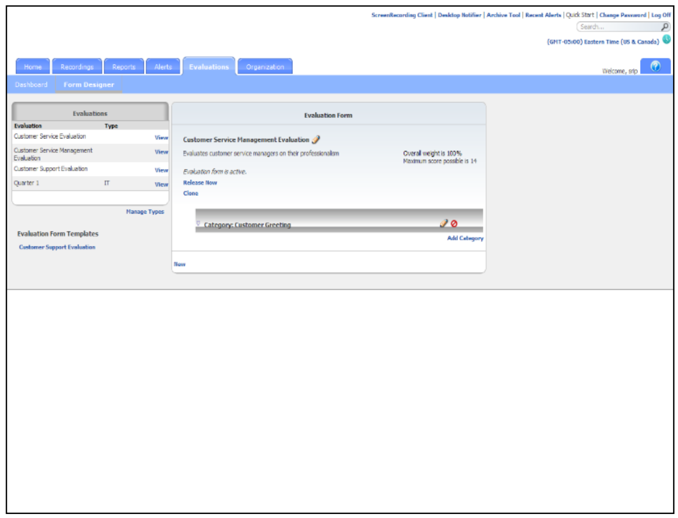
3. Select the Customer Relations **Delete** link.



4. Click **OK**.



5. Click **Close**.



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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. While creating the hierarchical structure, Group Administrators can assign Screen Recording access to each employee and their related subscriber.

The Organization not only displays the organizations 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. 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.

Employees are created under the Group and then assigned to Departments. The Employee level is where you will identify Screen Recording access and criteria for Employees and their assigned subscriber(s). Employees can have multiple Employees. When logged on to the application Employees can only see other Employees that are assigned to them. Click on 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.

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

- Department - identifies the department to which the employee is assigned

  Note: Employees can also be dragged and dropped under the applicable department once they have both been created.

- Manager - identifies the manager to which the employee is assigned, if applicable
- Name - identifies the name of the employee
- Title - the employees title within the organization
- Description - a brief description about the employee, job title, etc.
- Shift Start Time - identifies the start time of the call handler's work shift
- Shift End Time - identifies the end time of the call handler's work shift

Click Update Employee. Select the subscriber to assign to this employee for screen recording by clicking in the corresponding option box and click Assign Subscribers. To assign screen recording criteria, enter or select the following Screen Recording Profile information:

- Company Network ID - identifies the log on ID of the domain used for screen recording (for example: the Active Directory log on ID).
- Screen Recording Password - identifies the personal identification number (PIN) the employee uses to access screen recording.

- Recording Quality - identifies the quality of the screen recording image. The quality you select will affect the size of the screen recording output. The default recording quality is Medium.
- Wrapup Time - identifies the number of seconds screen recording will occur after the call has been terminated.
- Only Record Screen From - identifies a specific incoming number or numbers that should trigger screen recording. For example: Every time the incoming number identified in this field this subscriber, the system should record the employee's screen. The wildcard % (percent) can be used in place of a number. A _ (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.
- Only Record Screen To - identifies a specific outgoing number or numbers that should trigger screen recording. For example: Every time the outgoing number identified in this field is called from this subscriber, the system should record the employee's screen. The wildcard % (percent) can be used in place of a number. A _ (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.
- Only Record Screen From Caller ID - identifies incoming calls from a specific person, people, or place (the actual text part or ID) that should trigger screen recording. For example: Every time the name or ID identified in this field calls this subscriber, the system should record the employee's screen. The wildcard % (percent) can be used in place of a number. A _ (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.
- Only Record Screen To Caller ID - identifies outgoing calls from a specific person, people, or place (the actual text part or ID) that should trigger screen recording. For example: Every time the outgoing name or ID identified in this field is called from this subscriber, the system should record the employee's screen. The wildcard % (percent) can be used in place of a number. A _ (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.
- Percent of sessions to record
    - ✓ Inbound Percent of screen recordings to record for this employee. Range values are 0-100%. The default is 100%.
    - ✓ Outbound Percent of screen recordings to record for this employee. 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 screen recording.
- 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 screen recordings will be recorded.
- Days of Week to Record - identifies specific days of the week on which to perform screen recording for a particular employee.

Click Update Screen Recording Profile.

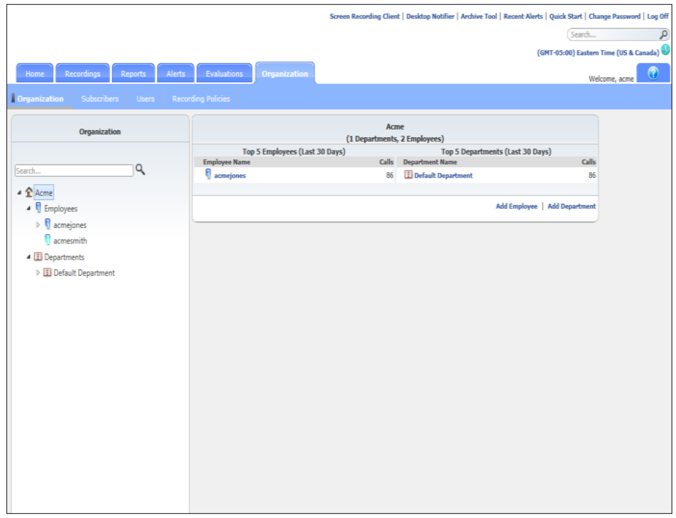
A Department can be characterized as a department or manger within the organization. Departments can have multiple Departments and/or Employees. Departments, when logged on to the application, can only see Departments and Employees that fall under them in the hierarchy. Click on Departments (the top level of the department hierarchy) to display a list of departments with no employees assigned. Employees can only be assigned to one department at a time.

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

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.

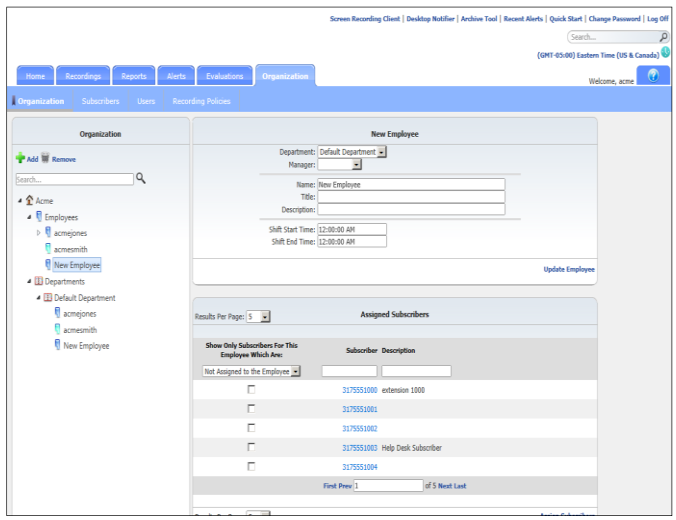
Example: Adding a new employee

1. Click the **Organization** tab and select **Organization** to ensure that you are looking at the organizational hierarchy.



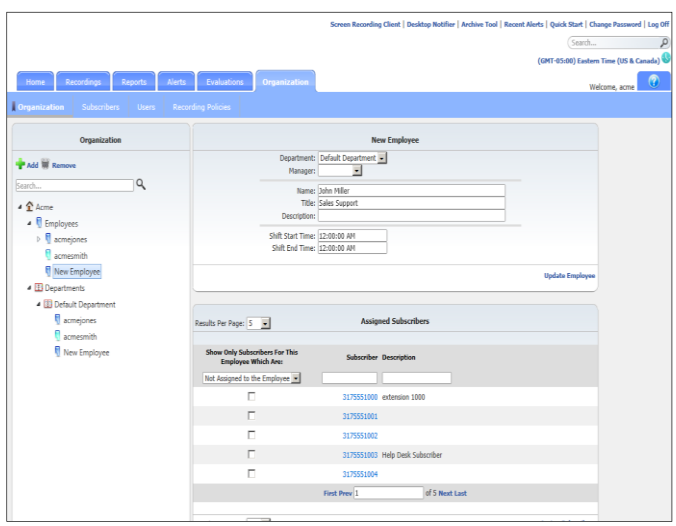
2. Click on the **Employees** folder and select **Add Employee** link.

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

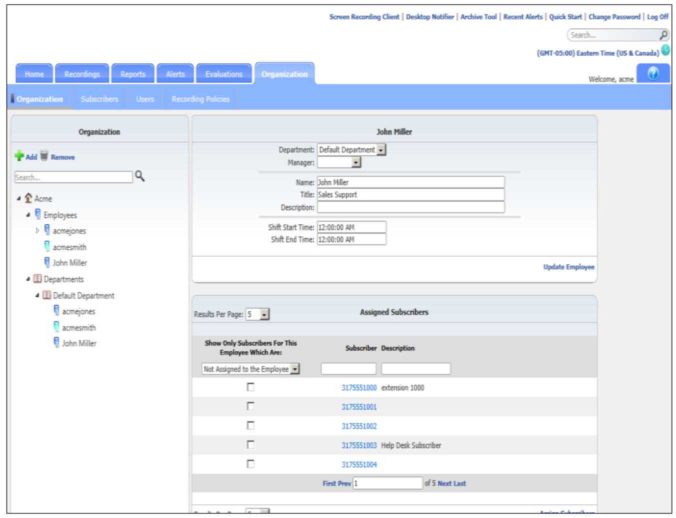


3. Enter or select the following information:

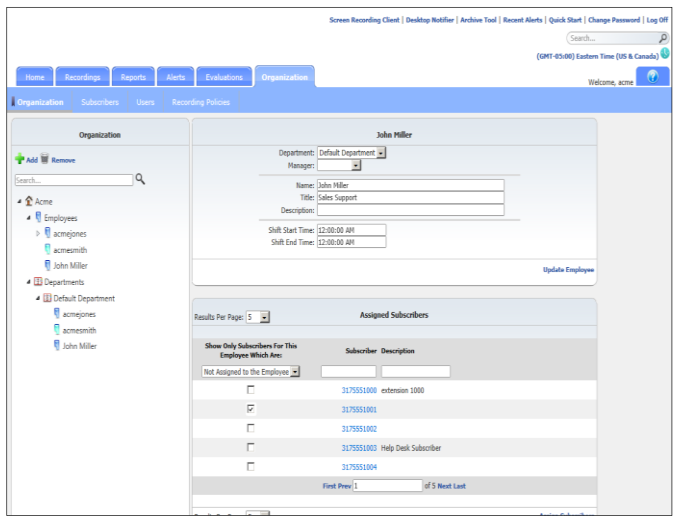
   - Department – **Default Department**
   - Name – **John Miller**
   - Title – **Sales Support**



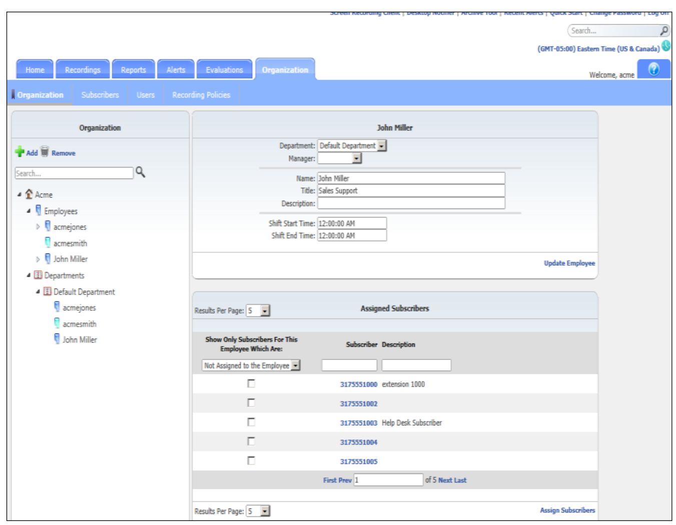
4. Click **Update Employee**.



5. Select a subscriber to assign to the employee by clicking in the corresponding option box.

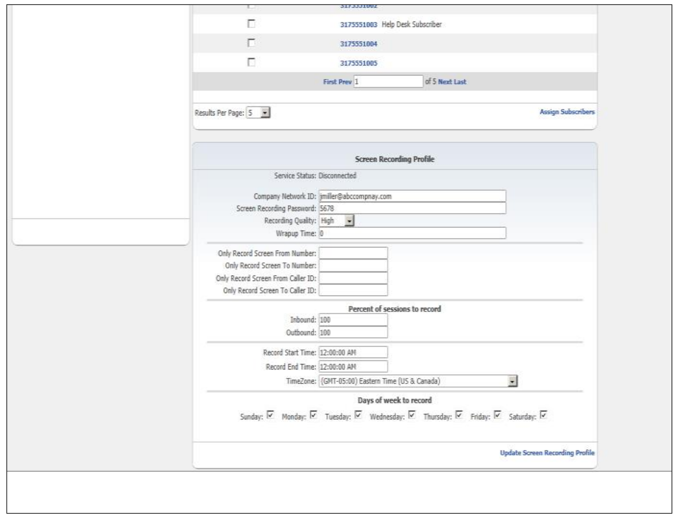


6. Click **Assign Subscribers**.

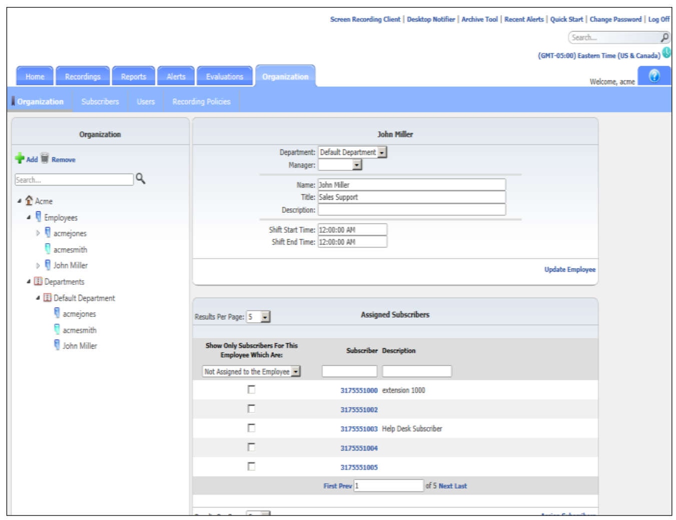


7. To assign screen recording criteria, enter or select the following Screen Recording Profile information:

    - Company Network ID – **jmiller@ctigroup.com**
    - Screen Recording Password – **5678**
    - Recording Quality – **High**

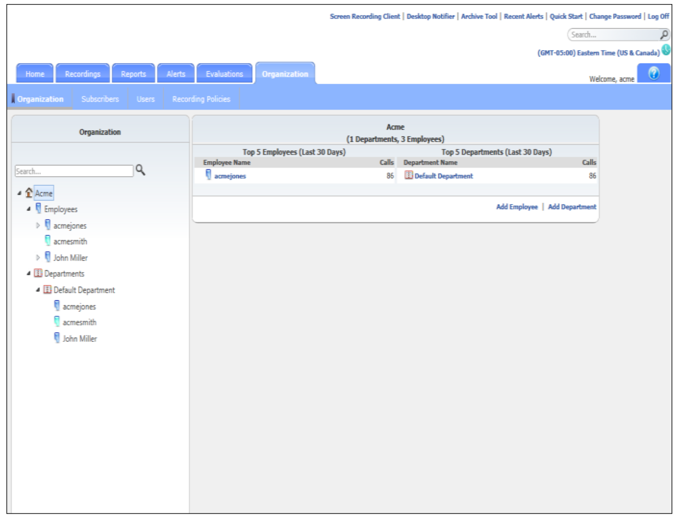


8. Click **Update Screen Recording Profile**.

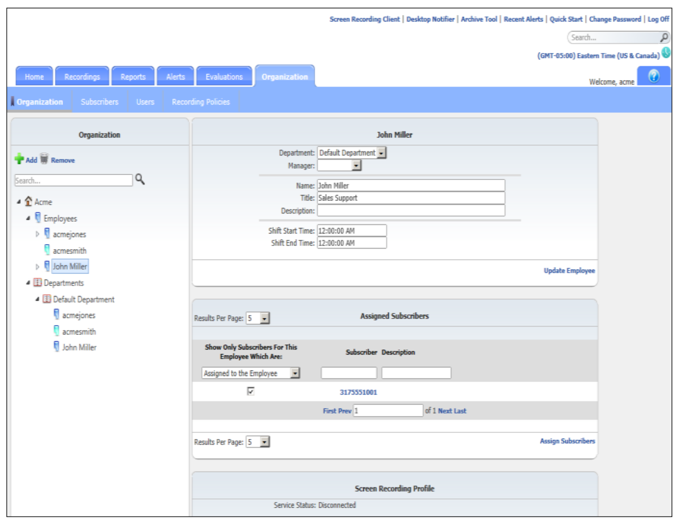


Example: Updating an employee

1. Click the **Organization** tab and select **Organization** to ensure that you are looking at the organizational hierarchy.

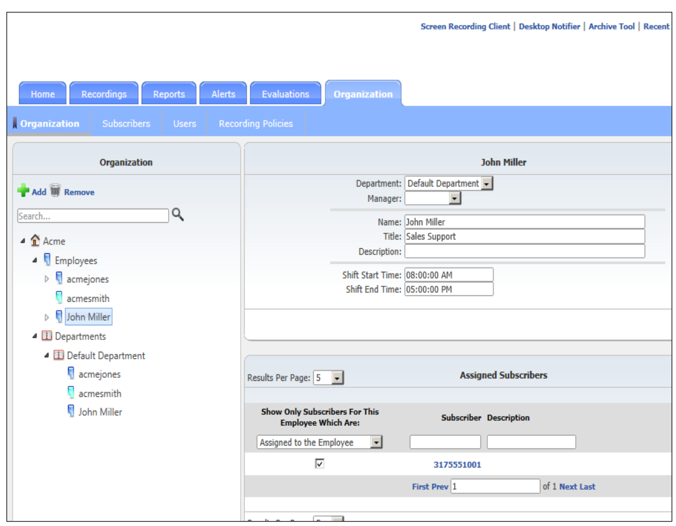


2. Select **John Miller** from the Employees list.

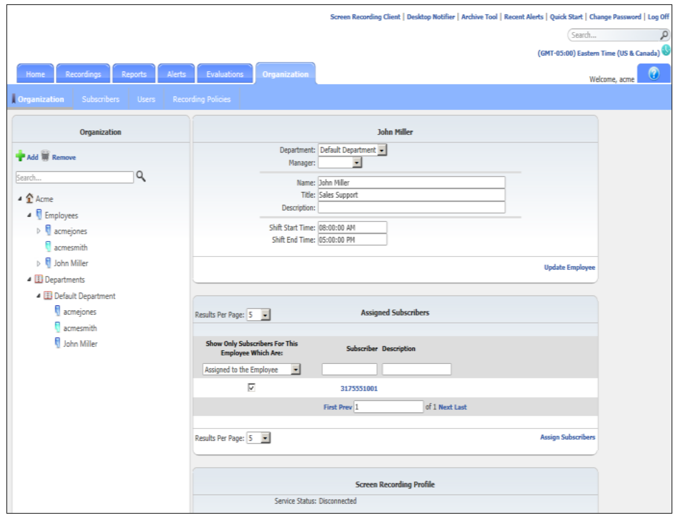


3. Enter or select the following Employee information:

   - Shift Start Time – **08:00:00 a.m.**
   - Shift End Time – **05:00:00 p.m.**

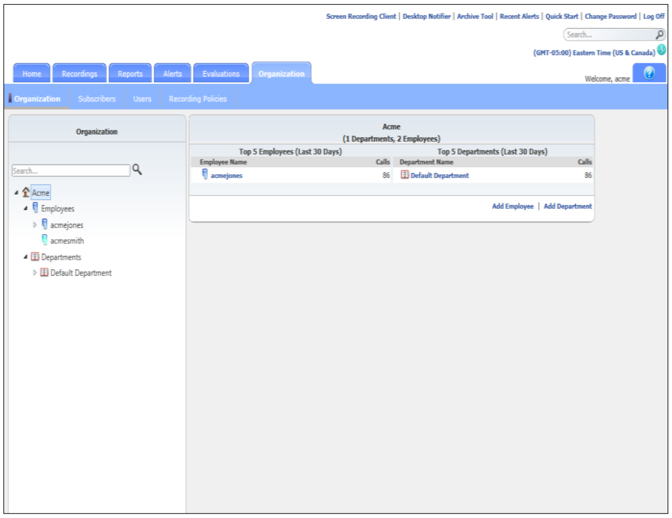


4. Click **Update Employee**.

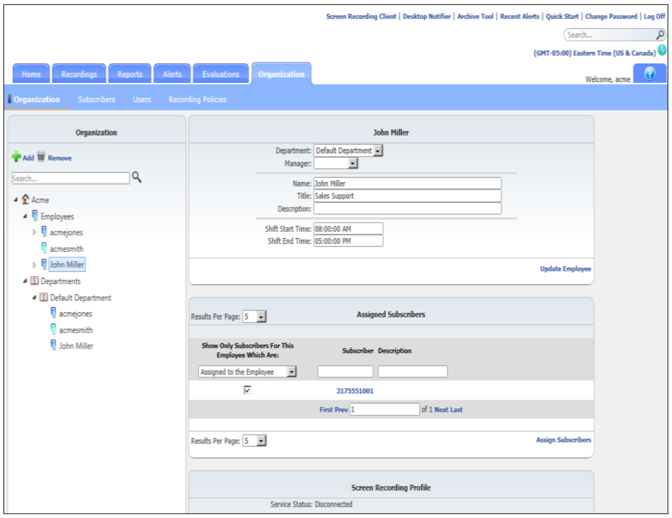


Example: Updating screen recording options

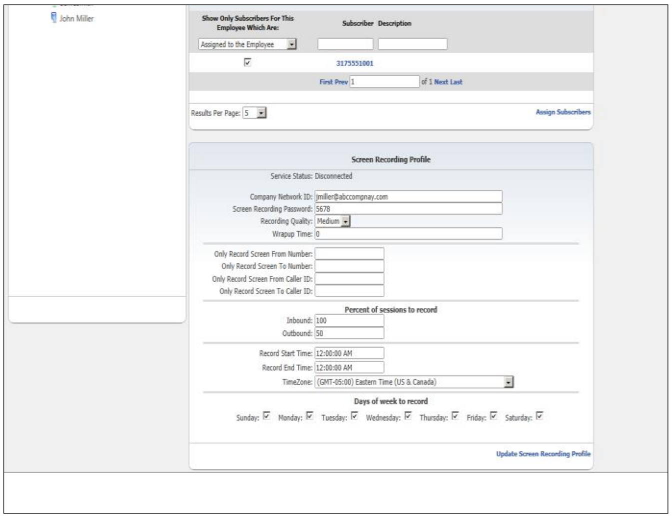
1. Click the **Organization** tab and select **Organization** to ensure that you are looking at the organizational hierarchy.



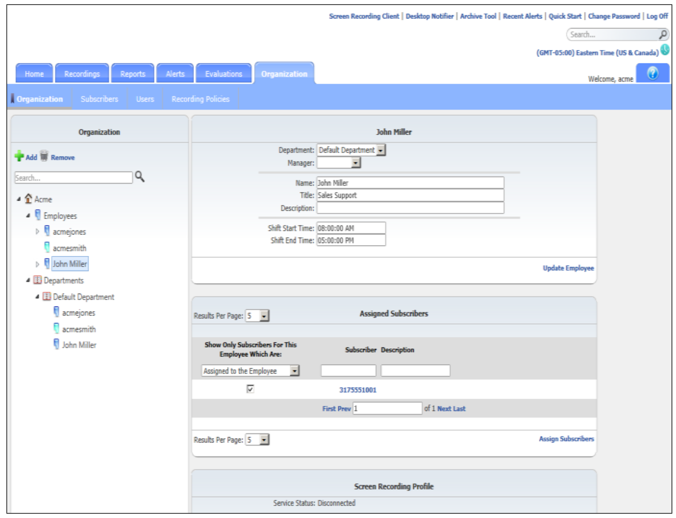
2. Select **John Miller** from the Employees list.



3. Enter or select the following Screen Recording Profile information:
   - Recording Quality – **Medium**
   - Outbound - **50**

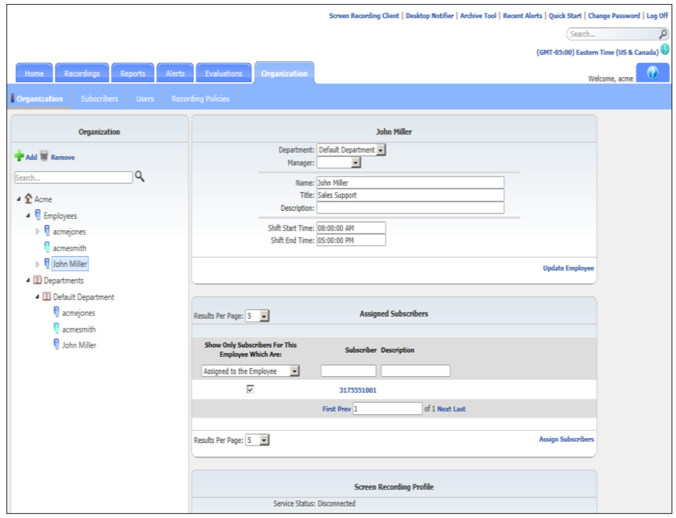


4. Click **Update Screen Recording Profile**.

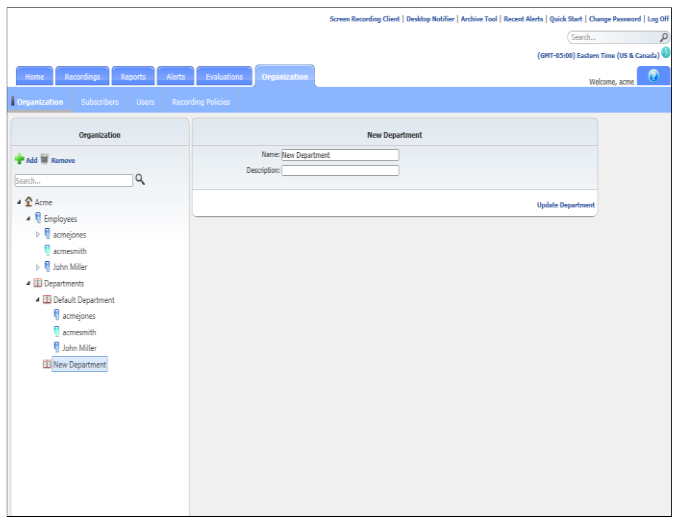


Example: Adding a new department

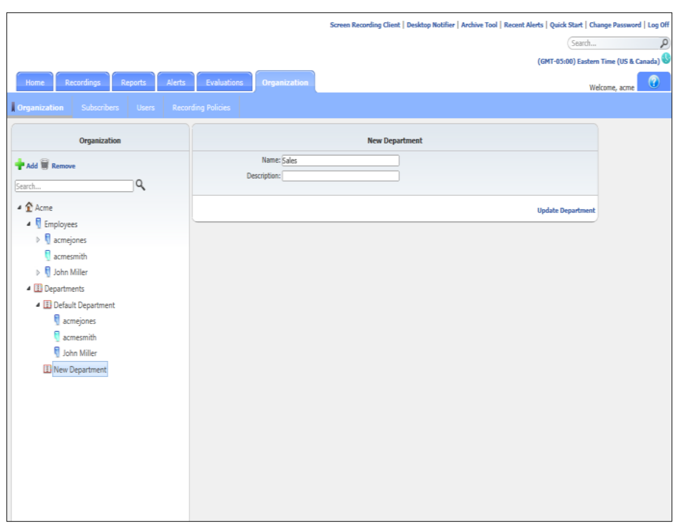
1. Click the **Organization** tab and select **Organization** to ensure that you are looking at the organizational hierarchy.



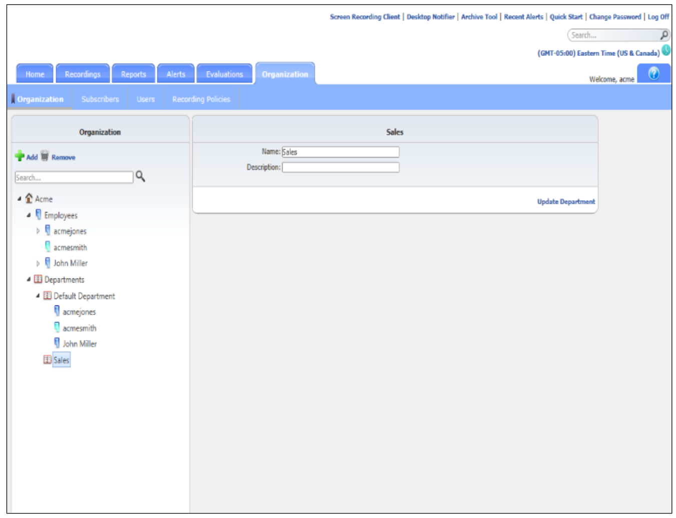
2. Select the **Departments** folder and click **Add Department**.



