TDS® *managed*IP Hosted

Call Recording User Guide

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Usage

The Usage section includes the following subsections: Phone and Search. Each subsection displays the detailed information about the user's telephone usage.

Phone

The phone subsection has two tabs. The User Status tab allows you to view real-time phone calls occurring on your PBX. The Recorded Calls tab allows you to search for and listen to previously recorded phone calls.

User Status tab

The users included in the Direct Reports in Configure>Users are the users for whom you can monitor status in the User Status tab and start recording if required rights are assigned to you. It displays the Monitoring, Recording, Flags, and Call Status group box.

User Status Definitions

Column	Description
Name	Name of the user
Ext	Extension number of the user
Caller ID Number	Number of the caller ID
Caller ID Name	Name of the caller ID
Outgoing Number	Outgoing number dialed by the user
Local Status	Status of the logged in user
Remote Status	Status of the other logged in users
Call Duration	Duration of the call
Recording Groups	The phone profile assigned to the user. The profiles include On-Demand Only or Phone.

Local Status and Remote Status

The Local Status column refers to the local client looking at the call status and can be different than the Remote Status. When you log on to an account, you cannot view the remote status of your account because it is blocked, but you can view the status of any other direct reports.

Note:

> The remote status of the agent is blocked. The agent does not know whether they are being recorded or monitored.

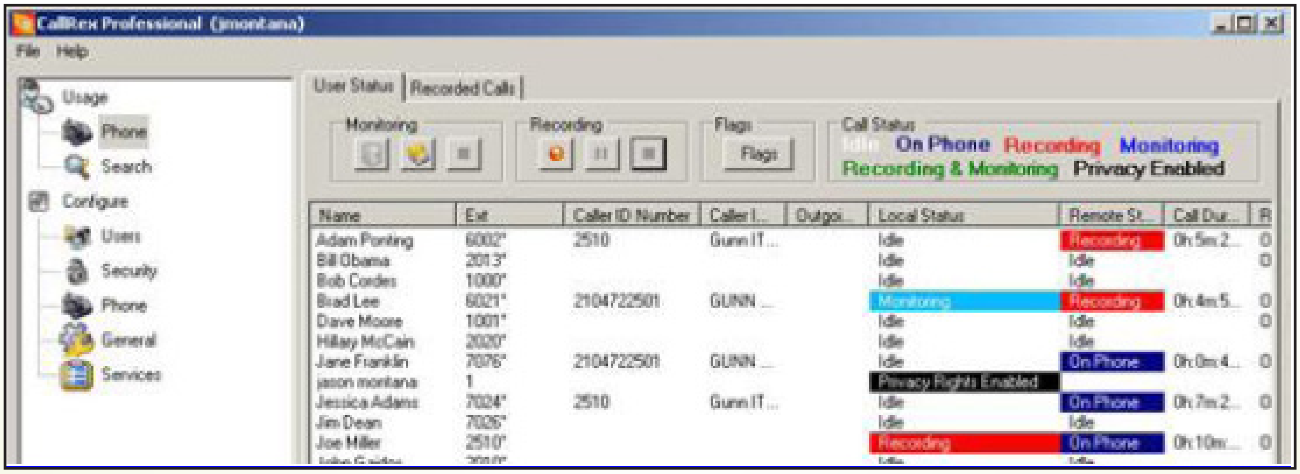
Monitoring Calls Using PC Speakers or Headset

You can monitor any calls for your direct reports if they have a license assigned to them. You can listen to a call being monitored using speakers or headset on your computer.

To Monitor A Call

1. Select the user name with active call, and click in the Monitoring group box.

2. The Local Status of the user changes from On Phone or Idle to Monitoring, and is highlighted in blue.



Recording Calls

You can record the phone calls of any of your Direct Reports if they have a Call Recording license assigned to them. An asterisk sign (*) next to the extension number in the user list indicates that Multi-Media Add-on license is not assigned to the user.

