

Call Recording

User Guide

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Table of Contents

1. CALL RECORDING OVERVIEW.....	2
1.1. FEATURES	2
1.2. ADMINISTRATIVE AND USER COMPONENTS	2
2. LOGIN.....	3
3. BROWSE PAGE & TOP TOOLBAR OPTIONS	3
4. MANAGING USER ACCOUNTS	4
4.1. SETTING USER STATUS & ACCOUNT EDITING	4
4.2. TURNING RECORDING ON AND OFF.....	4
5. MANAGING GROUPS	5
6. PROGRAMS.....	5
7. TAGS	6
8. AUDIT TRAIL.....	6
9. LIVE MONITORING	6

1. Call Recording Overview

The Xchange Call Recording System is an enterprise business solution designed to allow businesses to record their incoming and outgoing calls and store and retrieve large amounts of their call recordings.

It is a Central Office add-on product – meaning that the requests for services and administration will be part of the current Central Office H2O provisioning processes. It is setup on an extension by extension basis with customizable archival settings per user.

Access to the system is through a web portal allowing the system administrators to setup and manage the business users and their settings, perform troubleshooting, as well as allowing the end users to manage their recorded calls.

1.1. Features

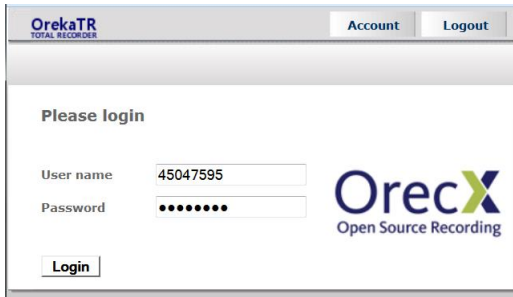
- Enable call recording for specific lines
- Live call monitoring (listen to calls as they happen)
- Selective recording
- Tagging the entire recording or sections of it
- Powerful and flexible search capabilities that allow for immediate and accurate retrieval of required recordings.
- Statistical reports per line
- Audit trail logging allowing the administrator to view a list of all events in the system including who logged into the system and when.
- Create recording programs to record interactions selectively, according to a schedule and other criteria, as well as manage the recording themselves automatically such as moving, copying and deleting.

1.2. Administrative and User Components

The system is basically split into two components:

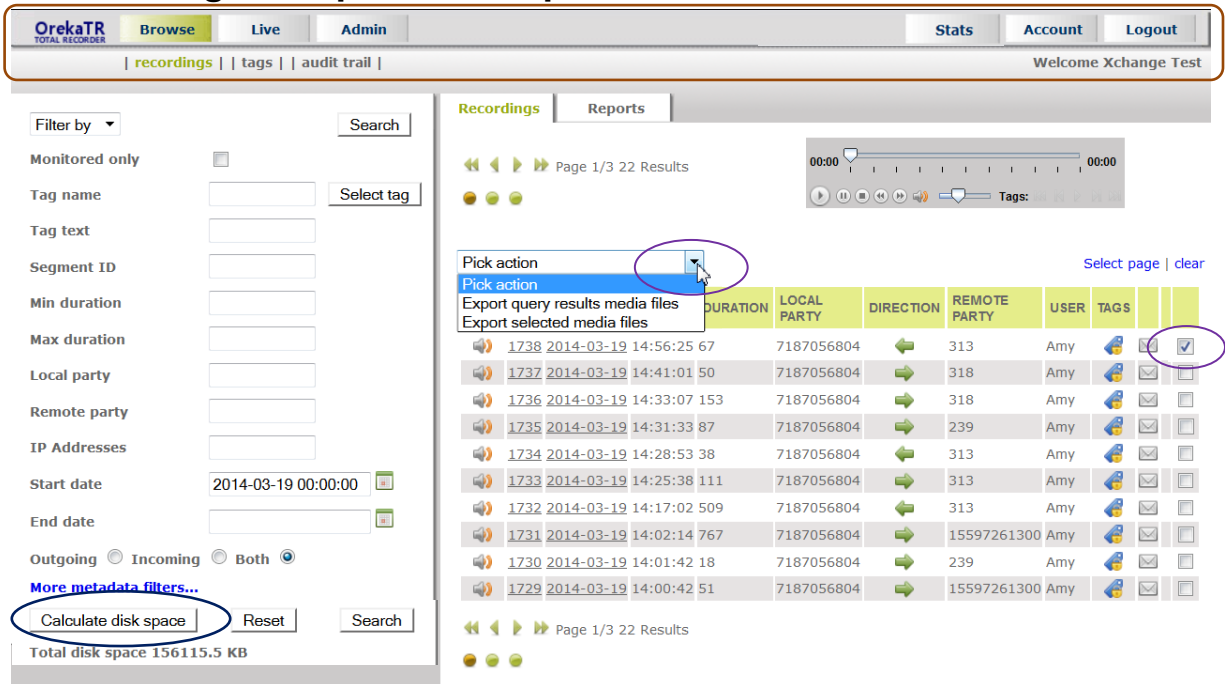
1. System related administrative tasks to make sure the business is setup correctly, such as; creating groups and users, assigning the users to their proper groups, and setting user access levels and limits, perform troubleshooting and review auditing trails.
2. End User management tasks are limited to managing their profile and recorded calls, such as; changing their password, listening to and exporting their recorded calls, creating reports and searches, setting recording schedules and other related tasks.