3. Enter or select the following information:
   - Name – **Sales**

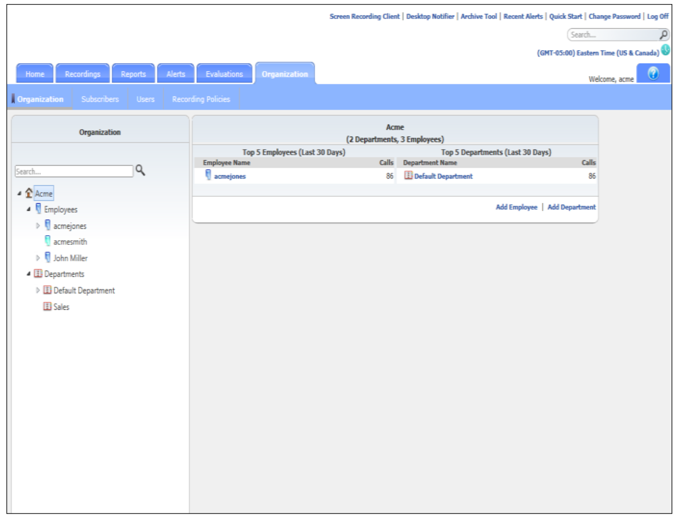


4. Click **Update Department**.

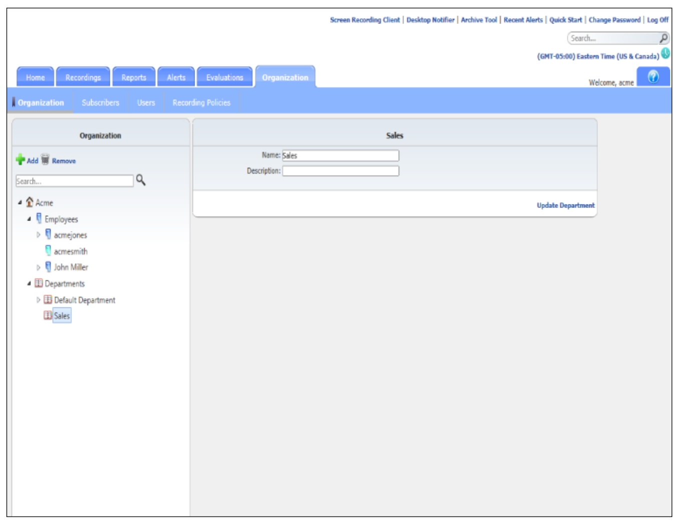


Example: Updating a department

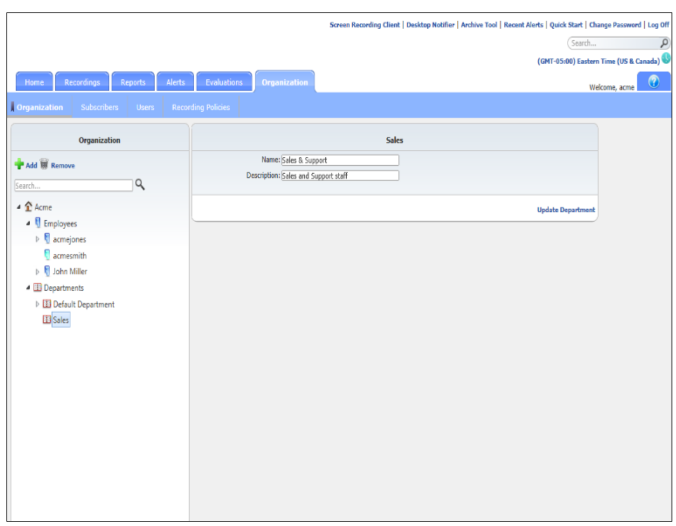
1. Click the **Organization** tab and select **Organization** to ensure that you are looking at the organizational hierarchy.



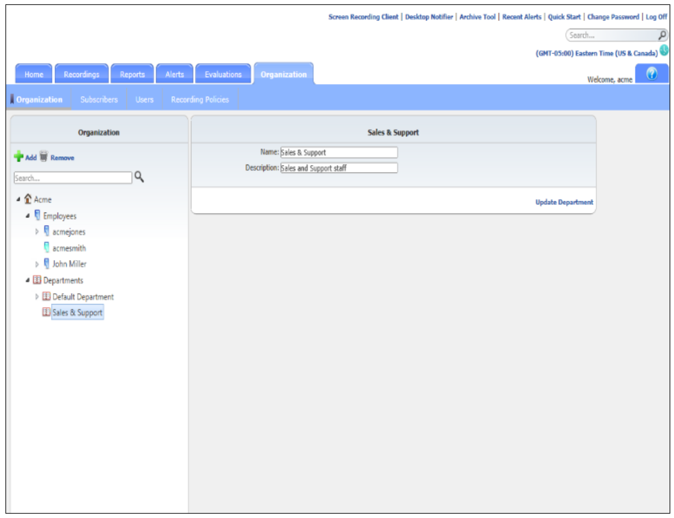
2. Select **Sales** from the Departments list.



3. Enter or select the following information:
   - Name – **Sales & Support**
   - Description –**Sales and Support staff**

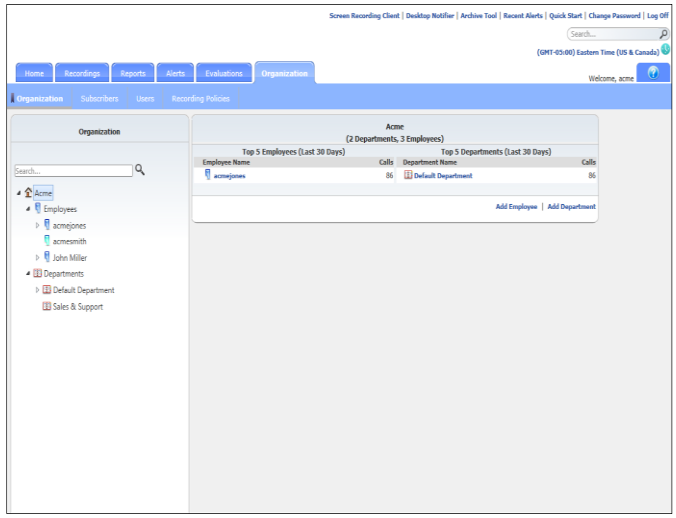


4. Click **Update Department**.

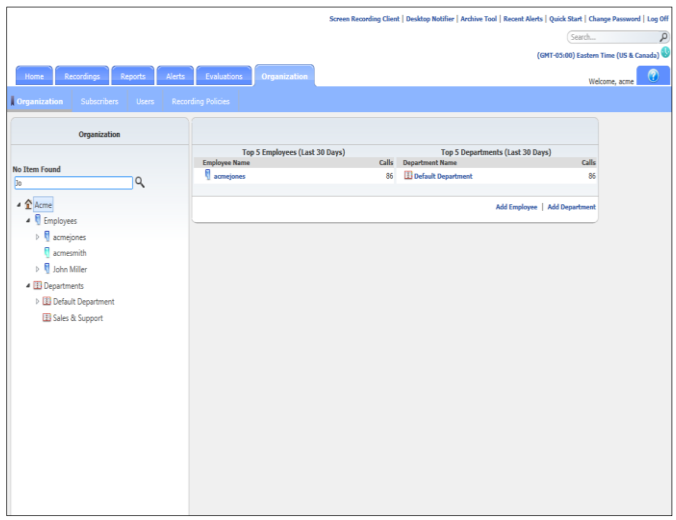


Example: Searching for an employee or department

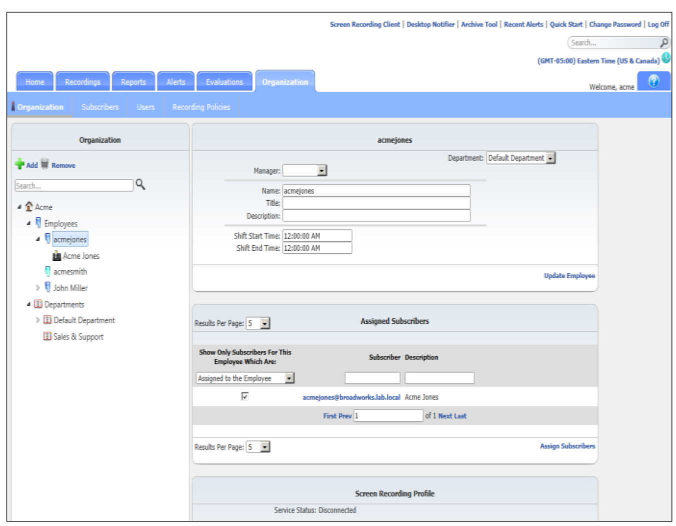
1. Click the **Organization** tab and select **Organization** to ensure that you are looking at the organizational hierarchy.



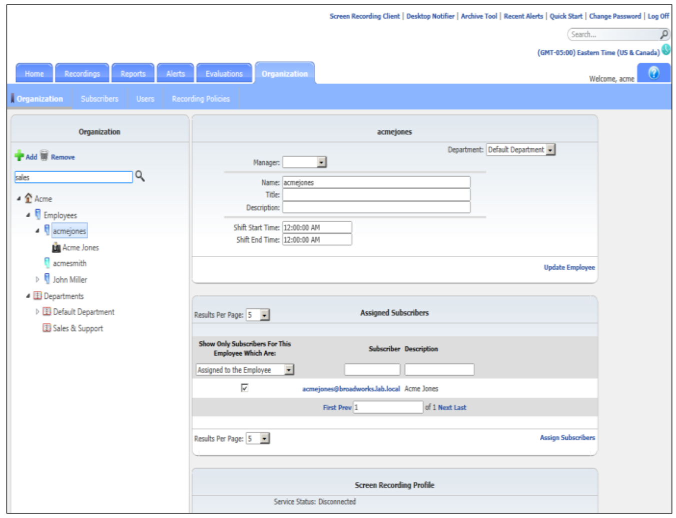
2. Enter the following in the Search field:
   - Search - **Jo**



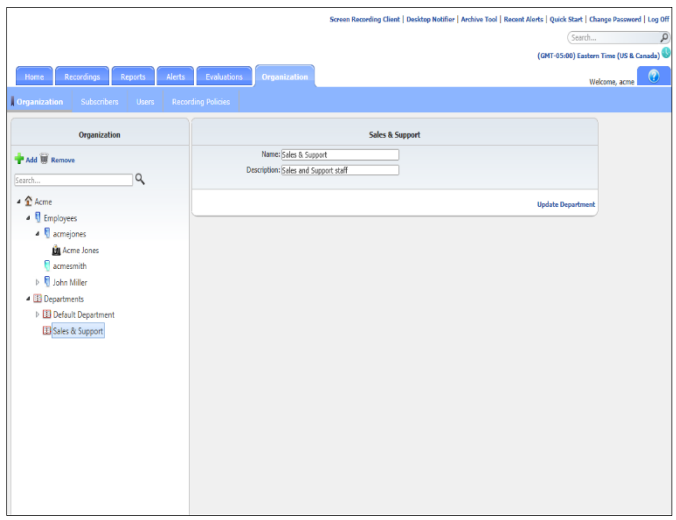
3. Click the button.



4. Enter the following in the Search field:
   - Search - **Sales**

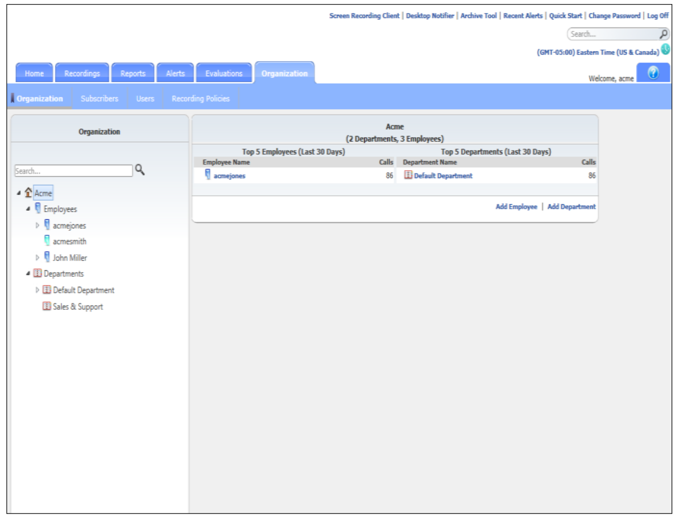


5. Click the  button.

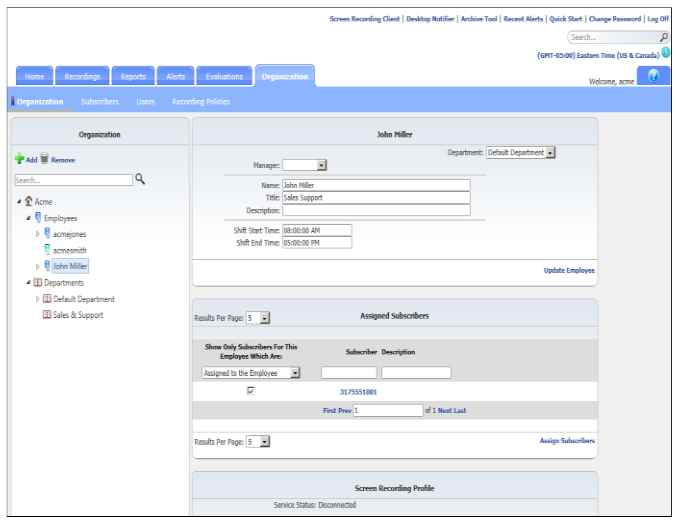


Example: Deleting an employee or department

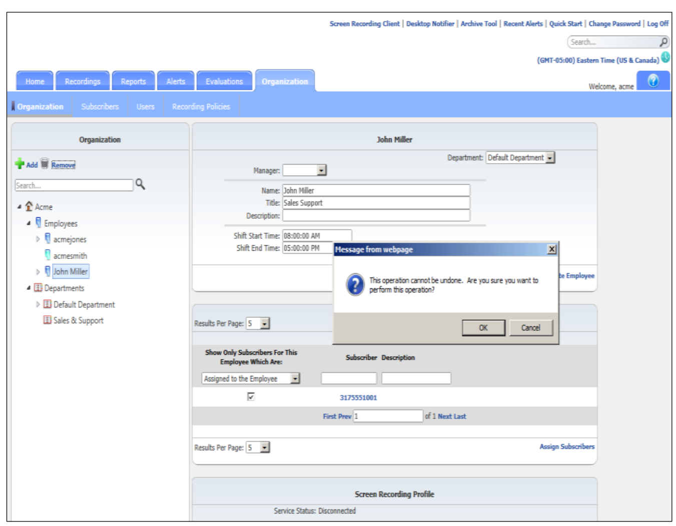
1. Click the **Organization** tab and select **Organization** to ensure that you are looking at the organizational hierarchy.



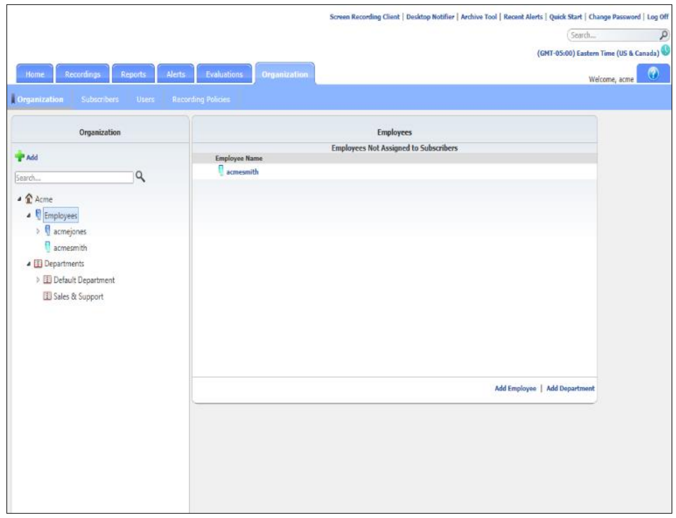
2. Select **John Miller** from the Employees list.



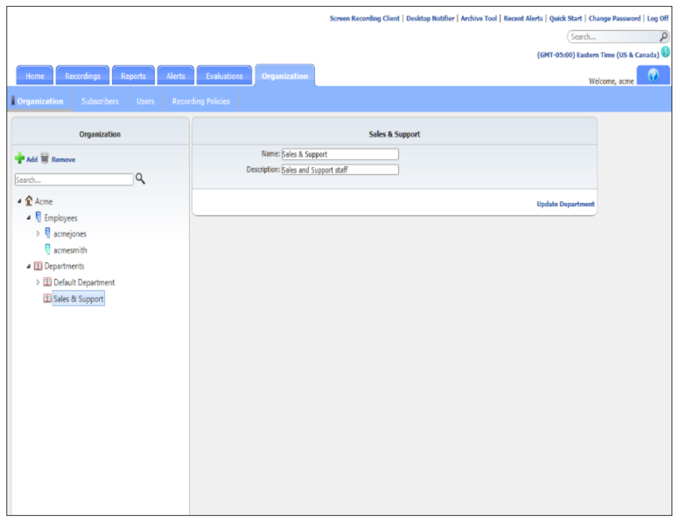
3. Select the (Remove) button.



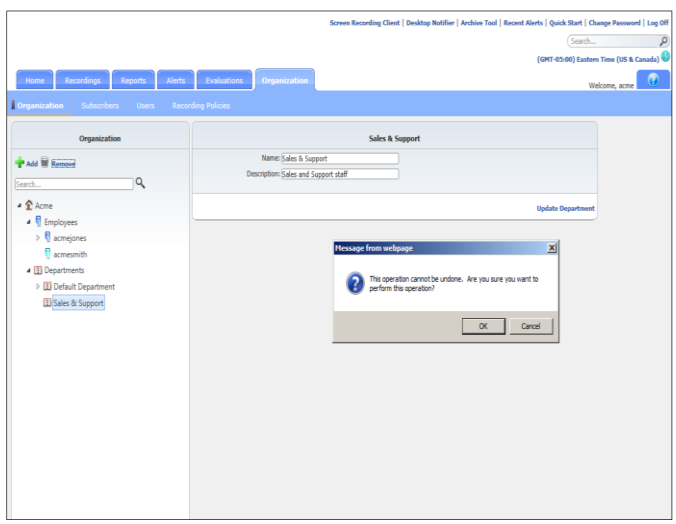
4. Click **OK**.



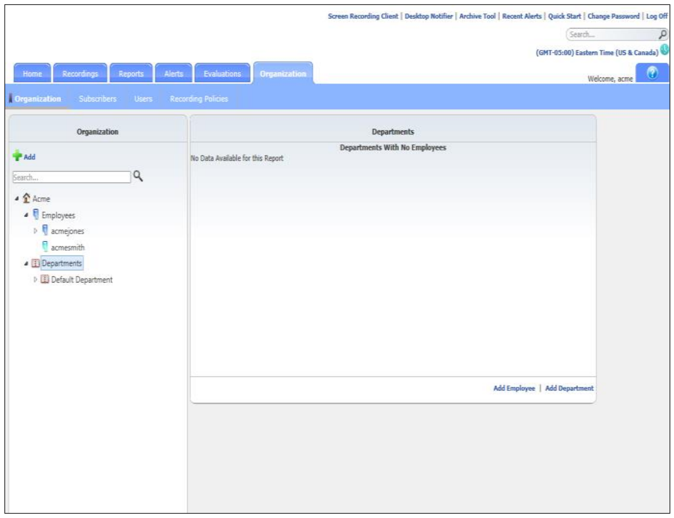
5. Select **Sales & Support** from the Departments list.



6. Select the (Remove) button.



7. Click **OK**.


Screen Recording Client | Desktop Notifier | Archive Tool | Recent Alerts | Quick Start | Change Password | Log Off
(GMT-05:00) Eastern Time (US & Canada)
Home
Recordings
Reports
Alerts
Evaluations
Organization
Welcome, acme
Organization
Subscribers
Users
Recording Policies
Organization
Add
Acme
Employees
acmejones
acmesmith
Departments
Default Department
Departments
Departments With No Employees
No Data Available for this Report
Add Employee | Add Department

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Subscribers

Subscribers are assigned by the Administrator or Provider in the Administrative Interface when the Group Administrator is created. It is then the Group Administrator's responsibility to identify the recording and retention criteria for each subscriber and then assign the subscribers to users via the End User Interface. Recording and retention criteria includes: application features, call retention, and message retention, if applicable.

Recording criteria includes the following:

Criteria	Definition
Subscriber Tab	
Subscriber	Identifies the subscriber. This information is automatically entered by the application.
Description	If applicable, provides a description for this subscriber. For instance who it belongs to or where it is located.
Time Zone	Identifies the time zone in which the calls will be recorded.
Languages	Identifies the language pack or packs in which to output audio mining speech packs. Language options include the following: English (US), English (UK), and Spanish.
Call Retention Tab	
Do Not Retain Recording	Identifies whether or not recordings from this subscriber will be retained each time a call occurs. The recordings will be retained each time a call occurs if a check mark does not appear in the option box. The recordings will not be retained each time a call occurs if a checkmark does appear in the option box.
Only Record Calls From	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) can be used in place of a number. A _ (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.
Only Record Calls To	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) can be used in place of a number. A _ (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.
Only Record Calls Redirected From	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,

Criteria	Definition
	the system should record the calls. The wildcard % (percent) can be used in place of a number. A _ (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.
Only Record Calls Redirected To	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) can be used in place of a number. A _ (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.
Only Record Calls With DTMF Sequence	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.
Only Record Calls From Caller ID	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) can be used in place of a number. A _ (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.
Only Record Calls To Caller ID	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) can be used in place of a number. A _ (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.
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.

Criteria	Definition
Record Stop Time	Designates a specific time of day to stop recording in the event you have designated a record start time.
Days of week to record	Identifies specific days of the week on which to record calls for a particular subscriber.
Message Retention Tab	
Do Not Retain Recording	Identifies whether or not message files from this subscriber will be retained each time a message occurs. The message files will be retained each time a message occurs if a check mark does not appear in the option box. The message files will not be retained each time a message occurs if a checkmark does appear in the option box.
Only Record Messages From	Identifies a specific number or numbers from which messages should be recorded. For example: Every time the incoming number identified in this field messages this subscriber, the system should record the message. The wildcard % (percent) can be used in place of a number. A _ (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.
Only Record Messages To	Identifies a specific number or numbers to which messages should be recorded. For example: Every time the outgoing number identified in this field is messaged from this subscriber, the system should record the message. The wildcard % (percent) can be used in place of a number. A _ (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.
Only Record Messages From Name	Identifies a specific person, people, or place (the actual text part or ID) from which messages should be recorded. For example: Every time the name or ID identified in this field messages this subscriber, the system should record the message(s). The wildcard % (percent) can be used in place of a number. A _ (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.

Criteria	Definition
Only Record Messages To Name	Identifies a specific person, people, or place (the actual text part or ID) to which messages should be recorded. For example: Every time the outgoing name or ID identified in this field is messaged from this subscriber, the system should record the message(s). The wildcard % (percent) can be used in place of a number. A _ (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.
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 messages.
Record Stop Time	Designates a specific time of day to stop recording in the event you have designated a record start time.
Days of week to record	Identifies specific days of the week on which to record messages for a particular subscriber.

Until alternative recording criteria is selected, all calls and messages 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, Call Retention, and Message Retention screen and select Update Subscriber to save your changes.

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:

Note: Depending on which Application Features were selected at the parent Provider level, some of the Application Features listed below may not be available.

- Alerting – allows the user to use the alerting functionality.
- Archive to ISO – allows the user to archive selected calls as an ISO image file that can be stored on a CD or DVD.
- Audio Mining Advanced – allows the user to create audio mining packs and apply them to recorded calls. Applied speech packs do not have a maximum number of active phrases.
- Audio Mining Basic – allows the user to create audio mining packs and apply them to recorded calls. Applied speech packs can only have a maximum number of 25 active phrases.
- Call Annotation – 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 to mark it for future review with a comment.
- Call Annotation File Upload – allows the user to upload and attach a file into call annotations.
- Call Barge – allows the user to actively participate in a call that is currently taking place and actively participate with both parties of the call.
- Call CRM Integration – allows the user to upload recordings (call and message) to various CRM systems (for example: SalesForce.com and Sugar).
- Call Monitor – allows the user to listen in on a call without the other participants of the call knowing.

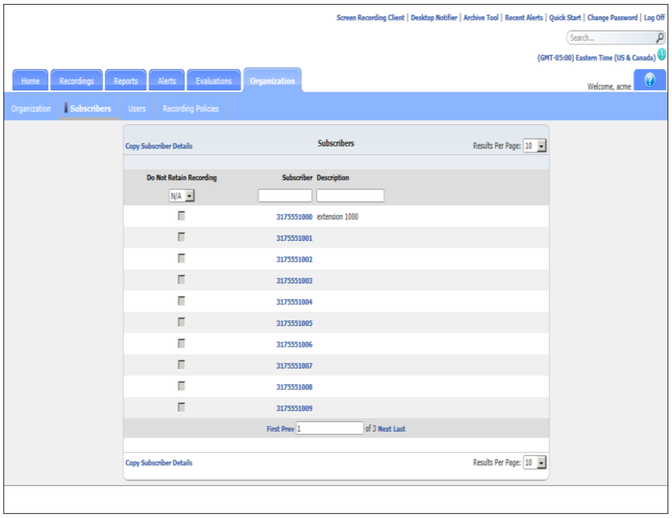
- Call Whisper – allows the user to listen in on a call and actively participate with the call handler (selected subscriber), but not to the other party on the call.
- Categorization – allows the user to categorize calls into areas unique to their business such as geographic region or customer satisfaction. These calls can then be filtered and reported on based upon these categories.
- Classification – allows the user to set access permissions on a call. Calls can be assigned one classification, and cannot be accessed by users without explicit classification permissions
- Clip Recordings in Progress – allows the user to record a clip of the call in progress.
- Comments – 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.
- Desktop Notifier Client – 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.
- Email Links – allows the user to email recording (call, screen, & message) links.
- Evaluation – allows the user to access the call handler evaluation functionality in order to create evaluations to assign to recorded calls.
- External Call ID - allows users to associate an external call ID to a clip recording.
- FTP File Access – selecting the FTP Access option box will allow the Group or User to FTP into the system to download any recordings 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.

  Note: Once FTP recordings have been downloaded to a permanent directory, you are able to find to them for as long as you retain them. All tags (with the exception of comments and attachments) are attached to the files to allow you to view and listen to recordings in the original state as downloaded from the application.

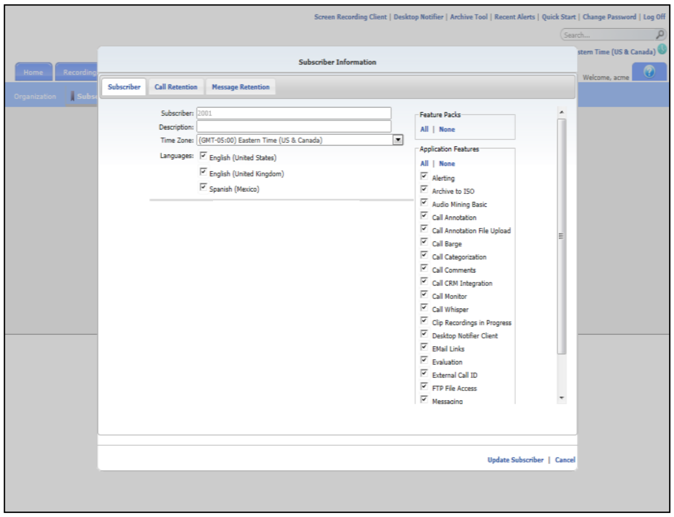
- Messaging – allows the Group Administrator to select and enable messaging functionality for employees.
- Mobile Access – allows the user access to the mobile applications.
- Reporting – allows the user to see reports in the end user interface.
- Screen Recording – allows the user to access the screen recording functionality in order to view and play back screen recordings.

Example: Updating a subscriber

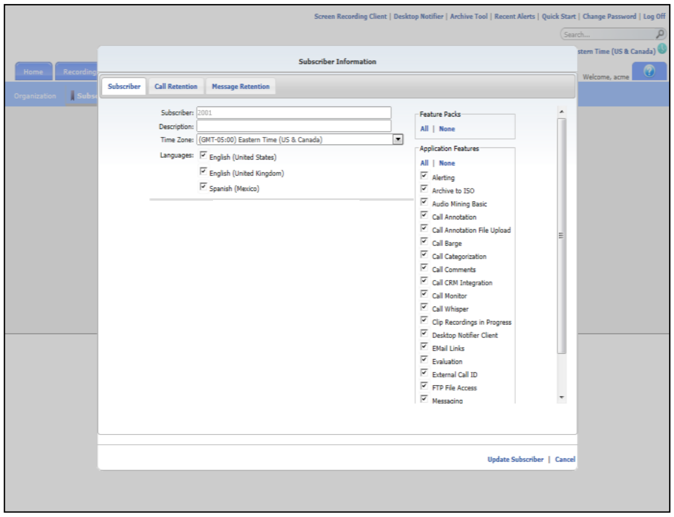
1. Click the **Organization** tab and select **Subscribers**.



