

Business Voice

Cloud

Call Recording

For Administrators

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Sign In

In order to access the application, you must logon with a user name and password. The user name is assigned by the Group Administrator that created them in the End User Interface.

Passwords are auto-generated by the application and emailed directly to you. Once you have access to the application, you have the ability to change your password using the Change Password link. You are then able to select a password of your choice. Passwords are initially auto-generated because Administrators and Providers are not 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://mycallrecordings.mylogix.com/>
3. Enter the User Name and click **Next**.
4. Enter the Password and click **Sign In**.

Call Recorder Login

 **x Sara Kipling**

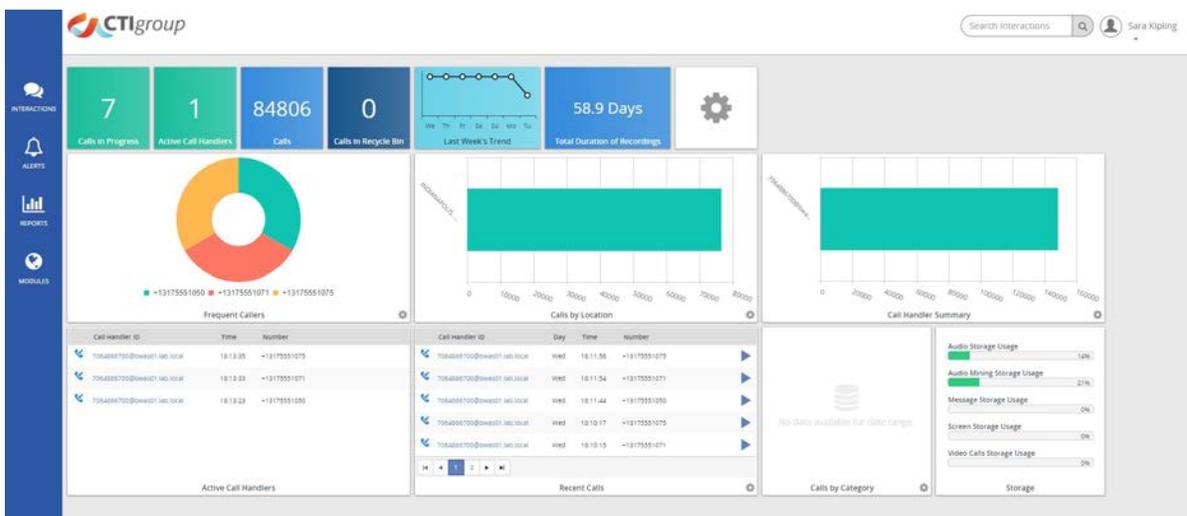


SIGN IN

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.



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

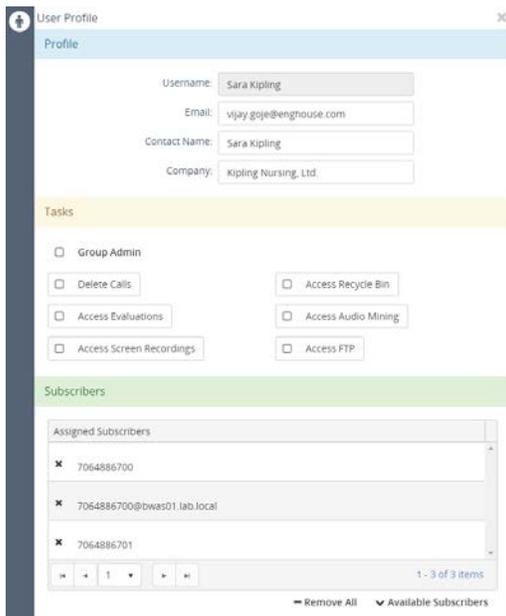
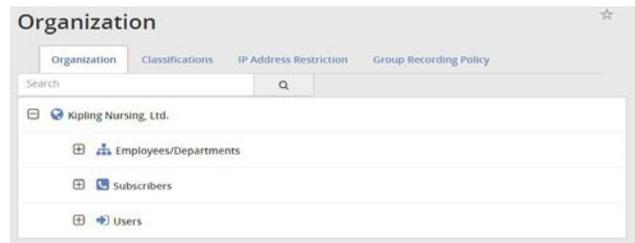
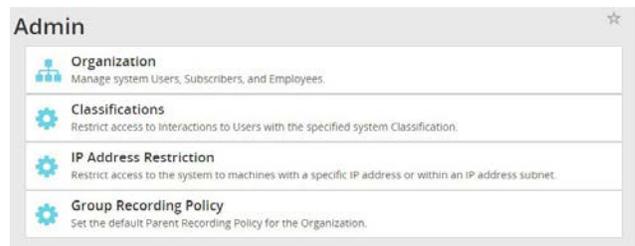


Type the desired search term in the **Search Interactions** field in the upper right of the screen and click the Search button or press Enter.

Search for an Employee or Department

1. Click the **Admin** tab on the side panel to open the Admin page.
2. Select the **Organization** tab to review the organizational hierarchy.
3. Enter the information you wish to find following in the Search field:
4. Click the Search  button.

Results of the search display. Users can click on the user name to open up the User Profile page.



ADMIN TAB

The Administration tab is only available to **Group Administrators**. This is where Group Administrators will add and maintain their Organization, Subscribers, Users, classifications, IP Addresses Restriction, and Group Recording Policies.

The Organization section allows Group Administrators to create and manage a hierarchical structure of their organization and/or department(s), and its employees. While creating the hierarchical structure, Group Administrators can assign Screen Recording access to each employee and their related subscriber.

The Group account is created automatically during the installation process or when the Group is created in the Administrative Portal. The Group will always appear as the top level "account" in the hierarchy structure and can have multiple Employees and/or Departments.

For organizational purposes, it is best to create all employees and departments first and then assign employees to the departments

Employees

Employees are created under the Group and then assigned to Departments. The Employee level is where you will identify Screen Recording access and criteria for Employees and their assigned subscriber(s). Users can also add a new employee from the top hierarchy level under the Employees and Departments hierarchies. Employees can have multiple assignments. When logged on to the application, Employees can only see other Employees that are assigned to them.

Assign Employee to Subscribers

1. Click on Employees (the top level of the employee hierarchy) to display a list of employees that are not currently assigned to subscribers.
2. Select an Employee to assign.
3. Note: Users may drag and drop employees under the applicable department once both are created.
4. Ensure the following information is defined or selected for the employee:
 - Name - identifies the name of the employee
 - Description - a brief description about the employee, job title, etc.
 - Title - the employees title within the organization
 - Department - identifies the department to which the employee is assigned
 - Manager - identifies the manager to which the employee is assigned, if applicable
 - Shift Start Time - identifies the start time of the call handler's work shift
 - Shift End Time - identifies the end time of the call handler's work shift
5. Click in the corresponding option box to select the screen recording subscription assignment(s) for this employee.
6. Click AssignSubscribers.

Assign Screen Recording Criteria

While reviewing an Employee Profile:

1. Enter or select the following Screen Recording Profile information and Save:

User Name - identifies the log on ID of the domain used for screen recording (Example: Active Directory log onID).

Password - The personal identification number (PIN) the employee uses to access screen recording.

Recording Quality - Defines the quality of the screen recording image. The quality selected will affect the size of the screen recording output. The default recording quality is **Medium**.

Wrapup Time (Seconds) - The number of seconds screen recording will occur after the call has been terminated.

From Number – A specific incoming number or numbers that should trigger screen recording. For example: Every time the incoming number identified in this field this subscriber, the system should record the employee's screen. The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The comma (,) and semicolon (;) can be used as delimited values if you would like to apply two or more rules.

To Number – A specific outgoing number or numbers that should trigger screen recording. For example: Every time the outgoing number identified in this field is called from this subscriber, the system should record the employee's screen. The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The comma (,) and semicolon (;) can be used as delimited values if you would like to apply two or more rules.

From Caller ID - identifies incoming calls from a specific person, people, or place (the actual text part or ID) that should trigger screen recording. For example: Every time the name or ID identified in this field calls this subscriber, the system should record the employee's screen. The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The comma (,) and semicolon (;) can be used as delimited values if you would like to apply two or more rules.

To Caller ID - identifies outgoing calls from a specific person, people, or place (the actual text part or ID) that should trigger screen recording. For example: Every time the outgoing name or ID identified in this field is called from this subscriber, the system should record the employee's screen. The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The comma (,) and semicolon (;) can be used as delimited values if you would like to apply two or more rules.

Percent of sessions to record:

- *Inbound Percent of screen recordings to record for this employee.* Range values are 0-100%. The default is **100%**.
- *Outbound Percent of screen recordings to record for this employee.* Range values are 0-100%. The default is **100%**.

Start Time - it may only be necessary to record for a certain time range during the day. In this case, you can designate a specific time of day to begin screen recording.

Stop Time - designates a specific time of day to stop recording in the event you have designated a record start time.

Time Zone - Defines the time zone in which the screen recordings will be recorded.

Days – Defines specific days of the week on which to perform screen recording for a particular employee.

Departments

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

The Department profile includes the following information:

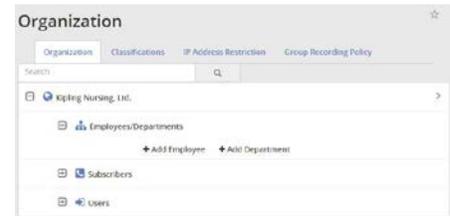
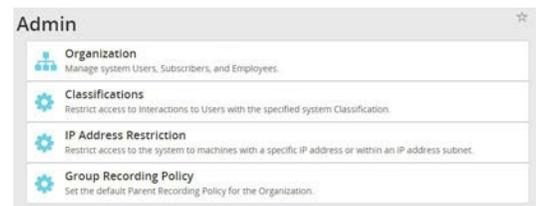
- **Name** – The unique name of the department.
- **Description** – A brief description of the department.
- **Parent** – Defines whether the department falls under a parent Group.



A screenshot of a web form titled "Department". It contains three input fields: "Name:" (empty), "Description:" (empty), and "Parent:" (a dropdown menu with "No Parent" selected). A blue "Save" button is located at the bottom right.

Add a New Department

1. Click the **Admin** tab on the side panel.
2. Select the **Organization** option to ensure that you are looking at the organizational hierarchy.
3. Click the **Expand** icon  to review the Employees/Departments option.
4. Select the **Add Department** link to open the Department window.
5. Enter or select the following information:
 - **Name** – Unique identifier for lists
 - **Description** – Short note about the new department.
 - **Parent** – Select an option from the drop-down menu.
6. Click **Save**.



Update a Department

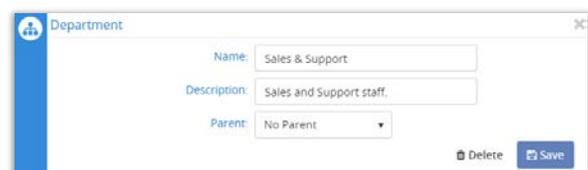
While in Admin > Organization:

1. Locate the desired Group/organization.
2. Click the  Expand icon next to Employees/Departments.
3. Click the arrow > next to the desired Department to open the Departments window.
4. Modify the Name, Description, or Parent association, as needed.
5. Click **Save**.

Delete a Department

While Viewing a Department:

1. Click **Delete**.
2. Click **Delete** again when prompted to confirm.



A screenshot of the "Department" form. The "Name:" field contains "Sales & Support", the "Description:" field contains "Sales and Support staff.", and the "Parent:" dropdown is set to "No Parent". There are "Delete" and "Save" buttons at the bottom right.

