

# **Business**

# **Voice Cloud**

## **Call Recording**

## **User Guide**



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## Welcome

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

- The End User Interface allows Users of the system to manage calls by number.
- 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 as well as recorded calls.

**Note:** Users should be aware that the organization defines the features and tools they will be permitted to view and use. Some information and feature descriptions in this guide may not be enabled for use by all users. Contact your organization or Group's Archive Call Recording Administrator to learn more about which features you will have access to use.

## Sign In

In order to access the application, you must log in with a user name and password.

The Username is assigned by the Group Administrator when the user profile is created.

Initial 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 Users they create.


1. Open an Internet session. Supported browsers and versions include the following and should be HTML 5 compliant:


IE/Edge  
Firefox  
Google Chrome  
Safari

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

2. Enter the following URL to open the Call Recorder Login Page:  
**<http://callrecording.mymtm.us/CallRecorder/account/login>**
3. Enter the User Name and click **Next**.
4. Enter the Password and click **Sign In**.

### Call Recorder Login


Sara Kipling

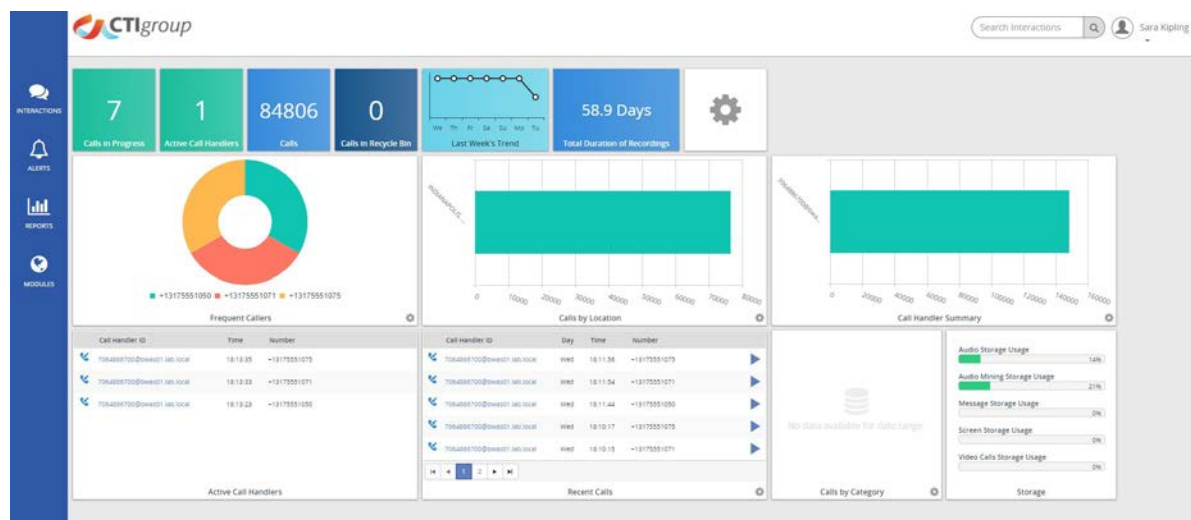


SIGN IN

**Note:** The first time a user logs in, the system requires them to create a new password.

version: 5.0.638.42

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.

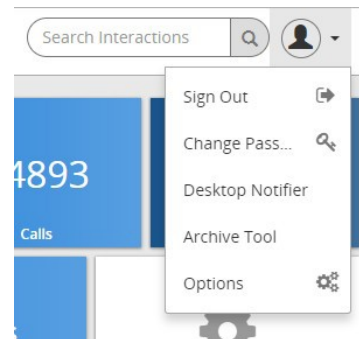


## User Menu

In the upper right corner of the screen, the drop down next to the avatar image will display the User Menu.

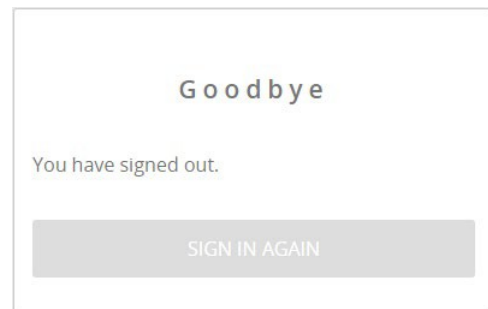
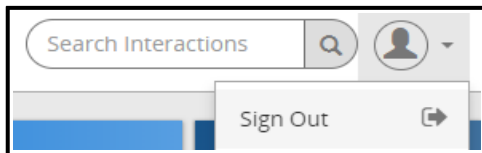
The User Menu provides the following selection options:

- Sign Out
- Change Password
- Desktop Notifier
- Archive Tool
- Options



### Sign Out

Select this option to immediately sign out.



To return to the dashboard, click on the **SIGN IN AGAIN** button.

### Change Password

Users are created in the End User Interface by the Group Administrator.

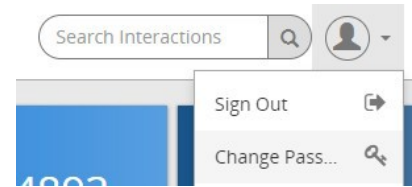
The Group Administrator assigns the User a username during the creation process. Once the user is added, the application will automatically email a temporary password. Users logging in for the first time will be redirected to the expired password dialog to reset the password to something more meaningful 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 system, 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.

1. Click the Change Password option in the User Menu drop down.
2. Enter or select the following information:
  - Old Password – **current password**
  - **New Password** – select a new password that meets the password security requirements
  - Confirm – enter your new password again
3. When an appropriate password has been entered, the Confirm new password field will appear. Enter your new password again.
4. Click **Change Password** to save your new password.
5. Click **OK** to confirmation the action.



*NOTE: Password security requirements are defined during the installation and configuration process. Once you begin typing your new password, the security requirements will be displayed under the New Password field.*

 A screenshot of a 'Change Password' form. It contains three input fields: 'Current password' (filled with dots), 'New password' (filled with dots and a green progress bar), and 'Confirm new password' (filled with dots). Below the 'New password' field, the text 'Password is strong.' is displayed. A 'Change Password' button is at the bottom.

## Change an Expired Password

The **Password Is Expired** screen displays on the day that it is set to expire. There will not be any previous warnings. When you attempt to log on you will be redirected to update the password before you can proceed any further in the application.

1. Enter or select the following information:
  - **Current Password** – current password
  - **New Password** – select a new password that meets the password security requirements
  - **Confirm** – enter your new password again
2. Click **Change Password**.

 A screenshot of a 'Password Is Expired' form. It contains three input fields: 'Current password' (filled with dots), 'New password' (filled with dots and a green progress bar), and 'Confirm new password' (filled with dots). Below the 'New password' field, the text 'Password is strong.' is displayed. A 'Change Password' button is at the bottom.

## Desktop Notifier

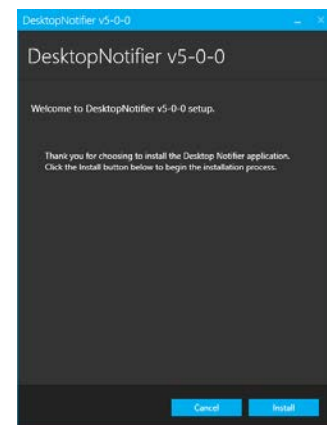
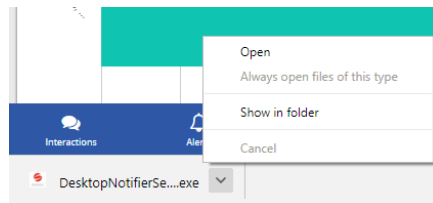
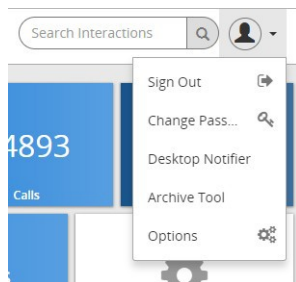
The Desktop Notifier is an external application that allows the User to receive automated notifications of new incoming alerts. It then picks up on what call the alert is associated with, and enables you to playback the call, associate a category with the call, save the call (if it is still in progress),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

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.

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

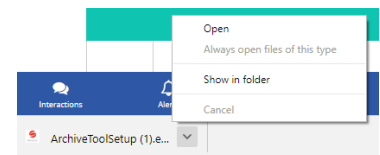
### Download the Desktop Notifier

1. Click the **Desktop Notifier** option from the User Menu drop down.  
The Desktop Notifier application will be downloaded to your system.
2. Click on the drop down menu ^ on the downloaded file in the lower left of your screen to open the application menu
3. Click **Open**. Or click the file itself to open the application directly.
4. When the DesktopNotifier Install window launches, click **Install**.
5. Select the defaults for each screen in the wizard.



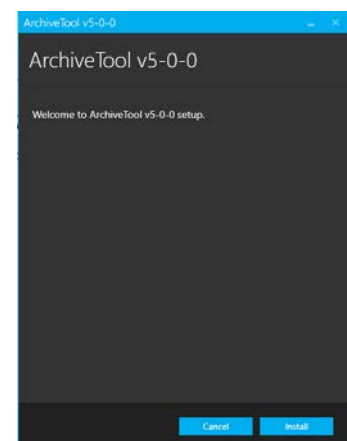
## Archive Tool

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. Once downloaded, the Archive Tool contains a complete help file with instructions to use the available features and functions of the tool. For more information on how to configure the Archive Tool, open the Archive ISO Image tool and click the **Documentation** tab.



### Download the Archive Tool

1. Click the **User Menu** drop down.
2. Click on the **Archive Tool** option. The file will be downloaded to your system.
3. Click **Install** when the Archive Tool Install window launches
4. Select the defaults for each screen in the wizard and Finish.





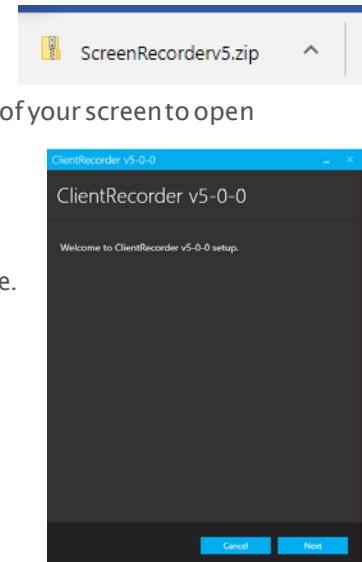
## Screen Recording Client

This option is only available under an Administrator login.

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.

### Download the Screen Recording Client

1. Click on the User Menu drop-down.
2. Click the [Screen Recording](#) option.  
The *Screen Recorder* application will be downloaded to your system.
3. Click on the drop down menu ^ on the downloaded zip file in the lower left of your screen to open the application menu and click [Open](#).
4. Extract the zip file.
5. Click the [Screen Recording Client](#) link.
6. Double click on the [ProgramFiles/ClientRecorder/x64/Setup/setup.exe](#) file.  
This will start the Smart Recording Client application.
7. Select the defaults for each screen in the wizard and finish.



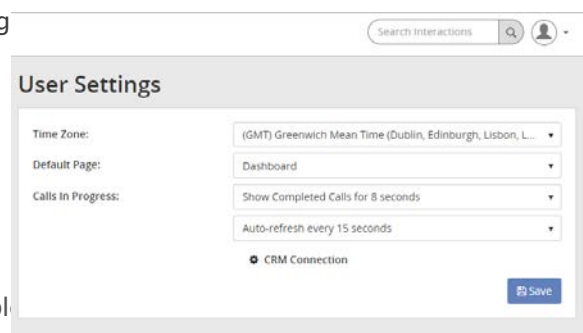
## Options

Clicking on the Options item in the User Menu drop down list will open up the User Settings page. This will allow you to customize your SmartRecord experience.