2. Click on the subscriber for which you wish to update the recording criteria.



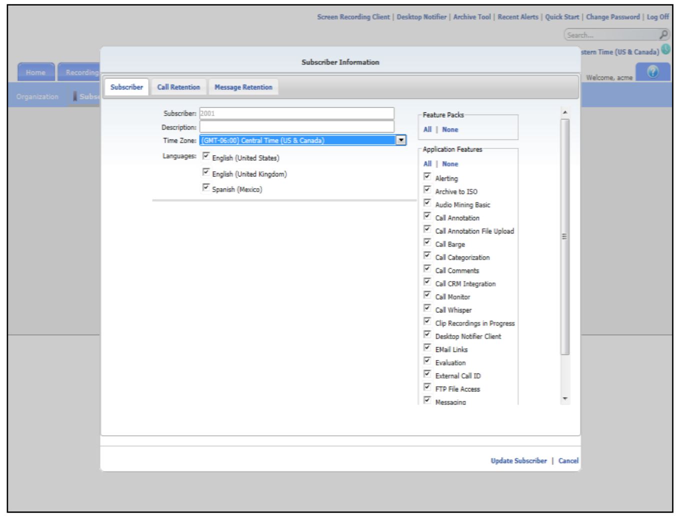
3. If it is not already selected, click **Subscriber**.



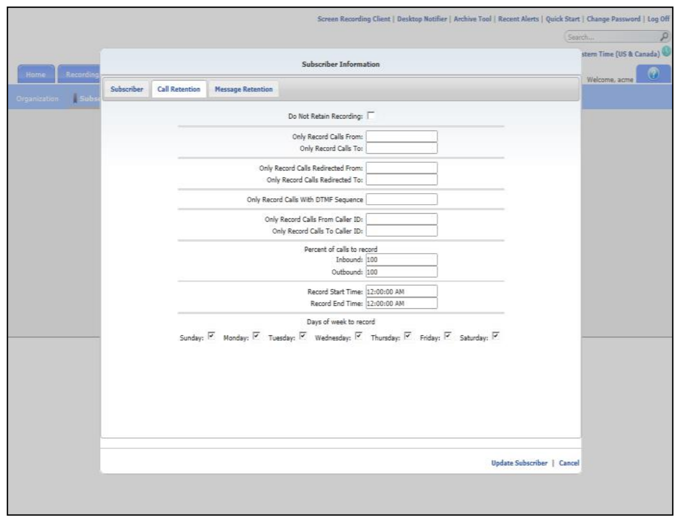
4. Enter or select the following information:

    - Time Zone – **(GMT -06:00) Central Time (US & Canada)**

    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.

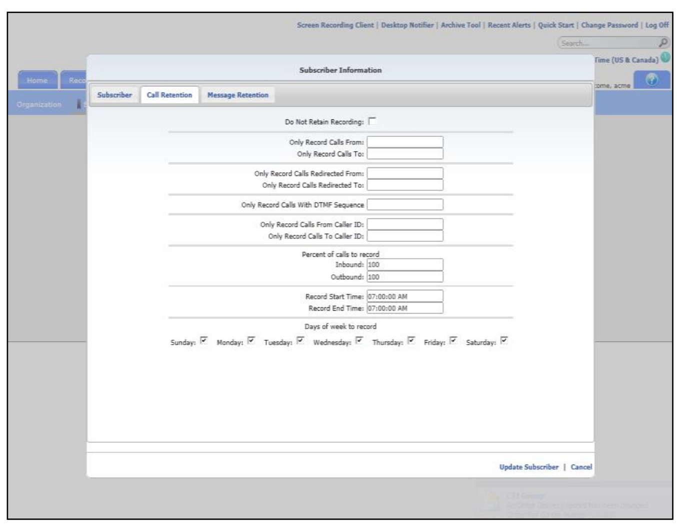


5. Select **Call Retention**.

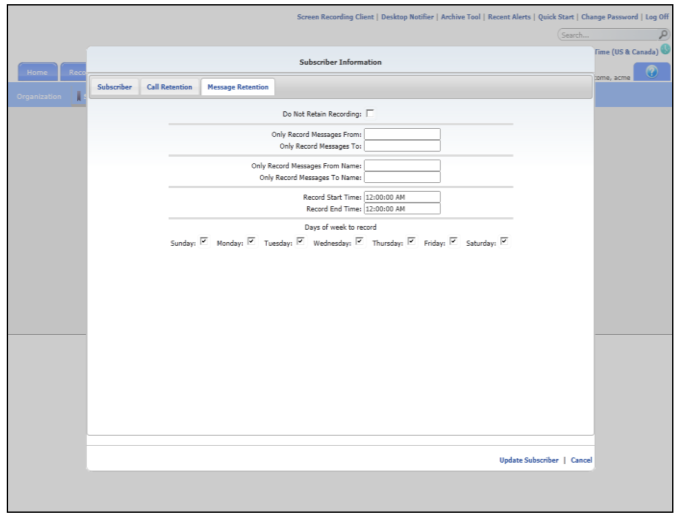


6. Enter or select the following information:

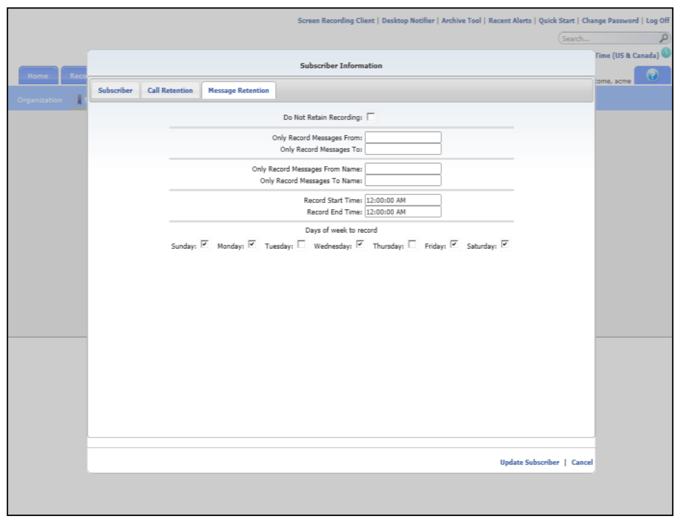
    - Record Start Time – **07:00:00 a.m.**
    - Record End Time – **07:00:00 p.m.**



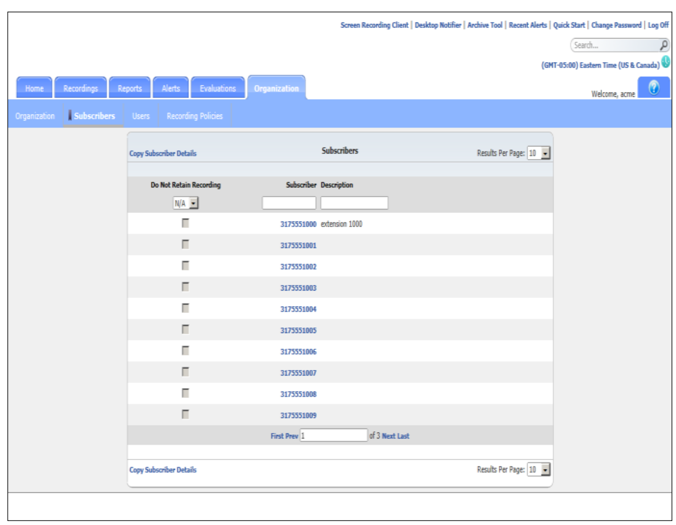
7. Select **Message Retention**.



8. Enter or select the following information by clicking in the corresponding option box:
   - **Tuesday**
   - **Thursday**

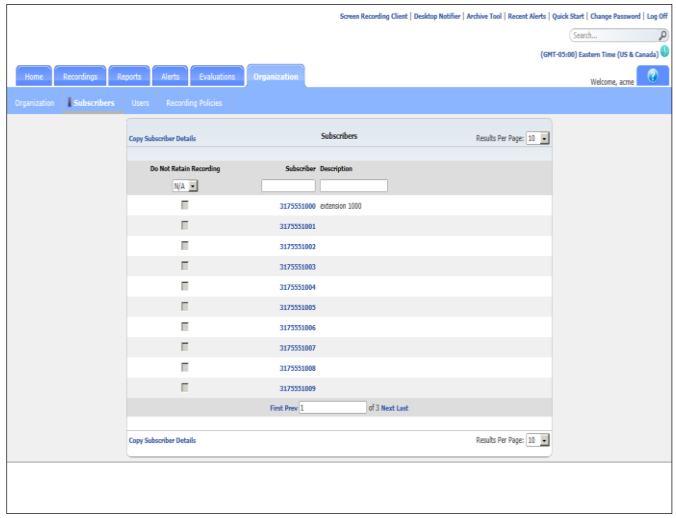


9. Click **Update Subscriber**.

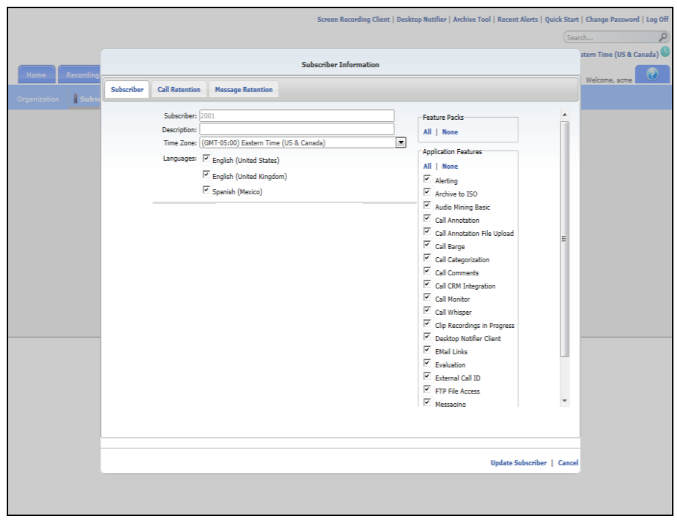


Example: Adding a description to a subscriber

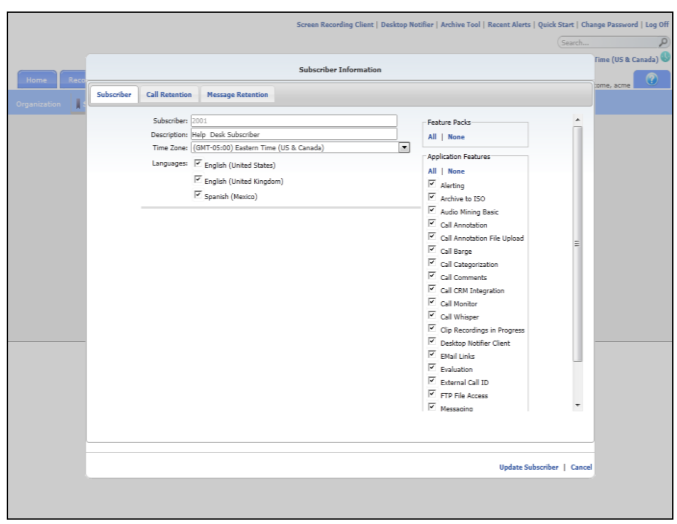
1. Click the **Organization** tab and select **Subscribers**.



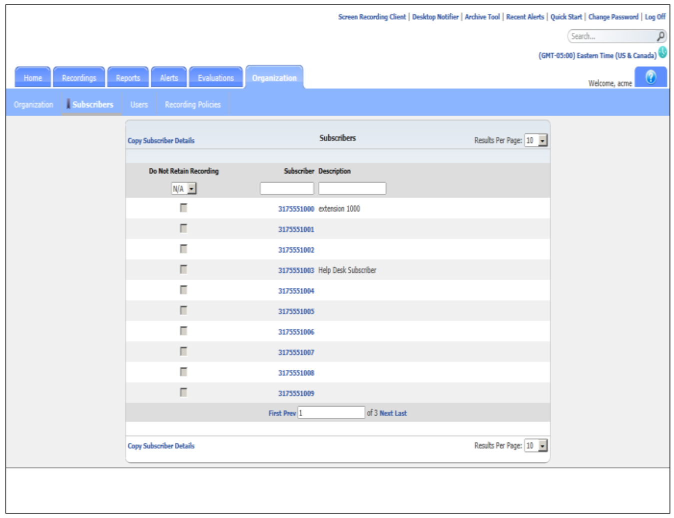
2. Click on the subscriber for which you wish to add a description.



3. Enter the following information:
   - Description – **Help Desk Subscriber**

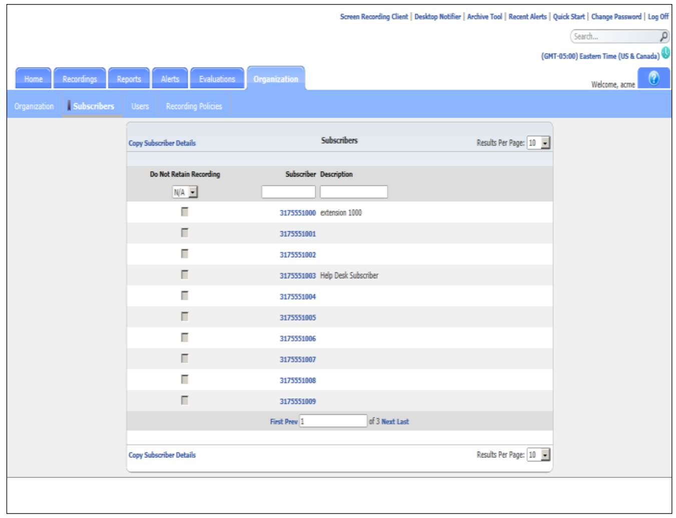


4. Click **Update Subscriber**. The description will appear under the Number column in place of the number.

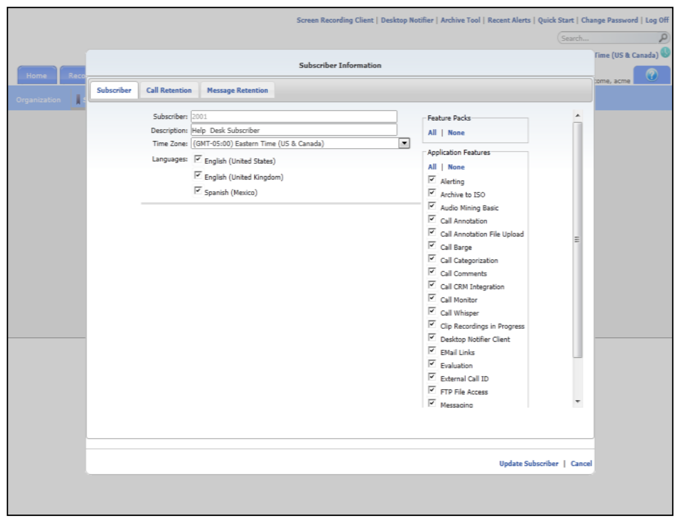


Example: Excluding a subscriber's calls and messages from being recorded

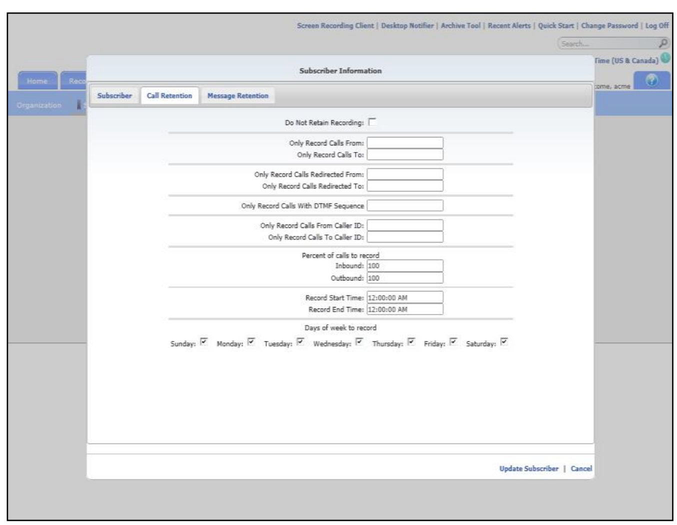
1. Click the **Organization** tab and select **Subscribers**.



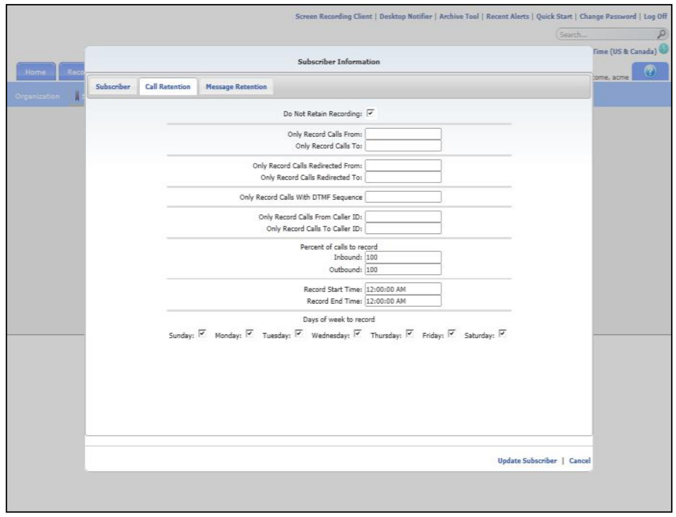
2. Click on the subscriber that you wish to exclude from being recorded.



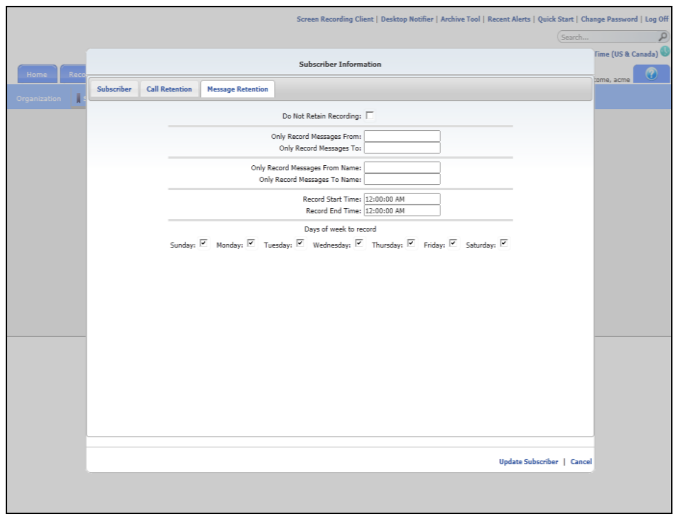
3. Select **Call Retention**.



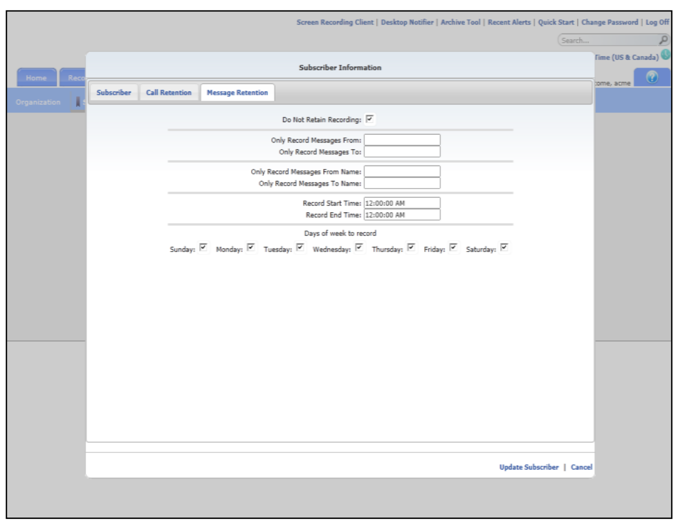
4. Select **Do Not Retain Recording** by clicking in the option box.



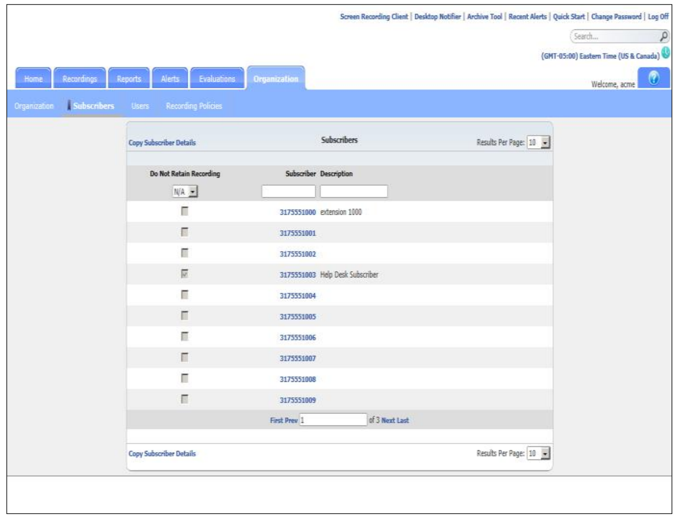
5. Select **Message Retention**.



6. Select **Do Not Retain Recording** by clicking in the option box.

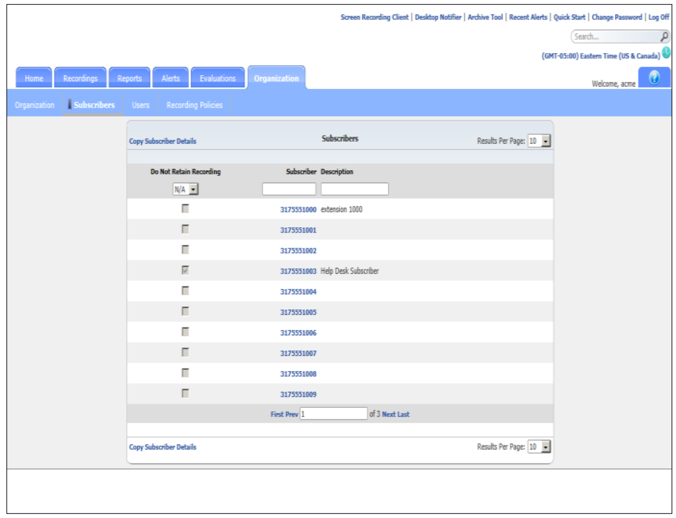


7. Click **Update Subscriber**. A check mark will appear in the Do Not Record option box on the Subscribers tab.

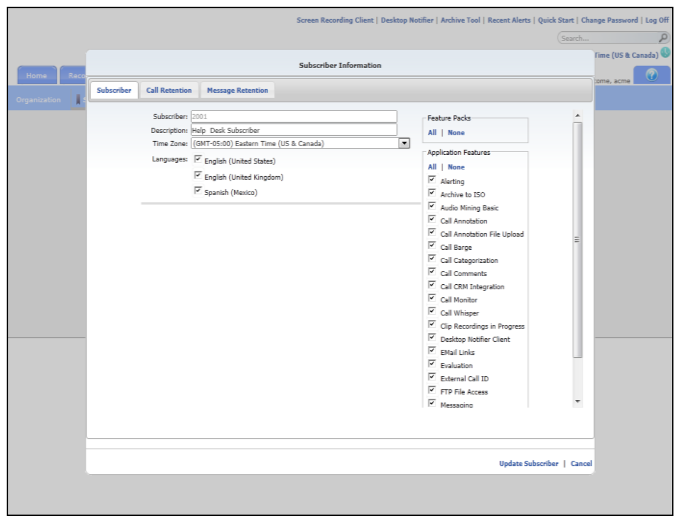


Example: Assigning/Unassigning feature packs and features to subscribers

1. Click the **Organization** tab and select **Subscribers**.

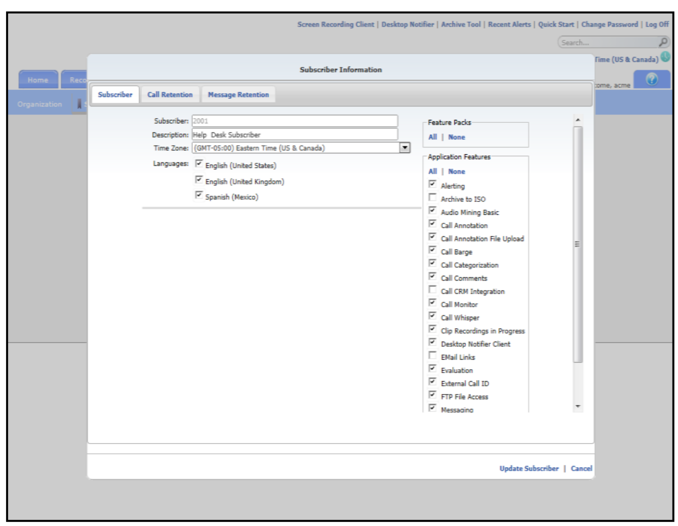


2. Click on the subscriber that you wish to assign/unassign application features.

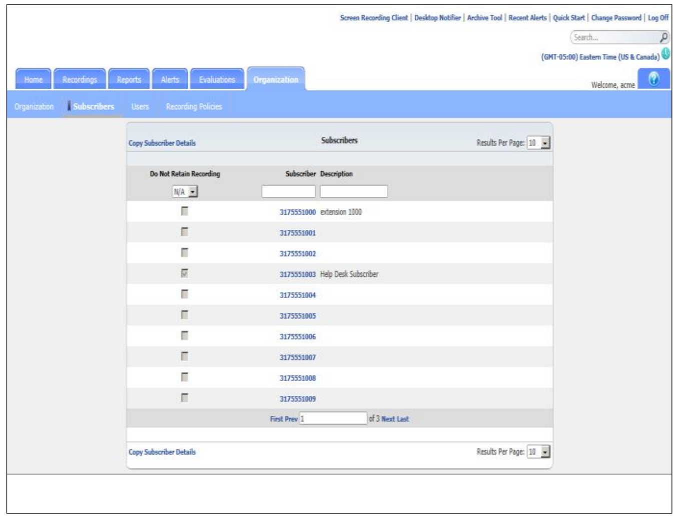


3. Click in the option boxes of the feature pack(s) and/or application features you wish to assign or unassign.

   A check mark means the application feature is assigned. An empty option box means the application feature is unassigned.



4. Click **Update Subscriber**.



Users

In order to view recordings, Users 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 temporary password. Users logging in for the first time will be redirected to the expired password dialog to reset their password to something more meaningful and within the company's rules for a valid password. The rules for a valid password are displayed as text on the expired password dialog. The dialog will also display a message identifying the strength of the selected password. It is encouraged that all passwords meet the Excellent strength level. Strong vs. Weak passwords are described by the following:

- Weak password - no password at all; contains your user name, real name, or company name; or contains a complete dictionary word
- Strong password - at least seven characters long; does not contain dictionary words, letter or number sequences, usernames, relative or pet names, romantic links, or biographical information; does not contain a complete dictionary word; is significantly different from previous passwords; contains a combination of uppercase, lowercase, numerical, and symbol characters; and is not the same password used for multiple sites or purposes

In the event a user forgets their password, they can come to the Group Administrator at which time their password can be reset from the User Maintenance screen. The application will automatically email them a temporary password. Upon logging in, users will be redirected to the expired password dialog to reset their passwords.

To add a new User, click on the Users tab. 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 enter 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.

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:

- Delete Calls – allows Group Administrators to delete calls from the Recorded Calls tab.
- Edit Users – allows Group Administrators to create and edit new and existing users in the End User Interface.
- Edit Organization – allows Group Administrators to add, edit, and delete employees and departments within the organization structure.
- View Screen Recordings – allows the Group Administrators to access the screen recording functionality in order to view and play back screen recordings.
- Access Audio Mining – allows the Group Administrators to create audio mining packs and apply them to recorded calls.
- Access the Recycle Bin – allows the Group Administrators access to the Recycle Bin tab to recover, download, or permanently delete calls in marked for deletion.
- Edit Subscribers – allows the Group Administrators to edit the recording criteria and application features of subscribers assigned to users.
- Edit Recording Policies – allows the Group Administrators to view, create, and edit recording policies.
- Access Evaluations – allows the Group Administrators access the call handler evaluation functionality in order to create evaluations to assign to recorded calls.

- FTP Access – 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.
- Manage Classifications – allows the Group Administrators to designate which classifications a user has access to.

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 situations where a company needs a person or authority figure to monitor the activity of all users, but doesn't need them to have full functionality. Essentially, a read-only Group Administrator. Click **Add User** to save your changes.

Note: The primary Group Administrator is automatically assigned all subscribers.