Add a New Employee

1. Go to **Admin > Organization**.
2. Click on the  Expand icon next to **Employees/Departments**.
3. Click the **Add Employee** link to open the Employee Profile window.
4. **Profile:** Enter or select the following information as needed:

- **Name** – required. employee's name
- **Title** – job/role
- **Department** – select a department
- **Manager** – select a manager
- **Shift Start Time** – select a time
- **Shift End Time** – select a time

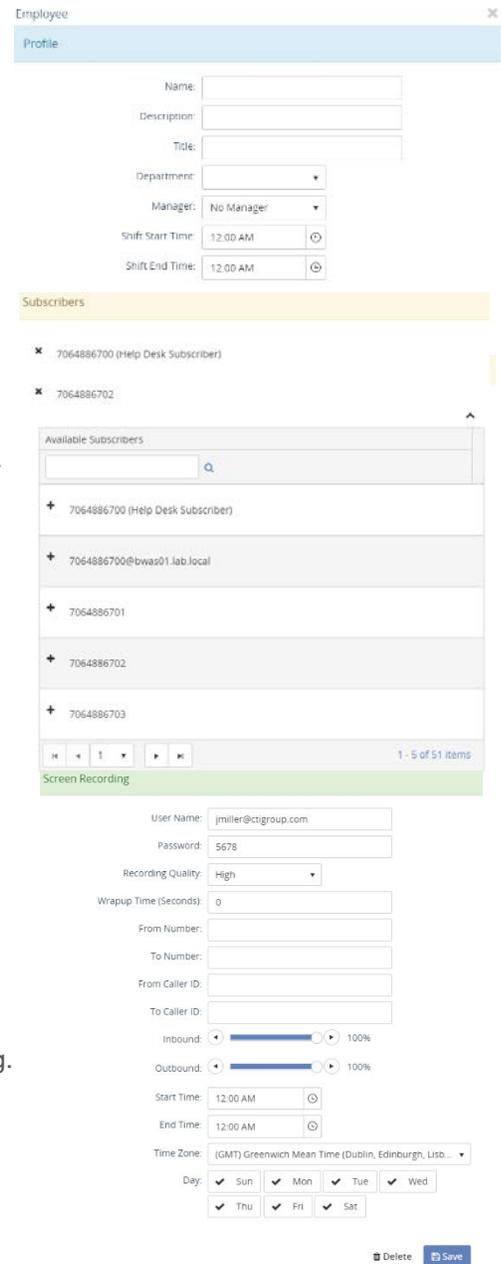
5. **Subscribers:** Click the down arrow next to **Available Subscribers** to open up the list of available Subscribers to assign.

- Select at least one subscriber to associate with the User by clicking the **+** to add that Subscriber to the Assigned Subscribers list at the top of the panel.

6. **Screen Recording:** Enter or select the following Screen Recording profile information:

- **User Name** – Login Name (e.g.; email address)
- **Password** – Enter the PIN (e.g.; 1234)
- **Recording Quality** – Select from the drop-down menu.
- **Wrapup Time (Seconds)** – Enter the number of seconds to continue recording after the call ends.
- **From Number** – Originating number to trigger recording
- **To Number** – Terminating number to trigger recording
- **From Caller ID** – Originating caller ID to trigger recording.
- **To Caller ID** – Terminating number to trigger recording.
- **Inbound** – Select confidence level. (default is 100%)
- **Outbound** – Select confidence level (default is 100%)
- **Start Time** – Time of day to begin to allow recording.
- **End Time** – Time of day to stop allowing recording.
- **Time Zone** – Select the time zone for recording.
- **Day** – Click to select the days of the week to include.

7. Click **Save**.



The screenshot displays the 'Employee Profile' window, which is divided into three main sections: Profile, Subscribers, and Screen Recording.

Profile Section: This section contains several input fields for employee information: Name (text input), Description (text input), Title (text input), Department (dropdown menu), Manager (dropdown menu with 'No Manager' selected), Shift Start Time (time selector set to 12:00 AM), and Shift End Time (time selector set to 12:00 AM).

Subscribers Section: This section shows a list of available subscribers. At the top, there are two assigned subscribers: '7064886700 (Help Desk Subscriber)' and '7064886702'. Below this is a section titled 'Available Subscribers' with a search bar and a list of subscribers, each with a '+' icon to add them to the assigned list. The list includes: '7064886700 (Help Desk Subscriber)', '7064886700@bwas01.lab.local', '7064886701', '7064886702', and '7064886703'. A pagination indicator at the bottom right shows '1 - 5 of 51 items'.

Screen Recording Section: This section contains various configuration options for recording: User Name (text input with 'jmillerc@ctigroup.com'), Password (text input with '5678'), Recording Quality (dropdown menu set to 'High'), Wrapup Time (Seconds) (text input with '0'), From Number (text input), To Number (text input), From Caller ID (text input), To Caller ID (text input), Inbound and Outbound confidence levels (sliders both set to 100%), Start Time (time selector set to 12:00 AM), End Time (time selector set to 12:00 AM), Time Zone (dropdown menu set to '(GMT) Greenwich Mean Time (Dublin, Edinburgh, Lsb...)', and Day (checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, Sat, with Sun, Mon, Tue, Wed, and Fri checked).

At the bottom right of the Screen Recording section, there are 'Delete' and 'Save' buttons.

Update an Employee

1. Go to **Admin > Organization > Employees/Departments.**
2. Select the Employee from the list.
3. Modify the employee profile information, as needed.
4. Click **Save.**

Delete an Employee

1. Go to **Admin > Organization > Employees/Departments.**
2. Select the Employee from the list.
3. Click the **Delete** option at the bottom of the Employee Profile window.
4. Click **Delete** when prompted to confirm to complete the action.

Deleting an Employee cannot be undone.
Click "Delete" to continue.

Employee Profile

Name: John Miller
Description:
Title: Sales Support
Department: Sales & Support
Manager: No Manager
Shift Start Time: 12:00 AM
Shift End Time: 12:00 AM

Subscribers

- 7064886700 (Help Desk Subscriber)
- 7064886702
- 7064886705

Available Subscribers

Screen Recording

User Name: jmillerc@ctigroup.com
Password: 5678

Subscribers

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

Organization

Organization | Classifications | IP Address Restriction | Group Recording Policy

Search

Kipling Nursing, Ltd.

Employees/Departments

Subscribers

Subscriber Bulk Update

- 7064886700
- 7064886700@bwass01.lab.local
- 7064886701
- 7064886702
- 7064886703
- 7064886704
- 7064886705
- 7064886706

Recording criteria for Subscribers includes the following:

Profile Panel

Subscriber	Identifies the subscriber. This information is automatically entered by the application.
Description	If applicable, provides a description for this subscriber. For instance who it belongs to or where it is located.
Time Zone	Identifies the time zone in which the calls will be recorded.
Languages	Identifies the language pack or packs in which to output audio mining speech packs. Language options include the following: English (US), English (UK), and Spanish.

Retention Policy and Call Retention

Do Not Retain Recording	Identifies whether or not recordings from this subscriber will be retained each time a call occurs. The recordings will be retained each time a call occurs if a check mark does not appear in the option box. The recordings will not be retained each time a call occurs if a check- mark does appear in the option box.
From Number	Identifies a specific number or numbers from which calls should be recorded. For example: Every time the incoming number identified in this field calls this subscriber, the system should record the calls. The wildcard % (percent) can be used in place of a number. A _ (under- score) is identified as a single character substitution. The , (comma) and ; (semicolon) can be used as delimited values if you would like to apply two or more rules.
To Number	Identifies a specific number or numbers to which calls should be recorded. For example: Every time the outgoing number identified in this field is called from this subscriber, the system should record the calls. The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The , (comma) and ; (semicolon) can be used as delimited values if you would like to apply two or more rules.
Redirected From	Identifies a specific number or numbers a call was redirected from that should be recorded. For example: Every time the incoming number identified in this field is redirected to this subscriber, the system should record the calls. The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The , (comma) and ; (semicolon) can be used as delimited values if you would like to apply two or more rules.

Redirected To	Identifies a specific number or numbers a call was redirected to that should be recorded. For example: Every time the outgoing number identified in this field is redirected from this subscriber, the system should record the calls. The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The , (comma) and ; (semicolon) can be used as delimited values if you would like to apply two or more rules.
DTMF Sequence	Identifies the number sequence, or DTMF digits, entered by the user while a call is in progress, to identify calls that are to be recorded.
From Caller ID	Identifies a specific person, people, or place (the actual text part or ID) from which calls should be recorded. For example: Every time the name or ID identified in this field calls this subscriber, the system should record the calls. The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The , (comma) and ; (semicolon) can be used as delimited values if you would like to apply two or more rules.
To Caller ID	Identifies a specific person, people, or place (the actual text part or ID) to which calls should be recorded. For example: Every time the outgoing name or ID identified in this field is called from this subscriber, the system should record the calls. The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The , (comma) and ; (semicolon) can be used as delimited values if you would like to apply two or more rules.
Inbound	Percent of inbound calls to record for this subscriber. Range values are 0-100%. The default is 100%.
Outbound	Percent of outbound calls to record for this subscriber. Range values are 0-100%. The default is 100%.
Start Time	It may only be necessary to record for a certain time range during the day. In this case, you can designate a specific time of day to begin recording calls.
Stop Time	Designates a specific time of day to stop recording in the event you have designated a record start time.
Days of week to record	Identifies specific days of the week on which to record calls for a particular subscriber.

Message Retention

Do Not Retain Recording	Identifies whether or not message files from this subscriber will be retained each time a message occurs. The message files will be retained each time a message occurs if a check mark does not appear in the option box. The message files will not be retained each time a message occurs if a checkmark does appear in the option box.
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- From Number** Identifies a specific number or numbers from which messages should be recorded. For example: Every time the incoming number identified in this field messages this subscriber, the system should record the message. The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The , (comma) and ; (semicolon) can be used as delimited values if you would like to apply two or more rules.
- To Number** Identifies a specific number or numbers to which messages should be recorded. For example: Every time the outgoing number identified in this field is messaged from this subscriber, the system should record the message. The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The , (comma) and ; (semicolon) can be used as delimited values if you would like to apply two or more rules.
- From Name** Identifies a specific person, people, or place (the actual text part or ID) from which messages should be recorded. For example: Every time the name or ID identified in this field messages this subscriber, the system should record the message(s). The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The , (comma) and ; (semicolon) can be used as delimited values if you would like to apply two or more rules.
- To Name** Identifies a specific person, people, or place (the actual text part or ID) to which messages should be recorded. For example: Every time the outgoing name or ID identified in this field is messaged from this subscriber, the system should record the message(s). The wildcard % (percent) can be used in place of a number. A _ (underscore) is identified as a single character substitution. The comma (,) and semicolon (;) can be used as delimited values if you would like to apply two or more rules.
- Start Time** It may only be necessary to record for a certain time range during the day. In this case, you can designate a specific time of day to begin recording messages.
- Stop Time** Designates a specific time of day to stop recording in the event you have designated a record start time.
- Days of week to record** Identifies specific days of the week on which to record messages for a particular subscriber.

Until alternative recording criteria is selected, all calls and messages are recorded by default.

Note: All application features are defined for use at the Provider level. Some features described here may not be available to all users or Admins.

Features identify what functionality or features the user(s) assigned to this subscriber will have access to in the End User Interface. Features can be assigned as feature packs or individual features. Feature packs contain a subset of individual features. Individual features are also known as Application Features.

Application Features for Subscribers may include the following:

- **Alerting** – allows the user to use the alerting functionality.
- **Archive to ISO** – allows the user to archive selected calls as an ISO image file that can be stored on a CD or DVD.
- **Audio Mining Advanced** – allows the user to create audio mining packs and apply them to recorded calls. Applied speech packs do not have a maximum number of active phrases.
- **Audio Mining Basic** – allows the user to create audio mining packs and apply them to recorded calls. Applied speech packs can only have a maximum number of 25 active phrases.
- **Call Annotation** – allows the user to add comments and markers on calls to indicate where in the call a notable event might have occurred. This allows other users to find a notable event in a call and to mark it for future review with a comment.
- **Call Annotation File Upload** – allows the user to upload and attach a file into call annotations.
- **Call Barge** – allows the user to actively participate in a call that is currently taking place and actively participate with both parties of the call.
- **Call Monitor** - allows administrators to monitor a call in progress.
- **Call Whisper** - allows administrators to coach a Call Handler during a call in progress.
- **Categorization** - allows for interactions to be grouped into various pre-defined and custom Categories.
- **Classification** - allows a recorded call or message to be assigned a Classification which limits access to Users who do not have access to that Classification.
- **Clip Recordings in Progress** – allows the user to record a clip of the call in progress.
- **Comments** – allows the user to add a description or notes to a call record in order to recall the purpose of that recorded call at a later date.
- **Desktop Notifier Client** – allows the user to receive automated notifications of new incoming alerts. It then picks up on what call the alert is associated with, and enables you to playback the call, associate a category with the call, save the call (if it is still in progress), and write up comments for the call.
- **Email Links** – allows the user to email recording (call, screen, & message) links.
- **Evaluation** – allows the user to access the call handler evaluation functionality in order to create evaluations to assign to recorded calls.
- **External Call ID** - allows users to associate an external call ID to a clip recording.
- **FTP File Access** – selecting the FTP Access option box will allow the Group or User to FTP into the system to download any recordings that belong to them. The following is an example of why the FTP option is beneficial: if you are notified that recorded calls are going to be deleted, you can use FTP to access the calls to be deleted and download them to a permanent directory at your location. Once FTP recordings have been downloaded to a permanent directory, they will remain for as long as they are retained. All tags (except comments and files) are kept in these files.
- **ISO File List** - allows the user to see the ISO file(s) where a Recorded Interactions has been archived.
- **Messaging** – Allows the Group Administrator to select and enable messaging functionality for employees.
- **Mobile Access** – allows the user access to the mobile applications.
- **Reporting** – allows the user to see reports in the end user interface.