### User Settings Window

The following items are customizable in the User Setting

- Time Zone - use the drop down to select the desired Time Zone.
- Default Page - use the drop down to select the page which will become the default page viewed upon opening of SmartRecord. The default is set as the Dashboard.
- Calls in Progress - there are two customizations available
  - The length of time each completed call is displayed.
  - How often Calls in Progress is automatically refreshed.

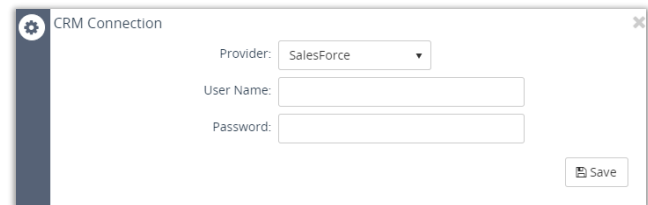


## CRM Connection

To upload recorded calls to an interfaced CRM system through the standard API, the CRM connection must first be set up.

### Setup CRM Connection

1. Click on the [CRM Connection](#) option at the bottom of the User Settings window.  
This will open up a separate CRM Connection window.
2. Enter in the requested information
3. Click [Save](#).



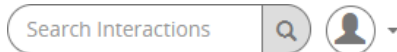
The CRM Connection window is a modal dialog with a title bar containing a gear icon and the text "CRM Connection". It has three input fields: "Provider:" with a dropdown menu showing "SalesForce", "User Name:" with a text input field, and "Password:" with a text input field. A "Save" button is located at the bottom right of the window.

## 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 *test* in it, you can search for that word to find that call record.

### Search Call Records

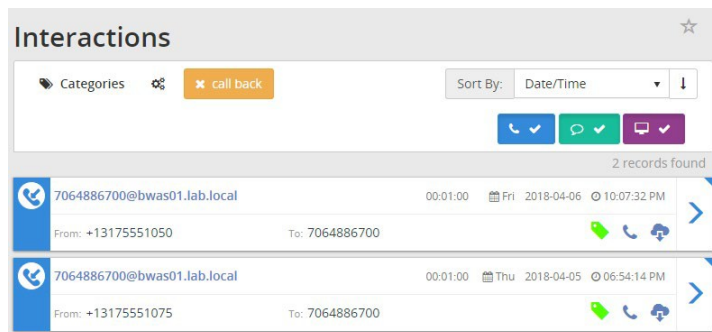
1. Type the desired search term in the [Search Interactions](#) field in the upper right of the screen.



The Search Interactions field is a text input field with the placeholder text "Search Interactions". To its right is a magnifying glass icon (search button) and a user profile icon with a dropdown arrow.

2. Click the  Search button, or press [Enter](#).

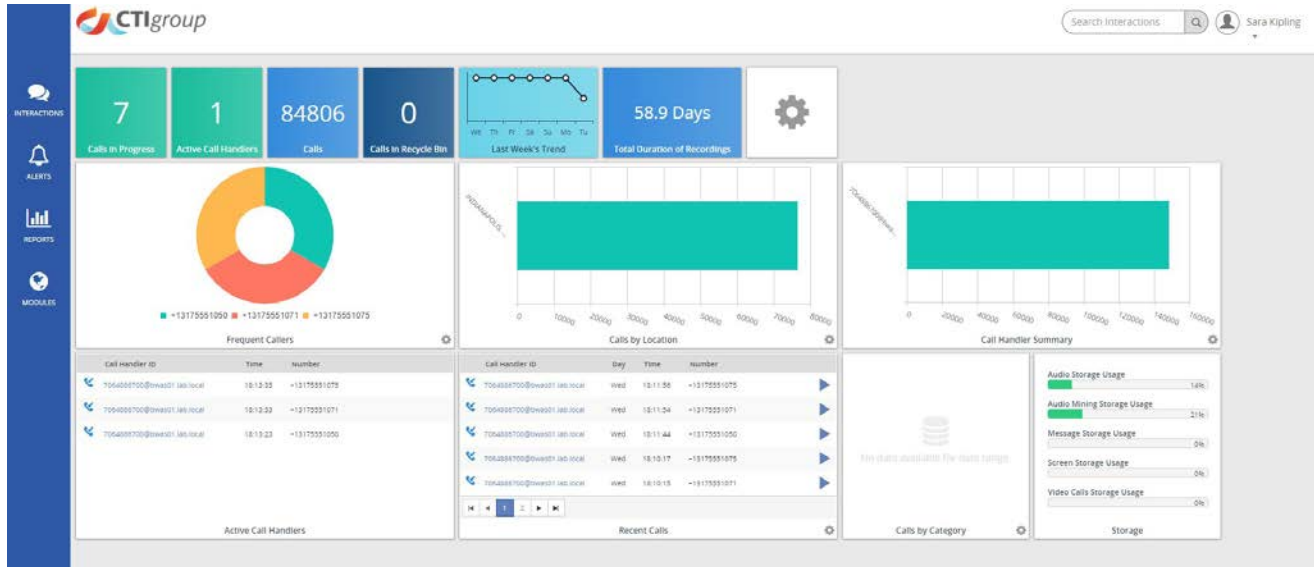
The **Interactions** page will be opened, displaying all call records that match the search word(s).





The Interactions page is a table-like view of call records. At the top, there is a "Categories" filter with a "call back" tag, a "Sort By:" dropdown set to "Date/Time", and a "2 records found" status. Below this, there are two call record entries. Each entry shows a phone icon, a phone number, a duration of "00:01:00", a date and time, and a status icon. The first entry is dated "Fri 2018-04-06 10:07:32 PM" and the second is dated "Thu 2018-04-05 06:54:14 PM". Both entries show "From: +13175551050" and "To: 7064886700".

# 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, number of calls, duration of recordings, calls in the recycle bin, trends, etc.



The Dashboard is divided into nine distinctive panes that give you a pictorial and data overview of your company's current call usage: First Look, Frequent Callers, Calls by Location, Call Handler Summary, Active Call Handlers, Recent Calls, Calls by Category, and available Storage. Where applicable, the panes can be viewed as data or as a graph.

With the exception of First Look, Active Call Handlers, and Storage, you have the ability to customize the information displayed within the panel. view each pane as either a text or graphical display. Customizable panes have a  (Settings) button in the lower right corner. Clicking on the button will flip the pane to open the available Options. When in the Option display, the Settings button turns into a  (Return) button, that will exit the panel options.

- Chart - toggles between displaying the information in chart or table form. This option is available for all customizable panes except Recent Calls.
- Last 30 Days - select the timeline for the information displayed in the pane. This option is available for all customizable panes except Recent Calls.
- Top 10 Results - select the number of results displayed within the pane.

Options

Chart

Last 30 Days

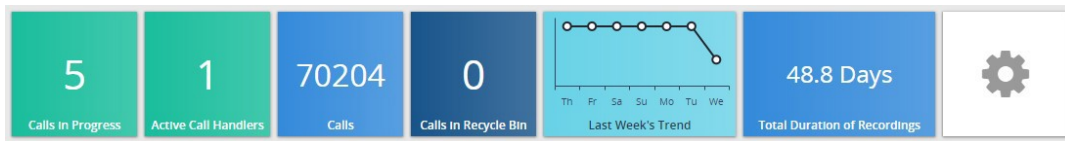
Top 10 Results

Frequent Callers

The Dashboard is set up to automatically adjust the view when the screen size is minimized, ensuring the most efficient use of screen space for the user. When the screen is minimized, the information tabs move from the left side of the screen to the bottom.

## First Look

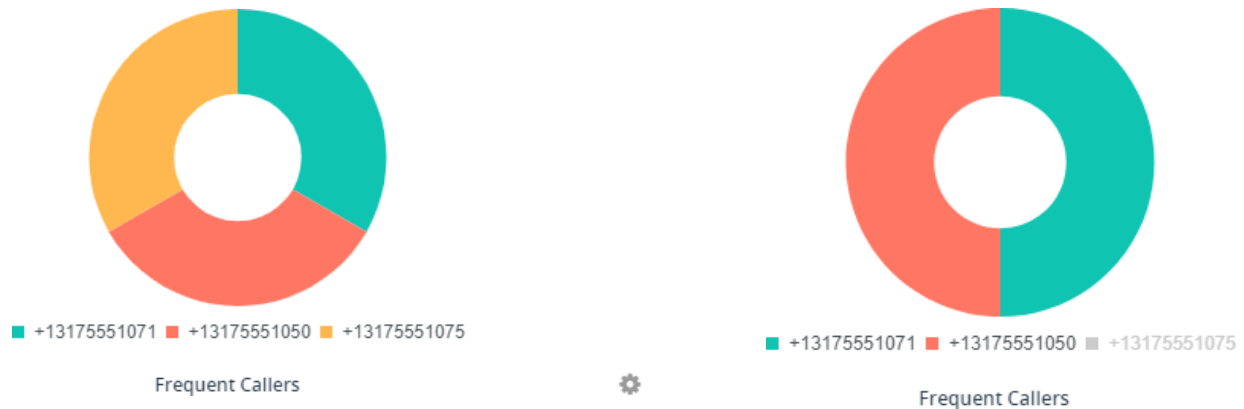
The First Look section appears horizontally across the top of the Dashboard and displays a quick view of totals for the following information:



|  |  |
|--|--|
|  | <p><b>Calls in Progress</b> – At a glance display of the total number of calls in the system that are not terminated, by Group and/or User. Clicking on Calls in Progress pane will take you to the Calls in Progress page of the Interactions tab.</p>  |
|  | <p><b>Active Call Handlers</b> – Displays the total number of extensions with an active call. Active Call Handlers displays information by Group and then by User. Groups and Users will only see information based on extensions to which they have access</p>  |
|  | <p><b>Calls</b> – Displays 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 cumulative over the lifetime of the Group. However, the number will adjust accordingly when call files are deleted and/or routinely purged from the application. Clicking on the Calls pane will take you directly to the Completed page of the Interactions tab</p> |
|  | <p><b>Calls in Recycle Bin</b> – Shows the total number of calls that have a recording associated with them and that are in the Recycle Bin pending deletion. This value is cumulative over the lifetime of the Group. However, the number will adjust accordingly when call files are deleted and/or routinely purged from the application.</p>   |
|  | <p><b>Last Week's Trend</b> – Interactive Pane that provides a visual display of the call history for the previous week. User can view the number of calls per day within the chart by hovering the cursor over a point on the graph.</p>  |
|  | <p><b>Total Duration of Recordings</b> – Shows the sum of duration for recorded calls that have a recording associated with them, by Group and User. This value is accumulative over the lifetime of the Group.</p>  |

## Frequent Callers

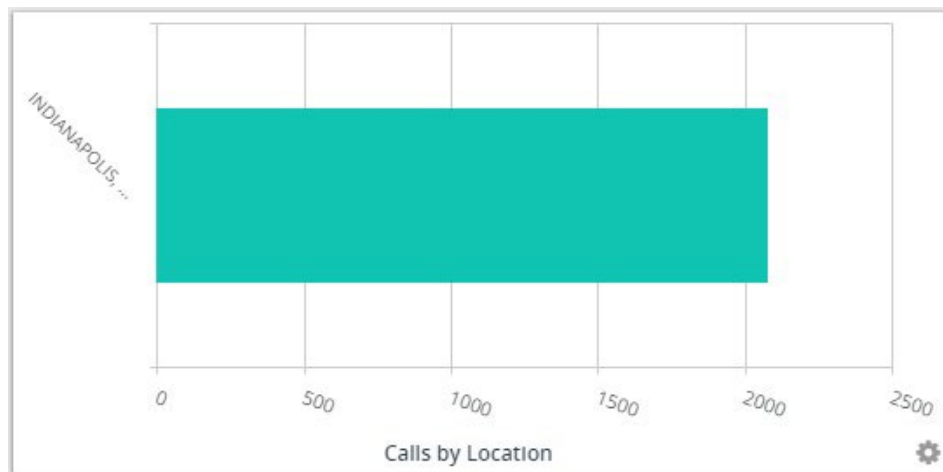
The **Frequent Callers** pane displays the total number of calls by calling number for the most frequently called numbers. The Frequent Callers chart displays inbound calls only. The number of frequent callers displayed in the pane will be determined by the applied filter (for example: Last 30 Days, 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.