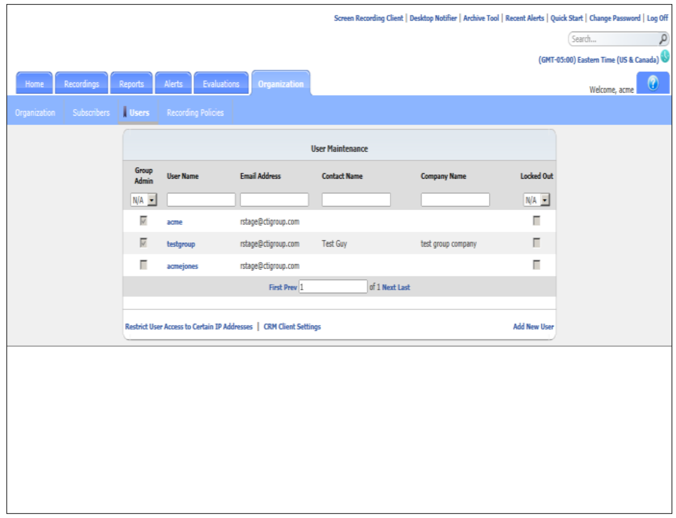
User Alerts displays a list of alerts created specifically by the user. Group Administrators have the ability to see the list of alerts for all users regardless of whether their subscribers are assigned to them or not. User Alerts allows Group Administrators to temporarily disable alerts that might be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

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.

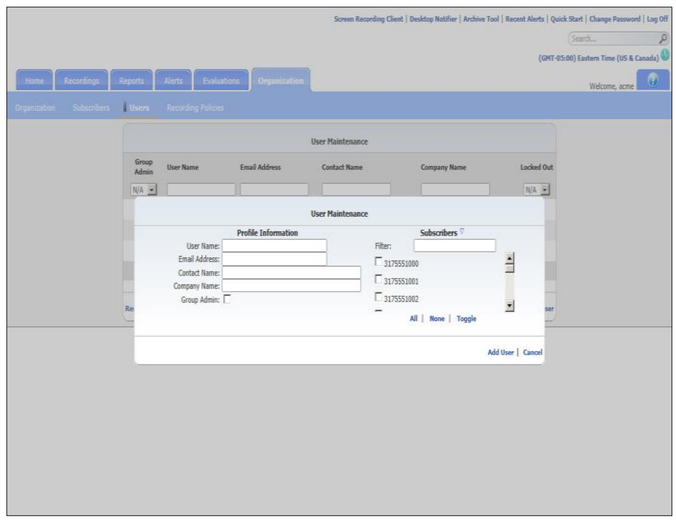
Using the Restrict User Access to Certain IP Addresses functionality restricts access of the users based upon their IP address. For example: if the Administrator enters the IP address of a Group and saves it, only that Group and their Users will be able to access the application from that IP address. Therefore, if User's 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 123.456.78 you would add wild cards to the end of the value to appear as 123.456.78*.

Example: Adding a new user

1. Click the **Organization** tab and select **Users**.

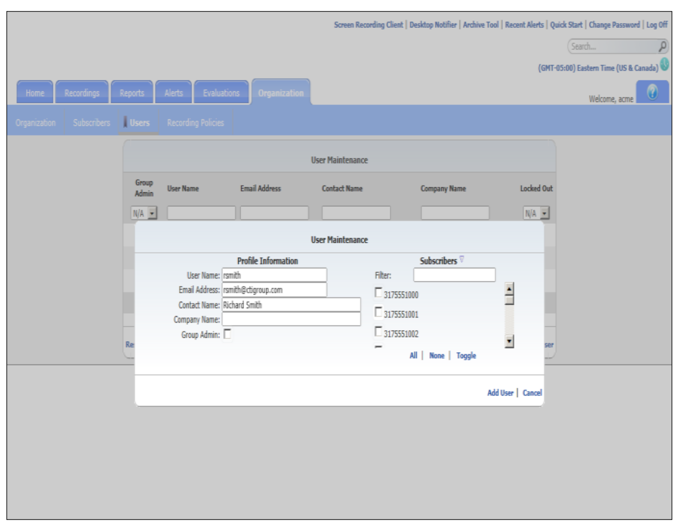


2. Select the **Add New User** link from the bottom of the User Maintenance page.

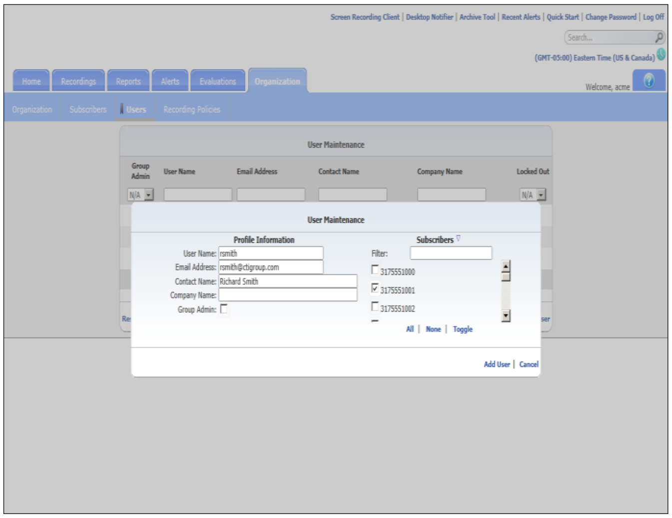


3. Enter the following information about the new User:

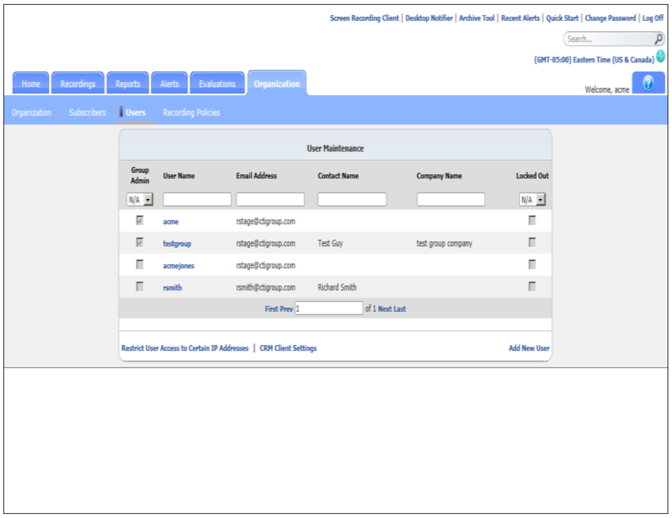
   - Login ID – **enter your first initial and last name (for example: efink)**
   - Email Address – **enter your email address**
   - Contact Name – **enter your name**



4. Select at least one subscriber to associate with the User by clicking in the corresponding option box.

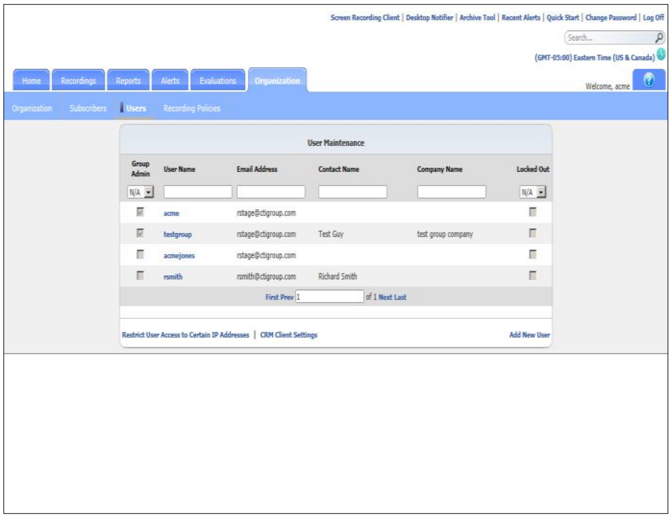


5. Click **Add User**.

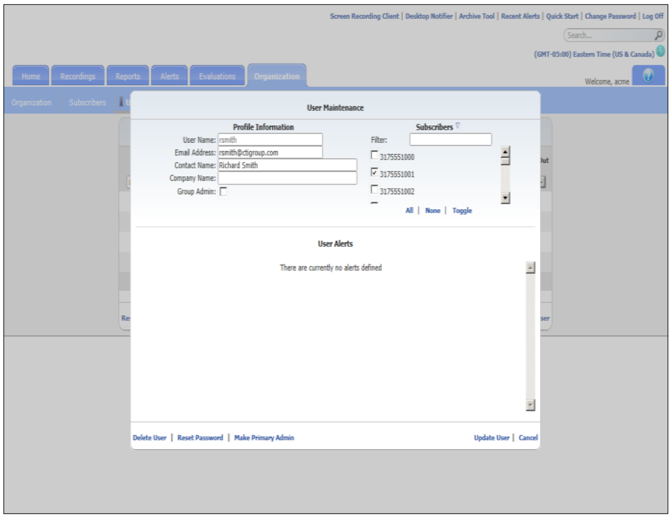


Example: Editing/updating a user

1. Click the **Organization** tab and select **Users**.

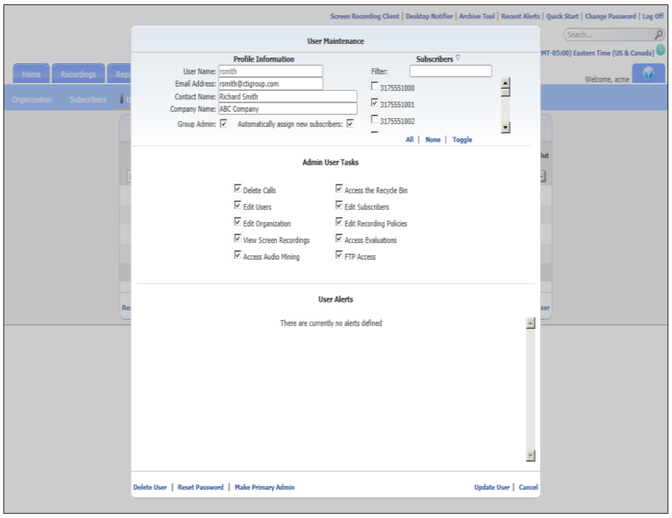


2. Select the User that you just created and click on the **User Name**.



3. Update the following information about the new User:

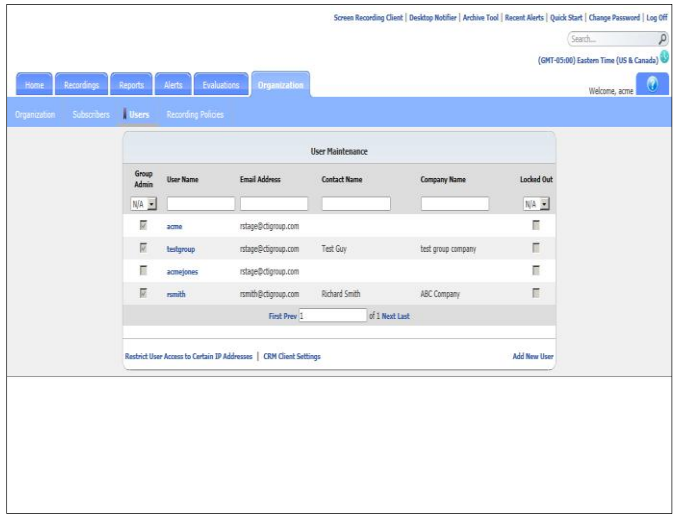
   - Company Name – **enter your company name**
   - Group Admin – **click in the option box.**
   - Automatically assign new subscribers - **click in the option box.**



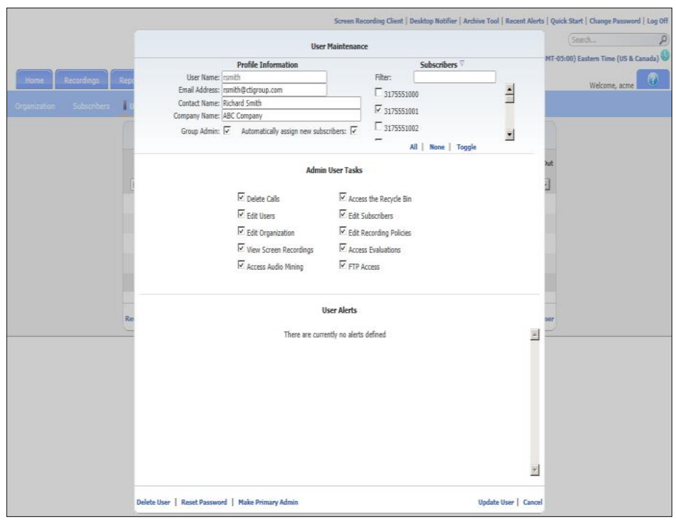
Note: The primary Group Administrator will automatically inherit every subscriber that is added to this Group now and in the future. The same applies for any User that has Group Administrator privileges and the

Automatically assign new subscribers option is selected.

4. Click **Update User**.

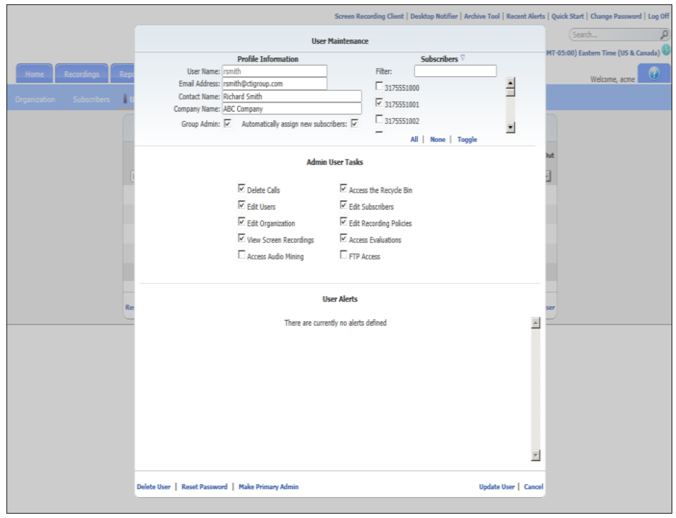


5. Select the User that you just created and click on the **User Name**.

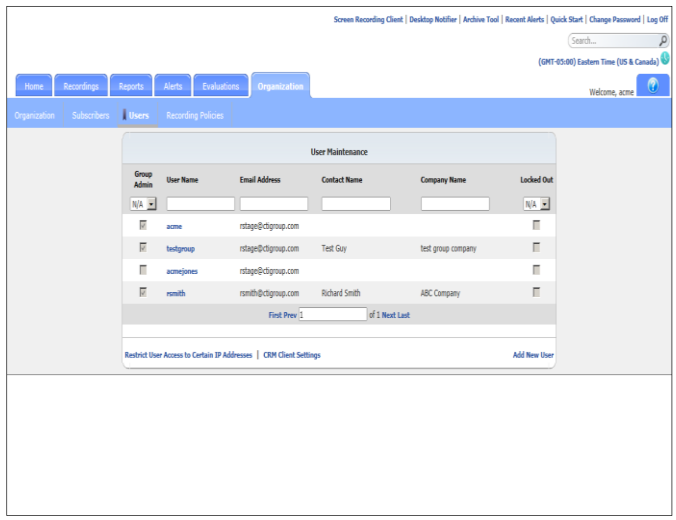


6. Deselect the following **Admin User Tasks** by clicking in the corresponding option boxes:

   - **Access Audio Mining**
   - **FTP Access**

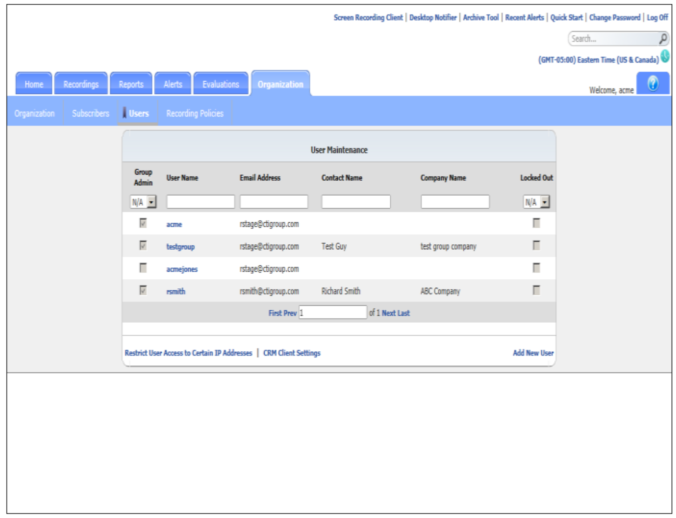


7. Click **Update User**.

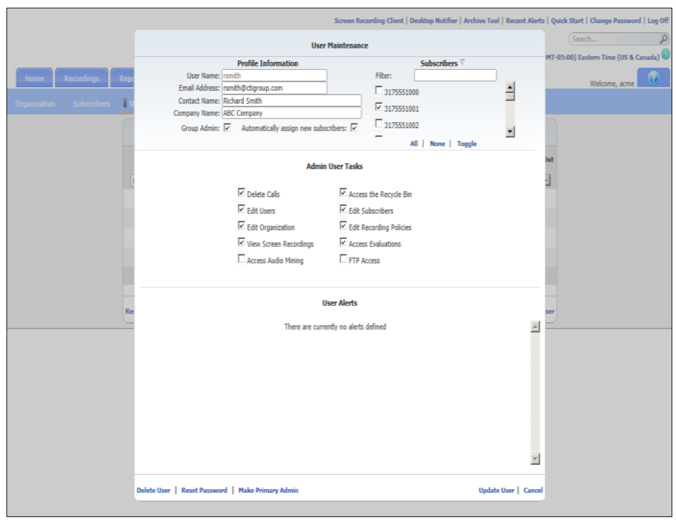


Example: Resetting a user's password

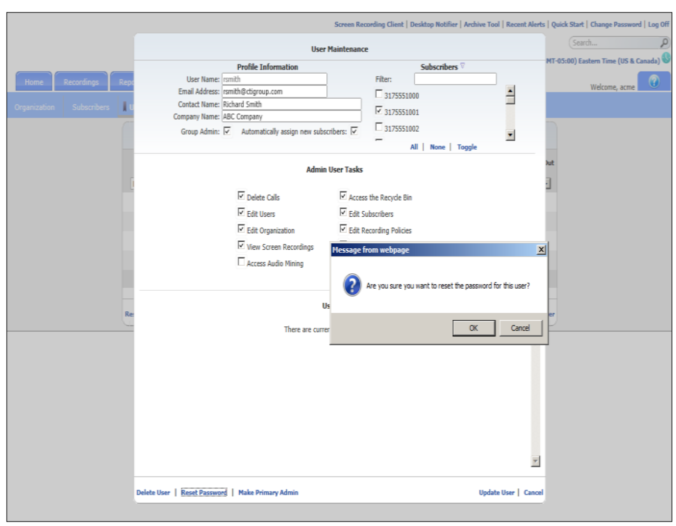
1. Click the **Organization** tab and select **Users**.



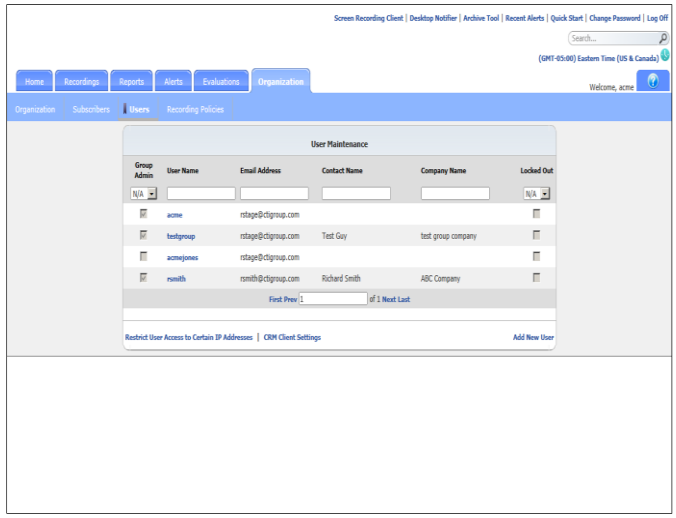
2. Select the User that you created earlier and click **User Name**.



3. Select **Reset Password**.

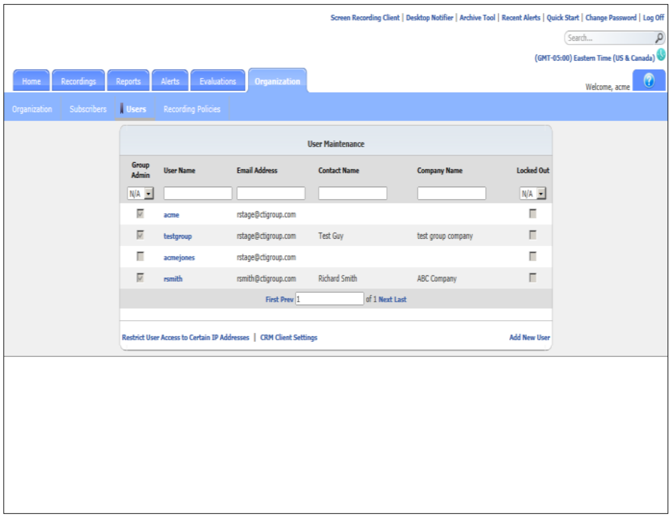


4. Click **OK**.

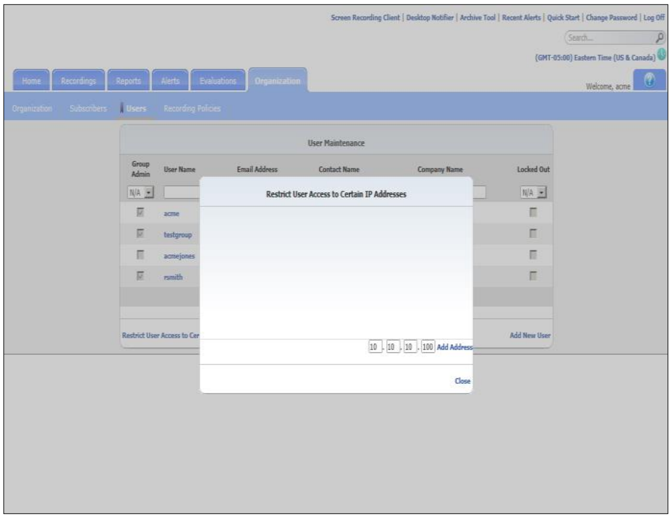


Example: Restricting user access to certain IP addresses

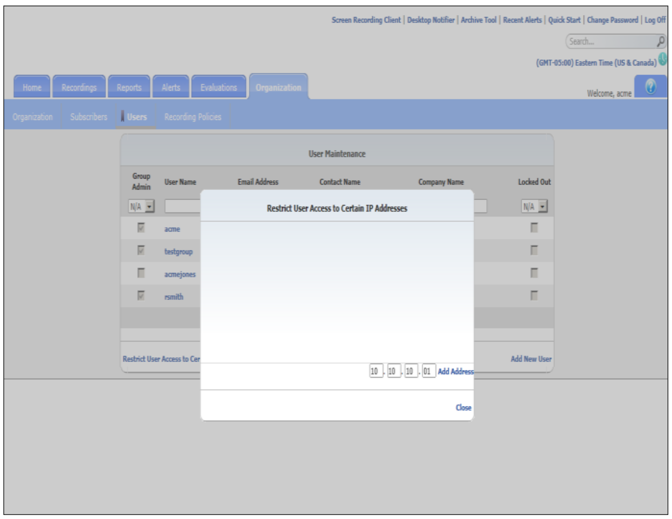
1. Click the **Organization** tab and select **Users**.



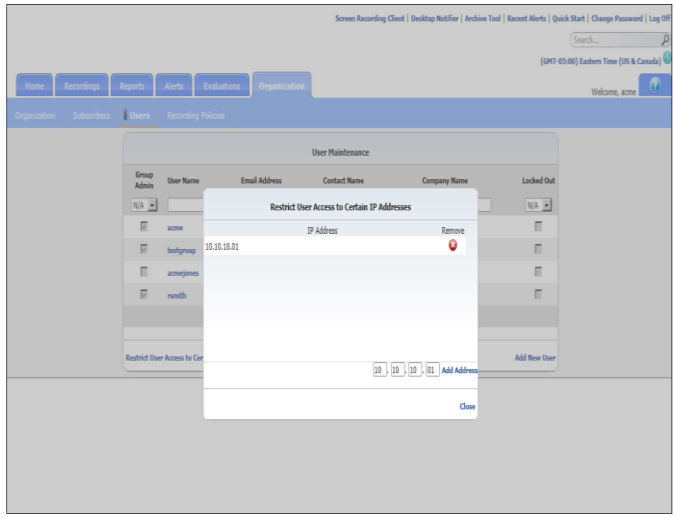
2. Select the **Restrict User Access to Certain IP Addresses** link.



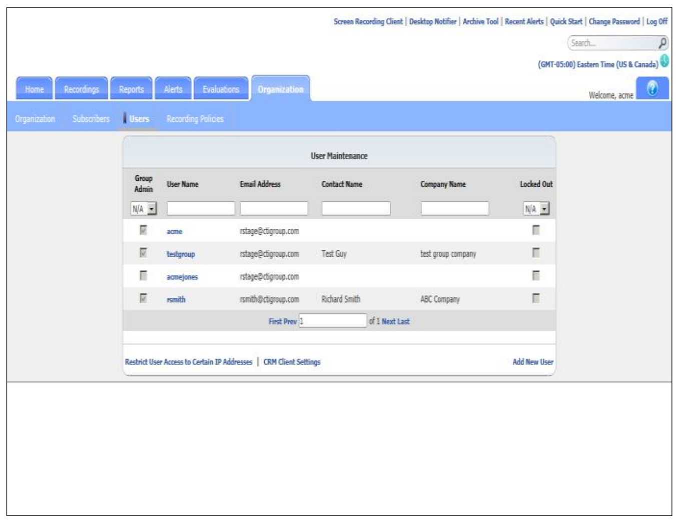
3. Enter the IP address to which the users are restricted.



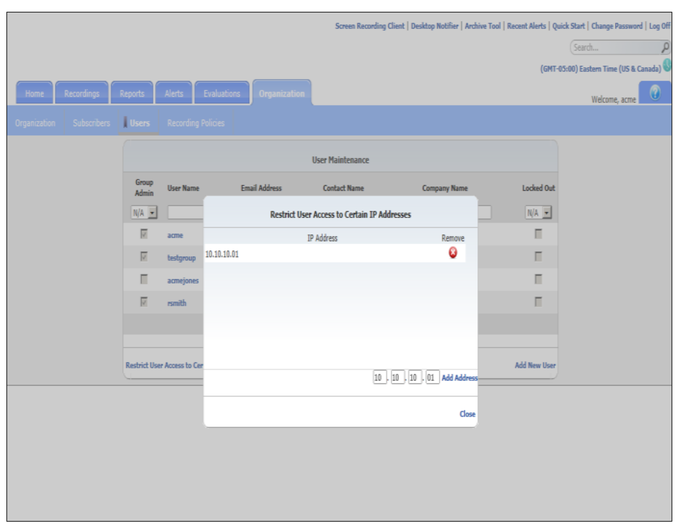
4. Click **Add Address**.



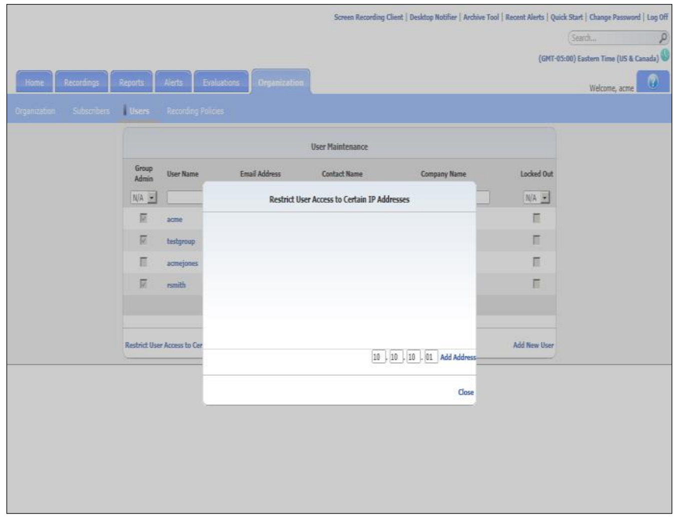
5. Select the **Close** link to close the Restrict User Access to Certain IP Addresses dialog box.