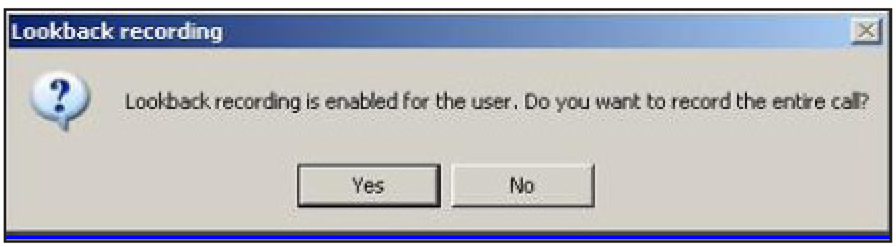
To record a call

1. Select a user with active call.
2. Click  in the Recording group box.

Note:

If recording is not activated before the call ends, the Lookback recording is discarded and the call is not recorded.

3. If the user is configured for Lookback recording, the Lookback recording dialog box is displayed for confirmation of recording a call from the beginning.



Note:

If a user is configured for Lookback recording, then recordings started with ** will automatically be Lookback recordings. This is ideal for On-Demand licenses.

4. Click **Yes** to record the call from the beginning. The Local Status of the user changes from On Phone or Idle to Recording and is highlighted in red.
5. To pause the recording, click **Pause**.
6. To stop the recording, click **Stop**.

Depending on the phone system, users can initiate a recording from their phone set. Pressing ** on the keypad starts the recording and pressing ## stops the recording. This affects the user recordings only and not the system events recording. The system event recordings are triggered by the phone profile settings.

Call Status Definitions

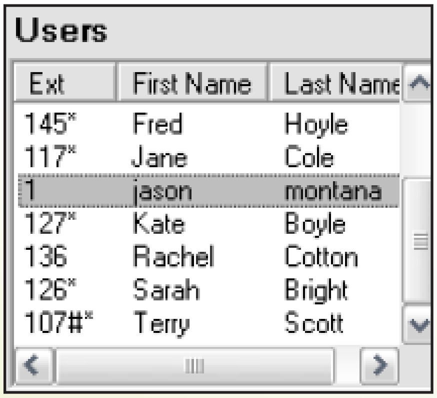
Call Status	Indicator	Description
Idle	White	Indicates that the user is currently not using the phone.
Recording	Red	Indicates that the call is being recorded.
Monitoring	Blue	Indicates that the user is being monitored.
Privacy Enabled	Black	Indicates that the user cannot see whether they are being recorded or monitored.
On Phone	Purple	Indicates that the user is currently using the phone.
Recording & Monitoring	Green	Indicates that the user is being monitored and recorded simultaneously.

Flagging Calls

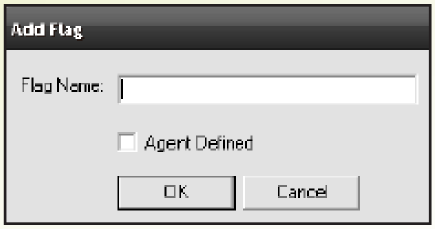
Flagging a call allows you to associate additional information about a phone call. Flagging a call makes it easier to search for calls that have the specific information that you require.

Creating a new flag

1. Click **Configure>Users.** Highlight the user you wish to assign the flag to.



2. Under Flags, click **Add**. Type in a name. If the flag is to be an Agent Defined flag, check the box next to Agent Defined. Click **OK**.



3. If the flag is to be a System Defined flag, highlight the flag name and click the **Add** button under the Values box. Enter a value name and click **OK**. Repeat for as many additional values as you wish to enter

4. For all users you want to be able to use this flag, you need to add that user to the Direct Reports list of the user the flag is created under. For example, if the Flag was created on John Doe, then Jane Doe will have to be listed in the Direct Reports list for John Doe.

To flag a call

1. Click **Flags**. The Call Flags dialog box opens. You can flag a call at any time during the call or after the call.

Note:

You can flag your phone call at any time during the recording or after you have stopped the recording session.