This pane is interactive. Click on the numbers within the Frequent Callers graph to toggle the results for that number on and off.

## Calls by Location

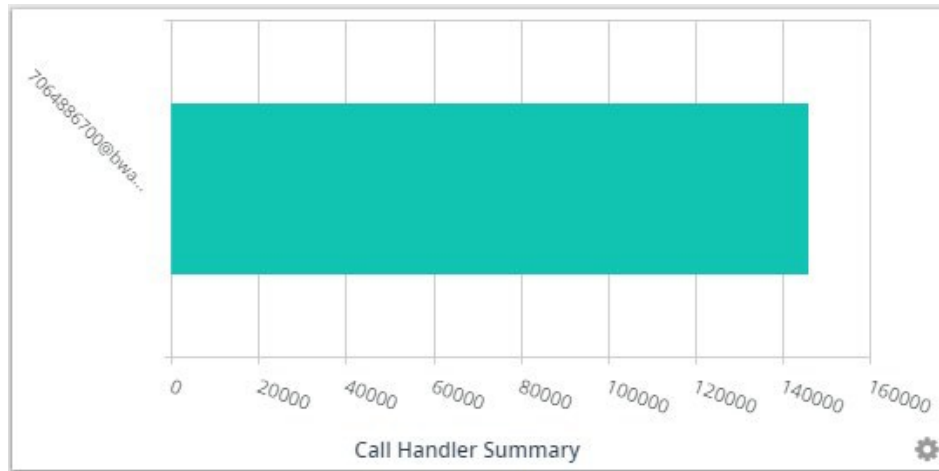
The **Calls by Location** pane displays total calls by each location as determined by the NPA/NXX. The calls included in the totals will be determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Calls by Location pane can be displayed as text or as a pie chart 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.

| Call Handler ID            | Time     | Number       |
|----------------------------|----------|--------------|
| 7064886700@bwa01.lab.local | 18:06:23 | +13175551075 |
| 7064886700@bwa01.lab.local | 18:06:21 | +13175551071 |
| 7064886700@bwa01.lab.local | 18:06:11 | +13175551050 |






Active Call Handlers

Selecting a number in the Call Handler ID column will take you directly to the Interactions page, displaying all Completed calls by that Call Handler ID.

| Interactions               |                |                    |             |  |
|----------------------------|----------------|--------------------|-------------|--|
| Completed                  |                | In Progress        |             |  |
| Categories                 |                | Sort By: Date/Time |             |  |
| 7064886700@bwa01.lab.local |                | 500+ records found |             |  |
| 7064886700@bwa01.lab.local | 00:01:00       | Thu 2018-04-05     | 07:10:44 PM |  |
| From: +13175551075         | To: 7064886700 |                    |             |  |
| 7064886700@bwa01.lab.local | 00:01:00       | Thu 2018-04-05     | 07:10:42 PM |  |
| From: +13175551071         | To: 7064886700 |                    |             |  |
| 7064886700@bwa01.lab.local | 00:01:00       | Thu 2018-04-05     | 07:10:32 PM |  |
| From: +13175551050         | To: 7064886700 |                    |             |  |
| 7064886700@bwa01.lab.local | 00:01:00       | Thu 2018-04-05     | 07:09:05 PM |  |
| From: +13175551075         | To: 7064886700 |                    |             |  |
| 7064886700@bwa01.lab.local | 00:01:00       | Thu 2018-04-05     | 07:08:53 PM |  |
| From: +13175551050         | To: 7064886700 |                    |             |  |













## 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.

| Call Handler ID   | Day | Time     | Number       |
|---|-----|----------|--------------|
|  7064886700@bwas01.lab.local | Thu | 19:07:26 | +13175551075 |
|  7064886700@bwas01.lab.local | Thu | 19:07:24 | +13175551071 |
|  7064886700@bwas01.lab.local | Thu | 19:07:14 | +13175551050 |
|  7064886700@bwas01.lab.local | Thu | 19:05:47 | +13175551075 |
|  7064886700@bwas01.lab.local | Thu | 19:05:45 | +13175551071 |

Recent Calls

Selecting a number in the Call Handler ID column opens the *Interactions* page to view all **Completed** calls by that Call Handler ID.

| Interactions  |             |                |             |
|---|-------------|----------------|-------------|
| Completed   | In Progress | Sort By        | Date/Time   |
| Categories  |             |                |             |
| Current View: Default   |             |                |             |
|  7064886700@bwas01.lab.local  | 00:01:00    | Thu 2018-04-05 | 07:16:41 PM |
|  +13175551075                | 00:01:00    | Thu 2018-04-05 | 07:16:41 PM |
|  7064886700@bwas01.lab.local | 00:01:00    | Thu 2018-04-05 | 07:16:41 PM |
|  +13175551075                | 00:01:00    | Thu 2018-04-05 | 07:16:41 PM |
|  7064886700@bwas01.lab.local | 00:01:00    | Thu 2018-04-05 | 07:16:41 PM |
|  +13175551050                | 00:01:00    | Thu 2018-04-05 | 07:16:41 PM |
|  7064886700@bwas01.lab.local | 00:01:00    | Thu 2018-04-05 | 07:16:41 PM |
|  +13175551075                | 00:01:00    | Thu 2018-04-05 | 07:16:41 PM |
|  7064886700@bwas01.lab.local | 00:01:00    | Thu 2018-04-05 | 07:16:41 PM |
|  +13175551071                | 00:01:00    | Thu 2018-04-05 | 07:16:41 PM |
|  7064886700@bwas01.lab.local | 00:01:00    | Thu 2018-04-05 | 07:16:41 PM |
|  +13175551050                | 00:01:00    | Thu 2018-04-05 | 07:16:41 PM |

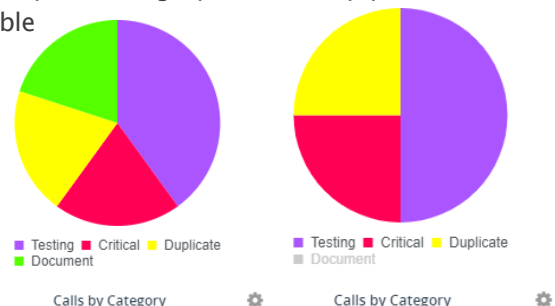
| Inbound Recorded Call  |                |
|--|----------------|
| 7064886700@bwas01.lab.local  |                |
| 00:01:00 Thu 2018-04-05 06:06:23 PM  |                |
| Details  | Annotations    |
|    |                |
| From: +13175551075   | To: 7064886700 |
| Related Calls  |                |
| Location: INDIANAPOLIS, IN   |                |
| Classification:  |                |
| Comments:  |                |
| External ID: callhalf-21602367-0   |                |
| Digital Signature (MD5): 421DBF8872F99ACB715430CFAD4E419B  |                |

Click on the  (Play Audio) button to open the Inbound Recorded Call window for a specific call.

## Calls by Category

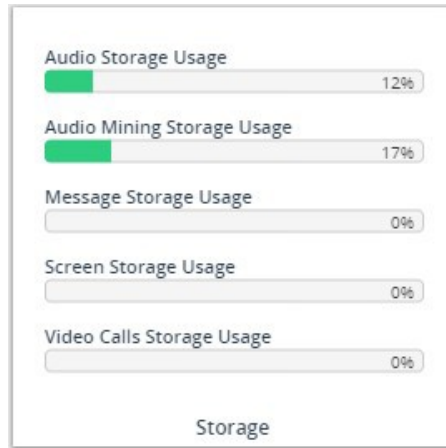
The **Calls by Category** pane displays total calls by custom category. Categories are specific to the user. The calls included in the totals are determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Calls by Category pane can be displayed as text or a graph 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.

This pane is interactive and allows you to receive specific section results by hovering the mouse over the desired area. Click on a category in the legend to toggle the included results on and off.

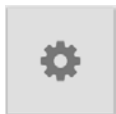


## Storage

The final panel on the Dashboard is the Storage pane. This displays the current usage of storage, including Audio Storage, Audio Mining Storage, Message Storage, Screen Storage, and Video Calls Storage where those mediums are in use.

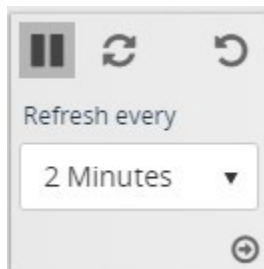


## Dashboard Preferences



First Look also displays a [Settings](#) icon panel, which opens the Dashboard Preferences.

The tools provided for dashboard preferences include:



Pause - Pauses the upload of new information into the dashboard.



Play - When pause is selected it becomes Play to restart services when ready.



Refresh - Refreshes incoming data.



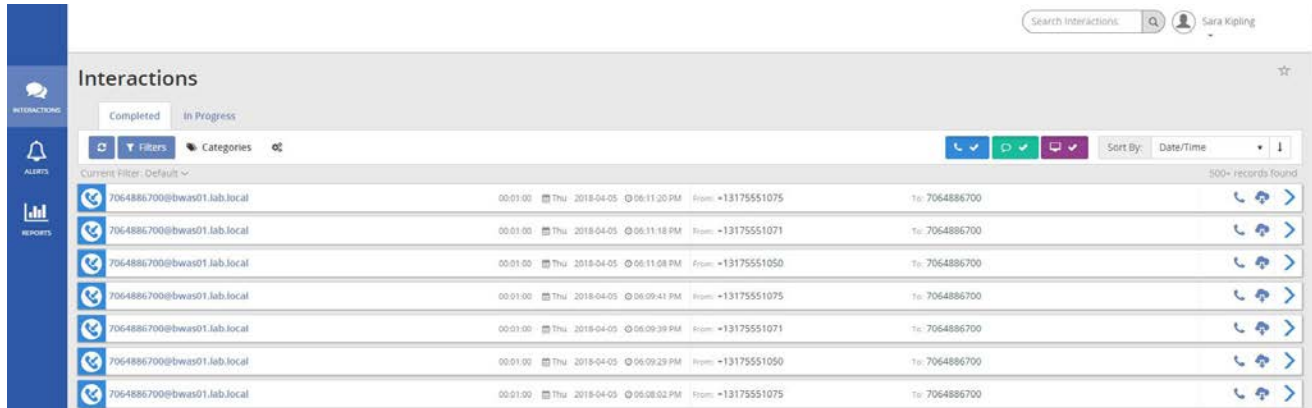
Undo - Undo the last change made in Dashboard.

[Refresh every](#)... select the preferred refresh rate in minutes.



## Interactions

On the left side of the Dashboard, the first tab option is **Interactions**. Clicking this will take you to the Interactions page. The default view of the Interactions page is the **Completed** tab which displays the completed calls.