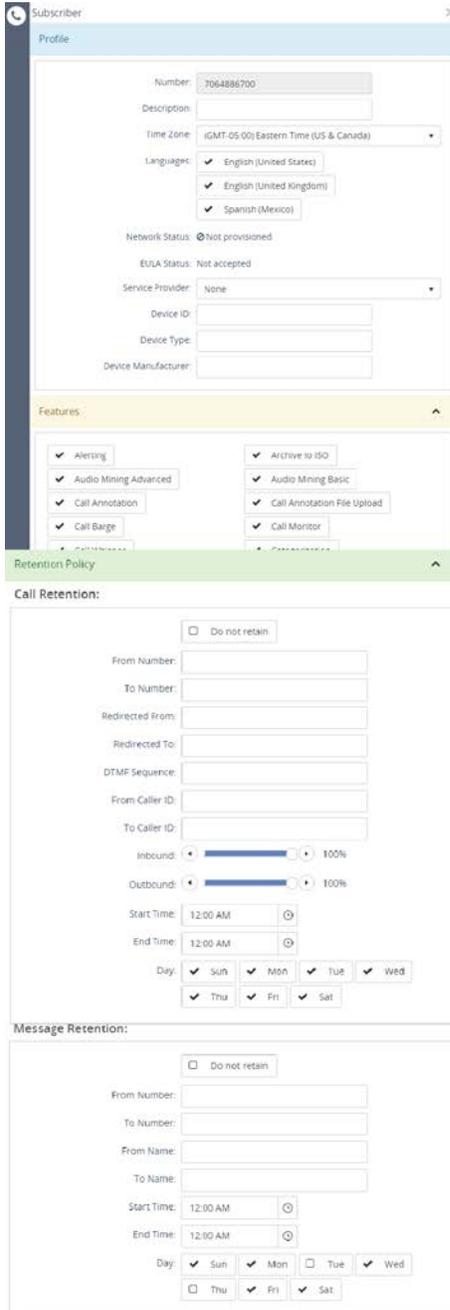
- **Screen Recording** – allows the user to access the screen recording functionality in order to view and play back screen recordings.
- **Video** - allows the video portion of a recorded call to be recorded and played back.

Access Subscribers

1. Go to **Admin > Organization**
2. Click the Expand icon  next to the **Subscribers** option to open the list for review.

Update a Subscriber

1. Go to **Admin > Organization**
2. Click the  to expand the **Subscribers** option.
3. Click on the subscriber you wish to update to open the **Subscriber Profile** window.
4. Modify settings and options in the following sections as needed:
 - **Profile:** Enter and select from the available options.
 - **Features:** Click to select/deselect options.
 - **Retention Policy:** Click the  link to expand the section and enter or select from the available options.
 - **Message Retention:** Click  link to expand the section and enter or select from the available options.
5. Click **Save** when finished.



The screenshot displays the 'Subscriber Profile' window with the following sections:

- Profile:** Includes fields for Number (7064886700), Description, Time Zone (iGMT-05:00 Eastern Time (US & Canada)), Languages (English (United States), English (United Kingdom), Spanish (Mexico)), Network Status (Not provisioned), EULA Status (Not accepted), Service Provider (None), Device ID, Device Type, and Device Manufacturer.
- Features:** A grid of checkboxes for features such as Alerting, Archive to ISO, Audio Mining Advanced, Audio Mining Basic, Call Annotation, Call Annotation File Upload, Call Barge, and Call Monitor.
- Retention Policy:** A section for configuring call retention settings.
- Call Retention:** Includes a 'Do not retain' checkbox, fields for From Number, To Number, Redirected From, Redirected To, DTMF Sequence, From Caller ID, and To Caller ID. It also features sliders for Inbound and Outbound retention percentages (both set to 100%), and time/day selection for Start and End times (both set to 12:00 AM).
- Message Retention:** Similar to Call Retention, it includes a 'Do not retain' checkbox, fields for From Number, To Number, From Name, and To Name, and time/day selection for Start and End times.

Add a Description to a Subscriber

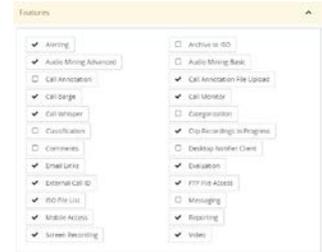
1. Go to **Admin > Organization > Subscribers**
2. Click on the subscriber to be modified to open the *Subscriber Profile* window.
3. Enter text in the **Description** field.
4. Click **Save** and the description will appear next to the number in the Subscribers list.

Exclude a Subscriber's Calls/ Messages from Recording

1. Go to **Admin > Organization > Subscribers**
2. Click on the subscriber to be modified to open the *Subscriber Profile* window.
3. **Retention Policy Panel** - Select **Do Not Retain Recording** by clicking in the option box.
4. **Message Retention Section** - Select **Do Not Retain Recording** by clicking in the option box.
5. Click **Save** when finished.

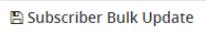
Assign/Unassign Feature Packs and Features to Subscribers

1. Go to **Admin > Organization > Subscribers**
2. Click on the subscriber to be modified to open the *Subscriber Profile* window.
3. Features panel: Click in the option boxes of the feature pack(s) and/or application features you wish to assign or unassign.
4. Click **Save** to update the subscriber with the new assignments.

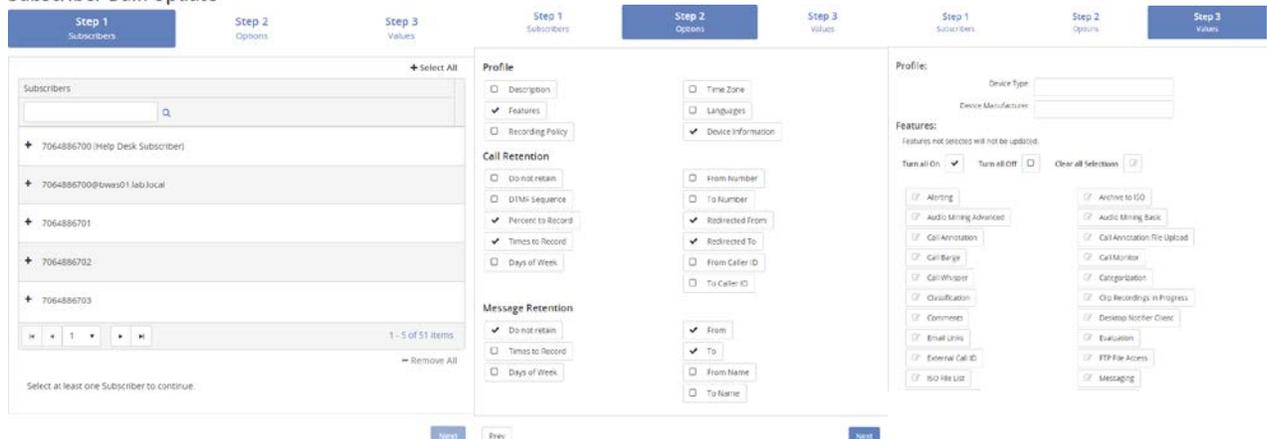


Subscriber Bulk Update

The Subscriber Bulk Update feature allows the user to update multiple subscribers at one time.

1. Go to **Admin > Organization > Subscribers**
2. Click on **Subscriber Bulk Update** link. 
3. Step 1 Subscribers
 - Use the (pagebackward) and (pageforward) tools to navigate through the pages of available subscribers. 
 - Click the Plus sign **+** next to a Subscriber to add them to the list at the bottom of the page.
 - Click **Next** when finished selecting Subscribers.
4. Step 2 Options
 - Click in the option boxes of the options you wish to assign or unassign to the previously selected Subscribers.
 - When you are finished adding Options, click **Next**. To go back to a previous page, click **Prev**.
5. Step 3 Values
 - Update the selected options.
 - When finished, click **Update All** and confirm the action
 - Click **Close** when the bulk update displays.

Subscriber Bulk Update



Subscriber Bulk Update



Users

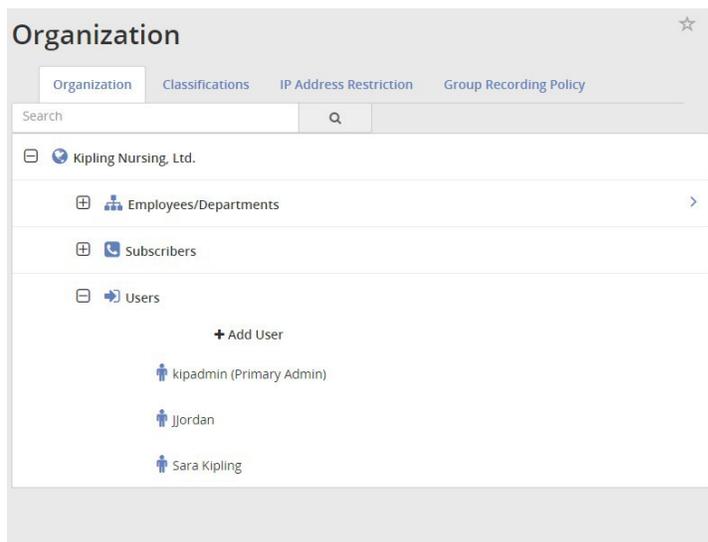
In order to view recordings, Users must first be added to the application and have subscribers assigned to them. Only the Group Administrator has the ability to add new Users to the application. When a new User is added, the application will automatically email them a temporary password. Users logging in for the first time will be redirected to the expired password dialog to reset their password to something more meaningful and within the company's rules for a valid password.

The rules for a valid password are displayed as text on the expired password dialog. The dialog will also display a message identifying the strength of the selected password. It is encouraged that all passwords meet the Excellent strength level. Strong vs. Weak passwords are described by the following:

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

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

If **Group Admin** is selected, the **Admin User Tasks** section will appear. By default, all Admin User Tasks are activated or selected for this user. Each task can be deselected by clicking in the applicable option box.



Admin User Tasks can include the following:

- Delete Calls – allows Group Administrators to delete calls from the Recorded Calls tab.
- Edit Users – allows Group Administrators to create and edit new and existing users in the End User Interface.
- Edit Organization – allows Group Administrators to add, edit, and delete employees and departments within the organization structure.
- View Screen Recordings – allows the Group Administrators to access the screen recording functionality in order to view and play back screen recordings.

- Access Audio Mining – allows the Group Administrators to create audio mining packs and apply them to recorded calls.
- Access the Recycle Bin – allows the Group Administrators access to the Recycle Bin tab to recover, download, or permanently delete calls in marked for deletion.
- Edit Subscribers – allows the Group Administrators to edit the recording criteria and application features of subscribers assigned to users.
- Edit Recording Policies – allows the Group Administrators to view, create, and edit recording policies.
- Access Evaluations – allows the Group Administrators access the call handler evaluation functionality in order to create evaluations to assign to recorded calls.
- FTP Access – allows the Group Administrators access to FTP into the system to download any recorded call files that belong to them. The following is an example of why the FTP option is beneficial: if you are notified that recorded calls are going to be deleted, you can use FTP to access the calls to be deleted and download them to a permanent directory at your location.
- Manage Classifications – allows the Group Administrators to designate which classifications a user has access to.

Some Admin User Tasks may not be available if the features were not selected as an Application Feature when the primary Group Administrator was originally created.

Even if a feature was selected at the parent level in the Administrative Portal, deselecting that Admin User Task for this Group Administrator will override the Application Feature functionality for that admin. The Group Admin functionality is useful in situations where a company needs a person or authority figure to monitor the activity of all users, but doesn't need them to have full functionality. Essentially, a read-only Group Administrator.