2. Select the flag name and flag value in the Flags and Value fields.

3. Enter call description and call notes in the respective fields.

4. Click **OK** to save the changes.

Note:

You can flag your phone call at any time during recording or after you have stopped the recording session.

Recorded Calls Tab

The Recorded Calls tab displays the search results and includes a log of recorded calls. You can search recorded calls. You can playback the recorded calls or export them. You can also edit flags and even verify the watermark.

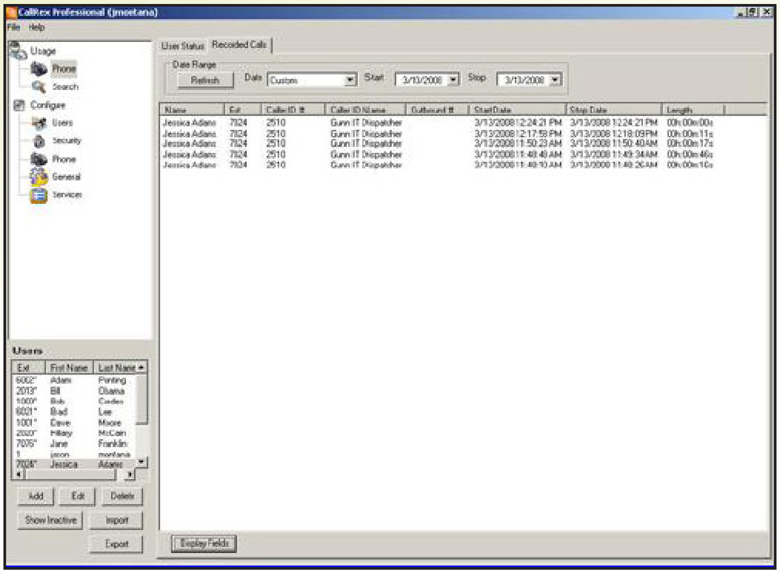
Viewing Recorded Calls

You can view recorded calls for a user in the Recorded Calls tab. You can filter call records for a specific date or date range.

To view recorded calls

1. Select **Usage** > **Phone** in the navigation pane.
2. Click **Recorded Calls** tab in the right pane.
3. Select the user whose calls you want to view from the Users list.
4. Select **Custom** from the Date list, and select the start date and stop date for the duration that you want to view the recorded calls from the Start and Stop lists. If you select any other option from Date list, then the Start and Stop fields appear as grayed out. These dates are automatically updated with reference to the system date.

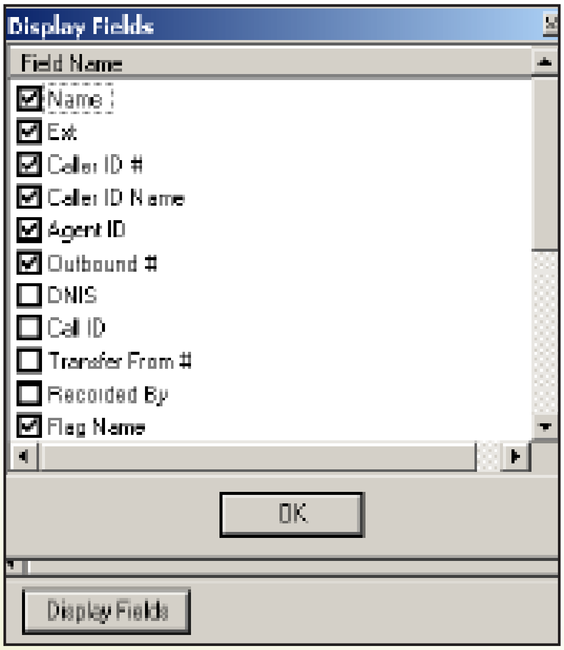
5. Click **Refresh**. The results are displayed.



You can also configure the display of the Recorded Calls list fields.

To configure Display Fields

1. Click Display Fields at the bottom of the list. The Display Fields dialog box opens.



2. Select or clear the check boxes corresponding to the fields to show or hide the fields.

3. Click **OK**. The selected fields are displayed in the list.

Playing Back a Recorded Call

An authorized user can play back a recorded call.