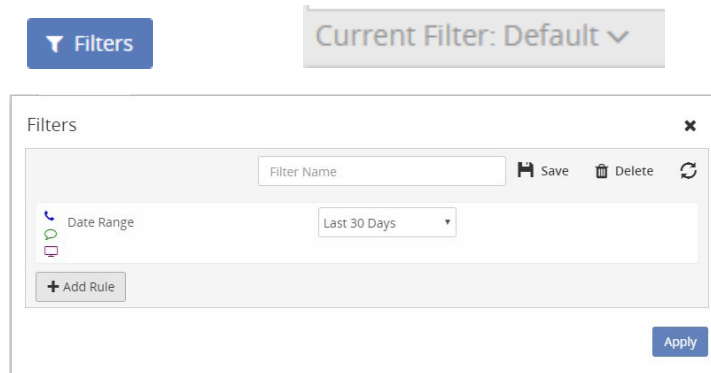
The screenshot shows the 'Interactions' page with the 'Completed' tab selected. The page header includes a search bar, user profile, and a star icon. The left sidebar has icons for Interactions, Alerts, and Reports. The main content area displays a table of call records with columns for status, time, date, and phone numbers. The table shows 8 records, all with a status of 'Completed' and a time of '00:01:00'.

| Status    | Time     | Date                       | From               | To             |
|-----------|----------|----------------------------|--------------------|----------------|
| Completed | 00:01:00 | Thu 2018-04-05 06:11:20 PM | From: +13175551075 | To: 7064886700 |
| Completed | 00:01:00 | Thu 2018-04-05 06:11:18 PM | From: +13175551071 | To: 7064886700 |
| Completed | 00:01:00 | Thu 2018-04-05 06:11:08 PM | From: +13175551050 | To: 7064886700 |
| Completed | 00:01:00 | Thu 2018-04-05 06:09:41 PM | From: +13175551075 | To: 7064886700 |
| Completed | 00:01:00 | Thu 2018-04-05 06:09:39 PM | From: +13175551071 | To: 7064886700 |
| Completed | 00:01:00 | Thu 2018-04-05 06:09:29 PM | From: +13175551050 | To: 7064886700 |
| Completed | 00:01:00 | Thu 2018-04-05 06:08:02 PM | From: +13175551075 | To: 7064886700 |

### Filter

There are two ways to open the **Filters** window to review or edit the filters when working in Interactions.

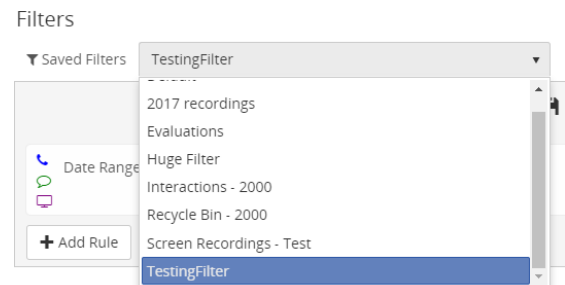
1. Click the **Interactions** tab on the side panel to open the **Completed** tab.
2. Click on the **Filters** button in the Completed tab to open the filters dialog.
3. Or – Click on the **Current Filter** drop-down tool and select **Edit Filter**.



### Create a Filter

While working in the **Completed** tab in *Interactions*:

1. Open the **Filters** window.
2. Enter a Filter Name (e.g.; **TestingFilter**)
3. Select a Date Range.
4. Click the **Save** button.  
Your filter will be added to the *Saved Filters* drop down.



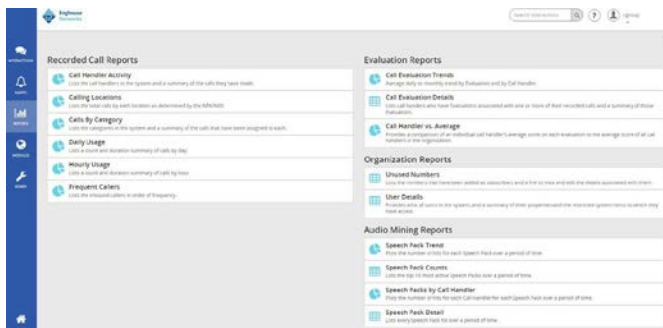
## Apply a Filter to a Completed Call

While working in the **Completed** tab in *Interactions*:

1. Open the **Filters** window.
2. Click the **Add Rule** button to open a new drop down.
3. Enter or select the following information:
  - To Number (drop down)
  - To Number (text) – enter a number that appears under the From Number column of the list of Recorded Calls.
4. Click **Apply Changes** to apply the filter to the list of Recorded Calls.

## Filter a Report

1. Click the **Reports** tab on the side panel to open the *Reports* page.
2. Click on a report to select it.
3. Click on the **Filter** button in the tools section to expand the Filter window and select/apply options as desired.





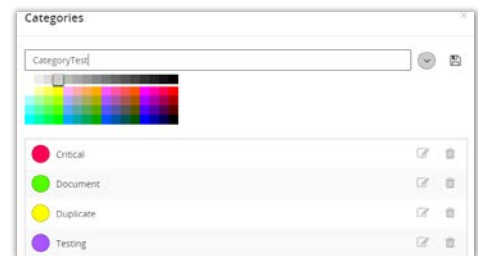
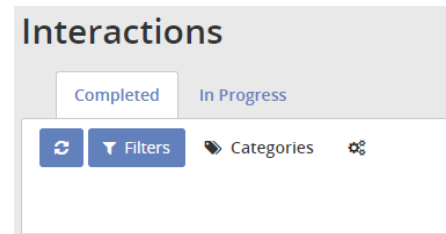
| Number       | Caller ID | Calls | Average Duration |
|--------------|-----------|-------|------------------|
| +13015551007 |           | 12    | 00:01:00         |
| 1002         | 666 1002  | 10    | 00:01:04         |

## Manage Categories

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. Click on the [Category](#) link and select the specific category from the drop down list. *NOTE: Categories are specific to the user. The categories that you create and assign to your recorded calls cannot be seen by other users.*



### Create a New Category

1. Click the [Interactions](#) tab on the side panel.
2. Select a Tab (e.g.; Completed).
3. Click on the [Categories](#) button in the tools section beneath the Tabs.  
The Categories window opens displaying all available categories for the Tab.
4. Enter a unique name in the Category Name text field.
5. Click on the  drop-down icon to open the color pallet.
6. Select a color from the options, and the drop down button will change to the selected color.
7. Click the  [Save](#) button to add the new Category to the Categories list.



### Edit a Category


While in Categories:

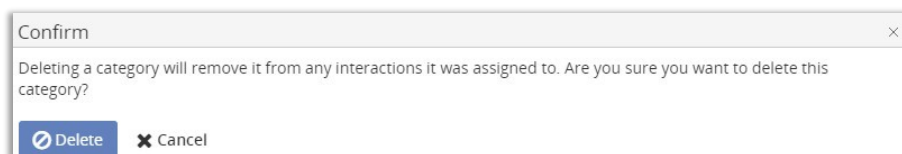
1. Click the  Edit button next to the Category to edit either the Category name or to select an updated color.
2. When finished, click  [Save](#).



### Delete a Category

While in Categories:

1. Click the [Delete](#) button  next to the Category to delete.
2. Click [Delete](#) to continue when prompted.




## Bulk Options

The **Bulk Options** feature on the Completed tab of the Interactions page allows the user to select multiple completed calls for export.

1. Click the Interactions tab on the side panel to open the Interactions page.
2. Select the completed calls to be exported by clicking on the image to the left of the calls.

Selected calls will turn from blue to dark gray.

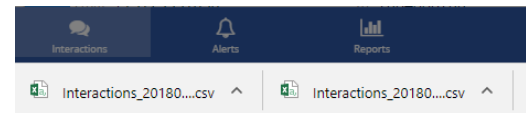
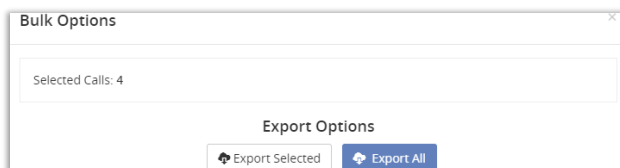
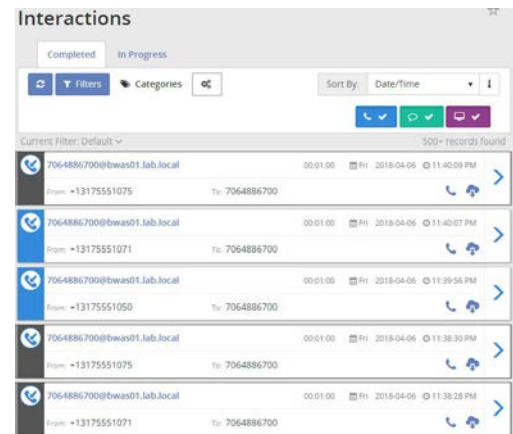
Note: To deselect, click the Refresh  button.

3. When you finish selecting calls, click the Tools icon  to open the **Bulk Options** window.

Export Selected - exports only the completed calls selected during step 2.

- Export All - exports all completed calls.

4. Click the desired **Export** option. The information will be automatically exported to a CSV file and will appear on the bottom of the screen.
5. Double click on the file to open the spreadsheet file in Excel.

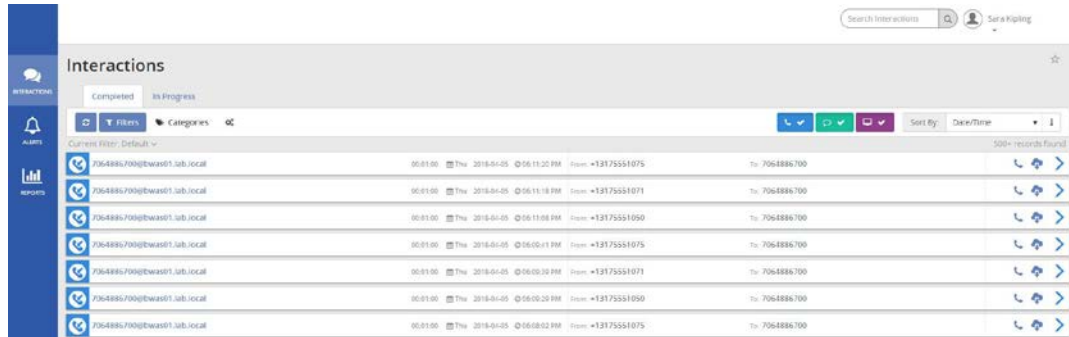


| Day | Date     | Time        | Number                      | To         | From        | Direction | Duration | Message | Categories | Media Type | Do Not Return | To Delete | To Delete Call Video | External Link  |
|-----|----------|-------------|-----------------------------|------------|-------------|-----------|----------|---------|------------|------------|---------------|-----------|----------------------|--|
| 1   | 4/6/2018 | 11:34:42 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?1  |
| 2   | 4/6/2018 | 11:36:02 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?2  |
| 3   | 4/6/2018 | 11:36:29 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?3  |
| 4   | 4/6/2018 | 11:36:50 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?4  |
| 5   | 4/6/2018 | 11:37:02 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?5  |
| 6   | 4/6/2018 | 11:37:14 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?6  |
| 7   | 4/6/2018 | 11:37:26 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?7  |
| 8   | 4/6/2018 | 11:37:38 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?8  |
| 9   | 4/6/2018 | 11:37:50 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?9  |
| 10  | 4/6/2018 | 11:38:02 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?10 |
| 11  | 4/6/2018 | 11:38:14 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?11 |
| 12  | 4/6/2018 | 11:38:26 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?12 |
| 13  | 4/6/2018 | 11:38:38 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?13 |
| 14  | 4/6/2018 | 11:38:50 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?14 |
| 15  | 4/6/2018 | 11:39:02 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?15 |
| 16  | 4/6/2018 | 11:39:14 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?16 |
| 17  | 4/6/2018 | 11:39:26 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?17 |
| 18  | 4/6/2018 | 11:39:38 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?18 |
| 19  | 4/6/2018 | 11:39:50 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?19 |
| 20  | 4/6/2018 | 11:40:02 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?20 |
| 21  | 4/6/2018 | 11:40:14 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?21 |
| 22  | 4/6/2018 | 11:40:26 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?22 |
| 23  | 4/6/2018 | 11:40:38 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?23 |
| 24  | 4/6/2018 | 11:40:50 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?24 |
| 25  | 4/6/2018 | 11:41:02 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?25 |
| 26  | 4/6/2018 | 11:41:14 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?26 |
| 27  | 4/6/2018 | 11:41:26 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?27 |
| 28  | 4/6/2018 | 11:41:38 PM | 7064886700@bwas01.lab.local | 7064886700 | 12170538079 | Inbound   | 0:01:00  |         |            | Audio      | FALSE         | FALSE     | FALSE                | http://demo.ritgroup.com/CallRecorder/Audio/Player.html?28 |

## Completed

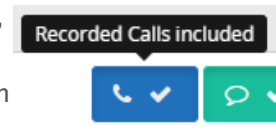
The first tab of the Interactions page, and the default selection for Interactions, is the Completed tab. This list will contain all completed interactions, including Recorded Calls, Messages, and Screen Recordings.