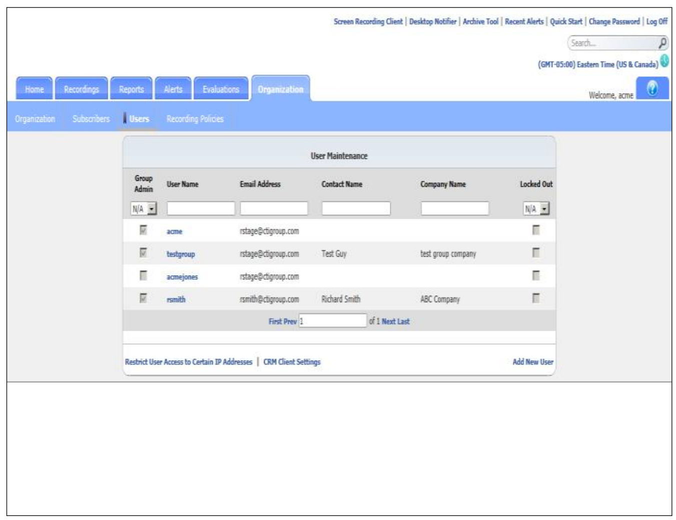
6. Select the **Restrict User Access to Certain IP Addresses** link.



7. Select the (Remove) button to remove the restriction.

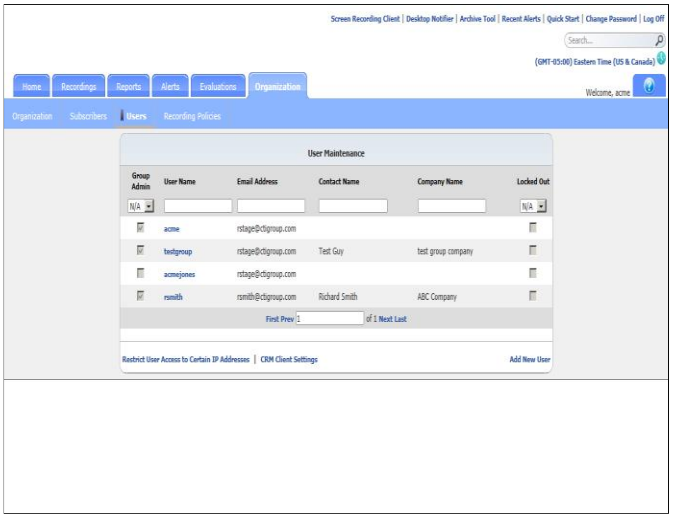


8. Select the **Close** link to close the Restrict User Access to Certain IP Addresses dialog box.

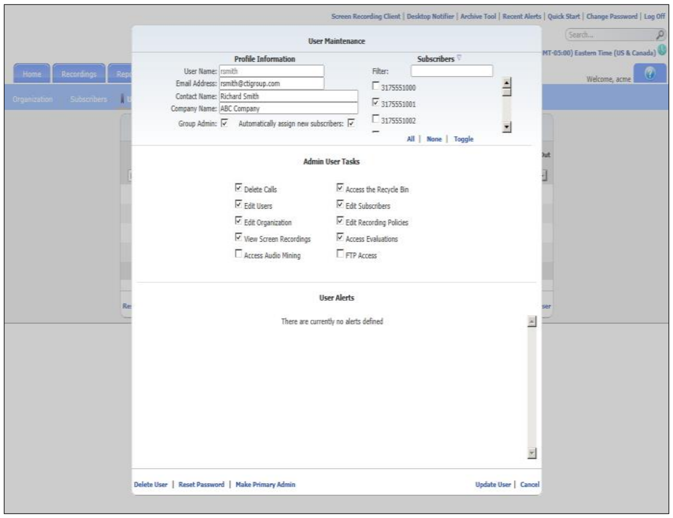


Example: Deleting a User

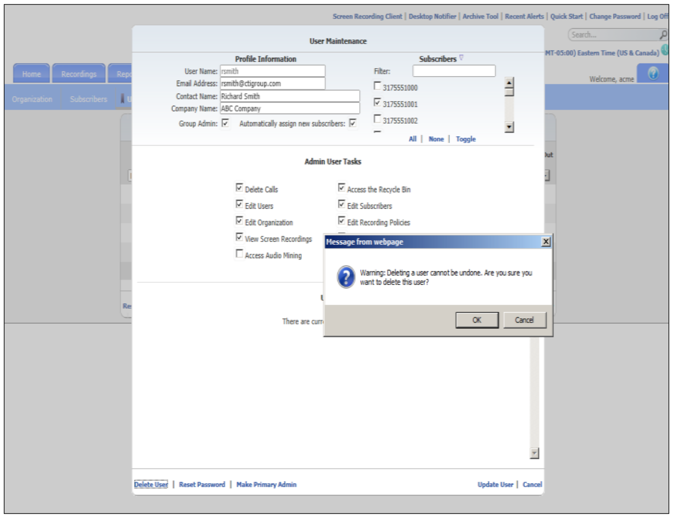
1. Click the **Organization** tab and select **Users**.



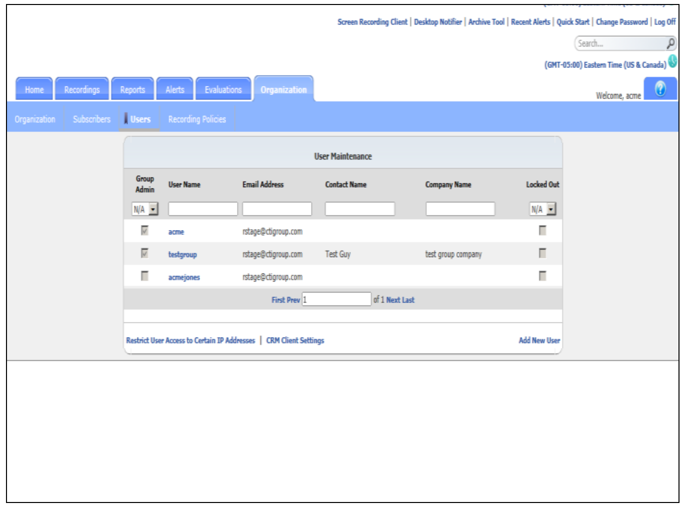
2. Select the User that you created earlier and click **User Name**.



3. Select **Delete User**.



4. Click **OK** to the confirmation message.



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 and/or entered on screen, the PCI Compliance feature disables the call and/or screen recorders briefly via recording policies. Recording policies define the criteria that enable the pause and resume triggers. Call and/or screen recording can be paused and resumed using the following triggers:

- In-focus Window Title Text – if the window that is in focus matches the title text criteria trigger pause or resume.
- No In-focus Window with this Title Text – if a window that is not in focus matches the title text criteria trigger pause or resume.
- Any Window Title Text – if any window that, in focus or not, matches the title text criteria trigger pause or resume.
- No Window with this Title Text – if none of the windows match the title text criteria trigger pause or resume.
- DTMF Digits – if a series of digits entered manually match the DTMF value criteria trigger pause or resume.
- On Demand – if the Pause or Resume button is selected from the Calls in Progress tab, trigger pause or resume.
- API Call – if the trigger criteria are met using an externally created API method, trigger pause or resume.

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.

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 a * appears next to the Value field. Identify whether this trigger pauses call recordings only, screen recordings only, 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 or screen recording is paused, it will not resume.

Hierarchy Level	Interface	Inherits From
Administrator	Administrative	
Provider	Administrative	Administrator
Group	Administrative & End User	Group, Provider, or Administrator 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.
Employee	End User	Group, Provider, or Administrator
Extension	End User	Employee, Group, Provider, or Administrator

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: Recording policies can only be disabled at the level where the recording policy was created.

Because inherited recording policies are read only, in order to "disable" a child node's inherited recording policy, the inheritance must be blocked. Blocking recording policy inheritance creates an empty recording policy and is useful when a specific child node does not need a recording policy. To block recording policy inheritance, click on the Block Recording Policy Inheritance link. Select Yes to the confirmation message.

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 nodes inheriting the recording policy.

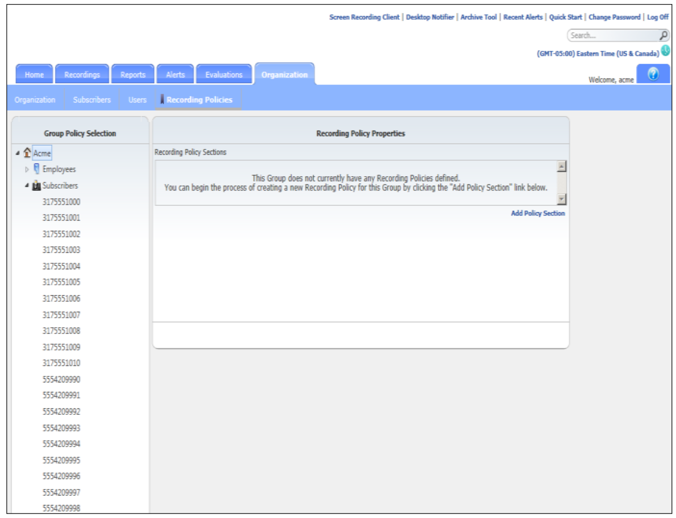
Similarly, because inherited recording policies are read only, in order to update or create a new recording policy at a child node the current recording policy must be copied and then updated. To edit or create a new recording policy at the child node level, click Copy Inherited Recording Policy to enable 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:

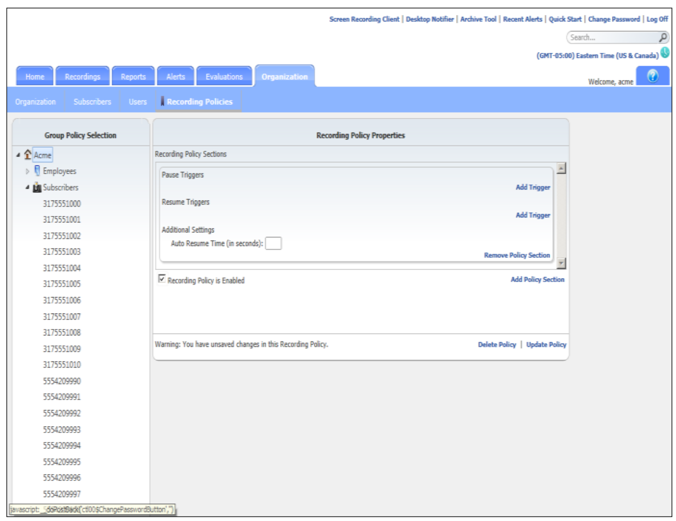
- Deleting a recording policy at a parent node will delete inherited recording policies for any child nodes as well.
- Depending on the parent node level the recording policy is deleted at, the child nodes will look to inherit an active recording policy from the higher level parent nodes. The same is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

Example: Adding a new recording policy

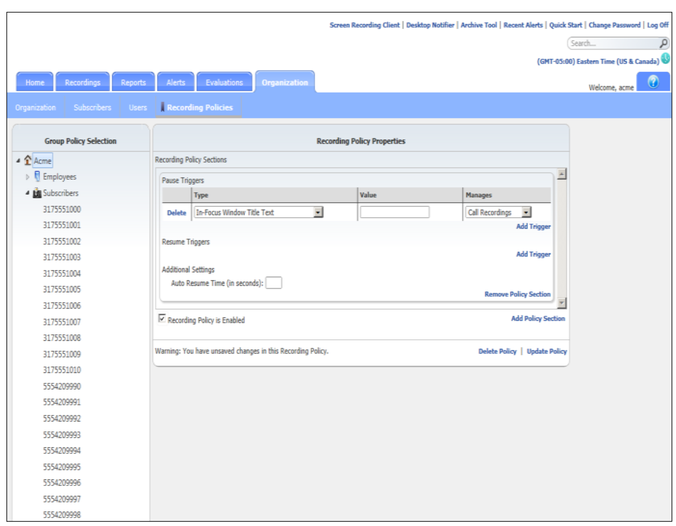
1. Click the **Organization** tab and select **Recording Policies**.



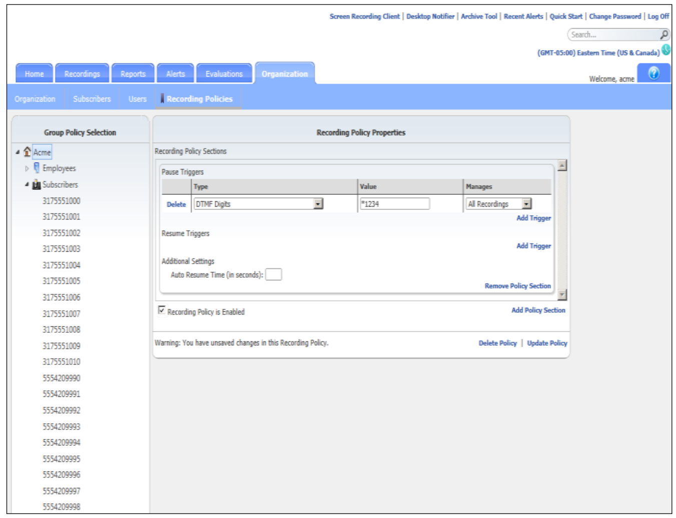
2. Click **Add Policy Section**.



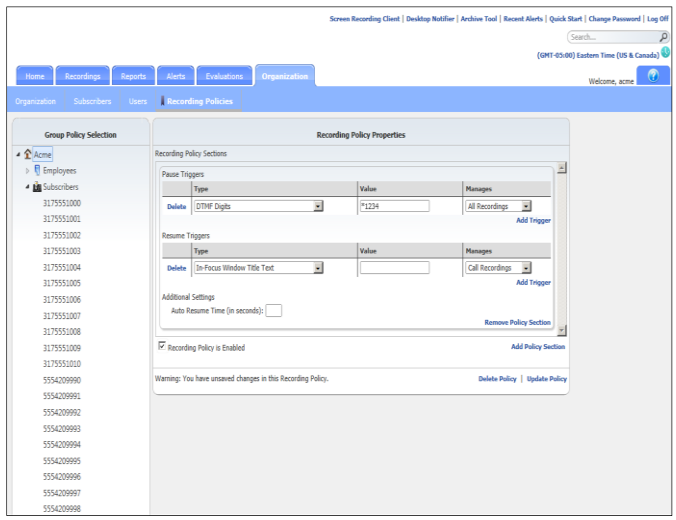
3. Select the Pause Triggers **Add Trigger** link.



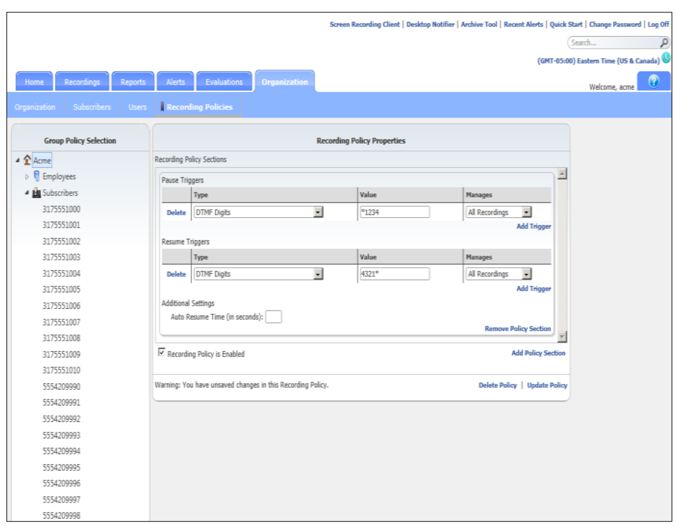
4. Enter or select the following information:
   - Type – **DTMF**
   - Value – ***1234**
   - Manages – **All Recordings**



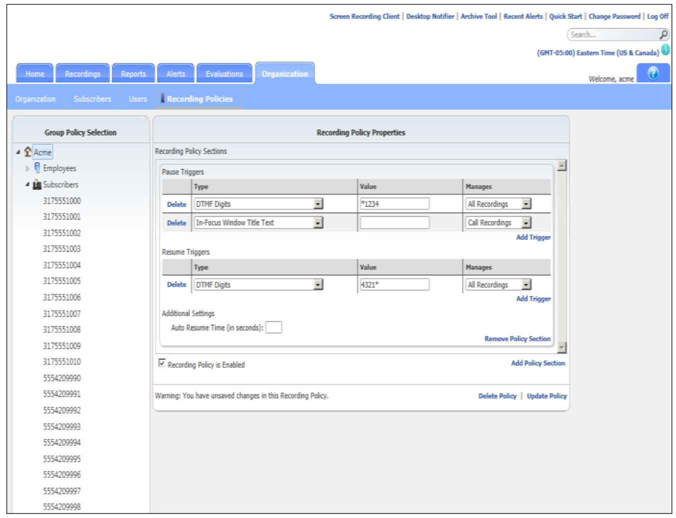
5. Select the Resume Triggers **Add Trigger** link.



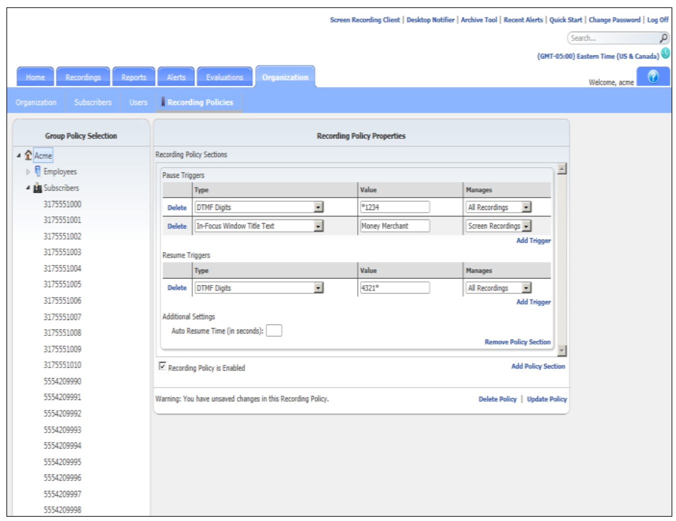
6. Enter or select the following information:
   - Type – **DTMF**
   - Value – **4321***
   - Manages – **All Recordings**



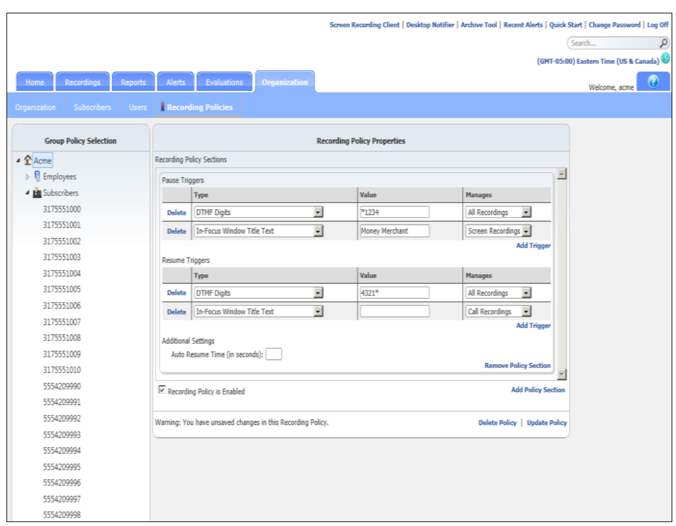
7. Select the Pause Triggers **Add Trigger** link.



8. Enter or select the following information:
    - Type – **In-Focus Window Title Text**
    - Value – **Money Merchant**
    - Manages – **Screen Recordings**

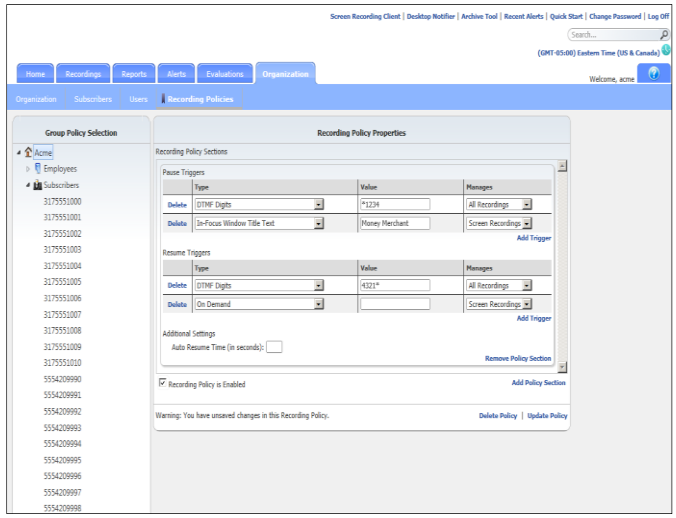


9. Select the Resume Triggers **Add Trigger** link.

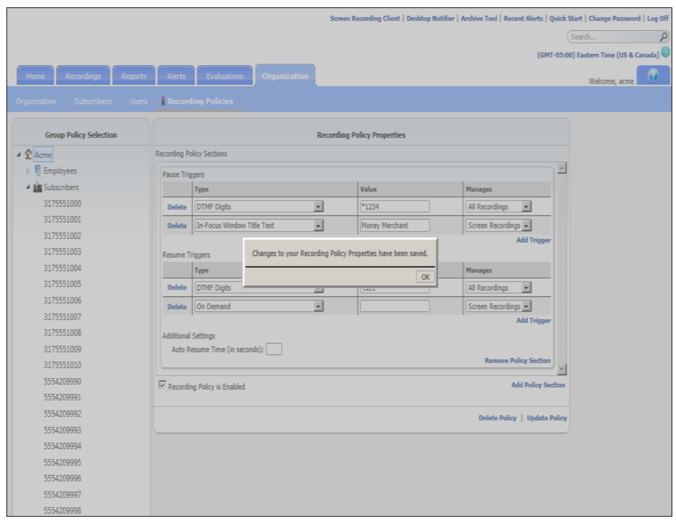


10. Enter or select the following information:

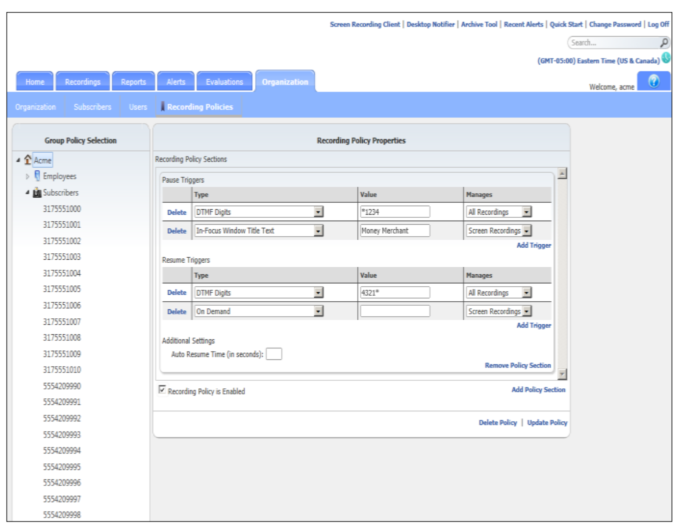
    - Type – **On Demand**
    - Manages – **Screen Recordings**



11. Click **Update Policy**.

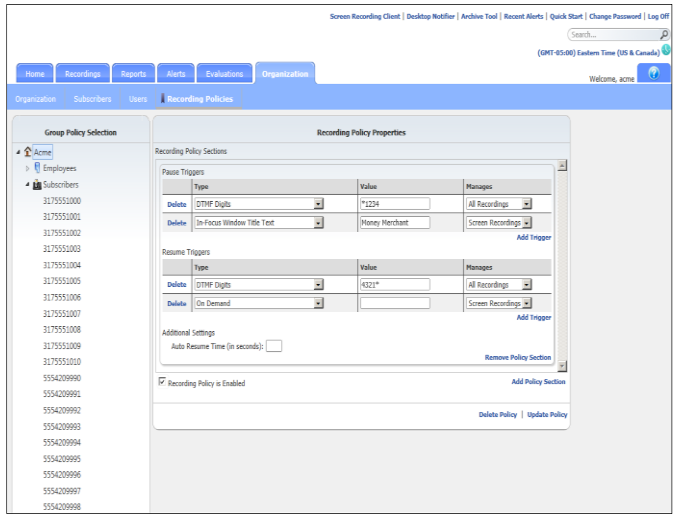


12. Click **OK**.

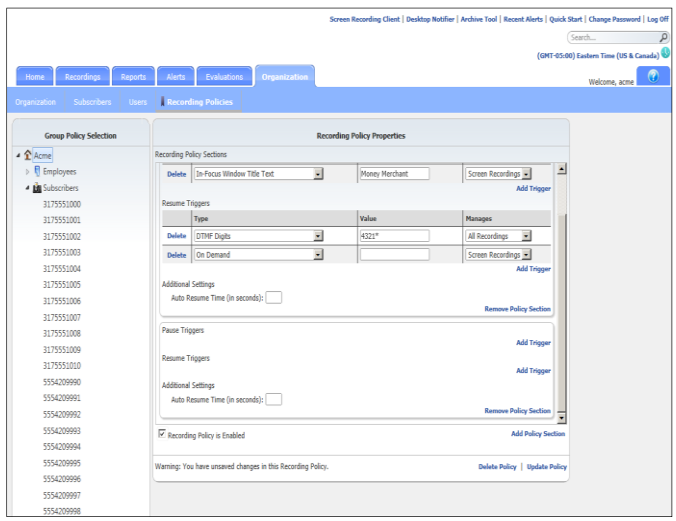


Example: Adding a new policy section

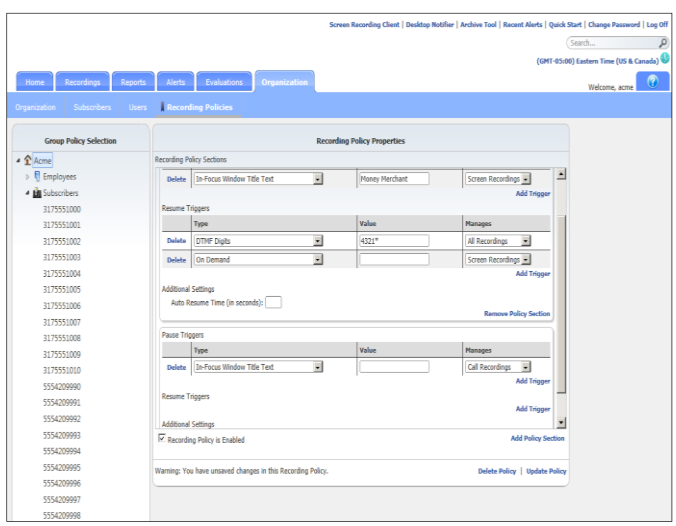
1. Click the **Organization** tab and select **Recording Policies**.



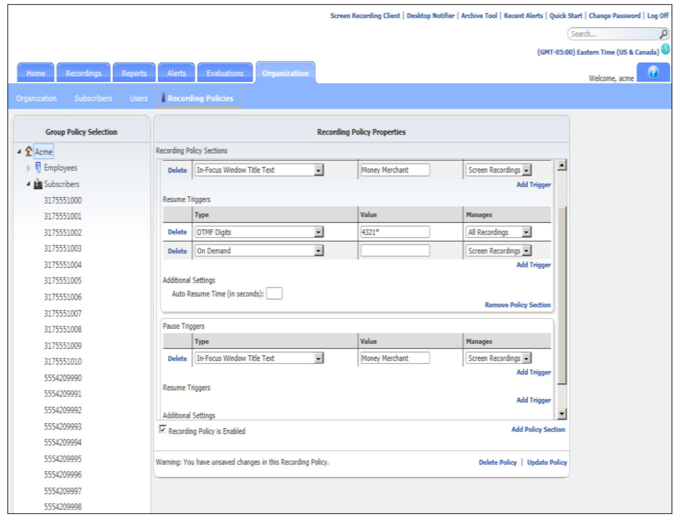
2. Click **Add Policy Section**.



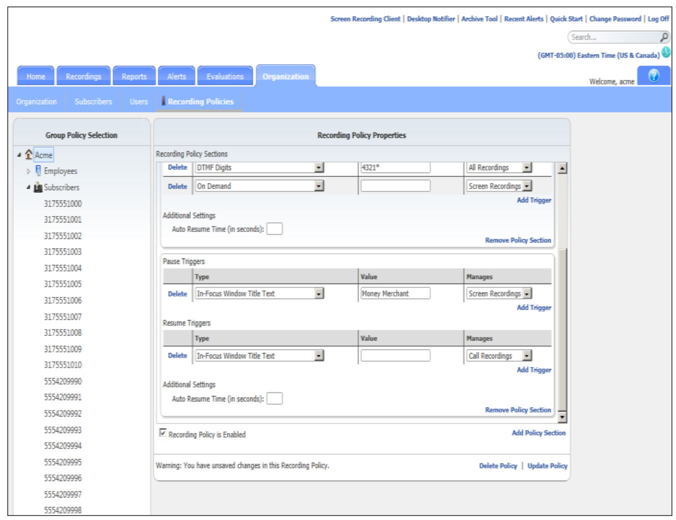
3. Select the Pause Triggers **Add Trigger** link.