To play back a recorded call

Right-click the call you want to play back and select **Play** from the shortcut menu. The CallRex Player is launched. All other calls linked to the selected call are listed in the play list. The play list shows the call details such as Name, Extension, Caller ID, etc. A call chain is created if all of the following criteria are true:

- A call with matching Caller ID or Outbound Number is recorded in the last four hours.
- The call recording is converted to .wav file.
- The recorded call ended in the last 20 minutes.

File menu

Menu Item	Description
Play	Downloads and plays the selected file.
Flag Selection…	Opens the flagging dialog box to flag a call recording, which allows you to associate additional information about a phone call.
Delete	Deletes the selected call recordings. A confirmation message is displayed before deleting the call recordings.
Play All	Plays all the call recordings in the chain of selected call. By default, Play All option is selected.
Exit	Closes the Call Recording Player and deletes call recordings stored in temporary location.

Export menu

Menu Item	Description
As individual files…	Saves each recording in the chain as an individual file at the specified location.
As concatenated sequence…	Each recording in the chain is saved as a single file at the specified location.

View menu

Menu Item	Description
Display columns…	Allows the user to select call information columns to be displayed.

Exporting Recorded Calls

You can export a recorded call as a standard wave and save it on your computer. This allows you to listen to the call even when you are not logged on to the Call Recording client. The file can be played on any standard media player. You can also export multiple calls by selecting them.

To Export Recorded Calls

1. Select the calls you want to export. Right-click the calls and select **Export** from the shortcut menu. The Browse for Folder dialog box opens.

2. Browse to the required folder and click **OK** to save the file.

Verifying Watermark

The watermark function allows you to verify whether a file has been tampered while it was stored in CallRex. The watermark functionality does not apply to recorded files that have been exported.

To Verify A Watermark

Right-click the call and select **Verify Watermark** from the shortcut menu. The Validate Watermark dialog box appears notifying whether the watermark for the selected recorded call is valid or not.

Search

Search allows you to find specific calls without having to wade through a lot of unrelated information. The Search subsection includes the Search Criteria tab and Search Results tab. The Search Criteria tab allows you to find specific information associated with a phone call. The Search Results tab displays the result for the selected search criteria.

Note:

At least one parameter should be set to perform a search.

Search Criteria

The Search Criteria tab allows you to find specific information associated with a phone call.

To search for a particular record

1. Select **Usage** > **Search** in the navigation pane.
2. Select the user name from the Users list.
3. In the Search Criteria tab, select one or more parameter of the search criteria.
4. Click **Search**. The results for the search criteria are displayed in the Search Results tab.

Note:

Click **Clear All** to clear the search criteria.

Selecting Search Criteria

The Search Criteria tab allows you to set the following search parameters:

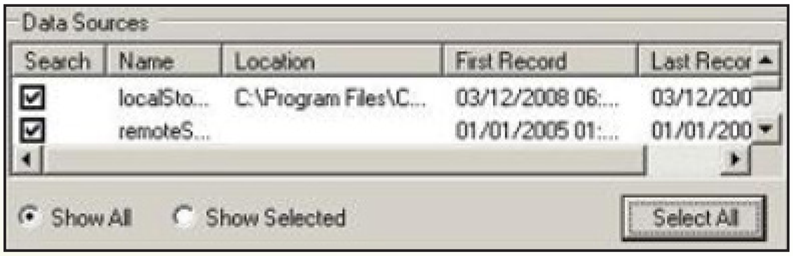
Parameter	Description
Data Source	Limit search to a specific call information data source
Time Period	Limit search to a specific time period
Phone Profile	Limit search to a specific phone profile
Email Keywords	Active only if Multi-Media license is purchased
Inbound Calls	Limit search to specific caller ID number and caller ID name
Outbound Calls	Limit search to specific outbound number
Flag Name	Limit search to specific flag name and flag value
DNIS	Limit search to specific DNIS number
URL	Active only if Multi-Media license is purchased

Data Sources

The data source stores the call information such as, name, location, and date and time of the first and last calls.