By default, all interaction types are selected. You can include and exclude different interaction types by clicking on the corresponding button in the upper right of the tab.

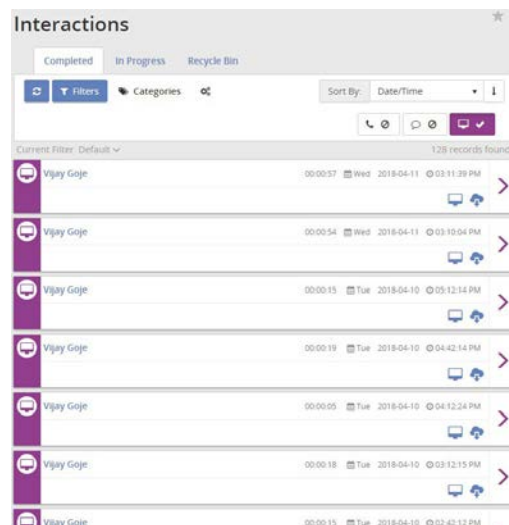


For example, to include only ONE data type in the Completed Interactions list:

1. Click on the **Recorded Calls** button to deselect it. This will gray out that option, and the selection will be excluded from the *Completed Interactions* list.
2. Repeat to exclude or include any additional options until only the data you wish to see is displayed in the list below.



In this example, when only Screen Recordings are left included, the subsequent Completed Interactions list will only include Screen Recordings.






## Recorded Call Media Player

At the top of the Recorded Call window is the audio of the recorded call.

Click the  (Play) button to begin playing audio.








When the audio is in play, the button turns into a  (Pause) button. The media player allows you to rewind and fast forward the audio, change the speed of the call, and adjust the volume

## Recorded Call Details Tab

Below the media player is the Recorded Call Detail.

By default, the *Details* tab is displayed with the following information and options:

-  **Email** button – Allows the user to email a recorded call.
-  **Download Options** button – Allows the user to download the recorded call.
-  **Recycle Options** button – Allows the user to send the audio to the Call Recorder recycle bin.
-  **Save** button (if applicable) - provides option to retain the message and remove it from the recycle bin. This only appears if the message has already been moved to the recycle bin.

-  **Delete** button – Provides the option to delete the message once it's in the recycle bin. When selected, all message option buttons will be replaced with the **Media file is not available** message.

**From Number** – The originating number.

**To Number** – The terminating number.

**From Caller ID** – Displays the name or number of the person that originated the call, if caller ID is available.

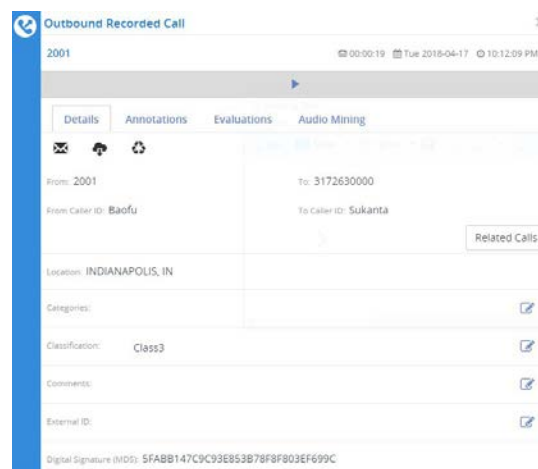
**To Caller ID** – Displays the name or number of the *To Number*, if caller ID is available.

**Related Calls** button – Expands a list of recorded calls which are related by their call flow to the current call.



**Location** – Provides the location the call originated from.

**Categories** – Access by clicking the Edit button . Allows the user to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction).

**Classification** – Access by clicking the Edit button . Allows the user to classify calls to restrict



access to them to only the user with explicit permissions.

- **Comments** – Access by clicking the Edit button . Any comments associated with the call.
- **External ID** – Access by clicking the Edit button . An identifier may be saved in this field, indicating this record is related to an external system by that id. Typically, External IDs are generated or forwarded by the telecom switch as meta information for the call.
- **Digital Signature (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.


*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.*

*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.*

**Note:** Group Administrators will see recorded calls for all numbers assigned to Users they created.




## Annotations

Annotations allow users 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.

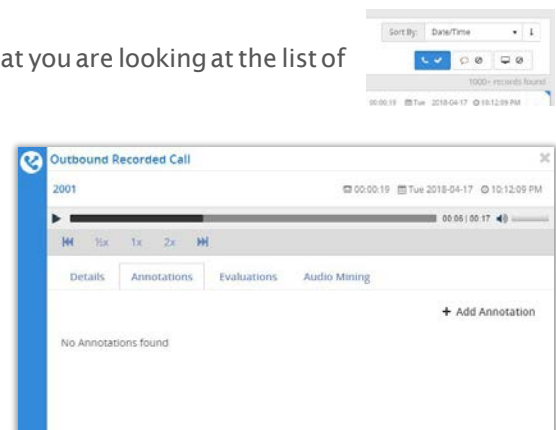
The  annotation icon shows users there are annotations associated with the recorded call file. Note: Pausing or resuming a recording automatically creates an empty annotation (no comments) on the call recording.

### Add an Annotation to a Recorded Call



While in Interactions > Completed tab:


1. Deselect *Messages* and *Screen Recordings*, to ensure that you are looking at the list of recorded calls.
2. Select a call and click on the  (View Details button) next to it to open up the Outbound Recorded Call window.
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. Click on the **Annotations** tab.
6. Click on the **Add Annotation** link.

**Note:** The time on the size of the annotation fields and the time the recorded call was paused are the same.

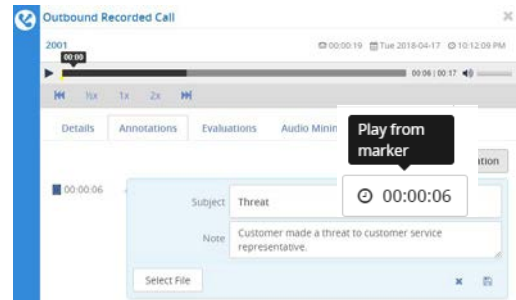




7. Enter the following information:
  - Subject – Concise reason for the annotation
  - Note – A short explanation.
8. Click the  **Save** button.
9. Click on the time marker next to the annotation to jump to the spot in the call.
10. Click the Close icon  at the right corner of the Outbound Recorded Call window to close.





The recorded call will have an updated icon  in the *Play*

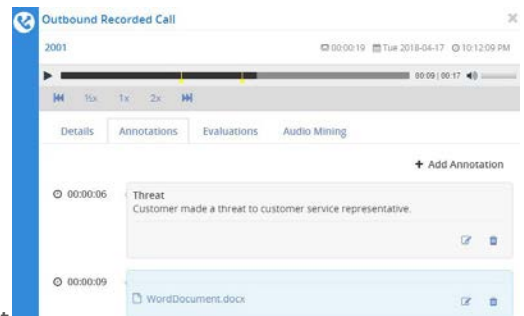
*Recorded Call* field, indicating there is an annotation associated with the call.



### Add a File Annotation to a Recorded Call


While in Interactions > Completed tab:

1. Deselect *Messages* and *Screen Recordings*, to ensure that you are looking at the list of recorded calls.
2. Select a call and click on the  (View Details button) next to a call to open up the Outbound Recorded Call window.
3. Select the **Play** button  to begin playing the recorded call.
4. Click on the Annotations tab to begin adding annotations.
5. Select the **Play** button  to begin playing the recorded call.
6. Select  **Pause** when you come to the point in the call that you wish to annotate.
7. Click the **Add Annotation** link.
8. Click the **Select File** button to choose and open the desired file as an attachment.
9. Click the **Save** button.




### Delete an Annotation from a Recorded Call

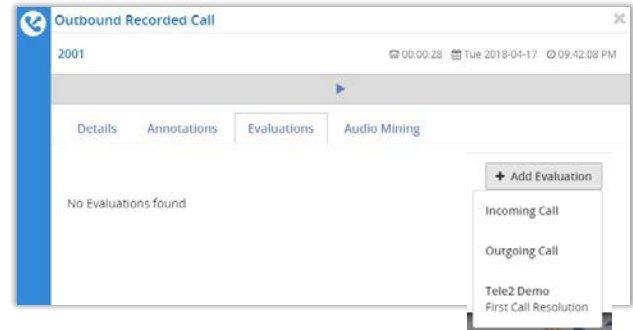
While looking at the Annotations for a Recorded call:

1. Click the  (Delete) button next to the annotation you wish to remove.
2. Choose **Delete** when prompted to complete the action.

## Evaluations


Call recording evaluations are performed in the in the Call Details view.

1. Click on the  (View Details button) next to a call in the list to open the Outbound Recorded Call window.
2. Click on the **Evaluations** tab.
3. Click the **Add Evaluation** link to open a drop down of available Evaluations.
4. Select **Incoming Call** to open up the Incoming Call detail panel.
5. Enter/select the following information:
  - Introduction - Choose an option from the drop-down tool.
  - Closure - Choose an option from the drop-down tool.
6. Click **Save**.




|              | Score       | Average    | Weighted Average |
|--------------|-------------|------------|------------------|
| Introduction | 5/5         | 100%       | 100%             |
| Closure      | 0/5         | 0%         | 0%               |
| <b>Total</b> | <b>5/10</b> | <b>50%</b> | <b>50%</b>       |

## Audio Mining

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.

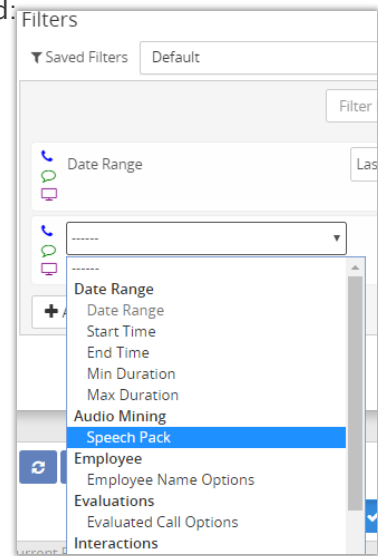
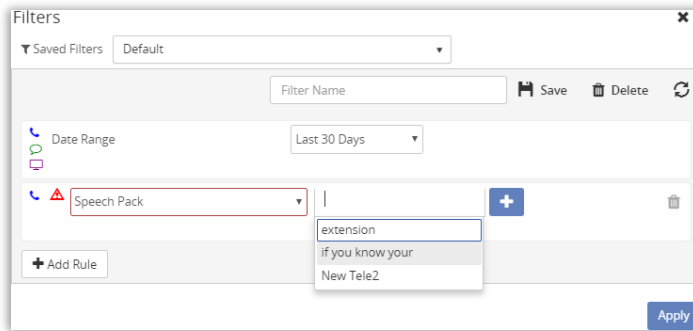
To apply an audio mining pack to a recorded call as a filter, click on the Recordings tab and select Recorded Calls. Expand the Filter toolbar by clicking once on it. Click on the Filter toolbar to expand it and select the By Audio Mining Pack tab. Select the audio mining pack from the Audio Mining pack 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 displays 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.