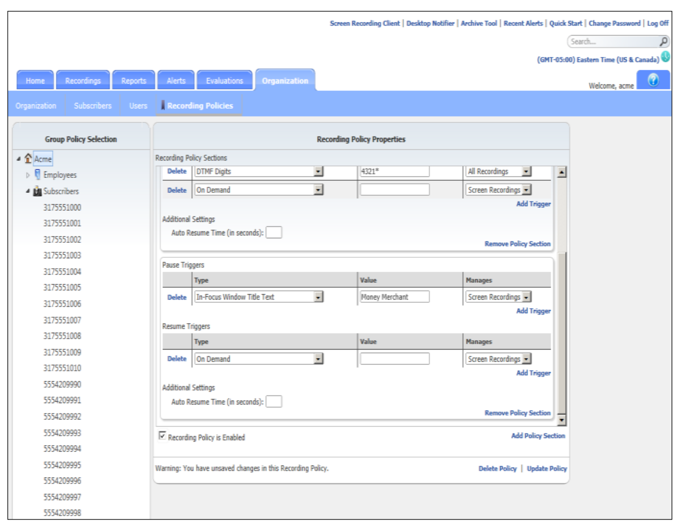
4. Enter or select the following information:
   - Type – **In-Focus Window Title Text**
   - Value – **Money Merchant**
   - Manages – **Screen Recordings**



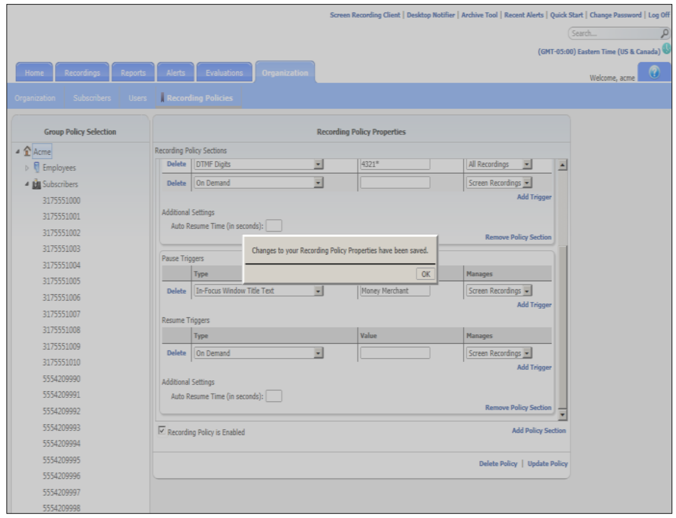
5. Select the Resume Triggers **Add Trigger** link.



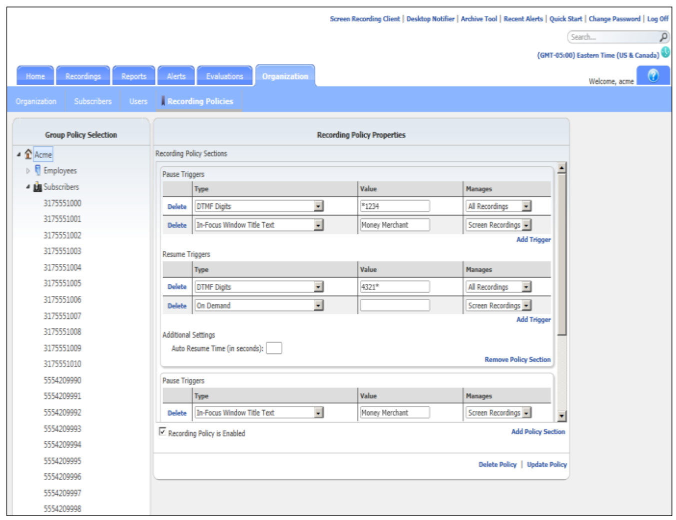
6. Enter or select the following information:
   - Type – **On Demand**
   - Manages – **Screen Recordings**



7. Click **Update Policy**.

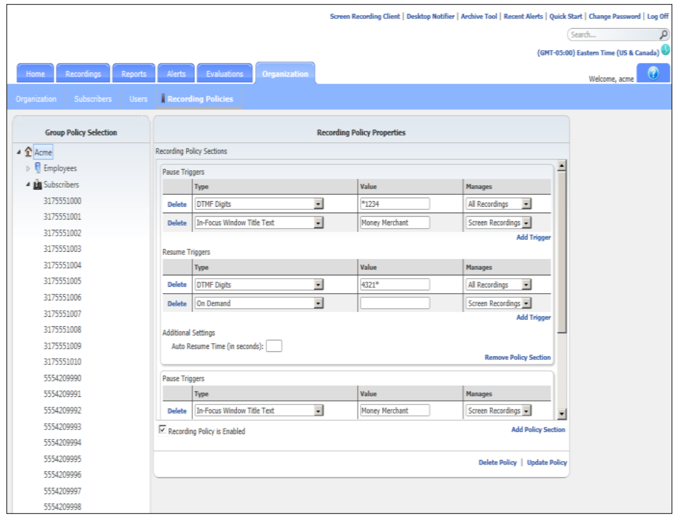


8. Click **OK**.

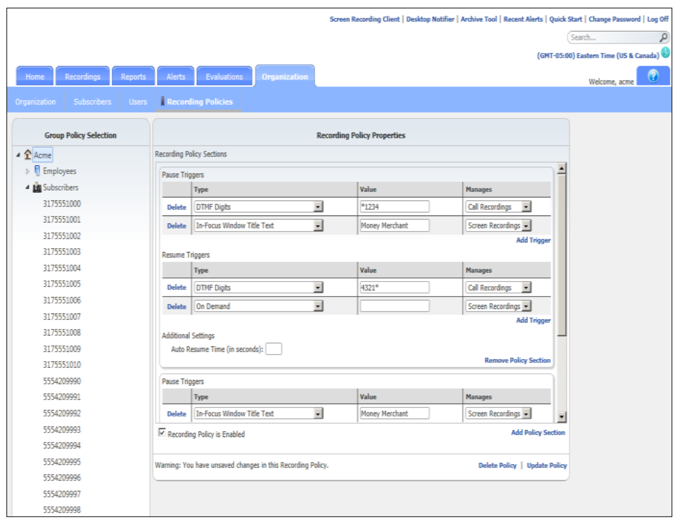


Example: Editing a recording policy

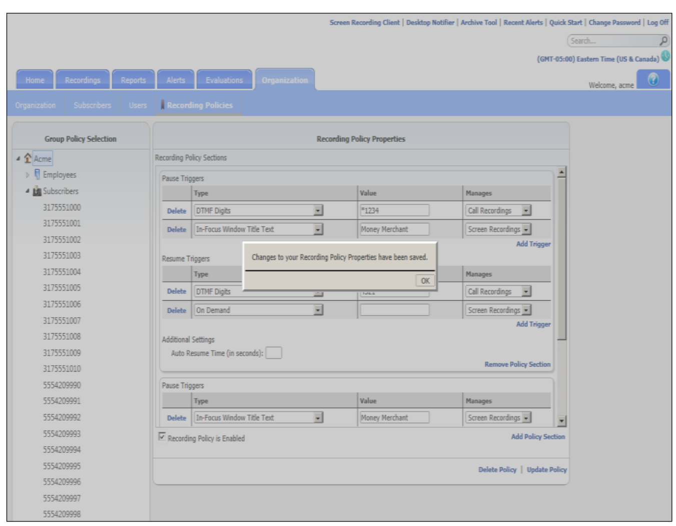
1. Click the **Organization** tab and select **Recording Policies**.



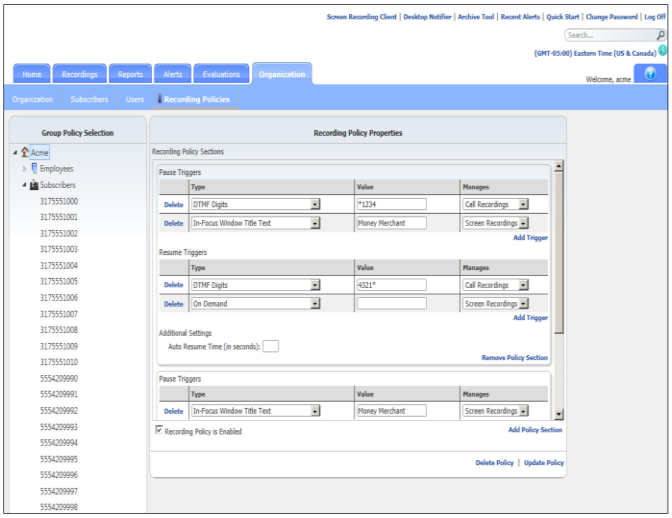
2. Under the first policy section, enter or select the following:
   - Pause Triggers/Manages – **Call Recordings**
   - Resume Triggers/Manages – **Call Recordings**



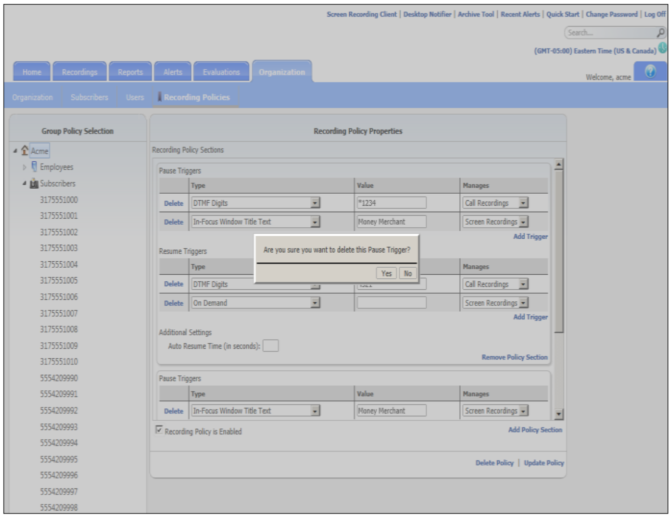
3. Click **Update Policy**.



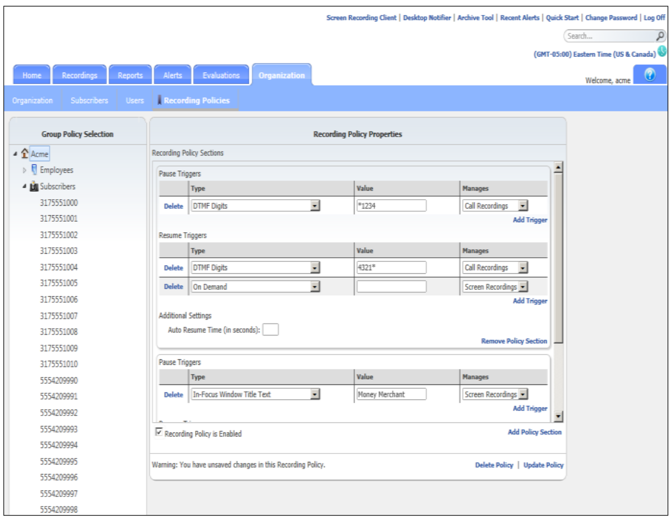
4. Click **OK**.



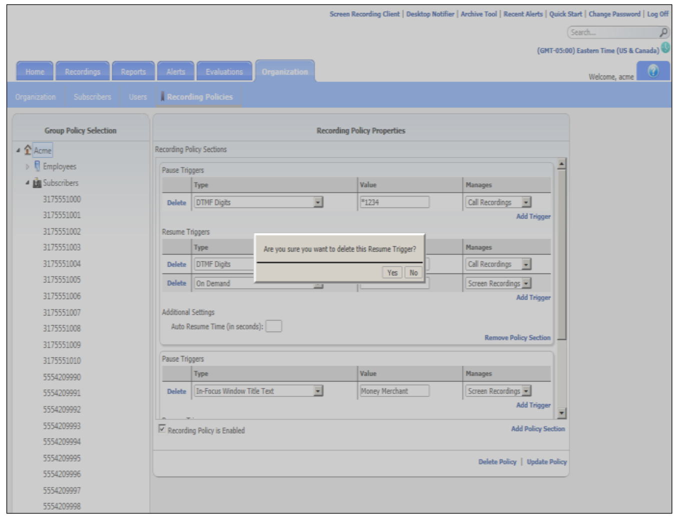
5. Select the **Delete** link located next to the In-Focus Window Title Text Pause Triggers found under the first policy section.



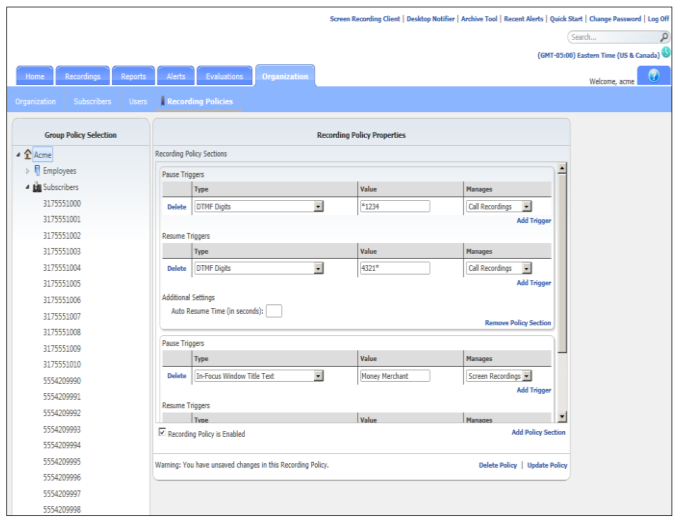
6. Click **Yes**.



7. Select the **Delete** link located next to the On Demand Resume Triggers found under the first policy section.

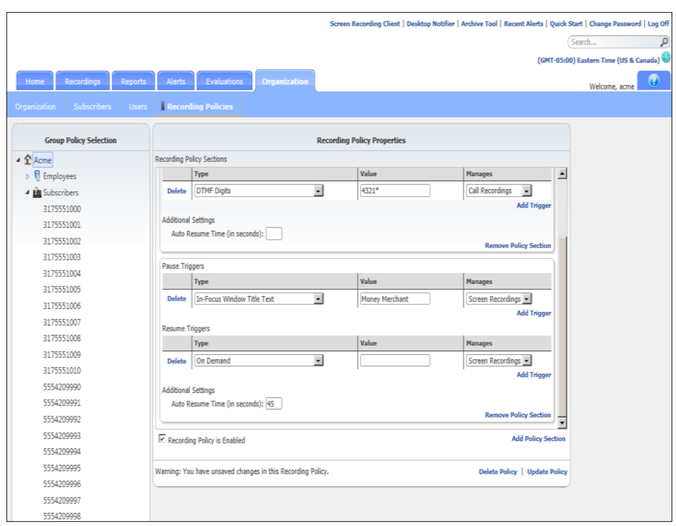


8. Click **Yes**.

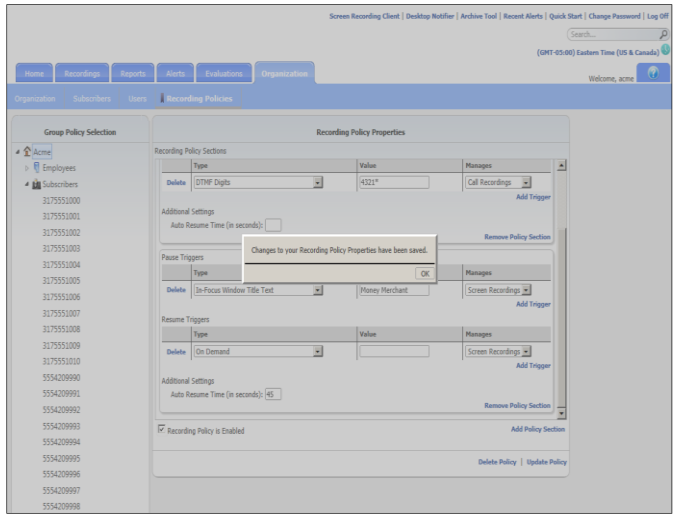


9. Under the second policy section, enter or select the following information:

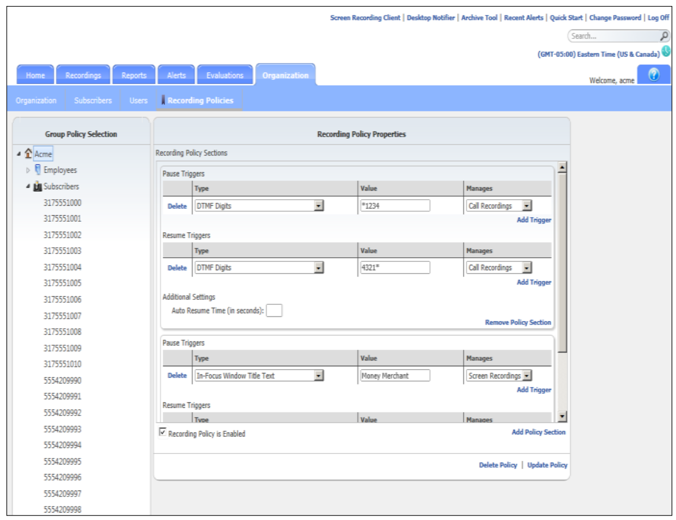
    - Auto Resume Time (in seconds) – **45**



10. Click **Update Policy**.

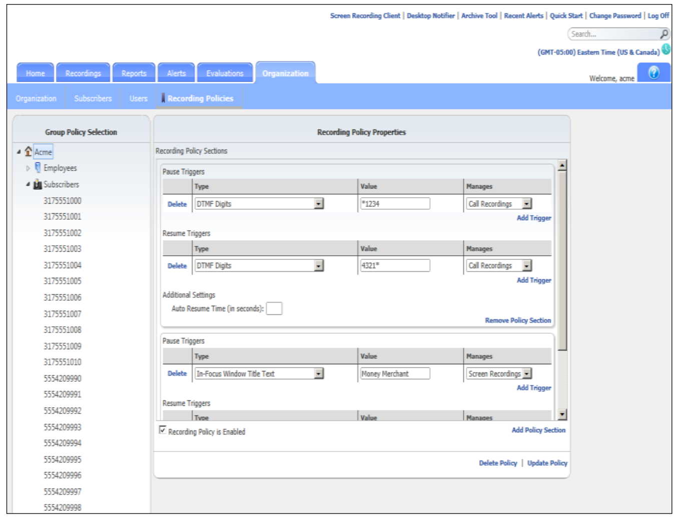


11. Click **OK**.

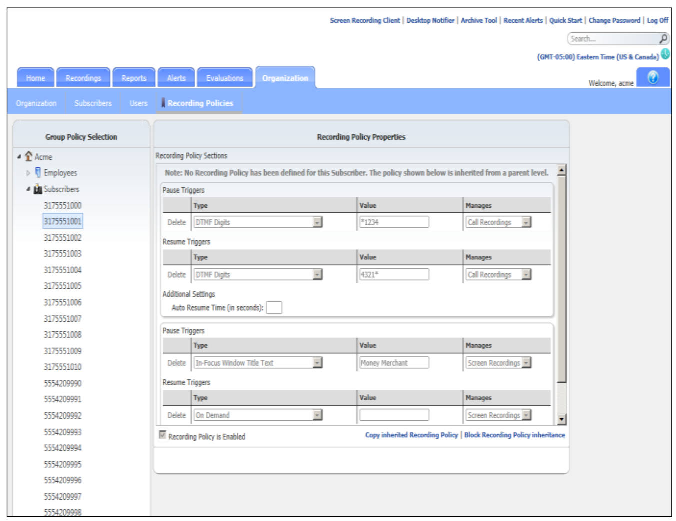


Example: Creating a new recording policy from an inherited recording policy

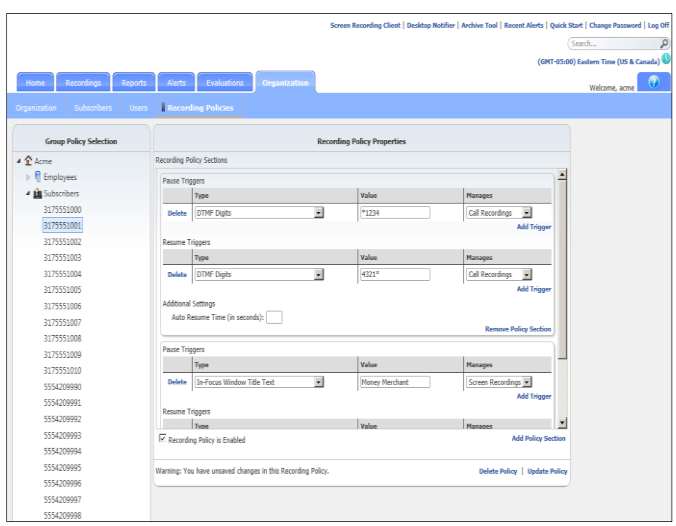
1. Click the **Organization** tab and select **Recording Policies**.



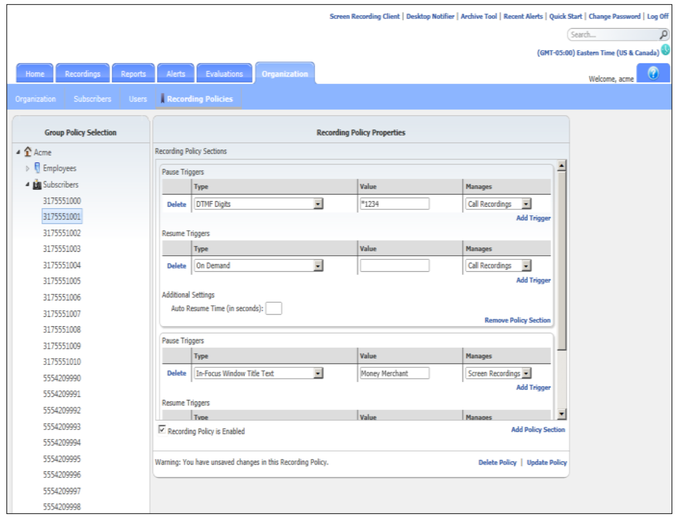
2. Click **Subscribers** and select the subscriber for which you wish to create a new recording policy.



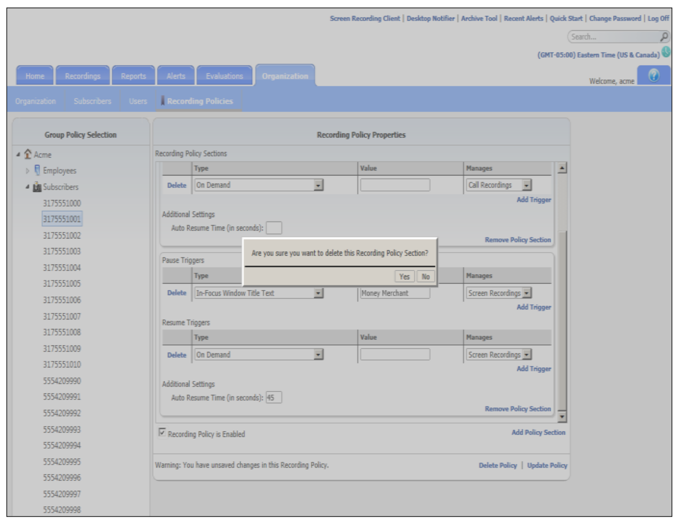
3. Select the **Copy Inherited Recording Policy** link.



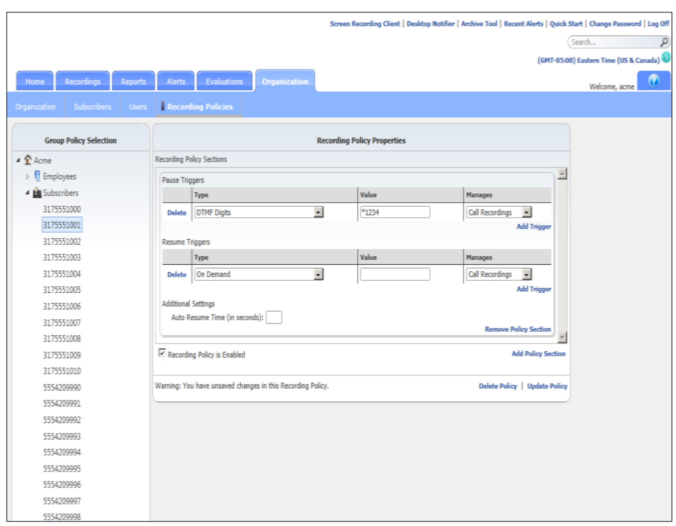
4. Enter or select the following information for the first resume trigger:
   - Type – **On Demand**



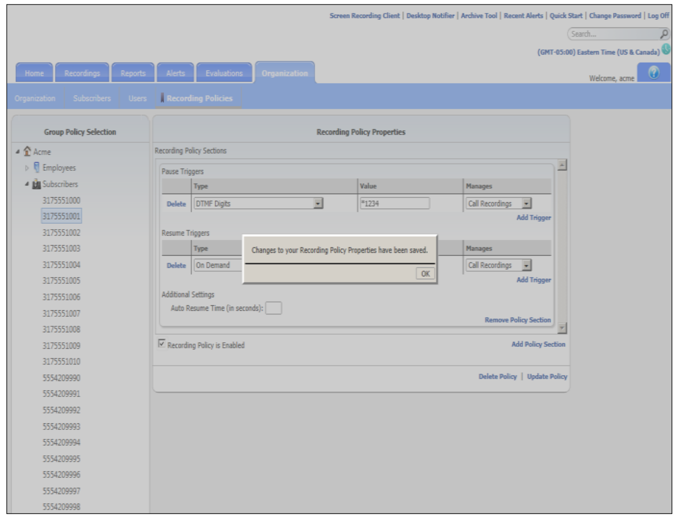
5. Select the **Remove Policy Section** link under the second policy section.



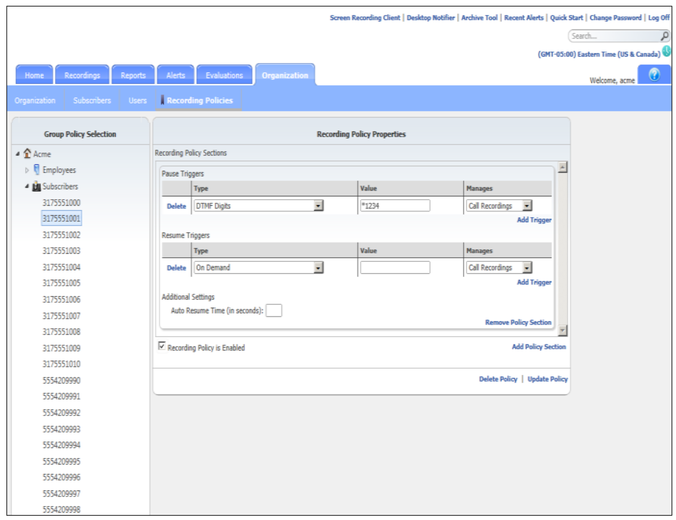
6. Click **Yes**.



7. Click **Update Policy**.

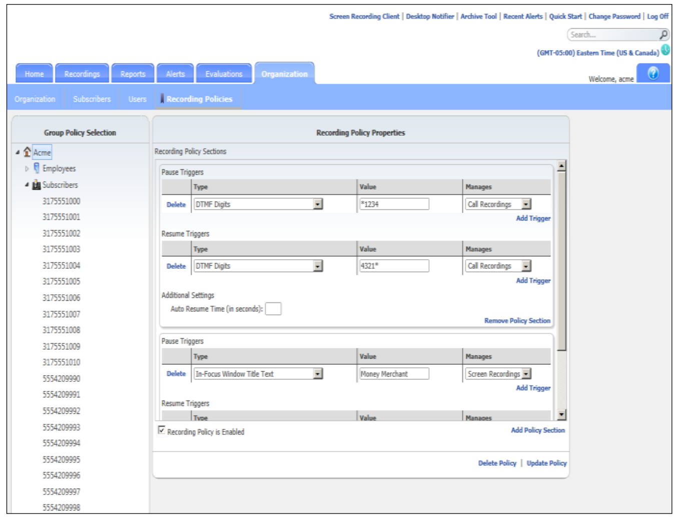


8. Click **OK**.

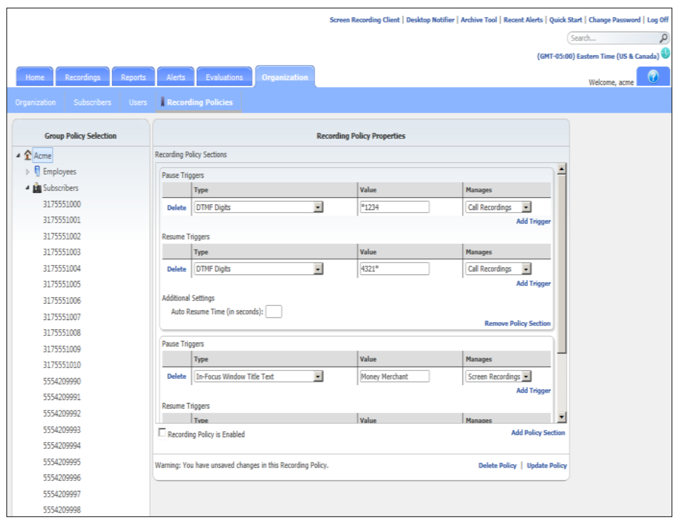


Example: Enabling/disabling a recording policy

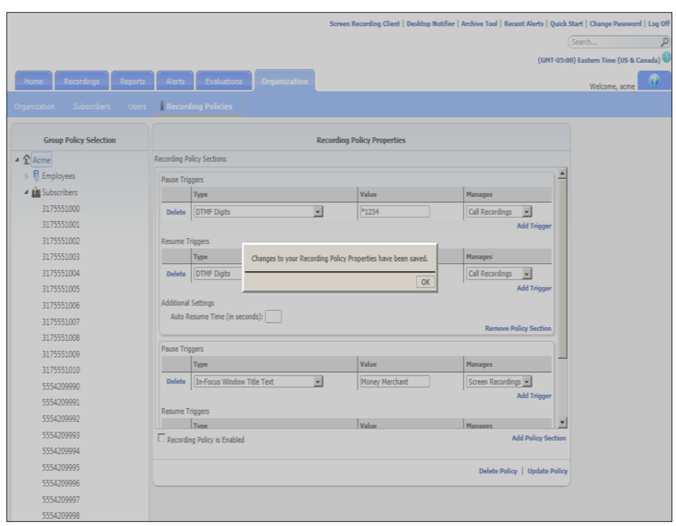
1. Click the **Organization** tab and select **Recording Policies**.