Select the **Show Selected** option to view only the selected data sources.

1. To set the Data Sources parameter, select the check boxes corresponding to the data source.



2. Click **Select All** to select all the data sources.
3. Select the **Show All** option to view all the data sources.
4. Select the **Show Selected** option to view only the selected data sources.

Time Period

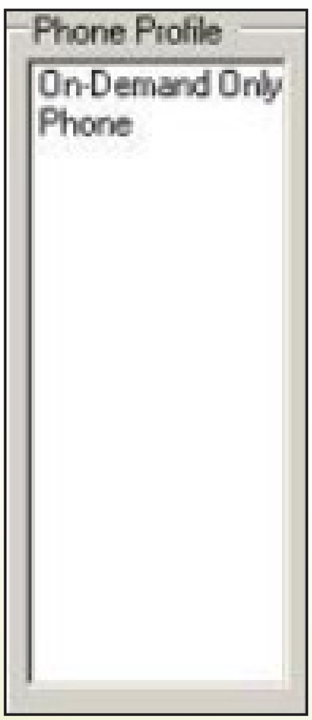
The time period helps limit the search for a record to specific time period.

To set the Time Period parameter, specify the Start and Stop time and date from respective Time and Date lists.

Phone Profile

The phone profile limits the search of records to the members of a specific phone profile.

To set the Phone Profile parameter, select one or more phone profiles.



Inbound Calls

The Inbound Calls parameter limits the search of records to the specific inbound call information details. There are three sub-parameters to be set from. You can set one or more sub-parameters.

Note:

Select a name or number, and click **Edit** to edit the parameter.
Select a name or number, and click **Delete** to delete the parameter.

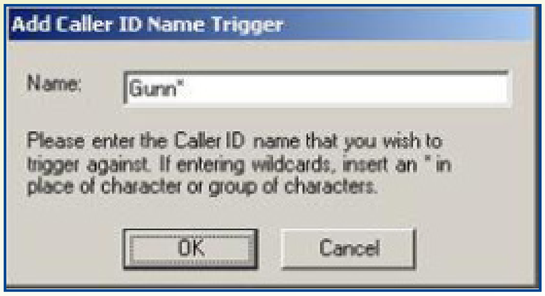
To set Caller ID Number sub-parameter, select a number in the list. You can also add new number to the list.

1. To add a new number, click **Add**. The Add Caller ID Number Trigger dialog box opens.

2. Enter the number. To perform wildcard search, you can replace a number by * (asterisk).
3. Click **OK**. The number is displayed in the Caller ID Number list.

To set Caller ID Name sub parameter, select a name in the list. You can also add new name to the list.

1. To add a new name, click **Add**.
2. The Add Caller ID Name Trigger dialog box opens.



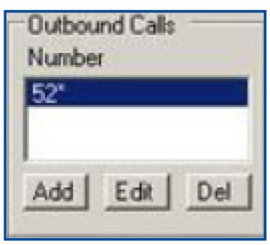
3. Enter the name. To perform wildcard search, you can replace letters with an *. For example, entering A* displays all names beginning with A.
4. Click **OK**. The name is displayed in the Caller ID Name list.

The Agent ID sub parameter is currently grayed out.

Outbound Calls

The Outbound Calls parameter limits the search of records to the specific outbound call number.

1. To set Number, select a number in the list. You can also add new number to the list.

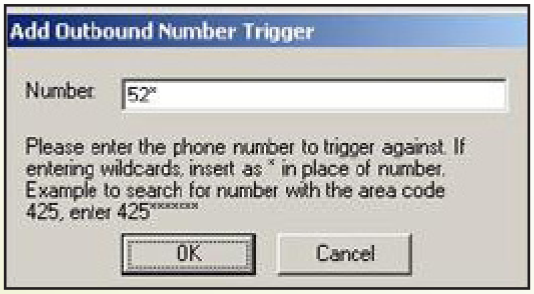


Note:

Select a number, and click **Edit** to edit the outbound number.