## Apply Audio Mining to a Recorded Call


While looking at the list of recorded calls in Interactions > Completed:

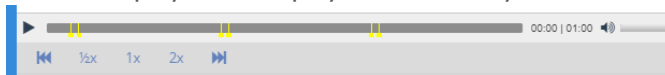
1. Click Filters  in the Completed tab.
2. Click the [Add Rule](#) link and select **Audio Mining Speech Pack**.
3. Click within the Speech Pack text field and select the if you know your option.




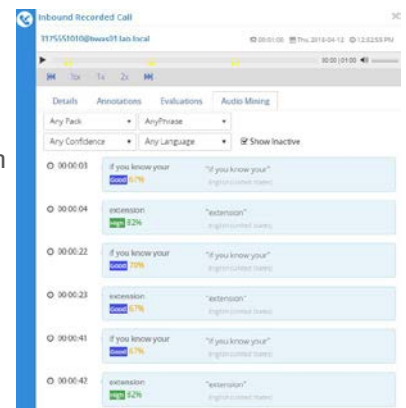
4. Enter or select the following information:
  - Minimum Confidence – Define the confidence level (e.g.; 10)
  - Speech Pack Match – Choose the match level (e.g.; Matching)
5. Click [Apply](#) to save the data and begin using as a filter for the recorded call results that contain the Audio Mining result.

## View Audio Mining Results

1. From the filtered results, select a call and click on the  (View Details button) to open the Outbound Recorded Call window.
2. Select the [Audio Mining Pack](#) tab to view the results for that call.
3. You can further filter the Audio Mining results by using the drop downs to select specific packs, phrases, confidence levels, or languages.
4. The media player will display the results as yellow markers.



5. Click on the time stamp associated with a result to play the audio from that marker.  00:00:04



## Screen Recording

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.





Deselecting the Recorded Calls and Messages buttons will provide a list of only Screen Recordings.

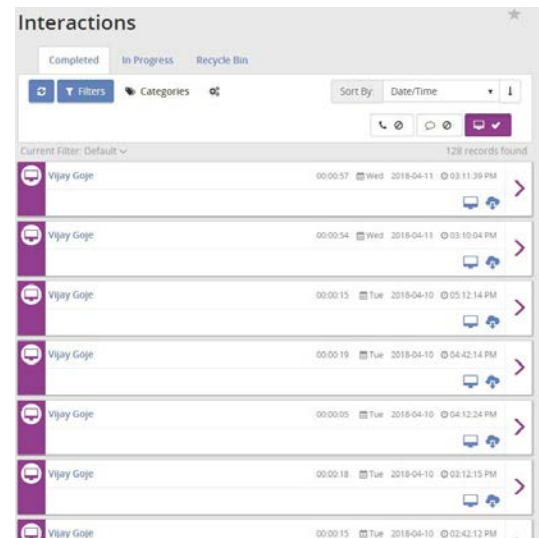


*Note: Group Administrators will see screen recordings for all extensions assigned to Users they created.*

The Screen Recordings list provides a quick glimpse of vital information regarding the completed screen recordings. The following information is displayed on the Screen Recordings 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
- **Duration** – The length of 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
-  Play ScreenRecording button – Allows the user to play the actual screen recording.
-  Displays if the message has already been sent to the recycle bin.
-  Download button – Allows the user to download individual screen recordings as a zipped file but without the audio file.
-  View Details button – Opens the recorded calls window.



When the Screen Recording window is opened, more detailed information is available, both for review, and for editing.

## Screen Recording Media Player

At the top of the Screen Recordings window is the video and audio of the recording. Click the ► (Play) button to begin playing the recording.

**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 the recording is in play, the ► button turns into a (Pause) button. The media player allows you to adjust the light balance of the video, and adjust the volume.








## Screen Recording Detail

Below the media player is the Screen Recording Detail.

*If the required Java plug is not installed, the user will be prompted to install the plugin.*

Tools and features offered include:

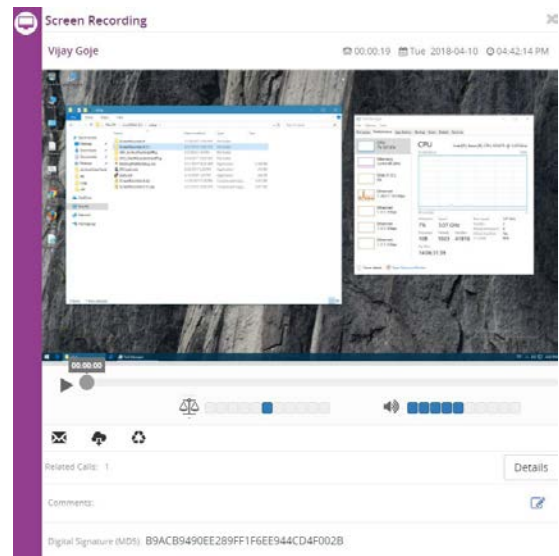
-  **Email** – Allows the user to email a recorded call.
-  **Download Options** – Allows the user to download the recorded call.
-  **Recycle Options** – Allows the user to send the audio to the Call Recorder recycle bin.
-  **Save** – Provides option to retain the message and remove it from the recycle bin. This only appears if the message has already been moved to the recycle bin.
-  **Delete** – Provides the option to delete the message once it's in the recycle bin. When selected, all message option buttons will be replaced with a message, Media file is not available.

**Related Calls** – identifies whether or not there is a recording associated with the call and allows you to play the associated recording

**Details** – Review details.

**Comments** – Review Comments.

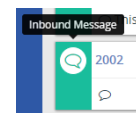
**Digital Signature (MD5)** – Shows whether the screen recording has been hashed using MD5 fingerprinting, thus ensuring that the screen recording has not been tampered with and satisfying regulatory requirements.



## Messages

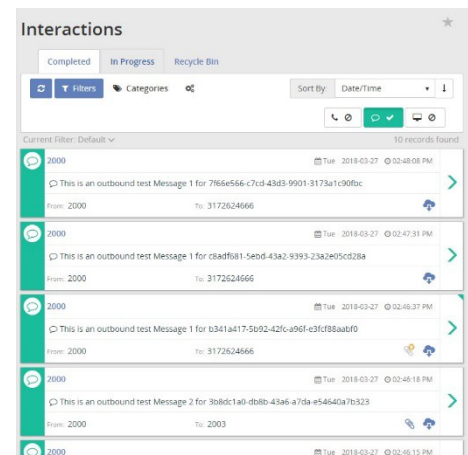
Where enabled, Group Administrators may see the Messages screen displaying all completed SMS/MMS recordings for all Users that have been created by the user.

Hover the cursor over the message display on the left side of the screen to see whether a message is Inbound or Outbound.



The Completed Messages list provides a quick glimpse of vital information regarding the messages. The following information and features display on the Messages list:

- **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 call took place.
- **Time** – The actual date the message occurred.
- **From Number** – The originating number.



- **To Number** – The terminating number.
- **Attachments** – Icon displays if there are attachments associated with a message.
- **Recycled Attachments** – Icon displays if the message has already been sent to the recycle bin.
- **Download** – Downloads the message as a zip file.
- **> View Details** – Opens the Outbound Message window.

## Message Detail

Where **Enabled**, the following tools are provided on the Message Details screen for review or edit:

**Email** – Allows the user to email a recorded call.

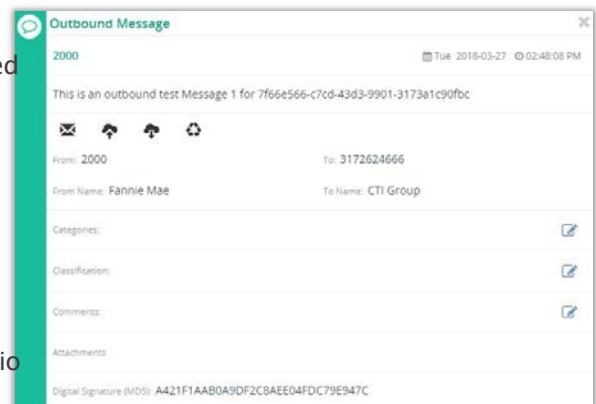
**Archive to CRM** – Upload messages to any interfaced CRM systems (such as Sugar or Salesforce.com) through the standard API. *Only one active CRM connection is allowed at a time. If the user wishes to switch CRM connections, Click CRM Client Settings, select the CRM and enter the required credentials.*

**Download Options** – Allows the user to download the recorded call.

**Recycle Options** – Allows the user to send the audio to the Call Recorder recycle bin.

**Save** – Provides option to retain the message and remove it from the recycle bin. This only appears if the message has already been moved to the recycle bin.

**Delete** – Provides the option to delete the message once it's in the recycle bin. When selected, all message option buttons will be replaced with a message, **Media file is not available**.



## Archive to CRM


### Setup Archive to CRM

1. Go to **Message Tab > CRM Client Settings** link in the toolbar.  
Or, click on the **CRM Client Settings** link in the Archive to CRM dialog box.
2. Select the CRM application to connect to from the drop-down list
3. Enter or select the **URL**, **username**, and **password** to that CRM application.
4. Click **Test Connection**. A confirmation is displayed notifying you if the connection was successful or failed.
5. Click **Save** when the connection is successful.

**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.

## Archive a message to CRM

While in the Message Tab:

1. Click  Archive to CRM next to the message that you want to 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.
2. Enter a **Subject** and a **Note** about the message
3. Click **Archive to CRM**.

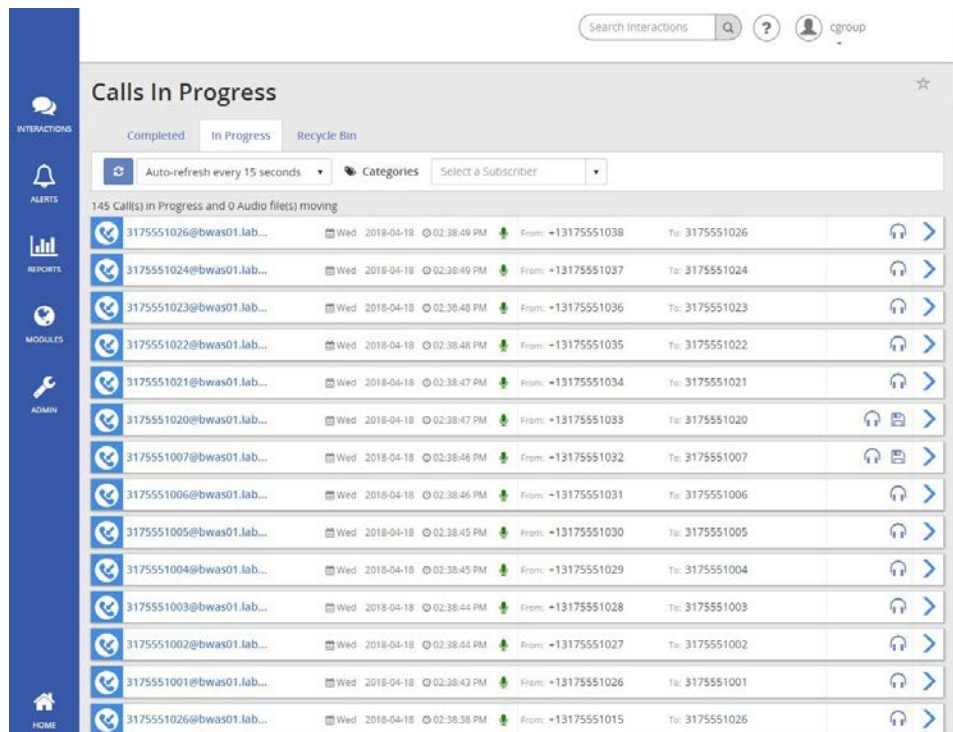
**Note:** *There will not be an email option for any messages that have been deleted.*