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

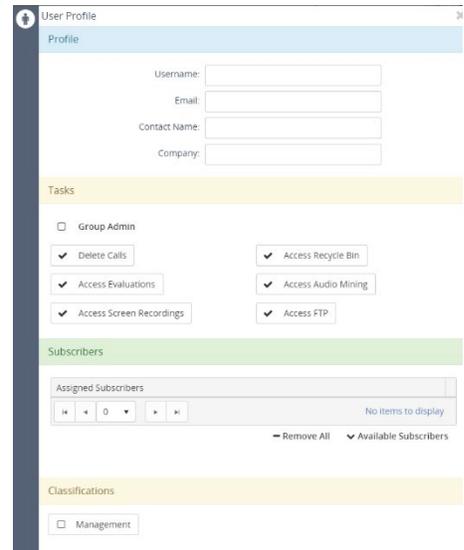
User Alerts displays a list of alerts created specifically by the user. Group Administrators have the ability to see the list of alerts for all users regardless of whether their subscribers are assigned to them or not. User Alerts allows Group Administrators to temporarily disable alerts that might be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

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

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

Add a New User

1. Click the Admin tab on the side panel to open the Admin page.
2. Select the **Organization** option to ensure that you are looking at the organizational hierarchy.
3. Click the **+** to expand the **Users** section.
4. Click the **+ Add User** link to open a blank User Profile.
5. Define the following information about the new User as needed:
 - **Profile:** Enter name, email, Contact name and Company
 - **Tasks:** Click to select / deselect from the available options. Choose Group Admin if this user will have more access.
 - **Subscribers:** Click the plus sign to select at least one subscriber for the User.
 - **Classifications:** Click to select from the available options in this section to assign a classification to the user.
6. Click **Save** when finished. The new user is added to the updated **Users** list.

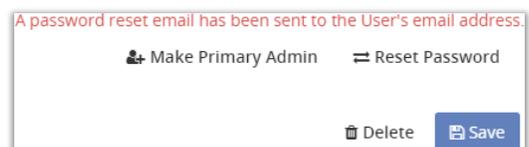


Edit/Update a User

1. Go to **Admin > Organization > Users**
2. Click on a User to select and open the User Profile.
3. Make changes as needed to feature selections, settings and information offered in the **Profile**, **Tasks**, **Subscribers**, and **Classifications** sections.
4. Click **Save** when finished. The user information is updated.

Reset a User's Password

1. Go to **Admin > Organization > Users**
2. Click on a User's name to open their User Profile for review/edit.
3. Click **↔ Reset Password** button at the bottom of the dialog.
4. Click **Save** to exit the profile when the system confirms the password reset action.



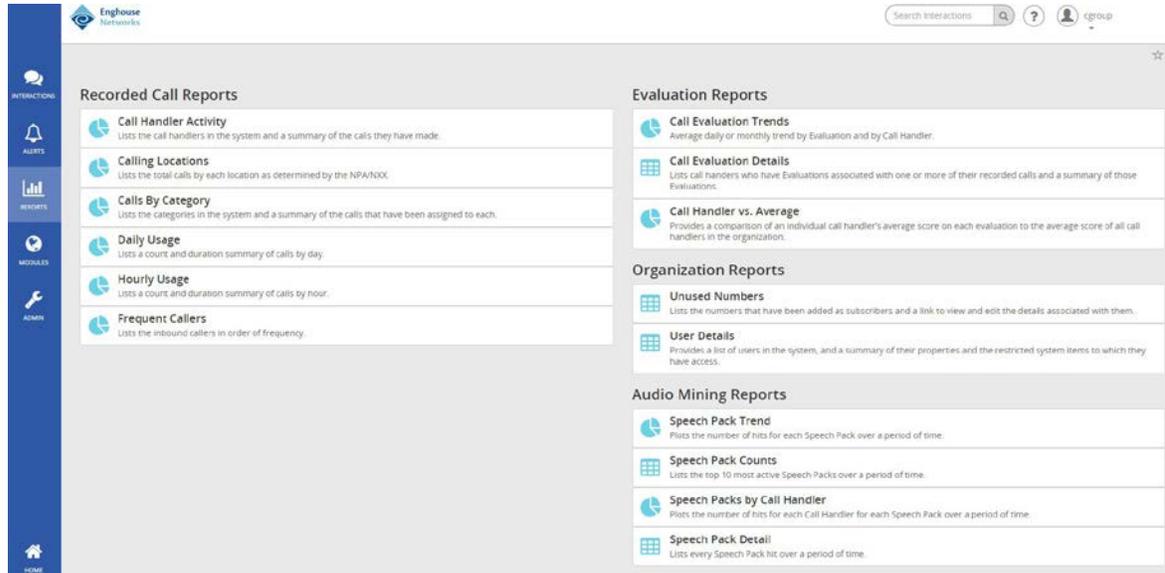
Delete a User

1. Go to **Admin > Organization > Users**
2. Click on a User's name to open their User Profile for review/edit.
3. Click **Delete** at the bottom of the dialog.
4. Click **Delete** when prompted to confirm the action and exit the dialog.



Admin Reports

There are seven Administrative specific reports included in the application. The reports identify information that can be found on the dashboard, or Home tab, but in more detail. Reports can be viewed as text or in a graphical format. You also have the ability to export reports and save them to your own PC. Additionally, you can filter on information in the reports such as number, date, and time.



Reports are divided into four categories:

Recording Call Reports

- Call Handler Activity
- Calling Locations
- Calls by Category
- Daily Usage
- Hourly Usage
- Frequent Callers

Organization Reports

- Unused Numbers
- User Details

Evaluation Reports

- Call Evaluation Trends
- Call Evaluation Details
- Call Handler vs. Average

Audio Mining Reports

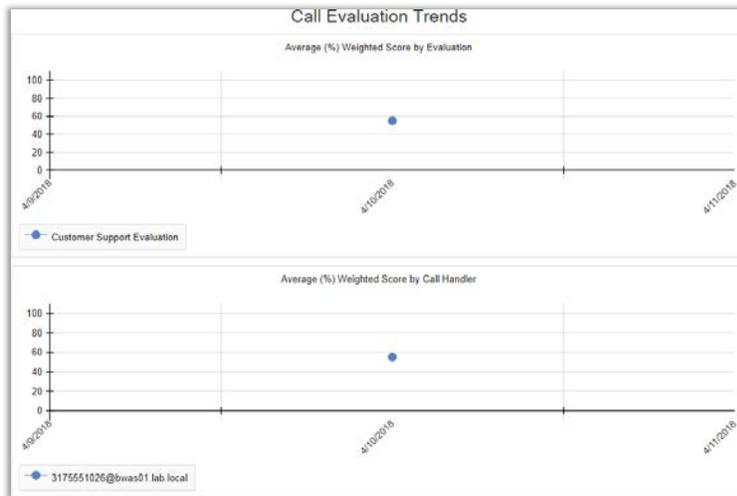
- Speech Pack Trend
- Speech Pack Counts
- Speech Packs by Call Handler
- Speech Pack Detail

To open, 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. This toolbar is standard for all reports.



Call Evaluation Trends

The Call Evaluation Trends report graphs the average daily or monthly trend by Evaluation and by Call Handler.



Call Evaluation Details

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

Call Evaluation Detail

Call Handler	Description	Evaluator	Evaluation	Call Time v	Points	Score
▶ 3175551026@bwas01.lab.local	Sid Rao	ogroup	Customer Support Evaluation	4/16/2018 2:41:48 PM	37 / 60	68.00 %
▶ 3175551024@bwas01.lab.local	CTIG Test	ogroup	Customer Support Evaluation	4/16/2018 2:41:47 PM	41 / 60	72.00 %

Call Handler vs Average

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

Call Handler Vs. Average

Evaluation Name	Call Handler	Description	Call Handler Average Score	Organization Average Score v	Number of Evaluations	Last Evaluation
Customer Support Evaluation	3175551026@bwas01.lab.local	Sid Rao	68	70	1	4/16/2018 2:47:33 PM
Customer Support Evaluation	3175551024@bwas01.lab.local	CTIG Test	72	70	1	4/16/2018 2:48:13 PM

Speech Pack Trend

The Speech Pack Trend report plots the number of hits for each Speech Pack over a period of time.

Speech Pack Trend

Speech Pack	Matches	Date
Automated Attendant	0	2018-03-10
Automated Attendant	34249	2018-03-11
Automated Attendant	35726	2018-03-12
Automated Attendant	23846	2018-03-13
Automated Attendant	26010	2018-03-14
Automated Attendant	34798	2018-03-15
Automated Attendant	38829	2018-03-16
Automated Attendant	35740	2018-03-17
Automated Attendant	34568	2018-03-18
Automated Attendant	35755	2018-03-19
Automated Attendant	34614	2018-03-20
Automated Attendant	35837	2018-03-21
Automated Attendant	34759	2018-03-22
Automated Attendant	35780	2018-03-23
Automated Attendant	35794	2018-03-24
Automated Attendant	34507	2018-03-25
Automated Attendant	35831	2018-03-26
Automated Attendant	34548	2018-03-27
Automated Attendant	35784	2018-03-28
Automated Attendant	34340	2018-03-29
Automated Attendant	35786	2018-03-30
Automated Attendant	35782	2018-03-31
Automated Attendant	34268	2018-04-01
Automated Attendant	35746	2018-04-02
Automated Attendant	34076	2018-04-03

Speech Pack Counts

The Speech Pack Counts report lists the top 10 most active Speech Packs over a period of time.

Speech Pack Counts

Speech Pack	Matches v	Percent
Automated Attendant	844742	100.00%

Speech Packs by Call Handler

The Speech Pack by Call Handler graph plots the number of hits for each Call Handler, for each Speech Pack over a period of time.

Call Handler Speech Pack Trend

Showing total daily sums for the following Speech Packs:
Automated Attendant

Call Handler	Matches	Date
3175551001@bwa01.lab.local	0	2018-03-10
3175551002@bwa01.lab.local	0	2018-03-10
3175551003@bwa01.lab.local	0	2018-03-10
3175551004@bwa01.lab.local	0	2018-03-10
3175551005@bwa01.lab.local	0	2018-03-10
3175551020@bwa01.lab.local	0	2018-03-10
3175551021@bwa01.lab.local	0	2018-03-10
3175551022@bwa01.lab.local	0	2018-03-10
3175551023@bwa01.lab.local	0	2018-03-10
3175551024@bwa01.lab.local	0	2018-03-10
3175551026@bwa01.lab.local	0	2018-03-10
3175551001@bwa01.lab.local	0	2018-03-11
3175551002@bwa01.lab.local	0	2018-03-11
3175551003@bwa01.lab.local	0	2018-03-11
3175551004@bwa01.lab.local	0	2018-03-11
3175551005@bwa01.lab.local	0	2018-03-11
3175551020@bwa01.lab.local	0	2018-03-11
3175551021@bwa01.lab.local	0	2018-03-11
3175551022@bwa01.lab.local	0	2018-03-11
3175551023@bwa01.lab.local	0	2018-03-11
3175551024@bwa01.lab.local	0	2018-03-11
3175551026@bwa01.lab.local	0	2018-03-11

Speech Pack Detail

The Speech Pack Detail reports lists every Speech Pack hit over a period of time.