Select a number, and click **Delete** to delete the outbound number.

2. To add a new number, click Add. The Add Outbound Number Trigger dialog box opens.



3. Enter the number. To perform a wildcard search, you can replace a number by *.
4. Click OK. The number is displayed in the Number list.

Flag Name

The Flag Name parameter limits the search of records to the specific flag names and/or values.

1. To set Flag Name parameter, select a flag name in the Flag name list.
2. Select the corresponding flag value from the Flag Value list.

DNIS

The DNIS parameter limits the search of records to the specific DNIS. To set DNIS parameter, select a DNIS number in the list. You can also add new DNIS number to the list.

Note:

SeleSelect a number, and click **Edit** to edit the DNIS number.
Select a number, and click **Delete** to delete the DNIS number.

1. To add a new DNIS, click **Add**. The Add DNIS Number Trigger dialog box opens.

2. Enter the number. To perform wildcard search, you can replace a number with *. For example, entering 425* will show all numbers with area code 425.

3. Click **OK**. The number is displayed in the DNIS list.

To save the search criteria

Follow steps 1–4 listed in Search to specify search criteria.

1. Click **Save** in the Saved Searches group box. The Save Search dialog box opens.

2. Enter a name for the search in the Name field.
3. Click **OK** to save the search. The name of the search appears in the Saved Searches list.

Note:

Click **Clear All** to clear the search criteria.

Search Results

The Search Results tab displays the results of the search criteria defined in the Search Criteria window. Additionally, you can further filter the search results Date Range.

To filter search

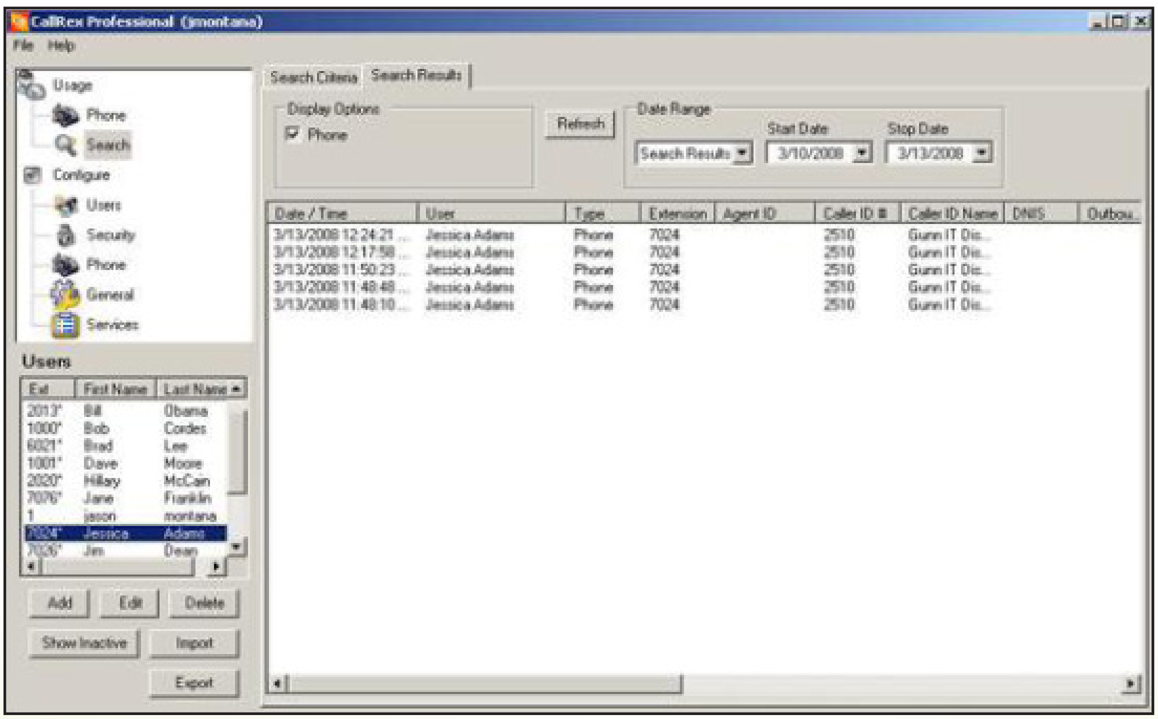
1. In the Display Options group box, select the check box for **Phone**.