## 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 In; Save recordings; and Add Notes and Categories.

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



**Calls In Progress**

Completed In Progress Recycle Bin

Auto-refresh every 15 seconds Categories Select a Subscriber

145 Call(s) in Progress and 0 Audio file(s) moving

| Call ID                  | Date | Time                   | Status      | From               | To             | Actions |
|--------------------------|------|------------------------|-------------|--------------------|----------------|---------|
| 3175551026@bwas01.lab... | Wed  | 2018-04-18 02:38:09 PM | In Progress | From: +13175551038 | To: 3175551026 |         |
| 3175551024@bwas01.lab... | Wed  | 2018-04-18 02:38:49 PM | In Progress | From: +13175551037 | To: 3175551024 |         |
| 3175551023@bwas01.lab... | Wed  | 2018-04-18 02:38:48 PM | In Progress | From: +13175551036 | To: 3175551023 |         |
| 3175551022@bwas01.lab... | Wed  | 2018-04-18 02:38:48 PM | In Progress | From: +13175551035 | To: 3175551022 |         |
| 3175551021@bwas01.lab... | Wed  | 2018-04-18 02:38:47 PM | In Progress | From: +13175551034 | To: 3175551021 |         |
| 3175551020@bwas01.lab... | Wed  | 2018-04-18 02:38:47 PM | In Progress | From: +13175551033 | To: 3175551020 |         |
| 3175551007@bwas01.lab... | Wed  | 2018-04-18 02:38:46 PM | In Progress | From: +13175551032 | To: 3175551007 |         |
| 3175551006@bwas01.lab... | Wed  | 2018-04-18 02:38:46 PM | In Progress | From: +13175551031 | To: 3175551006 |         |
| 3175551005@bwas01.lab... | Wed  | 2018-04-18 02:38:45 PM | In Progress | From: +13175551030 | To: 3175551005 |         |
| 3175551004@bwas01.lab... | Wed  | 2018-04-18 02:38:45 PM | In Progress | From: +13175551029 | To: 3175551004 |         |
| 3175551003@bwas01.lab... | Wed  | 2018-04-18 02:38:44 PM | In Progress | From: +13175551028 | To: 3175551003 |         |
| 3175551002@bwas01.lab... | Wed  | 2018-04-18 02:38:44 PM | In Progress | From: +13175551027 | To: 3175551002 |         |
| 3175551001@bwas01.lab... | Wed  | 2018-04-18 02:38:43 PM | In Progress | From: +13175551026 | To: 3175551001 |         |
| 3175551026@bwas01.lab... | Wed  | 2018-04-18 02:38:38 PM | In Progress | From: +13175551015 | To: 3175551026 |         |



preserved for a number, a green checkmark will appear under the Screen Recording column on the Calls in Progress screen.

Along with To/From, Names/Numbers, and timestamp information, the following features are displayed on the Calls in Progress screen:

- **Recording Status** – Indicates 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 In 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 is disabled. If calls are not set to be saved, the option box is 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*

If *On Demand* is defined 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 gray. When the recording is resumed or active, the buttons will appear green. Pausing or resuming a recording automatically creates an annotation.

The optional 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: A valid number must be entered. Users cannot modify the To or From numbers. Additionally, the number entered must be registered to your server. The application will attempt to call a non-registered number, but if it is not valid, it will time out.*

### Record a Call in Progress

1. Open the [In Progress](#) tab.
2. Click to place a checkmark in the option box of a call that does not have [Save Recording](#) selected.  
This action only records this call. It does not set up auto-record for future calls for this number.

## Alerts

Alerts can be setup based on specific call conditions. When those conditions are met, the user is notified with the pertinent details and can address any issues or make any necessary changes to current policies or procedures.

A history of the alerts that have executed is available within the Alerts tab. If excessive alerts are produced (more than 1000 per second) or the log grows to large, Alerts are halted and the user is informed via email so they may correct the issue.

### To Create an Alert

1. Enter an Alert Name. (maximum of 50 characters)
2. Select the following:
  - Event Type
  - Enabled/disabled
  - When the alert should run.

Your input options will vary depending on selections from the following alert rule options:

- **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.
  - **Start Time** – Select the start time the Alert should begin running on the selected day(s) as needed.
  - **End Time** – Select the end time that the Alert should stop running on the selected day(s) as needed.
- **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. Must be at least 3 digits.

| Recycle Bin                            |   | Manage Alerts | Dismiss All |
|--|---|---------------|-------------|
| Name                                   | Message   |               |             |
| Call Terminated<br>2018-04-17 04:12 PM | The "Call Terminated" Alert was fired for a Call from 2001 (Baofu) to 3172630000 (Sukanta) which occurred on 2018-04-17 16:12:09. |               |             |
| Call Terminated<br>2018-04-17 03:42 PM | The "Call Terminated" Alert was fired for a Call from 2001 (Baofu) to 3172630000 (Sukanta) which occurred on 2018-04-17 15:42:09. |               |             |
| Call Terminated<br>2018-04-17 03:12 PM | The "Call Terminated" Alert was fired for a Call from 2001 (Baofu) to 3172630000 (Sukanta) which occurred on 2018-04-17 15:12:09. |               |             |
| Call Terminated<br>2018-04-17 02:42 PM | The "Call Terminated" Alert was fired for a Call from 2001 (Baofu) to 3172630000 (Sukanta) which occurred on 2018-04-17 14:42:09. |               |             |
| Call Terminated<br>2018-04-17 02:12 PM | The "Call Terminated" Alert was fired for a Call from 2001 (Baofu) to 3172630000 (Sukanta) which occurred on 2018-04-17 14:12:09. |               |             |
| Call                                   |   |               |             |

- **To Caller ID** – Defines the terminating caller ID or partial terminating caller ID on which to alert. Must be at least 3 digits.
  - **From Number** – Defines the originating number or partial originating number on which to alert. Must be at least 3 digits.
  - **To Number** – Defines the dialed number or partial dialed number on which to alert. Must be at least 3 digits.
  - **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.
3. **Add a Category** – As desired, 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.
  4. **Add a Comment** – As desired, 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.
  5. **Email** – Select whether or not you want to be notified by email when an alert occurs by clicking in the option box. If you selected to be notified by email, enter the To and From email addresses.
  6. Click **Save**.

The Alerts dialog box displays a list of alerts that have occurred under the Alerts History section.

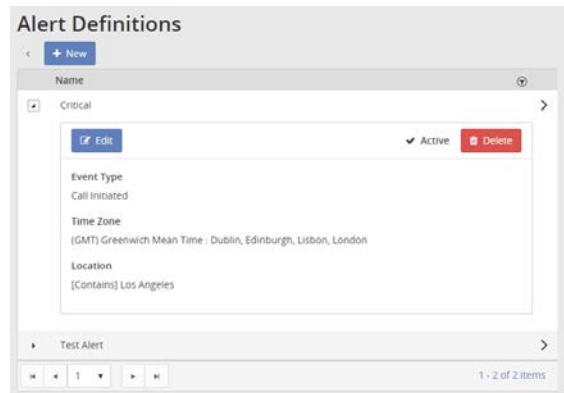
## Manage Alert Definitions

1. Click the **Alerts** tab on the side panel to open the Alerts page.
2. Click the **Manage Alerts** link to open the *Alert Definitions* page and review all active and inactive definitions.
3. Click on the arrow on either side of the specific alert definition to expand it.



<<5>>

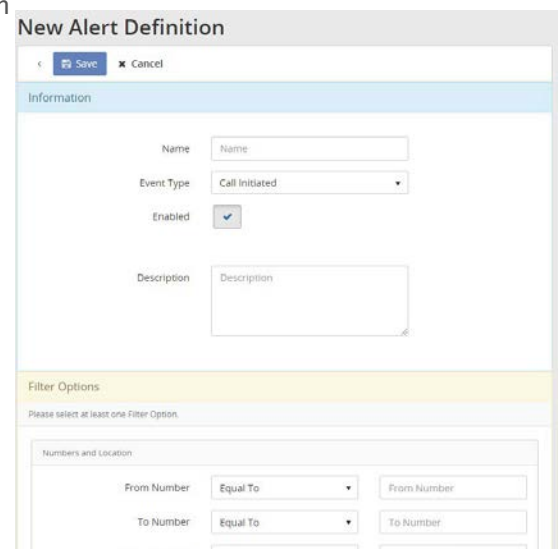
4. Make edits to alert definition, activate/deactivate alert definition, or delete alert definition.
5. Click **Save** when finished.



The screenshot shows the 'Alert Definitions' interface. At the top, there is a '+ New' button. Below it, a table lists alert definitions. The first entry is 'Critical' with an 'Edit' button, an 'Active' status indicator, and a 'Delete' button. The details for this alert are: Event Type: Call Initiated, Time Zone: (GMT) Greenwich Mean Time : Dublin, Edinburgh, Lisbon, London, and Location: [Contains] Los Angeles. At the bottom, there is a 'Test Alert' button and a pagination indicator '1 - 2 of 2 items'.

### Add a New Alert Definition

1. Click the Alerts tab on the side panel to open the Alerts page.
2. Click the New link to open up the New Alert Definition window.
3. Enter or select the following information, as needed:
  - Name – required. Example: Test Alert
  - Event Type – select an option.
  - Enabled – Click to place a check mark to use the definition.
  - Description – Short purpose of the alert.
  - Filter Options for From/To numbers, etc.
4. Click **Save** to add the new alert definition to the Alert Definitions list.



The screenshot shows the 'New Alert Definition' window. It has a 'Save' button and a 'Cancel' button. The 'Information' section contains fields for 'Name', 'Event Type' (a dropdown menu), 'Enabled' (a checkbox), and 'Description'. The 'Filter Options' section has a message 'Please select at least one Filter Option.' and a 'Numbers and Location' section with 'From Number' and 'To Number' fields, each with an 'Equal To' dropdown menu.

### Edit an Alert Definition


While in Alert Definitions:

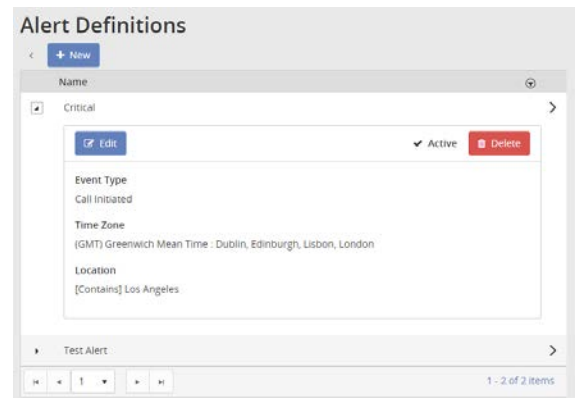
1. Click the arrow on either side of the desired Alert to expand that alert definition information.
2. Click the Edit button to open the Edit Alert Definition window.
3. Make changes, as needed.
4. Click on the **Save** button at the bottom of the dialog.

## Activate/Deactivate an Alert Definition

By default, Alert definitions are set to Active.

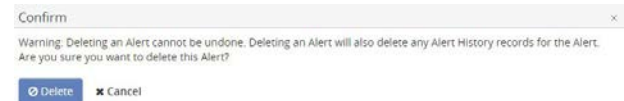
While in Alert Definitions:

1. Expand the desired Alert.
2. Click on the  **Active** link to deactivate that alert definition.
3. The inactive definition now displays as disabled (grayed out) in the Alert Definitions list.