Speech Pack Detail

Speech Pack	Subscriber	Call Time v	Confidence
Automated Attendant	3175551026@bwa01.lab.local	4/16/2018 2:36:01 PM	51.64%
Automated Attendant	3175551024@bwa01.lab.local	4/16/2018 2:36:01 PM	58.17%
Automated Attendant	3175551023@bwa01.lab.local	4/16/2018 2:36:00 PM	52.72%
Automated Attendant	3175551022@bwa01.lab.local	4/16/2018 2:36:00 PM	56.15%
Automated Attendant	3175551021@bwa01.lab.local	4/16/2018 2:35:59 PM	55.77%
Automated Attendant	3175551005@bwa01.lab.local	4/16/2018 2:35:57 PM	53.00%
Automated Attendant	3175551004@bwa01.lab.local	4/16/2018 2:35:57 PM	56.30%
Automated Attendant	3175551003@bwa01.lab.local	4/16/2018 2:35:56 PM	53.00%
Automated Attendant	3175551002@bwa01.lab.local	4/16/2018 2:35:56 PM	55.94%
Automated Attendant	3175551001@bwa01.lab.local	4/16/2018 2:35:55 PM	52.72%
Automated Attendant	3175551024@bwa01.lab.local	4/16/2018 2:35:50 PM	56.15%
Automated Attendant	3175551023@bwa01.lab.local	4/16/2018 2:35:49 PM	52.54%
Automated Attendant	3175551022@bwa01.lab.local	4/16/2018 2:35:49 PM	52.99%
Automated Attendant	3175551021@bwa01.lab.local	4/16/2018 2:35:48 PM	58.17%
Automated Attendant	3175551020@bwa01.lab.local	4/16/2018 2:35:48 PM	52.72%
Automated Attendant	3175551005@bwa01.lab.local	4/16/2018 2:35:46 PM	55.72%

Modules

The Modules pages is broken into two separate modules:

The screenshot displays the Enghouse Networks user interface. On the left is a vertical navigation menu with icons for INTERACTIONS, ALERTS, REPORTS, MODULES, and ADMIN. The main content area is divided into two columns. The left column is titled 'Evaluations' and contains four items: 'Evaluation Template Designer' (described as a tool to measure calls based on custom criteria), 'Call Evaluation Trends' (showing average daily or monthly trends), 'Call Evaluation Details' (listing call handlers and their associated evaluations), and 'Call Handler vs. Average' (comparing individual handler scores to the organization's average). The right column is titled 'Audio Mining' and contains five items: 'Speech Pack Designer' (for targeting specific phrases), 'Speech Pack Trend' (plotting hits over time), 'Speech Pack Counts' (listing top 10 active packs), 'Speech Packs by Call Handler' (plotting hits per handler per pack), and 'Speech Pack Detail' (listing every pack hit).

The **Evaluation** module includes the following items:

- Evaluation TemplateDesigner
- Call Evaluation Trends report
- Call Evaluation Details report
- Call Handler vs. Average report

The **Audio Mining** module includes the following items:

- Speech PackDesigner
- Speech Pack Trend report - plots the number of hits for each Speech Pack over a period of time.
- Speech Pack Counts report - lists the top 10 most active Speech Packs over a period of time.
- Speech Packs by Call Handler report - plots the number of hits for each Call Handler, for each Speech Pack over a period of time.
- Speech Pack Detail report - lists every Speech Pack hit over a period of time.

Evaluation Template Designer

The Evaluation Template Designer provides managers of phone based teams with the functionality to easily create evaluations that can be applied to recordings and to quickly view statistics based upon the created evaluations. Evaluations can be created for a multitude of business reasons like Training, Performance monitoring, Script development and adherence monitoring, Process adherence

The Evaluation Module reports provide you with a real-time view of evaluations data including information about the most frequently used evaluations, which call handlers are being evaluated, the call handlers average confidence score, the average confidence score of the evaluations being used, etc. The module is divided into the following three reports that give you an overview of how the evaluations are being used:

- Call Evaluation Trends report - graphs the average daily or monthly trend by Evaluation and by Call Handler.
- Call Evaluation Details report - displays call handlers that have evaluations associated with one or more of their recorded calls.
- CallHandler vs. Average report - compares an individual call handler's average evaluation score to the organization's overall average score for the same evaluation.

An unlimited number of evaluations can be created with an unlimited number of questions. Evaluations should be carefully thought out prior to creation. Once an evaluation is released, it cannot be changed or deleted. It can, however, be cloned and the information in the cloned evaluation can be updated. Additionally, each question in an evaluation is assigned a weight or level of importance in relation to other questions in the evaluation. The questions that make up an evaluation must equal 100% before it can be released.

Questions can contain different answer options that you decide during the creation of an evaluation. These answer options have default descriptions and associated values.

There are four different option sets built into the Designer Template:

- **Agreement Options** - question responses are based on a Strongly Disagree to Strongly Agree range.
- **Yes/No Options** - question responses are Yes, No, or N/A options only.
- **True/False Options** - question responses are True, False, or N/A options only.
- **Quality Options** - question responses based on a Poor to Excellent range.

These values and question answers can be modified to change either the description of the answer or the value associated. The defaults have been incorporated as a way to make the process of creating a new evaluation from scratch easier and less time consuming.

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

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

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

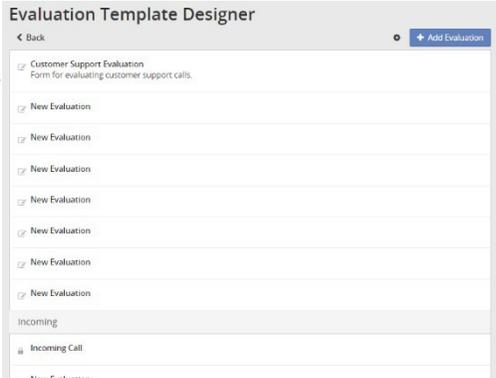
An evaluation will not be available for use from the Recorded Calls screen until it has been released. However, an evaluation cannot be released until it is complete and the overall weight is 100%. Once an evaluation is released, it cannot be edited. Released Evaluations marked with a  (Locked) icon. Evaluations able to be edited are marked with an  (Edit) button.

Since the list of evaluations can potentially get very large, you have the ability to apply an evaluation type to specific or all evaluations to essentially “categorize” them.

CREATE AN EVALUATION

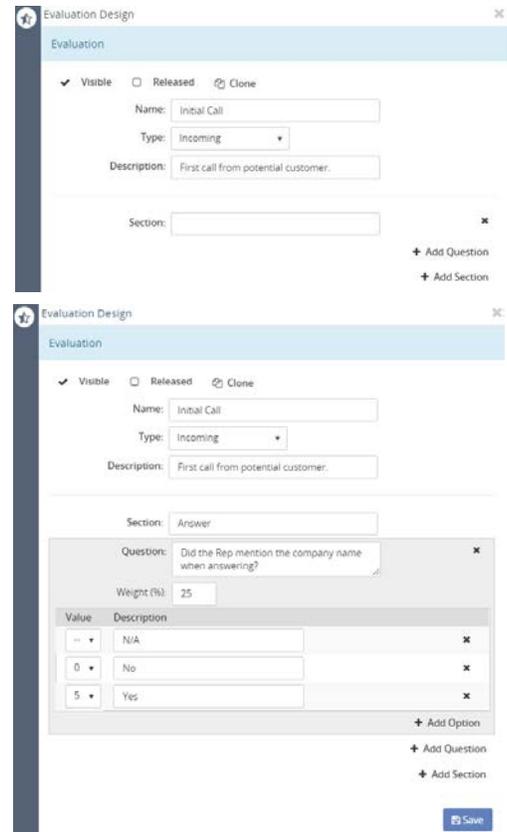
Users may create the questions and define the responses, values/ranks/points, and importance (weight%) for Evaluations

1. Click the **Modules** tab on the side panel to open the Modules page.
2. Click on **Evaluation Template Designer** in the *Evaluations* section of the page.
3. Click on the **+ Add Evaluation** button at the top of the page.
4. Enter or select the following information:
 - Name – Type a name for the Evaluation
 - Type – Select an evaluation type from the drop-down.



- Description – Type a brief description of the new evaluation.
5. Click on the **+ Add Section** button and **Name** the Section.
 6. Click on the **Add Question** button to start adding questions and choosing response Options.
 7. Enter or select the following information:
 - **Section** – Type a name or reason for the questions.
 - **Question** – Type a question.
 - **Weight (%)** – Define the weight for the question. All weights in the evaluation must total 100%.
 8. Click on **+ Add Option** to define response options.
 - Select an **Option Set** from those provided.
 - Choose the **Value**.
 - Add a **Description**.
 9. Repeat the steps above as needed to add more sections and/or questions.
 10. Click **Save** when you have finished adding sections and questions.

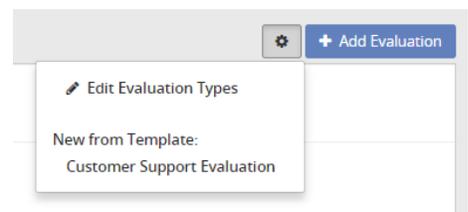
The newly created evaluation is added to the Incoming Evaluation section of the Evaluation Template Designer.

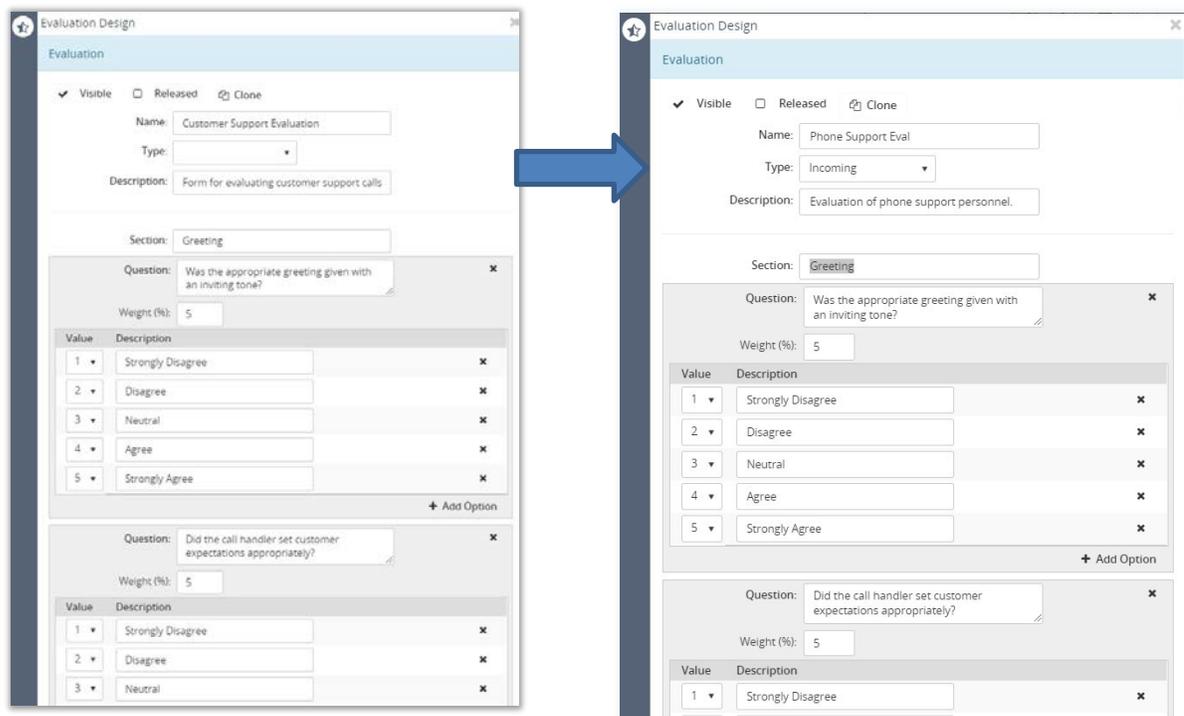


CREATE AN EVALUATION FROM TEMPLATE

Users may create new Evaluation templates based on those already in the system.

1. Go to **Modules > Evaluation Template Designer**
2. Click on the settings icon  in the upper right corner to display the **Settings** drop-down menu.
3. Select a template option under **New from Template** to open up the Evaluation Design window.
4. Change the information in the fields to create a new template f:
 - **Name** – Required. Type a unique name.
 - **Type** – Select an Evaluation Type, as needed.
 - **Description** – Type a brief description of the new template.
5. Edit, Add or Remove sections, questions, or response options, as desired to define the new evaluation.
6. Click **Save** to submit the new Evaluation and close the dialog. The new evaluation template is added to the appropriate section of the Evaluation Template Designer.





CLONE AN EXISTING EVALUATION

Users may create evaluations by cloning current evaluation templates, making changes to them, and saving them as a new Evaluation. This can be a big time-saver if only minor changes to an already existing evaluation will create exactly the Evaluation needed.

1. Go to **Modules > Evaluation Template Designer**.
2. Click on an existing Evaluation in the list to open the Evaluation Design window.
3. In the top of the Evaluation panel, click on the **Clone** button.  Clone

An editable copy of the selected Evaluation is created and added to the appropriate section in Evaluation Template Designer.

4. Click the **X** Close icon to exit and view the new cloned evaluation in the list (marked Cloned).
5. The user may now click on the cloned evaluation in the list to open the Evaluation Design window and modify, add to, or remove information already created in the previous Evaluation template, as needed.
6. Click **Save** when edits are complete to add the newly created Evaluation and add it to the appropriate list.