2. In the Date Range group box, select the **Search Results** from the list and set **Start Date** and **Stop Date** for the duration that you want to filter the search result.

3. Click **Refresh**. The result is narrowed to the date range.
4. Select a record and right-click to play the recorded call, export it, edit the flag, or verify the watermark.

Note:

You can also right-click a record and select Play from the shortcut menu to listen to the call.



Viewing Calls By Date Range

If you know the specific date of a call, you can modify the Date Range in the Search Results tab to view all the calls for the user, rather than using the Search Criteria window to run a search. You can search records of multiple users for a specific date range.

To search calls for a date range

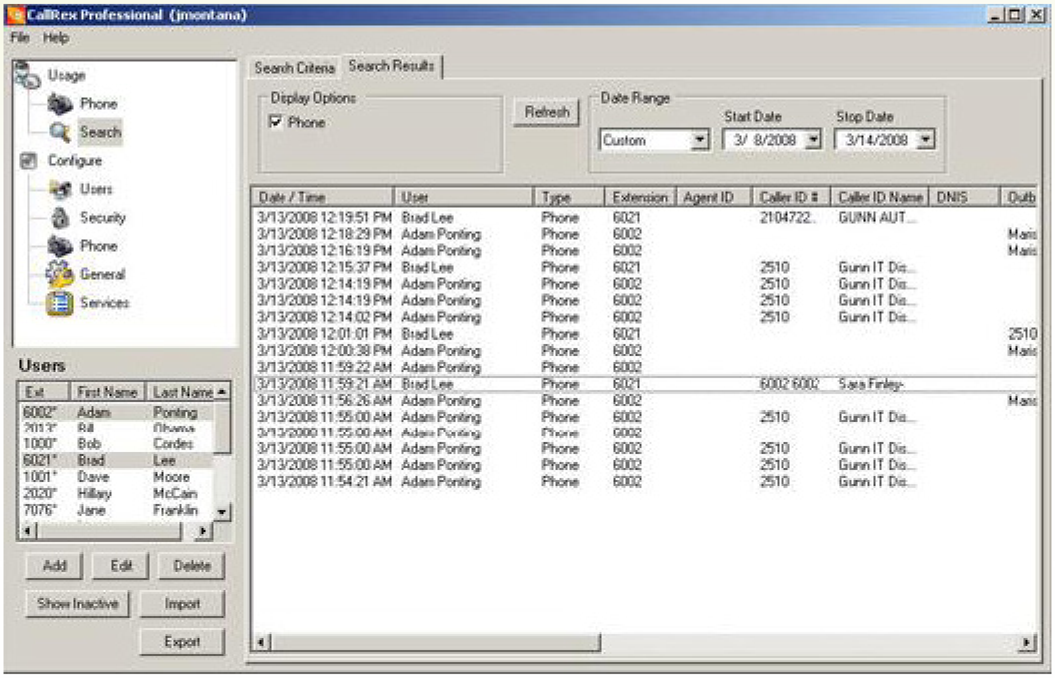
1. Select these users from the **Users** list.

Note:

You can search and view call records of your direct reports only.

2. Select **Custom** from the **Date** list, and select the start date and stop date for the duration that you want to view the recorded calls from the Start and Stop lists. If you select an option other than Custom or Search Results from the list, then the Start and Stop fields appear as grayed out. These dates are automatically updated with reference to the system date.

3. In the Display Options group box, select the **Phone** check box to view the information related to phone calls.
4. Click **Refresh**. The call records for all or your Direct Reports are displayed. You can also right-click the record and perform different operations from the shortcut menu.



Additional Support

- Contact the *managed*IP Administrator at your company or
- Visit support.tdsmanagedip.com/hosted for additional resources