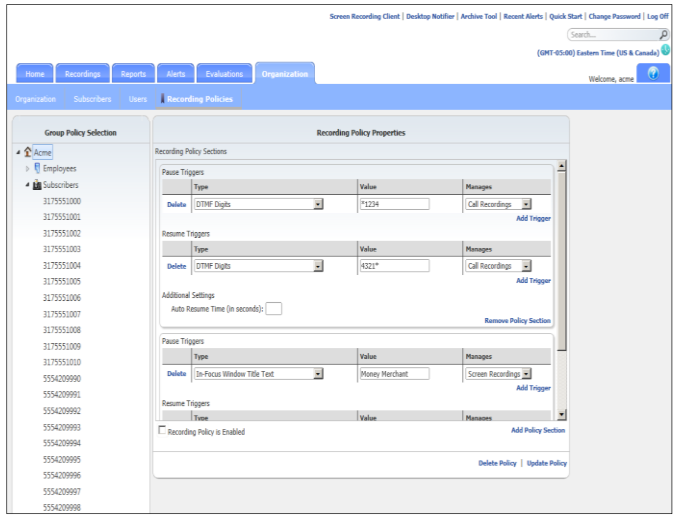
2. Click in the **Recording Policy is Enabled** option box.



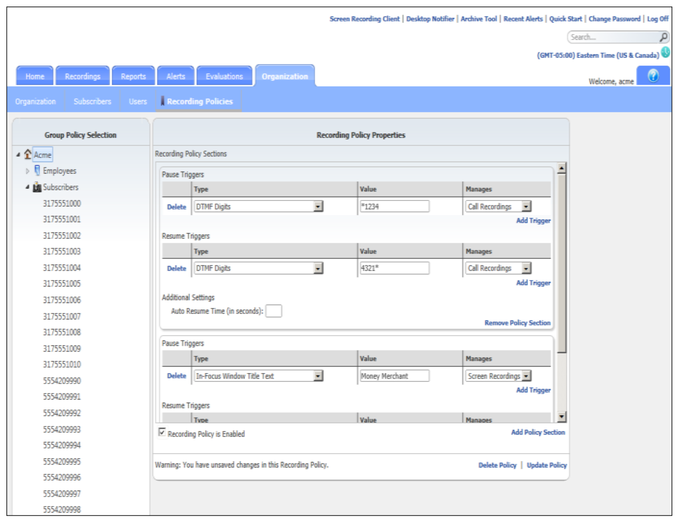
3. Click **Update Policy**.



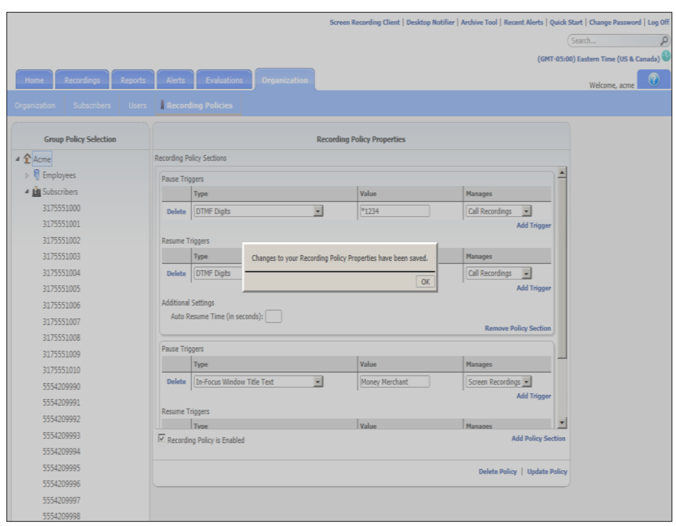
4. Select **OK**.



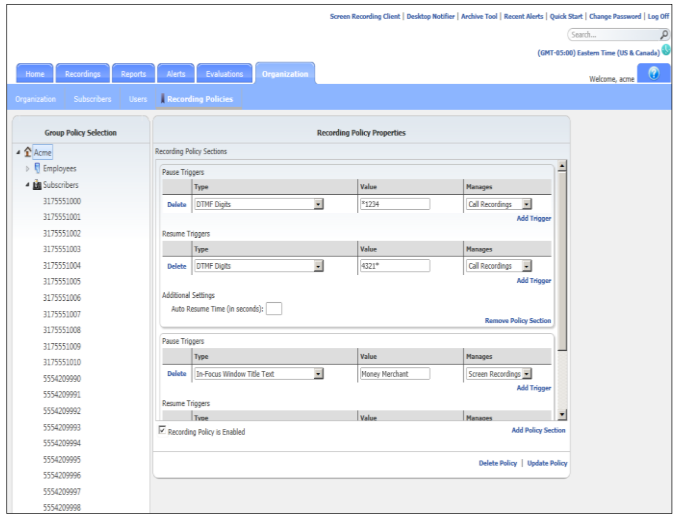
5. Click in the **Recording Policy is Enabled** option box.



6. Click **Update Policy**.

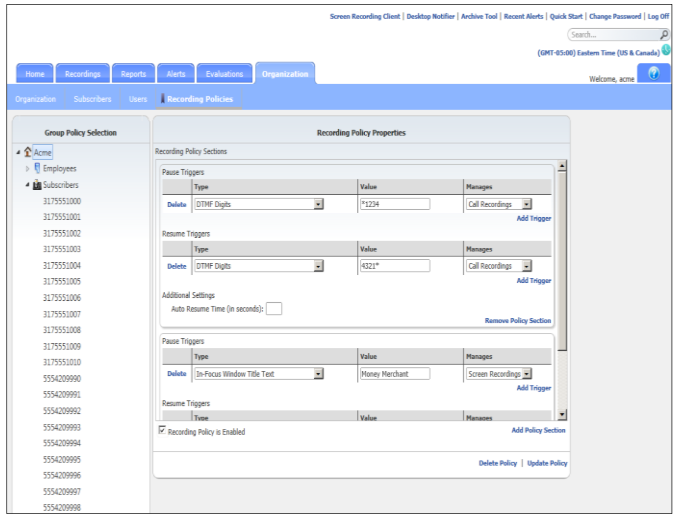


7. Select **OK**.

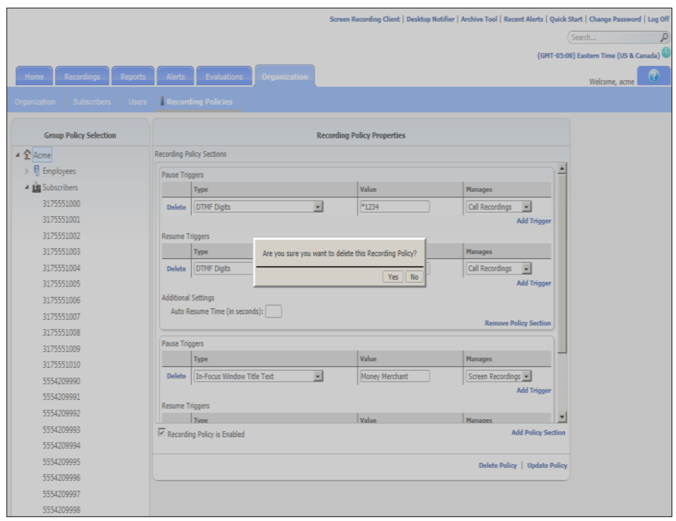

Screen Recording Client | Desktop Notifier | Archive Tool | Recent Alerts | Quick Start | Change Password | Log Off
Home
Recordings
Reports
Alerts
Evaluations
Organization
Organization
Subscribers
Users
Recording Policies
Group Policy Selection
Recording Policy Properties
Pause Triggers
Resume Triggers
Additional Settings
Add Trigger
Remove Policy Section
Add Policy Section
Recording Policy is Enabled
Delete Policy
Update Policy

Example: Deleting a recording policy

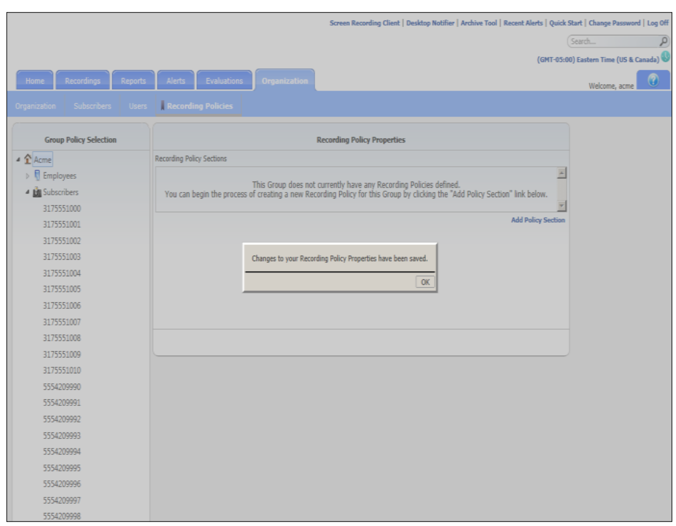
1. Click the **Organization** tab and select **Recording Policies**.



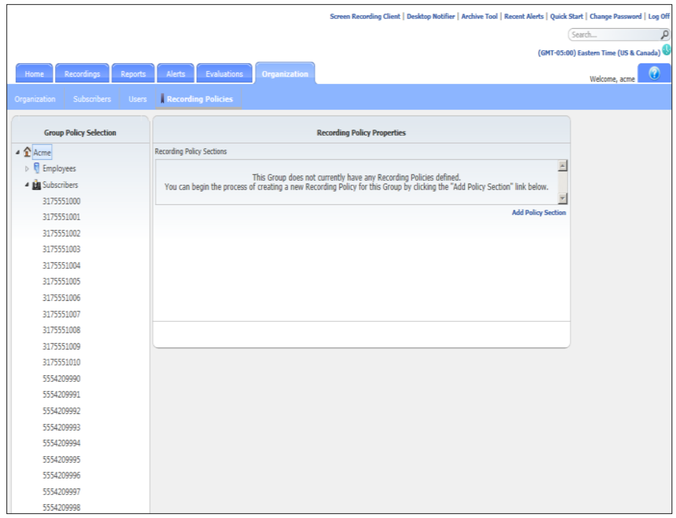
2. Select the **Delete Policy** link.



3. Select **Yes**.



4. Select **OK**.



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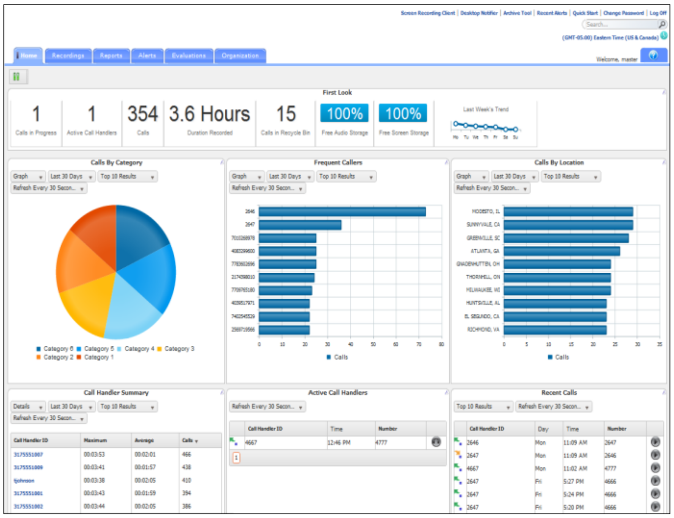
Screen Recording Client

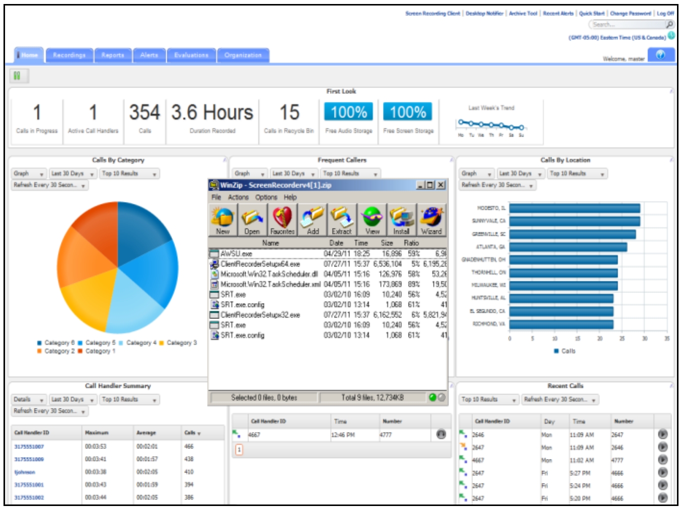
The Screen Recording Client is an external application that captures the call handler's desktop and records the actions taken by them in order to satisfy their customer call. In order to access the screen recording functionality, the user must first download the client and then must have access, via the application features, to the functionality.

Example: Downloading the Screen Recording Client

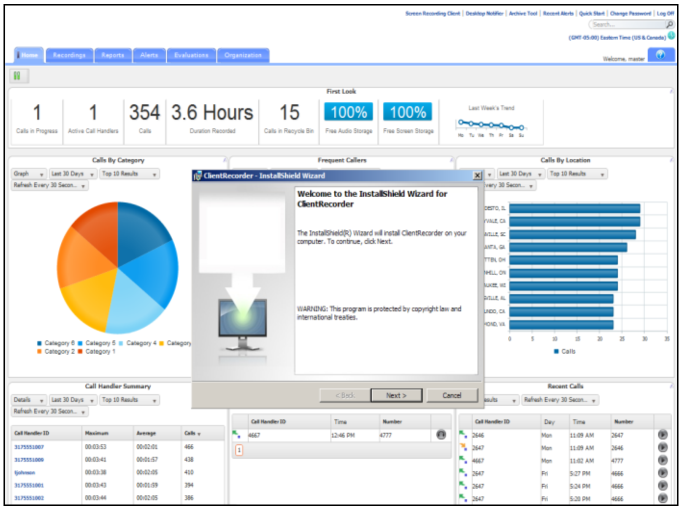
1. Click the **Screen Recording Client** link.



2. Double click on the **ClientRecorderSetupx32.exe** file.



3. Select the defaults for each screen in the wizard.



Desktop Notifier

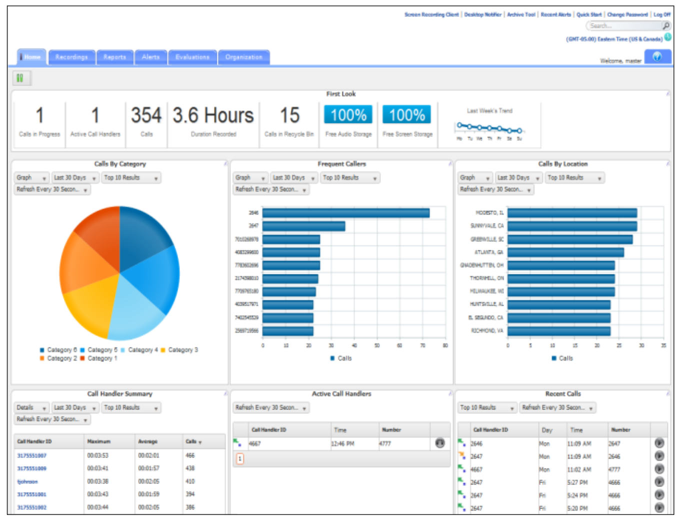
The Desktop Notifier is an external application that allows the User to receive automated notifications of new incoming alerts. It then picks up on what call the alert is associated with, and enables you to playback the call, associate a category with the call, save the call (if it is still in progress),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

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

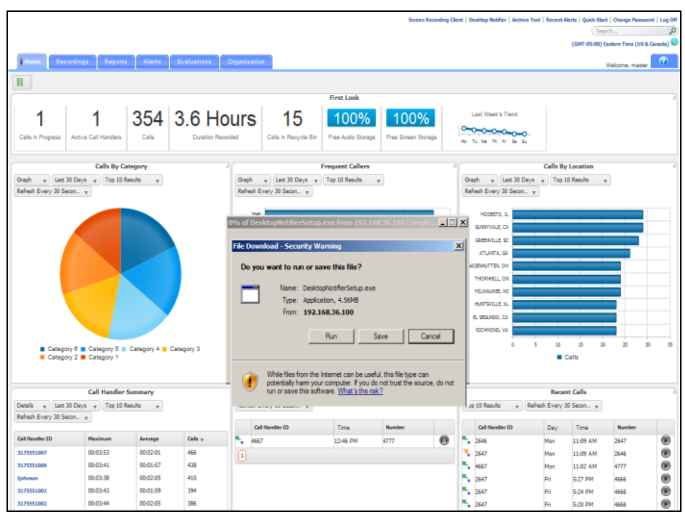
The following describes how to download the Desktop Notifier via the End User Interface. For information about how to use the application, refer to the Desktop Notifier Online Help found within the application.

Example: Downloading the Desktop Notifier

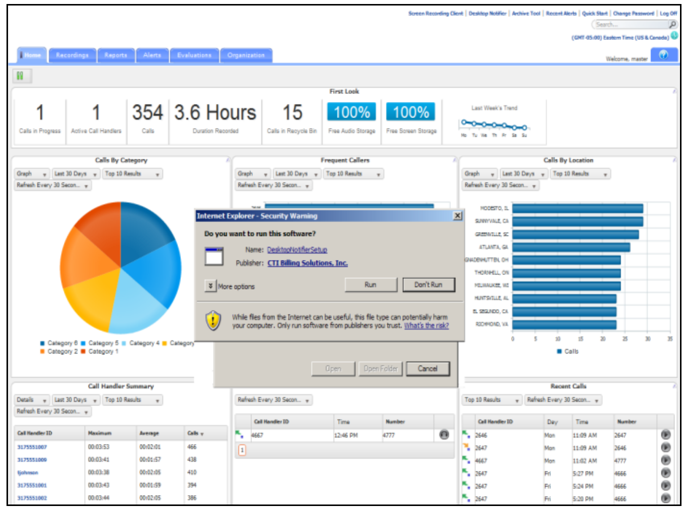
1. Click the **Desktop Notifier** link.



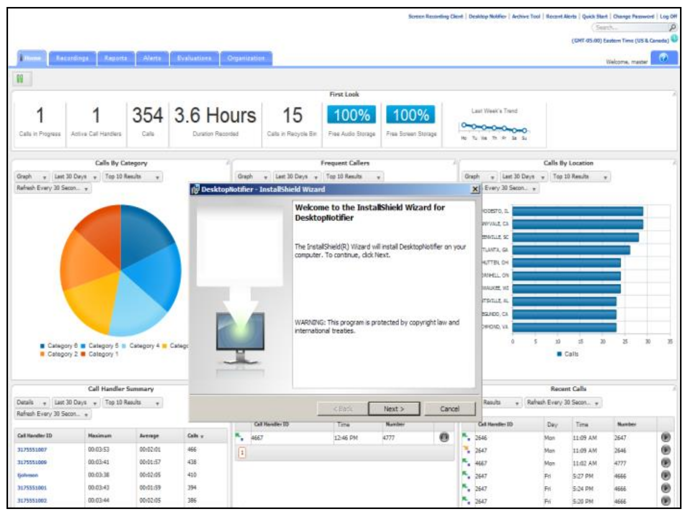
2. Click **Run**.



3. Click **Run**.



4. Select the defaults for each screen in the wizard.



Archive Tool

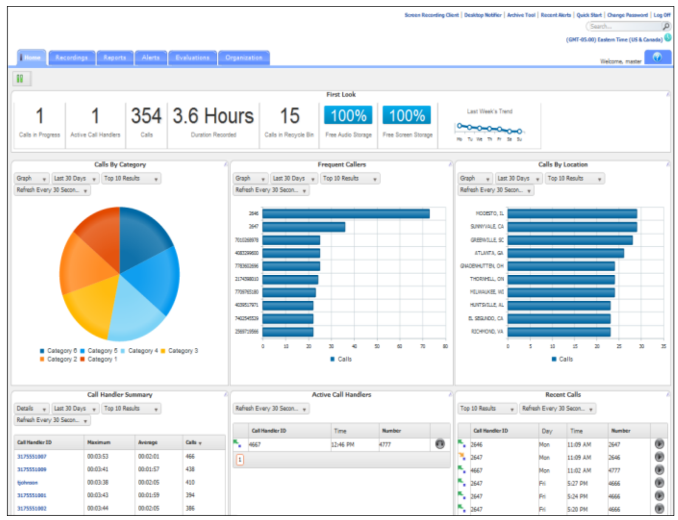
The Archive Tool allows users to archive call recordings to ISO images. These image files can be burned to CD/DVD at the convenience of the user.

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.

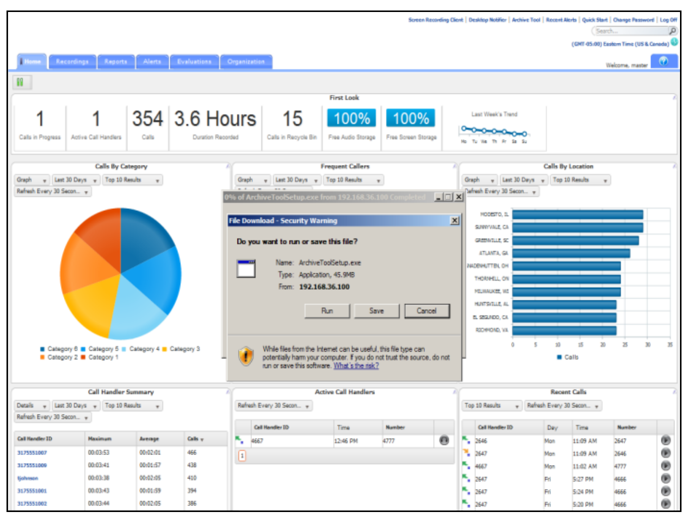
For more information on how to configure the Archive Tool, open the Archive ISO Image tool and click the **Documentation** tab.

Example: Downloading the Archive Tool

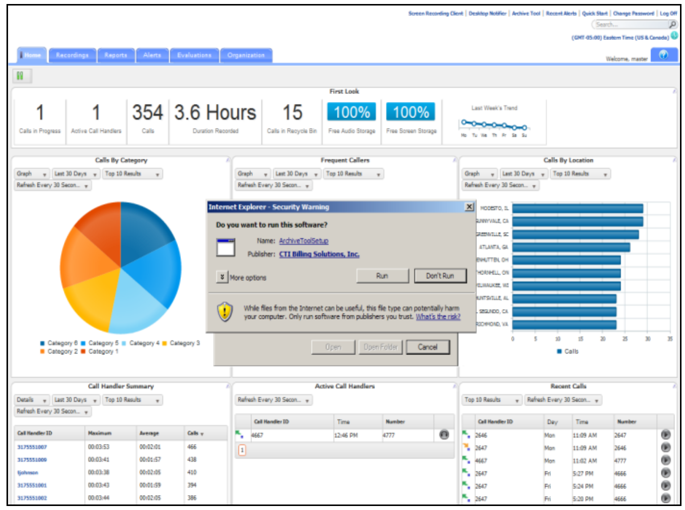
1. Click the **Archive Tool** link.



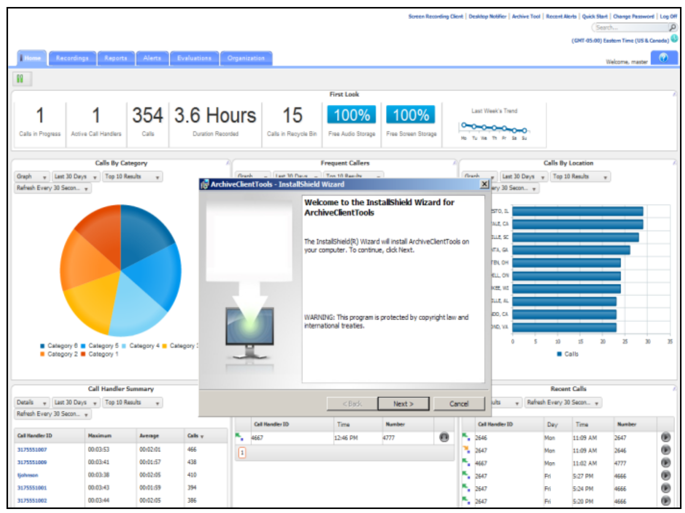
2. Click **Run**.



3. Click **Run**.



4. Select the defaults for each screen in the wizard.



Passwords

Group Administrators are created in the Administrative Interface by the Administrator or Provider. The Administrator or Provider assigns the Group Administrator a user name during the creation process. Once the new Group Administrator is added, the application will automatically email a temporary password. Group Administrators logging in for the first time will be redirected to the expired password dialog to reset the password to something more meaningful and within the company's rules for a valid password. The rules for a valid password are displayed as text on the expired password dialog. The dialog will also display a message identifying the strength of the selected password. It is encouraged that all passwords meet the Excellent strength level. Strong vs. Weak passwords are described by the following:

- Weak password - no password at all; contains your user name, real name, or company name; or contains a complete dictionary word
- Strong password - at least seven characters long; does not contain dictionary words, letter or number sequences, usernames, relative or pet names, romantic links, or biographical information; does not contain a complete dictionary word; is significantly different from previous passwords; contains a combination of uppercase, lowercase, numerical, and symbol characters; and is not the same password used for multiple sites or purposes

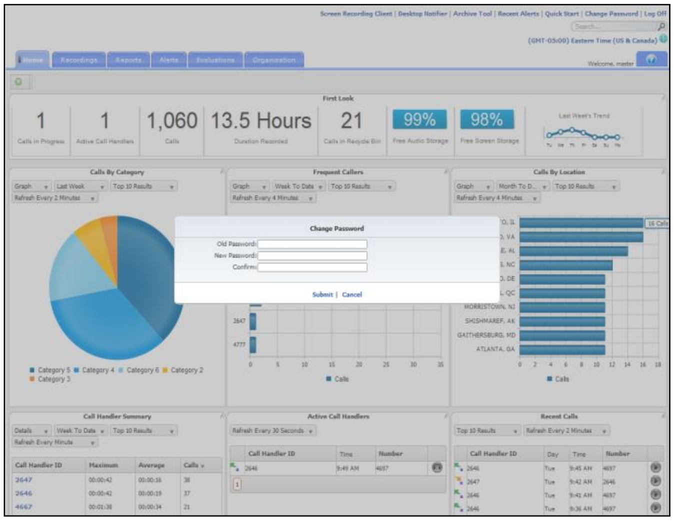
By default, passwords are set to expire 90 days after the date of the last password change. During installation and configuration of the call recorder, your System's Engineer has the option to pick a timeframe other than 90 days or to set the value so that passwords never expire. On the day the password is set to expire, when logging in you will be redirected to the expired password dialog to reset the password.

In the event a user forgets their password, they can come to the Group Administrator at which time their password can be reset from the User Maintenance screen. The application will automatically email them a temporary password. Upon logging in, users will be redirected to the expired password dialog to reset their passwords.

Note: To complete this use case, you must have a Group Administrator or User account created with the email address assigned to you.