2. Login



To login to the Web Portal go to:
<http://callrecording.xchangetele.com:8080/orkweb/app>

3. Browse Page & Top Toolbar Options



- **Browse** – Search for recordings by user, time or other options and view summary reports.
- **Live** – Listen to a live conversation.
- **Admin** – Manage user accounts; group settings, account settings, and enable, disable or unlock their account.
- **Stats** – View call statistics - This feature is **not** supported at this time.
- **Account** – Change your password.
- **Logout** – Logout of the system.

For your current disk usage click on the “Calculate disk space” button

Exporting files will be saved to your local computer in a ZIP file.

Either run a search or check the box at the end of the recordings and select an option from the drop down list to export the recordings.

Important Note: Verify your local disk has the storage capacity needed since the size of the downloaded files can be very high.

4. Managing User Accounts

4.1. Setting User Status & Account Editing

The screenshot shows the OrekaTR user management interface. At the top, there are navigation tabs for 'Browse', 'Live', and 'Admin'. Below the navigation, there are links for 'users', 'groups', and 'programs'. The main content area is divided into two sections. On the left, there is a table of users with columns for 'FIRSTNAME', 'LASTNAME', 'LOGIN STRINGS', and 'USERID'. A 'Pick action' dropdown menu is open, showing options like 'Disable', 'Enable', 'Unlock', and 'Add user to group'. On the right, there is a detailed view of a user's account settings, including fields for 'First name', 'Last name', 'Login strings', 'Email', and 'Comments'. There are also radio buttons for 'Recordable', 'External', and 'Force password change'. A 'submit' button is visible at the top of the detailed view.

FIRSTNAME	LASTNAME	LOGIN STRINGS	USERID
CLARICE	STARLING	2128675309	50
VITO	CORLEONE	VCORLEONE@ELMERJAY.COM	51
STUART	DIAMOND	SDIAMOND@ELMERJAY.COM	52
ELLEN	RIPLEY	2121234567	53
NORMAN	BATES	2128675311	54
CORNELIUS	CARMEN	8523697412	55
VITO	SANDUCHI	4567894563	56
ARCHIBALD	SMITH	2123456547	57
JACK	TORRANCE	JTORRANCE@ELMERJAY.COM	58
WILLIAM	WONGA	2128675314	59

The Users screen allows you to manage the users' account and their system settings.

User's Account
Click on the **view** and **edit** buttons to change the account settings

System Settings
Check the **box** at the next to the USERID number select an option from the **drop down** list to disable, enable, unlock, or add the user to a group

4.2. Turning Recording On and Off

This screenshot is similar to the previous one but focuses on the 'Recordable' setting. The 'Recordable' field has radio buttons for 'Yes' and 'No', with the 'No' button selected. A red circle highlights the 'No' button. The 'submit' button at the top of the detailed view is also circled in red. The 'view' button in the user list is also circled in blue.