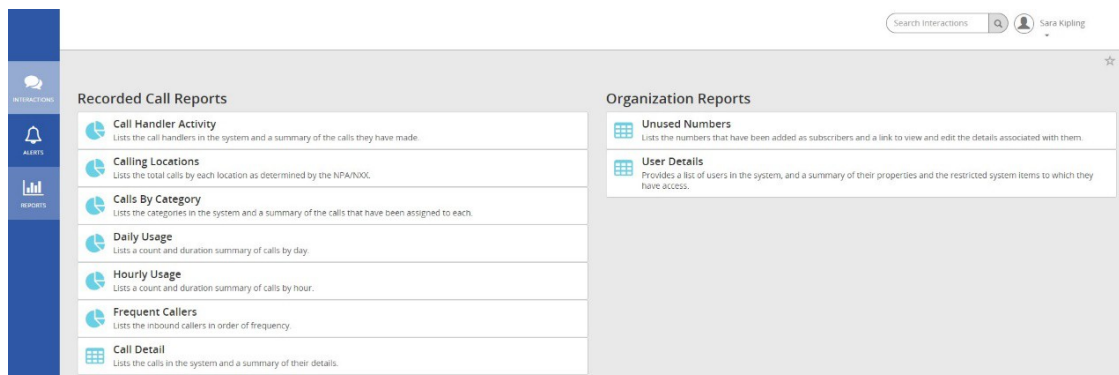
## Delete an Alert Definition

1. Expand an Alert to review the Alert Definition information.
2. Click the **Delete** button.
3. Confirm the action (click **Delete**) when prompted.



## Reports

There are nine reports included in the application to 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. Users can filter on information in the reports, such as number, date, and time.



Reports are divided into two categories:

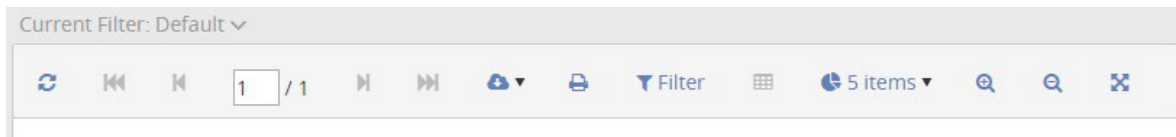
### Recorded Call Reports

Call HandlerActivity  
Calling Locations  
Calls byCategory  
Daily Usage  
Hourly Usage  
Frequent Callers

### Organization Reports

Unused Numbers  
User Details

To open a Report, click on the desired report on the Recorded Call Reports page. This will open up a report window displaying the report and an editing bar. The tools are standard for all reports.



## Call Handler Activity

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

| Call Handler               | Description | Calls v | Average Duration | Minimum Duration | Maximum Duration |
|----------------------------|-------------|---------|------------------|------------------|------------------|
| 7054855700@bwa01.lab.local |             | 50000   | 00:01:00         | 00:01:00         | 00:01:02         |

## Calling Locations

The Calling Locations report displays total calls by each location as determined by the NPA/NXX, for the last 30 days by default. 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.

| Number    | Location         | Calls v |
|-----------|------------------|---------|
| (317) 555 | INDIANAPOLIS, IN | 50000   |

## Calls by Category

The Calls by Category report displays total calls by custom category for the last 30 days by default. 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.

| Category  | Calls v | Average Duration | Minimum Duration | Maximum Duration |
|-----------|---------|------------------|------------------|------------------|
| Testing   | 2       | 00:01:00         | 00:01:00         | 00:01:00         |
| Duplicate | 1       | 00:01:00         | 00:01:00         | 00:01:00         |
| Document  | 1       | 00:01:00         | 00:01:00         | 00:01:00         |
| Critical  | 1       | 00:01:00         | 00:01:00         | 00:01:00         |

## 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.

| Daily Usage |       |                  |                  |                  |
|-------------|-------|------------------|------------------|------------------|
| Date        | Calls | Average Duration | Minimum Duration | Maximum Duration |
| 2018-03-16  | 802   | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-03-17  | 2619  | 00:01:00         | 00:01:00         | 00:01:00         |
| 2018-03-18  | 2619  | 00:01:00         | 00:01:00         | 00:01:00         |
| 2018-03-19  | 2615  | 00:01:00         | 00:01:00         | 00:01:02         |
| 2018-03-20  | 2619  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-03-21  | 2617  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-03-22  | 2617  | 00:01:00         | 00:01:00         | 00:01:00         |
| 2018-03-23  | 2614  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-03-24  | 2619  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-03-25  | 2508  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-03-26  | 2616  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-03-27  | 2619  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-03-28  | 2617  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-03-29  | 2618  | 00:01:00         | 00:01:00         | 00:01:00         |
| 2018-03-30  | 2618  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-03-31  | 2619  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-04-01  | 2616  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-04-02  | 2615  | 00:01:00         | 00:01:00         | 00:01:02         |
| 2018-04-03  | 2619  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-04-04  | 2071  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2018-04-05  | 123   | 00:01:00         | 00:01:00         | 00:01:00         |

## 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.

| Hourly Usage |       |                  |                  |                  |
|--------------|-------|------------------|------------------|------------------|
| Time         | Calls | Average Duration | Minimum Duration | Maximum Duration |
| 12:00 AM     | 2060  | 00:01:00         | 00:01:00         | 00:01:01         |
| 1:00 AM      | 1959  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2:00 AM      | 2070  | 00:01:00         | 00:01:00         | 00:01:01         |
| 3:00 AM      | 2076  | 00:01:00         | 00:01:00         | 00:01:01         |
| 4:00 AM      | 2070  | 00:01:00         | 00:01:00         | 00:01:01         |
| 5:00 AM      | 2073  | 00:01:00         | 00:01:00         | 00:01:00         |
| 6:00 AM      | 2073  | 00:01:00         | 00:01:00         | 00:01:01         |
| 7:00 AM      | 2073  | 00:01:00         | 00:01:00         | 00:01:00         |
| 8:00 AM      | 2072  | 00:01:00         | 00:01:00         | 00:01:01         |
| 9:00 AM      | 2073  | 00:01:00         | 00:01:00         | 00:01:00         |
| 10:00 AM     | 2079  | 00:01:00         | 00:01:00         | 00:01:00         |
| 11:00 AM     | 2070  | 00:01:00         | 00:01:00         | 00:01:01         |
| 12:00 PM     | 2075  | 00:01:00         | 00:01:00         | 00:01:00         |
| 1:00 PM      | 2070  | 00:01:00         | 00:01:00         | 00:01:01         |
| 2:00 PM      | 2076  | 00:01:00         | 00:01:00         | 00:01:01         |
| 3:00 PM      | 2070  | 00:01:00         | 00:01:00         | 00:01:01         |
| 4:00 PM      | 2116  | 00:01:00         | 00:01:00         | 00:01:01         |
| 5:00 PM      | 2235  | 00:01:00         | 00:01:00         | 00:01:01         |
| 6:00 PM      | 2247  | 00:01:00         | 00:01:00         | 00:01:01         |
| 7:00 PM      | 2075  | 00:01:00         | 00:01:00         | 00:01:02         |
| 8:00 PM      | 2073  | 00:01:00         | 00:01:00         | 00:01:02         |
| 9:00 PM      | 2072  | 00:01:00         | 00:01:00         | 00:01:01         |
| 10:00 PM     | 2073  | 00:01:00         | 00:01:00         | 00:01:00         |
| 11:00 PM     | 2074  | 00:01:00         | 00:01:00         | 00:01:01         |

## 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.

### Frequent Callers

| Number       | Caller ID | Calls v | Average Duration | Minimum Duration | Maximum Duration |
|--------------|-----------|---------|------------------|------------------|------------------|
| +13175551071 |           | 16669   | 00:01:00         | 00:01:00         | 00:01:01         |
| +13175551050 |           | 16668   | 00:01:00         | 00:01:00         | 00:01:02         |
| +13175551075 |           | 16663   | 00:01:00         | 00:01:00         | 00:01:01         |

## Call Detail

The Call Detail report lists calls in the system and a summary of the associated call details. The Call Details report is text format only.

### Call Detail

| Start Date           | From Number  | To Number  | From Caller | To Caller | Location         | End Date             | Tenantid | ToDelete Flag |
|----------------------|--------------|------------|-------------|-----------|------------------|----------------------|----------|---------------|
| 4/10/2018 9:24:09 PM | +13175551075 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:25:09 PM | 5        | False         |
| 4/10/2018 9:24:07 PM | +13175551071 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:25:07 PM | 5        | False         |
| 4/10/2018 9:23:56 PM | +13175551050 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:24:56 PM | 5        | False         |
| 4/10/2018 9:22:30 PM | +13175551075 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:23:30 PM | 5        | False         |
| 4/10/2018 9:22:28 PM | +13175551071 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:23:28 PM | 5        | False         |
| 4/10/2018 9:22:17 PM | +13175551050 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:23:17 PM | 5        | False         |
| 4/10/2018 9:20:51 PM | +13175551075 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:21:51 PM | 5        | False         |
| 4/10/2018 9:20:49 PM | +13175551071 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:21:49 PM | 5        | False         |
| 4/10/2018 9:20:38 PM | +13175551050 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:21:38 PM | 5        | False         |
| 4/10/2018 9:19:12 PM | +13175551075 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:20:12 PM | 5        | False         |
| 4/10/2018 9:19:10 PM | +13175551071 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:20:10 PM | 5        | False         |
| 4/10/2018 9:18:59 PM | +13175551050 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:19:59 PM | 5        | False         |
| 4/10/2018 9:17:33 PM | +13175551075 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:18:33 PM | 5        | False         |
| 4/10/2018 9:17:31 PM | +13175551071 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:18:31 PM | 5        | False         |
| 4/10/2018 9:17:20 PM | +13175551050 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:18:20 PM | 5        | False         |
| 4/10/2018 9:15:54 PM | +13175551075 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:16:54 PM | 5        | False         |
| 4/10/2018 9:15:52 PM | +13175551071 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:16:52 PM | 5        | False         |
| 4/10/2018 9:15:41 PM | +13175551050 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:16:41 PM | 5        | False         |
| 4/10/2018 9:14:15 PM | +13175551075 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:15:15 PM | 5        | False         |
| 4/10/2018 9:14:13 PM | +13175551071 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:15:13 PM | 5        | False         |
| 4/10/2018 9:14:02 PM | +13175551050 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:15:02 PM | 5        | False         |
| 4/10/2018 9:12:36 PM | +13175551075 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:13:36 PM | 5        | False         |
| 4/10/2018 9:12:34 PM | +13175551071 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:13:34 PM | 5        | False         |
| 4/10/2018 9:12:23 PM | +13175551050 | 7064886700 |             |           | INDIANAPOLIS, IN | 4/10/2018 9:13:23 PM | 5        | False         |

## Unused Numbers

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

### Unused Numbers

| Number ^   | Description   |
|------------|---|
| 7064886700 | <a href="#">View and Edit Details (temporarily linked to Home Page)</a> |
| 7064886701 | <a href="#">View and Edit Details (temporarily linked to Home Page)</a> |

## 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.

### User Details

| User Name ^  | Email                   | Created On | Last Logon | Password Changed On | Assigned Subscribers | Annotations | Categories | CRM Enabled |
|--------------|-------------------------|------------|------------|---------------------|----------------------|-------------|------------|-------------|
| Sara Kipling | vijay.goje@enghouse.com | 4/22/2015  | 4/4/2018   | 2/15/2018           | 3                    | 0           | 0          | False       |