RELEASE AN EVALUATION

Users may release Evaluations for use, which makes them unavailable for editing.

1. Go to **Modules > Evaluation Template Designer**.
2. Click on an existing Evaluation in the list to open the Evaluation Design window.

3. Click to place a check next to the Released option at the top of the dialog.
4. Click **Save** to release the evaluation.

The Evaluation is marked with a locked  icon in the list, indicating that it has been released and is no longer available for editing.

If the weights for all questions do not total 100% at Save, a warning message displays.

The user can either modify the weights to equal 100% as desired and click **Save** again **OR**,



Click on the **Auto Balance Weights** button and allow the system to change the weights to equal 100% and click **Save** again to release the evaluation, close the dialog, and review the updated evaluation list. If the evaluation is clicked on again, the Released option will not be marked as locked.  **Released**

HIDE AN EXISTING EVALUATION

Released evaluations cannot be edited or deleted, but they can be hidden from view.

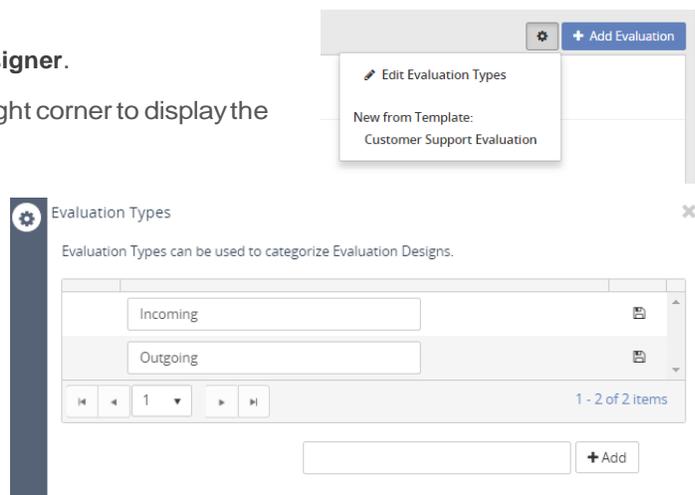
1. Go to **Modules > Evaluation Template Designer**.
2. Click on an Evaluation in the list to open the Evaluation Design window.
3. Click to remove the check next to **Visible** at the top of the dialog so it is disabled. **Visible**
4. Click **Save**. The selected evaluation is removed from view in the Evaluation Template Design list.

EDIT EVALUATION TYPES

Evaluation types are used to categorize Evaluation Designs. Users can modify Evaluation Types to change manage categories.

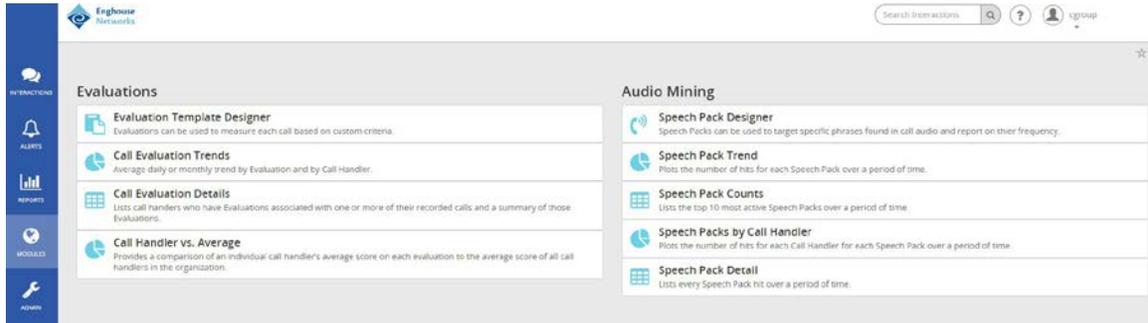
1. Go to **Modules > Evaluation Template Designer**.
2. Click on the **Settings** icon  in the upper right corner to display the **Settings** drop down menu.
3. Select the Edit Evaluation Types option to open the Evaluation Types window.
4. Enter a **New Type** into the **+ Add** text field below the list.
5. Click the **+ Add** button.

The new Evaluation Type is added to the list and is available when selecting the **Type** for an Evaluation.



Speech Pack Designer

The **Speech Pack Designer** is included in the **Audio Mining** module found under **Modules**.



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

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

The system default is **3 audio mining packs per Group Administrator**. Therefore, any users that are under that Group Administrator must share the default limit of **3** audio mining packs unless otherwise defined by the provider/license.

The Audio Mining module is divided into the following four reports that provide summary statistics about matching calls:

- Speech Pack Trends - plots the number of hits for each Speech Pack over a period of time.
- Speech Pack Counts - lists the top 10 most active Speech Packs over a period of time.
- Speech Packs by Call Handler - plots the number of hits for each Call Handler for each Speech Pack over a period of time.
- Speech Pack Detail - Lists every Speech Pack hit over a period of time.

In order for the Audio Mining feature to work, users must Add and Release Speech Packs. Once a speech pack is added and released, it will then be available to assign as a filter for recorded calls.

There are two phases to the Audio Mining module:

- Speech Packs – Create (Add) and Release Speech Packs for Audio Mining.
- Audio Mining – Assign Released Speech Packs to recorded calls as a filter.

CREATE A NEW SPEECH PACK

Users can create the key terms and phrases (speech packs) that the system searches recorded calls for and then presents the matching results in order of relevance.

1. Click On the **Modules** tab on the side panel to open the Modules page.
2. Select **Speech Pack Designer** in the Audio Mining section of the page to open the Speech Packs Designer.
3. Click the **+ Add Speech Pack** button to open the Speech Packs editing dialog.
4. Enter or select the following information:

- Name – The name of the Speech Pack [example: Tele2]
- Operator (drop down) – Select an option [Example: Or, etc.]
- Operator (text) – The phrase description [example: Greeting]
- Phrase (type drop-down) – Select an option [example: English (United States)].
- Phrase (text field) - The text to match [example: "Hello my name is"]

5. Click the **+ Add Operator** link to build another phrase or term to match, and enter or select the following information:

- Operator (drop down) – Select an option [Example: And]

Note: The **And** operation supports two modes: *Any Order* and *Sequential Match*. The default mode is *Any Order*. If *Sequential Match* is selected, the search must be successful within a specific and configurable time proximity and within the order defined in the Operation.

- Operator (text) – The phrase description [Example: Closure]
6. Click the **+ Add Phrase** link under the newly added Operator, and enter or select the following information:
 - Phrase (type) – Select an option [Example: English (United States)]
 - Phrase (text) – Enter the text to match [Example: "Thank you for calling your call is important to us"]
 7. Repeat steps as needed to include all phrases or terms to match when assigned to calls as a filter for Audio Mining reports.
 8. Click **Save**.

The screenshot shows the 'Speech Packs' dialog box with the following fields and options:

- extension
- if you know your
- New Pack
- New Pack
- operator
- Required phrases
- to speak with
- + Add Speech Pack

The screenshot shows the 'Speech Packs' dialog box with the following configuration:

- extension
- if you know your
- New Pack
- New Tele2
- Visible Released
- Operator: Or (dropdown), Greeting (text field)
- + Add Phrase + Add Operator
- Phrase: English (United States) (dropdown), "Hello my name is" (text field), Strength: 63 / 100
- Operator: And (dropdown), Closure (text field), Any order (dropdown)
- + Add Phrase + Add Operator
- Phrase: English (United States) (dropdown), "Thank you for calling your call is im" (text field), Strength: 95 / 100
- Save

EDIT A SPEECH PACK

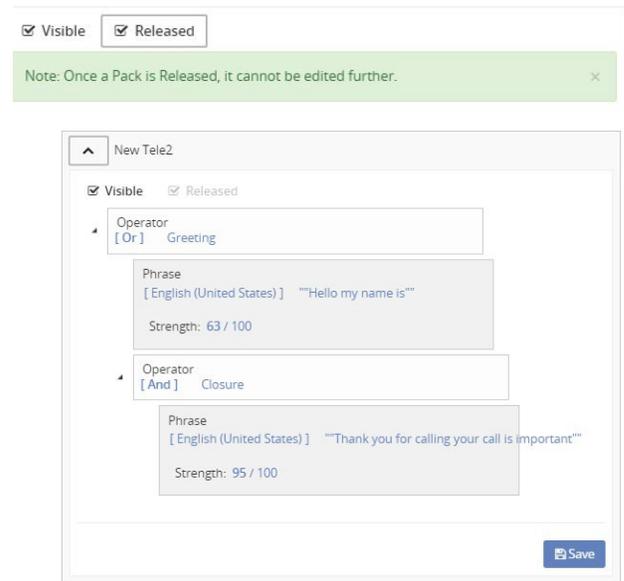
Any *unreleased* Speech Packs may be modified.

1. Go to **Modules > Speech Pack Designer**
2. Click the arrow ▼ next to the speech pack you want to edit to open the edit view.
3. Make desired changes to the Settings, operations or phrases.
4. Click **Save** when finished to update the Speech Pack.

RELEASE A SPEECH PACK

1. Go to **Modules > Speech Pack Designer**
2. Click the arrow ▼ next to the speech pack you want to release to open the edit view.
3. Click to place a check next to **Released** at the top of the dialog.
4. Click **Save** to release the speech pack.

Once released, the Speech Pack has no editable fields or settings, except Visible.



HIDE A SPEECH PACK

Once a Speech Pack has been released, it cannot be edited or deleted, but it can be *deactivated* and hidden. Once a hidden, the Speech Pack cannot be accessed again.

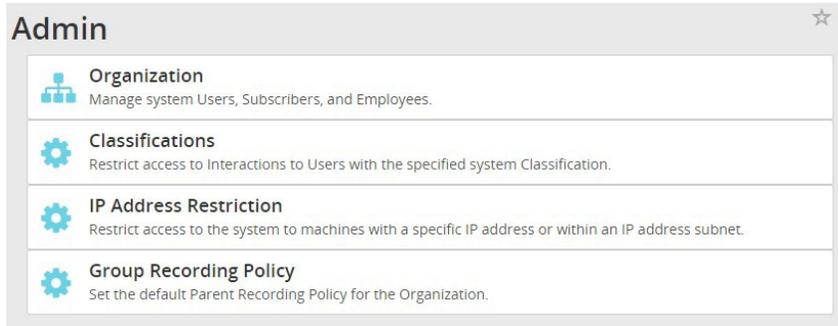
1. Go to **Modules > Speech Pack Designer**
2. Click the arrow ▼ next to the speech pack you want to hide to open the edit view.
3. Click to remove the checkmark next to **Visible**.
4. Click **Save**.

The hidden Speech Pack will no longer appear in the list or be available for selection.



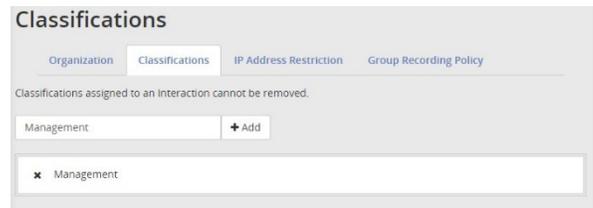
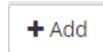
Classifications

Classifications in the Admin tab allow the user to set access permissions on a call. Calls can be assigned a classification, and cannot be accessed by users without explicit permissions granted to that classification. Classifications that have been assigned to an *interaction* cannot be removed.



Add a Classification

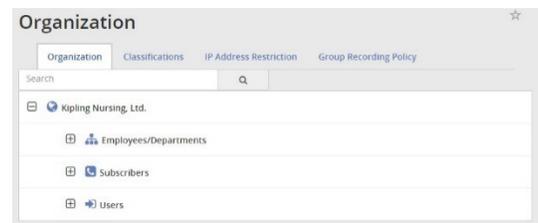
1. Click the **Admin** tab on the side panel to open the Admin page.
2. Select the **Classifications** option to open up the Classifications page. *If no classifications have been created yet, a No records found message displays.*
3. Enter a term [Example: Management] in the Classification text box.
4. Click the **+ Add** button.
5. Repeat steps as needed to create more Classifications.



Assign Classification Permissions

Once Classifications are created, they may be assigned to Users.