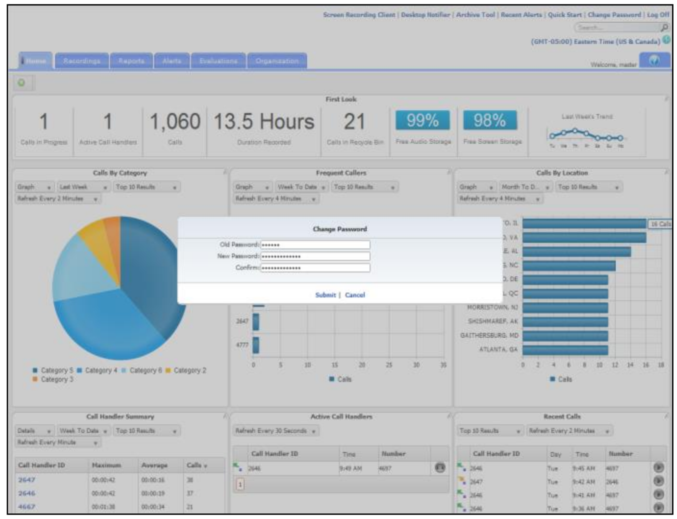
Example: Changing your password

1. Click the **Change Password** link.

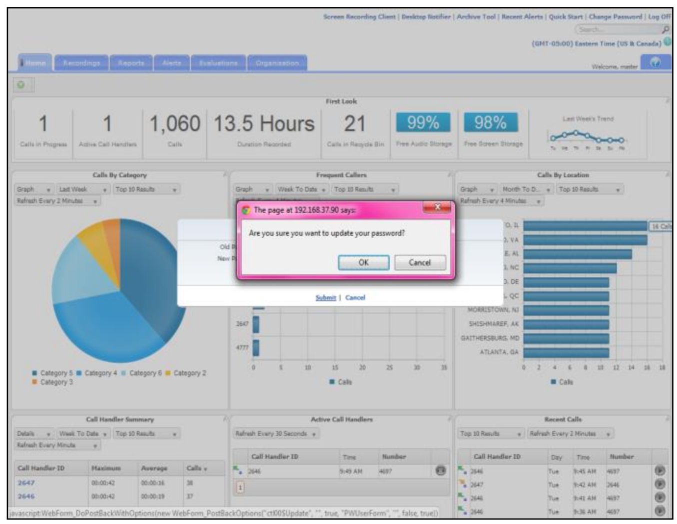


2. Enter the following information:
    - Old Password – **enter your old password**
    - Password – **enter your new password**
    - Confirm – **enter your new password again**

    Note: Passwords are case sensitive.



3. Click **Submit** to save your new password.



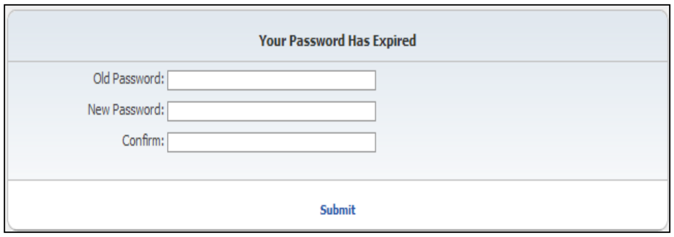
4. Click **OK** to accept the confirmation message.

Example: Changing an expired password

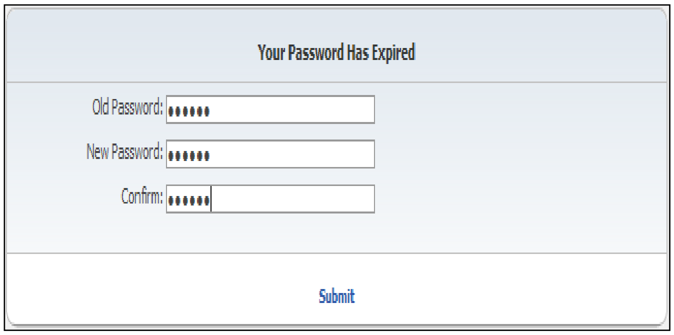
On the day the password is set to expire, when logging in you will be redirected to the expired password dialog to reset the password before you can proceed any further. There will not be any previous warnings.

1. Enter the following information:
   - Old Password – **enter your old password**
   - Password – **enter your new password**
   - Confirm – **enter your new password again**

   Note: Passwords are case sensitive.



2. Click **Submit** to save your new password.



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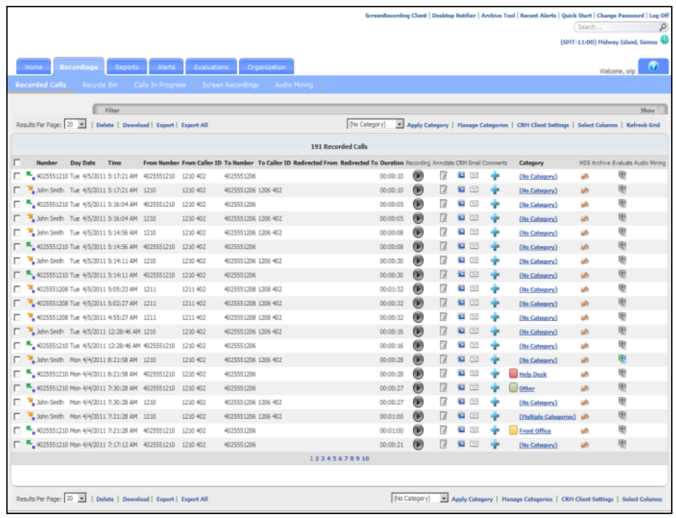
Search

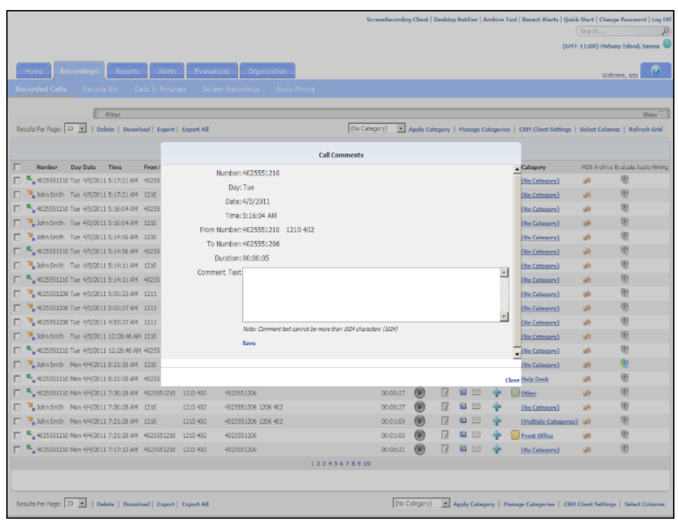
The Search feature allows you to search any part of the call record (Number, Duration, Time, Comments, etc.) on the Recorded Calls screen in order to find a specific call record. For example: if there are 10 pages of recorded call files on the Recorded Calls screen and you need to find a specific call 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 a wild card (%) to replace part of the word or number for which you are searching.

Example: Searching call records

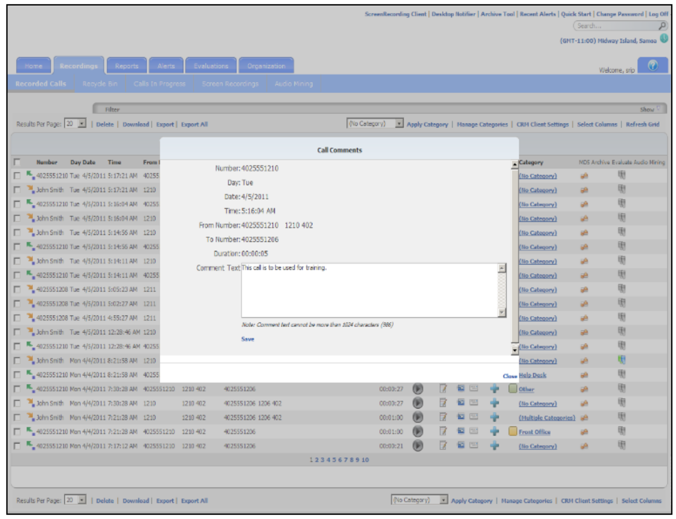
1. Click the **Recorded Calls** tab.



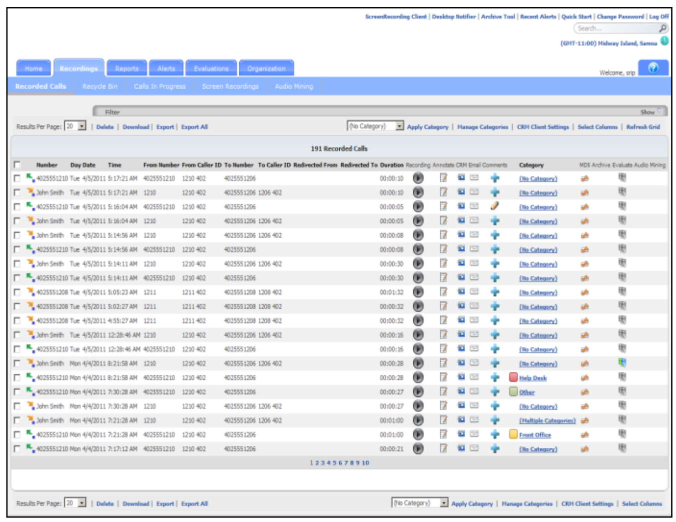
2. Select a recorded call file and click on the .



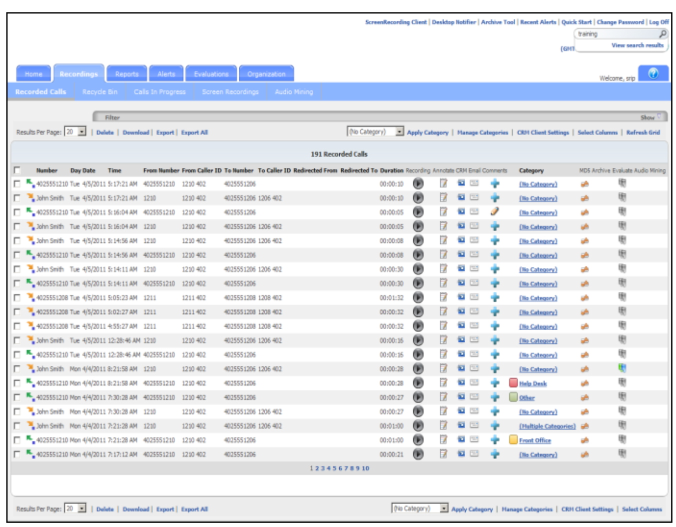
3. Enter the following information:
   - Comment – **This call is to be used for training.**



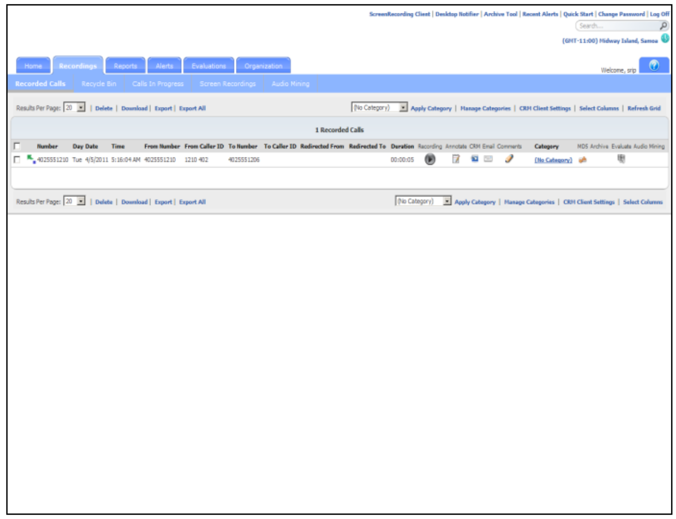
4. Click **Save**.



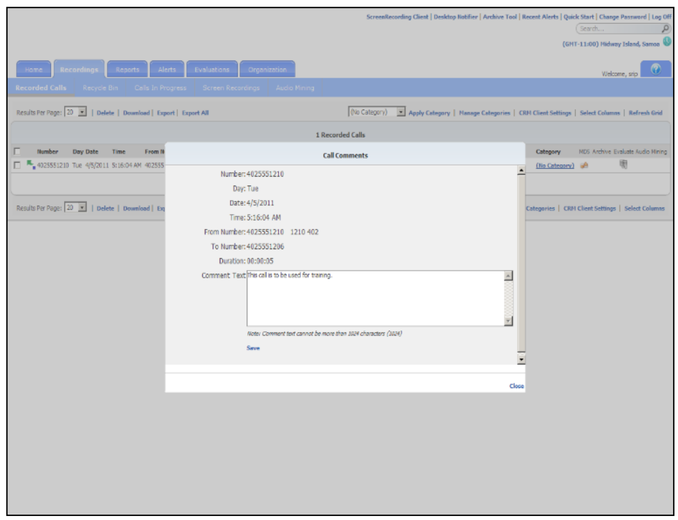
5. Type the word **training** in the Search field.



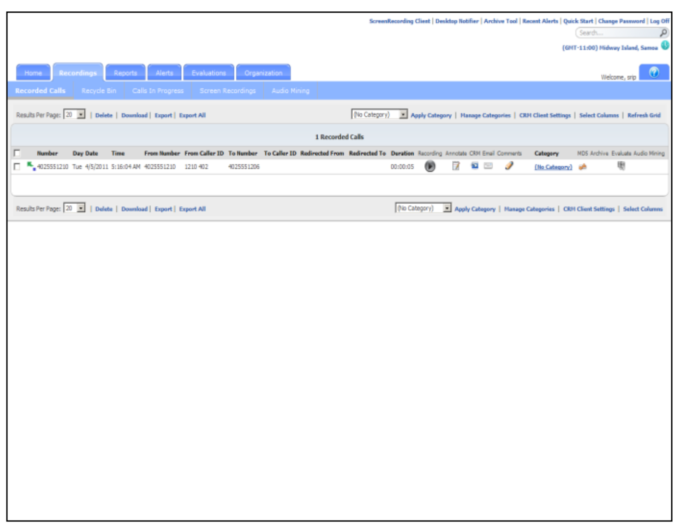
6. Click **View search results**.



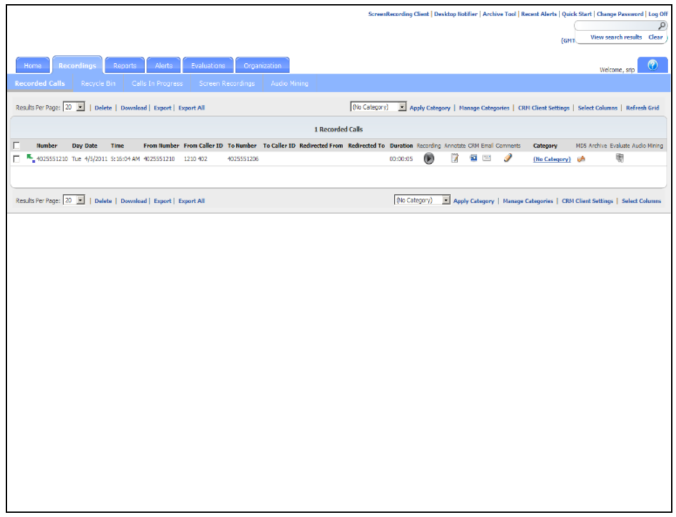
7. Click on the  button.



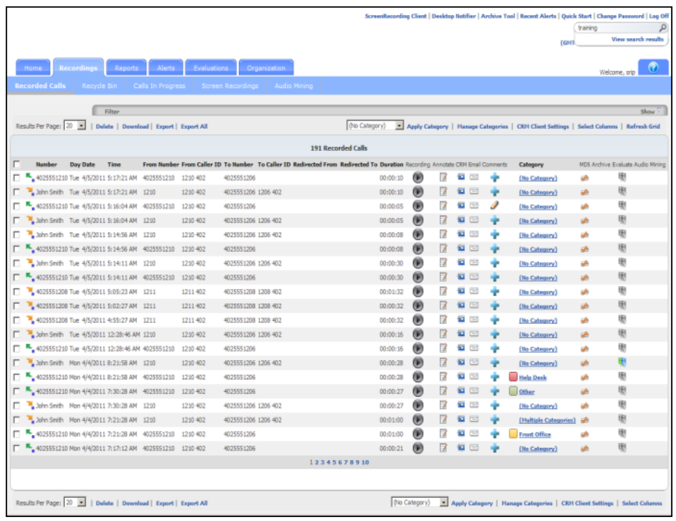
8. Click **Close.**



9. Click in the **Search** field.



10. Select **Clear**.

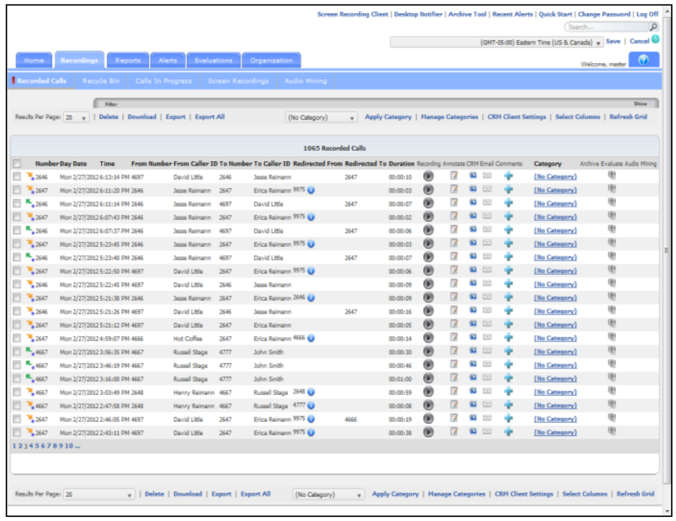


Time Zones

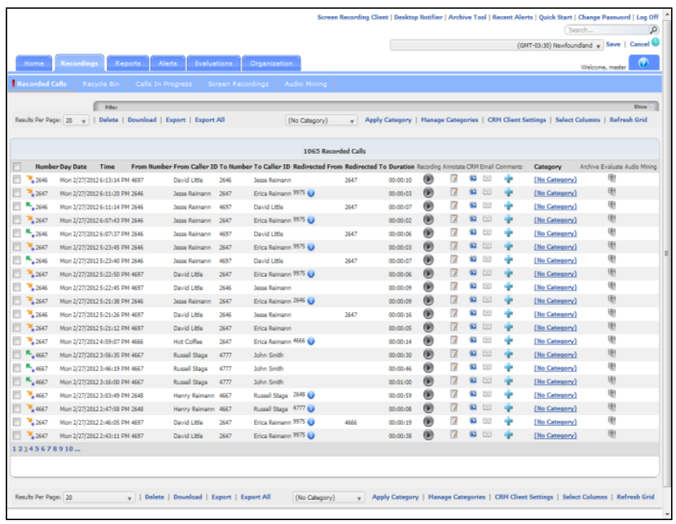
The call recording application has 85 standard preloaded time zones. When applied, time zones affect all aspects of the application.

Example: Changing time zones

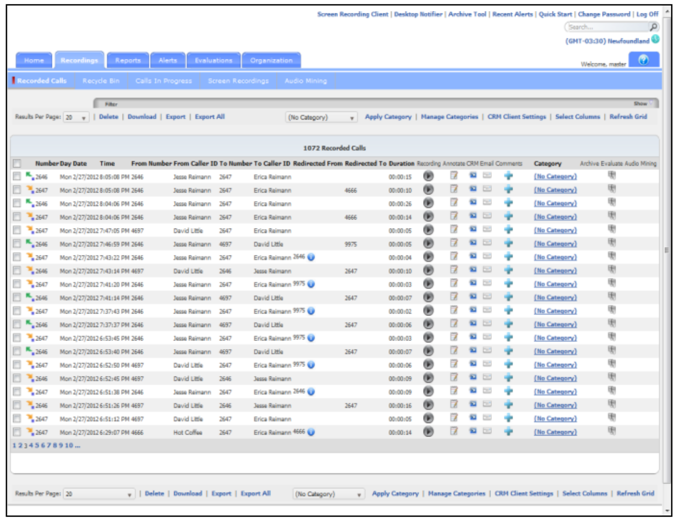
1. Click the **Recorded Calls** tab.



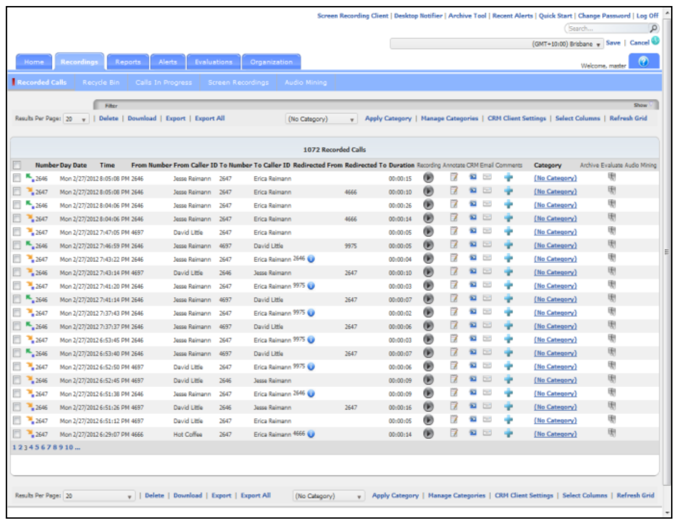
2. Click on the time zone link and select the following from the drop down menu:
   - Time Zone – **(GMT -03:30) Newfoundland**



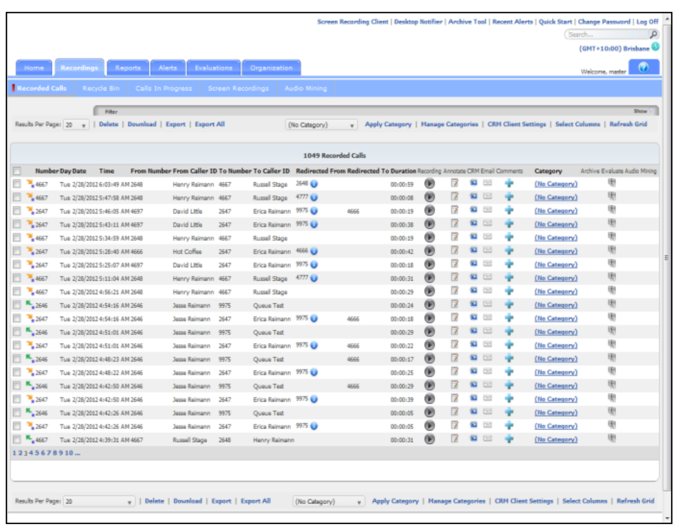
3. Click **Save**. Notice that the time and date (if applicable) change on the Recorded Calls screen.



4. Click on the time zone link and select the following from the drop down menu:
   - Time Zone – **(GMT +10:00) Brisbane**

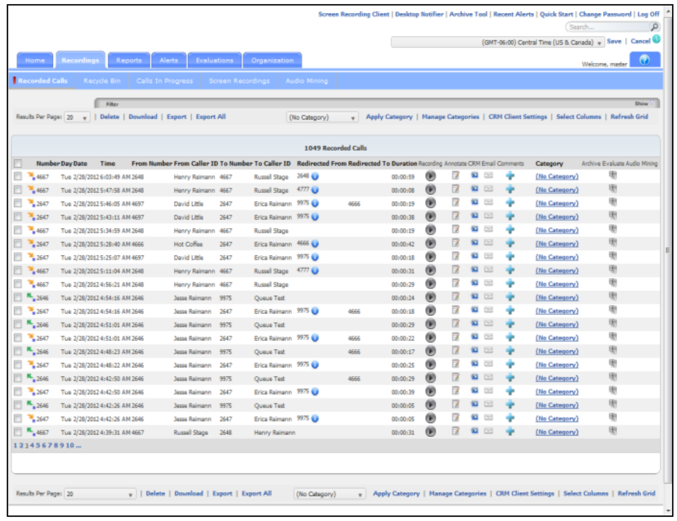


5. Click **Save**. Notice that the time and date (if applicable) change on the Recorded Calls screen.

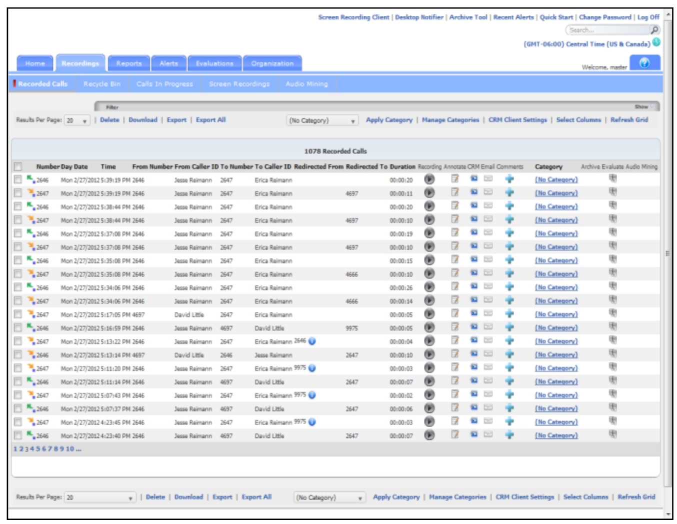


6. Click on the time zone link and select the following from the drop down menu:

   - Time Zone – **(GMT -06:00) Central Time (US & Canada)**



7. Click **Save**. Notice that the time and date (if applicable) change on the Recorded Calls screen.



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FTP

Group Administrators can be allowed access to their recording files (call and screen recordings) via FTP. When adding a new Administrator, Provider, or Group there is an option to give them FTP access from the Profile tab.

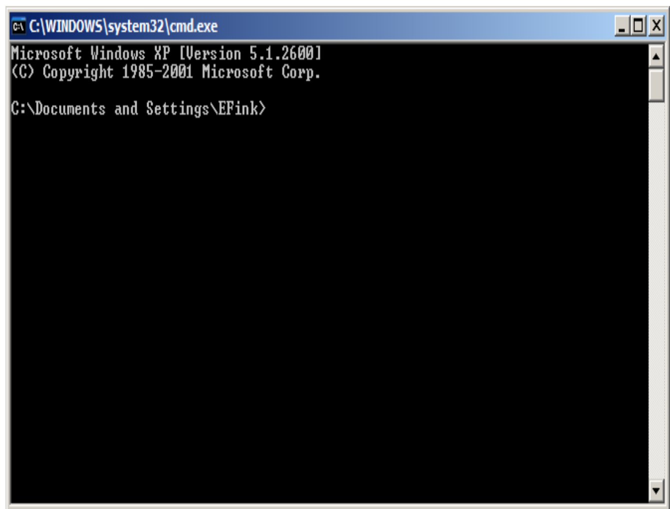
Selecting the FTP Access option box will open an FTP connection to the system to download any audio or video files that belong to any User's that they have created. For example: when creating a Group in the Administrative Interface, a Storage Path and Storage Limit can be selected in relation to recording. Recordings are saved to the identified Storage Path for the identified number of days or gigabytes. Once you reach your allocated Storage Limit, recordings stored in the application will automatically be deleted by the application in order of oldest to newest. The application notifies you three days prior to when the deletion process will occur. This gives you the opportunity to download, via FTP, the recordings to be deleted to a permanent directory at your location. Downloaded recorded calls contain all call tags (with the exception of comments) and can be viewed or played back just as easily as calls in the application. Downloaded videos can be played back as well. They will not contain the call recording; that will have to be located separately.

Example: Downloading recordings using FTP

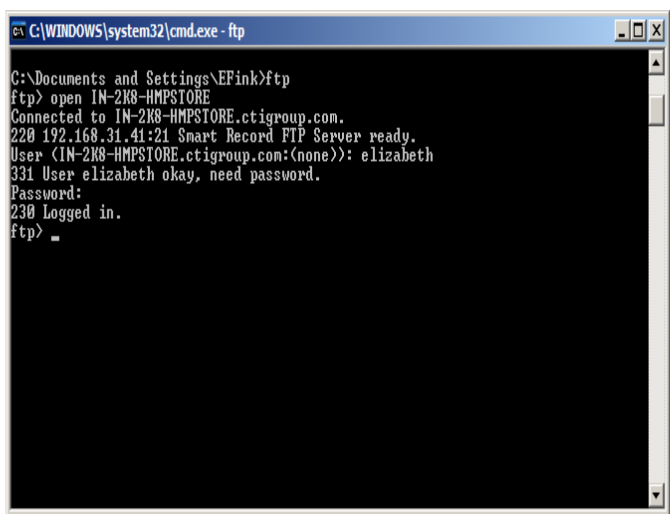
Note: The call recorder's FTP service must be the only FTP service on the host server in order for it to work correctly.

1. Open an Internet session using an IE or Firefox browser and enter the FTP URL or open a command prompt dialog. It is also possible to use many of the popular client tools to download recorded files via FTP.

   For the purposes of this use case, we will use the command prompt dialog.



2. Log onto the server that houses the call recording application or where your recordings are stored.



3. Go to the directory that contains the recordings that you wish to download or delete.