1. Go to **Admin > Organization**.
2. Expand  the **Users** section.
3. Click on the *User Name* in the list that you would like to add or remove Classification permissions.
4. In the **Classifications** panel, click to select an available classification. A checked box will grant a user access to calls of that classification. An unchecked box will remove access permission.
5. Click **Save** to submit and close the User Profile window. The user's permissions are updated to include the selected Classifications.



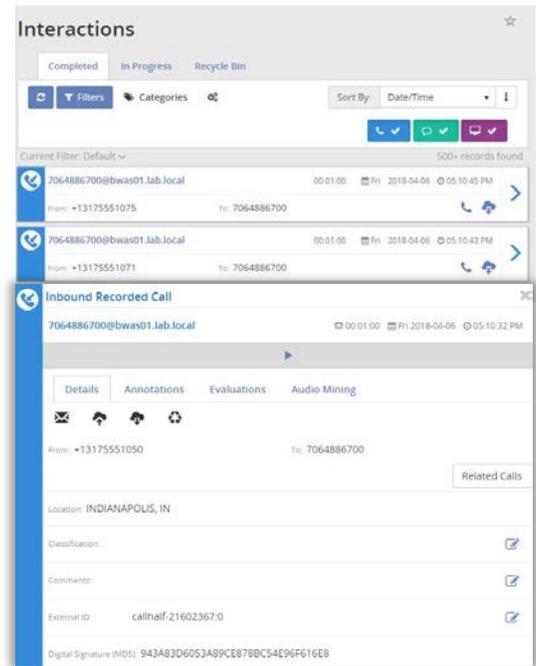
Classifications

Management

Classify a Recorded Call

Once Classifications are created they may be assigned to completed calls.

1. Go to **Interactions > Completed**.
2. Click on the **> View Details** icon next to a call that needs to be classified to open the Inbound Recorded Call window appears.
3. Click on the Edit button in the Classification section to review and select available classifications in the drop-down tool.
4. Click **Save** and then close the dialog to update the call with the new classification.

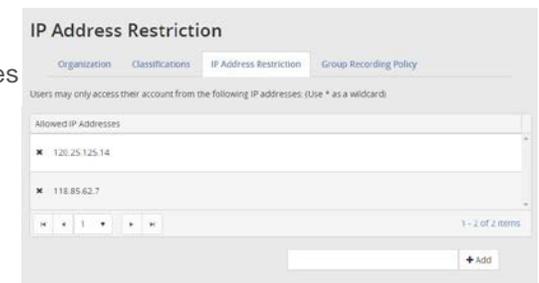
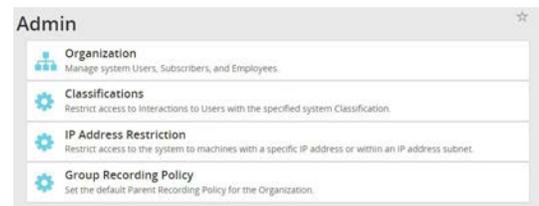


IP Address Restriction

Using the **IP Address Restriction** functionality restricts the access of users based upon their IP address. For example: if the Administrator enters the IP address of a Group and saves it, only that Group and their Users will be able to access the application from that IP address. Therefore, if User's were to try to access the application from home, they would not have access because it is not an IP address accepted by the application. Keep in mind that restricting user access to a certain IP address affects all users. To restrict a user's access, enter the IP address. IP addresses can also contain wild cards. For example: if you want to restrict a user's access to all IPs at 123.456.78 you would add wild cards to the end of the value to appear as 123.456.78*

Allow User Access from Certain IP Addresses

1. Click the **Admin** tab on the side panel to open the Admin page.
2. Select the **IP Address Restriction** option to open the *IP Address Restriction* page.
3. Enter the correctly formatted IP address that will be allowed access in the blank text field.
4. Click on the **+Add** button.
5. Repeat steps as needed to include any other IP addresses that may access the system.
6. The added IP addresses will display in a list under the Allowed IP Addresses list. Clicking the **x** next to a current listing removes the access permission for that IP address from the system.



Group Recording Policies

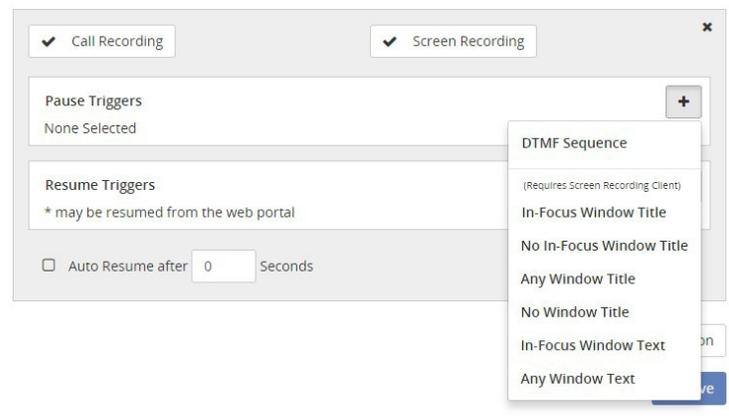
The Group Recording Policies tab is used to create and manage recording policies. Recording policies are needed to meet the Payment Card Industry Data Security Standard (PCI DSS or PCI Compliance). PCI DSS is a set of requirements designed to ensure that all companies that process, store, or transmit credit card information maintain a secure environment.

The top section of the Group Recording Policies page has global options for the **Pause** and **Resume** policies. These options are:

- Parent Policy drop down:
 - Disabled - Recording Policies may be saved as Disabled, allowing the User to keep policy settings without applying those settings to the system.
 - Override Parent Policy - Recording Policies may override their Parent Policy. The Parent Policy will not be altered. The current level policy will apply to this item and items inheriting their policy from this item.
 - Inherit Parent Policy - Recording Policies may inherit from their Parent Policy. The Parent Policy will not be altered. The current level policy will be permanently removed from the system.
- Pause and Resume from Portal checkbox- The Calls in Progress page has an option to Pause recording of Call Audio. Once audio is Paused, an option is available to Resume recording audio. Calls paused with any other Pause Trigger may also be resumed from the Calls in Progress page.
- Pause and Resume via API checkbox - API options are available to Pause and Resume recording of Call Audio. Pause and Resume from Portal must be enabled for the API to function.
- Copy Parent Policy link - A quick time saving action is available allowing a User to copy a Parent Recording Policy and load it into the UI for editing at the current level. Once loaded into the UI, make any desired changes, and click the Save button.

Note: Pausing and resuming automatically creates annotations on a call recording.

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



- DTMF Sequence - if a series of digits entered manually match the DTMF value criteria trigger pause or resume.
- In-Focus Window Title—if the window that is in focus matches the title text criteria trigger pause or resume.
- No In-Focus Window Title—if a window that is not in focus matches the title text criteria trigger pause or resume.
- Any Window Title—if any window that, in focus or not, matches the title text criteria trigger pause or resume.
- No Window Title – if none of the windows match the title text criteria trigger pause or resume.
- In-Focus Window Text -
- Any Window Text -

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

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

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

pause triggers are met. To resume recording, both policy element 1 and policy element 3's resume triggers must be executed.

Note: Auto Resume is an additional trigger (not required) that will resume recording after a certain amount of time (identified in seconds). If there is a value present in Auto Resume Time, this setting overrides **all** resume triggers defined in the policy element.

Hierarchy Level	Interface	Inherits From
Administrator	Administrative	N/A
Provider	Administrative	Administrator
Group	Administrative & End User	Group, Provider, or Administrator Since a Group can be created as a child node under another Group, it is possible to inherit a recording policy from a parent Group node.
Employee	End User	Group, Provider, or Administrator
Extension	End User	Employee, Group, Provider, or Administrator

The [Recording Policy is Enabled](#) option is used to disable and/or enable recording policies. Just keep in mind that if a parent node disables a recording policy, the recording policy will also be disabled for any child nodes currently inheriting that recording policy. Recording policies can be enabled and/or disabled as often as necessary.

Because inherited recording policies are *read only*, in order to “disable” a child node’s inherited recording policy, the inheritance must be blocked. Blocking recording policy inheritance creates an empty recording policy and is useful when a specific child node does not need a recording policy.

Note: The Block Recording Policy Inheritance link is only available if a recording policy is currently being inherited. Once a new recording policy has been defined, the link will no longer be available and will only be available to child nodes inheriting the recording policy.

Similarly, because inherited recording policies are read only, in order to update or create a new recording policy at a child node the current recording policy must be copied and then updated.

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

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

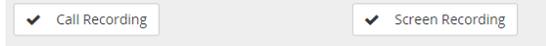
Add a New Group Recording Policy

1. Click the **Admin** tab on the side panel to open the Admin page.
2. Select the **Group Recording Policy** option to open up the Group Recording Policy page.
3. At the bottom of the page, select the **+ Add Section** button.

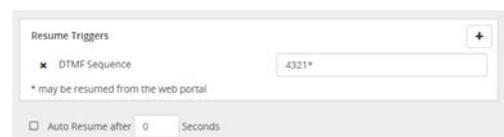
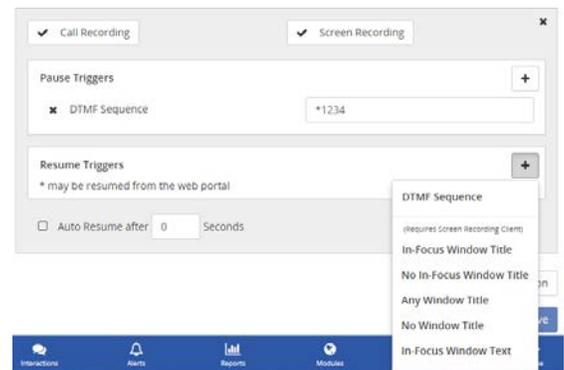
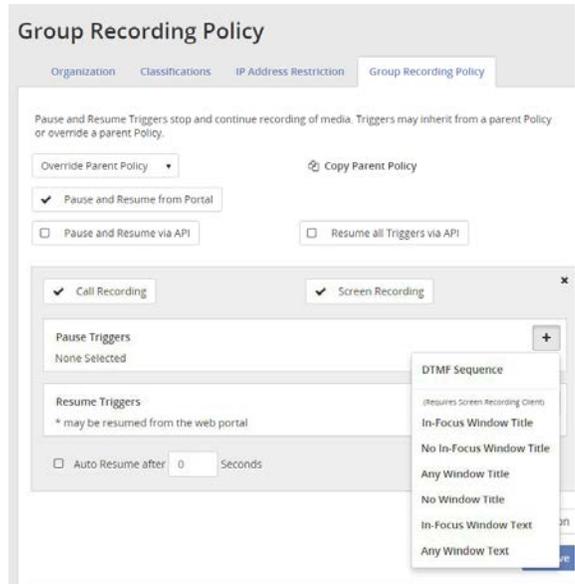
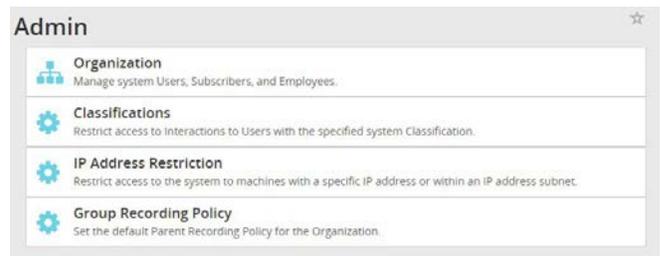
At the top of each policy section, there will be **Call Recording** and **Screen Recording** options.

4. Choose whether the new policy will be for All Call Recordings, All Screen Recordings, or Both.

Note: By default, All Call Recordings and All Screen Recordings are both enabled (checked). To deselect an option, click to remove the ✓.



5. **Pause Triggers** (required)
 - Click the **+** button in Pause Triggers to view the drop down menu.
 - Select an option and enter the requested information based on the selection. Example: Select *DTMF Sequence* to add it to the Pause Triggers, and enter *1234 (the sequence to be entered by a user) in the blank text field.
6. **Resume Triggers** (not required)
 - Click the **+** Add button to open the Resume Triggers drop down menu.
 - Select an option and enter the requested information based on the selection. Example: Select *DTMF Sequence*, and enter 4321* (the sequence to be entered by a user) in the blank text field.
7. Click **Save** when finished to add the new policy and close the dialog.



Edit a Recording Policy

1. Go to **Admin > Group Recording Policy**.
2. Select the Group Recording Policy option to open up the Group Recording Policy page.
3. Complete edits as needed to:
 - Enable/Change the Call Recording or Screen Recording setting for the policy.
 - Edit/Remove a trigger or change the type.
 - Enable/Disable **Auto Resume after x seconds**.
4. Click **Update Policy**.
5. Click **Save**.

Group Recording Policy

Organization Classifications IP Address Restriction Group Recording Policy

Pause and Resume Triggers stop and continue recording of media. Triggers may inherit from a parent Policy or override a parent Policy.

Override Parent Policy Copy Parent Policy

Pause and Resume from Portal Resume all Triggers via API

Pause and Resume via API

Call Recording Screen Recording

Pause Triggers +

✕ DTMF Sequence *123

Resume Triggers +

✕ DTMF Sequence 123#

* may be resumed from the web portal

Auto Resume after 0 Seconds

+ Add Section

Delete a Recording Policy

1. Go to **Admin > Group Recording Policy**.
2. Select the ✕ button next to the policy section.

No confirmation is displayed. The policy is immediately removed from the system and all inheritors, and the action cannot be undone.

Override Parent Policy Inheritance for Users

If *Override Parent Policy* is selected for all policies in the **Group Recording Policy** page, subscribers or users can be set to override the Group Recording Policy inheritance rules.

1. Go to **Admin > Organization > Subscribers**.
2. Click on the subscriber for which you wish to update the Recording Policy in the Subscriber Profile window.
3. Click the ▼ to expand the **Recording Policy** section.
4. In the **Inherit Parent Policy** drop down, select **Override Parent Policy**.
5. Click **Save** to update the setting for the Subscriber and all child accounts under it.

Recording Policy

Pause and Resume Triggers stop and continue recording of media. Triggers may inherit from a parent Policy or override a parent Policy.

Inherit Parent Policy Disabled Inherit Parent Policy Override Parent Policy

Pause Triggers

DTMF Sequence: *123

Resume Triggers

DTMF Sequence: 123#

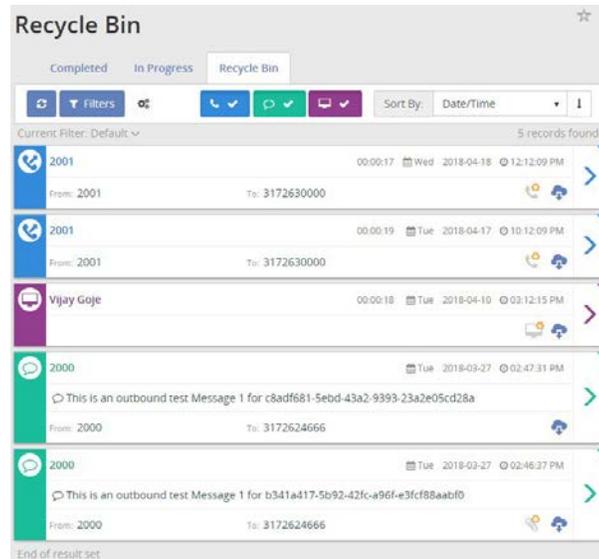
+ Add Section

Save

Recycle Bin

The Recycle Bin is intended to be a sort of "checks and balance" system when deleting recorded call, message, and screen recording files.

When you delete a file, it is placed into the Recycle Bin.



The files in the Recycle Bin will remain there until permanently deleted from the application manually. If you accidentally deleted a file and it is still in the Recycle Bin, it can be restored to the applicable tab. You also have the option to download any or all of the recorded call and message files in the Recycle Bin in order to store them for later use. The files in the Recycle Bin remain there until deleted.

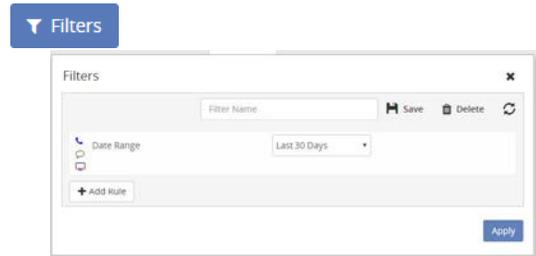
Since all files with attachments count against your allocated storage limit, it is good practice to empty the Recycle Bin from time-to-time. Before doing so, it would be reasonable to verify that all recorded calls, messages, and screen recordings in the Recycle Bin can be permanently deleted. Once they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

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

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

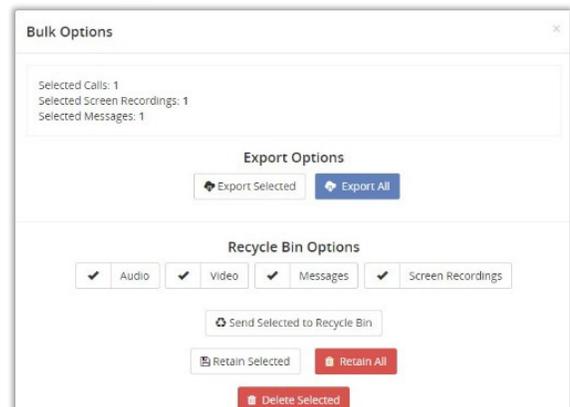
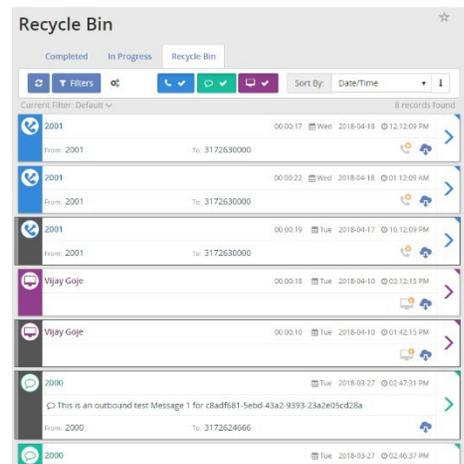
Filter Recycle Bin

1. Go to **Interactions > Recycle Bin**.
2. Click on the Filters button to open up the Filters window.
3. The following tools are available in the Filters window:
 - **Filter Name** – enter a name for the filter.
 - **Save** button - Saves the current filter.
 - **Delete** button - Deletes the current filter.
 - **Refresh** button - Clears the unsaved information and brings the window back to clear.
 - **Date Range** - The drop down provides a list of date and time ranges to use in the filter.
 - **Add Rule** button – Allows the user to create a new rule for the filter.
4. Click **Apply** when finished to create the filter for future use.



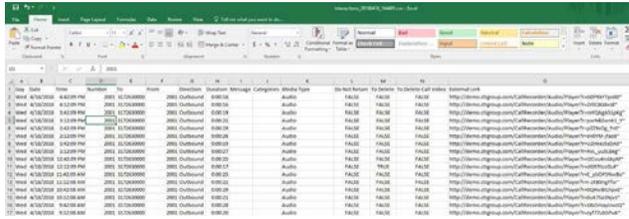
Recover Multiple Items

1. Go to **Interactions > Recycle Bin**.
2. Click on the colored option box next to the items you wish to recover. Selected items display a **Gray** option box.
3. Select the **Bulk Options** button in the top panel of the Recycle Bin page to open the Bulk Options window.
4. Click on the **Retain Selected** button at the bottom of the dialog.
5. Click **Continue** when prompted to move the selected message(s) out of the Recycle Bin and back into the Interactions list.

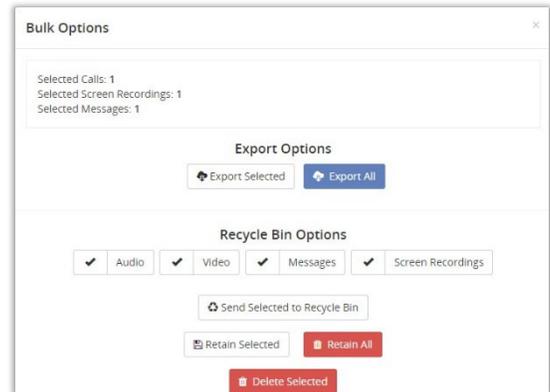


Download Entire Recycle Bin

1. Go to **Interactions > Recycle Bin**.
2. Select the  **Bulk Options** button in the top panel of the Recycle Bin page to open the Bulk Options window.
3. Click the **Export All** button to export the entire Recycle Bin to a .csv file.



ID	Name	Phone	Direction	Message	External URL
1	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/1
2	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/2
3	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/3
4	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/4
5	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/5
6	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/6
7	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/7
8	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/8
9	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/9
10	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/10
11	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/11
12	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/12
13	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/13
14	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/14
15	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/15
16	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/16
17	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/17
18	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/18
19	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/19
20	416-270-8100	416-270-8100	Outbound	Audio	http://www.pigeon.com/CallRecording/Audio/Player/4162708100/20

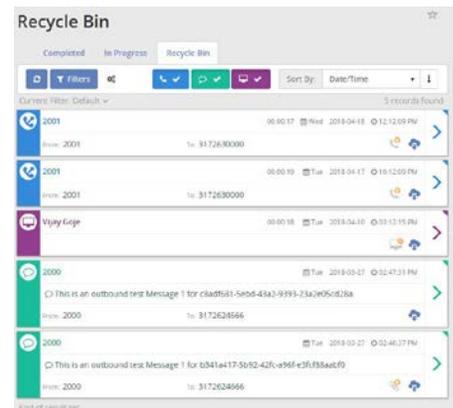


Download a Deleted Recorded Call, Message, or Screen Recording

1. Go to **Interactions > Recycle Bin**.
2. Click on the  **Download** button next to the item you want to download. The item will be downloaded to your system as a .zip file.

Delete a Single Item – Permanently

1. Go to **Interactions > Recycle Bin**.
2. Click on the  **View Details** button next to the item you want to permanently delete to view the details.
3. Click on the appropriate **Delete**  button in the section you want to remove (screen, message, or call recording) to view the delete options.
4. Choose the permanent delete option. The item is deleted immediately.

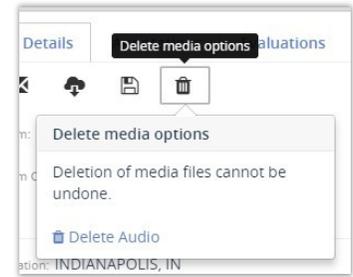


Delete Multiple Items – Permanently

1. Go to **Interactions > Recycle Bin**.
2. Click on the colored option box next to the items you wish to recover. Selected items display a **Gray** option box.
3. Click on the **Bulk Options** button in the top panel of the Recycle Bin page to open the Bulk Options window.
4. Click the **Delete Selected** button and click **Continue** to confirm when prompted.

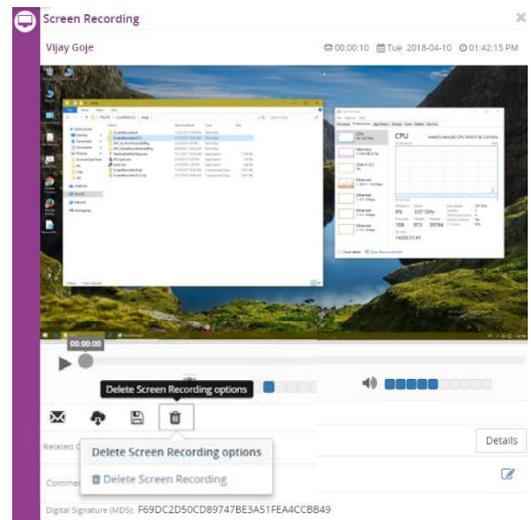
Delete a Recorded Call - Permanently

1. Go to **Interactions > Recycle Bin**.
2. Click on the **> View Details** button next to the Recorded Call you want to permanently delete.
3. Click the **Delete**  button to open up the *Delete Media Options* menu.
4. Click on **Delete Audio**.
The system displays **Media file is not available**.
This action cannot be undone.



Delete a Screen Recording - Permanently

1. Go to **Interactions > Recycle Bin**.
2. Click on the **> View Details** button next to the Screen Recording you want to permanently delete.
3. Click on the **Delete**  button open the *Delete Screen Recording* menu.
4. Click on **Delete Screen Recording**.
The system displays **Media file is not available**.
This action cannot be undone.



Delete a Message

1. Go to **Interactions > Recycle Bin**.
2. Click the **> View Details** button that corresponds to the Message you want to permanently delete.
3. Click the **Delete**  button to open up the *Delete Message Options* menu.
4. Click on **Delete Message**.
The system immediately deletes the message.