To Enable/Disable recording for a user

As Shown Above
Click on the **view** and **edit** buttons to change the users' account settings

Click **Yes** or **No** next to the **Recordable** option

Click on the **submit** button to save the changes

5. Managing Groups

4 Results

Pick action

GROUP NAME	GROUPID	
Elmer Jay DSL	25	<input type="checkbox"/> view
Elmer Jay Inc 45047595	26	<input checked="" type="checkbox"/> <input type="button" value="view"/>
Elmer Jay Central Office	27	<input type="checkbox"/> view
Elmer Jay Residential Phone	28	<input type="checkbox"/> view

Group ID: 26
 Group name: Elmer Jay Inc 45047595
 Security group: No
 Recordable login string quota: 0
 Total login strings (direct children): 1

SUBGROUPS

DIRECT | **ALL OTHERS**

Elmer Jay Residential Phone
 Elmer Jay Central Office
 Elmer Jay DSL

USERS

DIRECT | **ALL OTHERS**

STUART DIAMOND | ARCHIBALD SMITH
 Xchange Test | KEYSER SOZE
 VITO CORLEONE
 ELLEN RIPLEY
 VITO SANDUCHI
 CORNELIUS CARMEN
 NORMAN BATES
 SAM WILLIAMS
 CLARICE STARLING
 EMMETT BROWN
 WILLIAM WONGA
 JACK TORRANCE

The Groups screen allows you to manage the groups and their users and lists the groups, sub-groups, administrators and users.

Click view and edit to change the name of the group.

Check the box and select an option from the drop down list to delete the group or add it to a sub-group.

Important Note: Users can belong to multiple groups.

6. Programs

| users | | groups | | programs |

Welcome Xchange Test

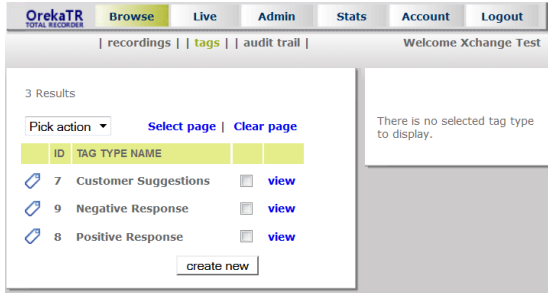
There are no recording programs to display.

We do **not** recommend using the Programs feature.

Programs can cause a loss of recordings and create inaccurate reports.

This feature allows your Group Administrator to create rules that will override the system's default settings.

7. Tags



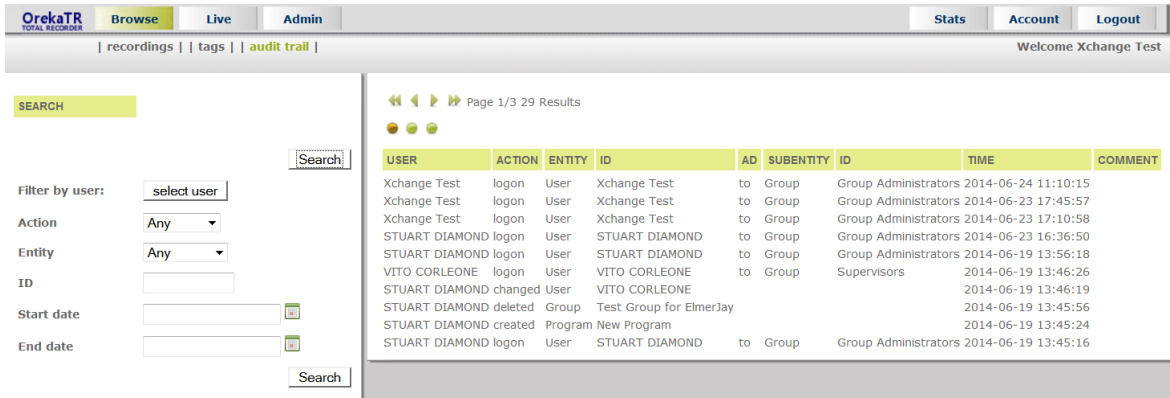
Tags are named bookmarks you can use to mark a point in a call for later review.

Tags can set at any time; either when listening live or reviewing the call.

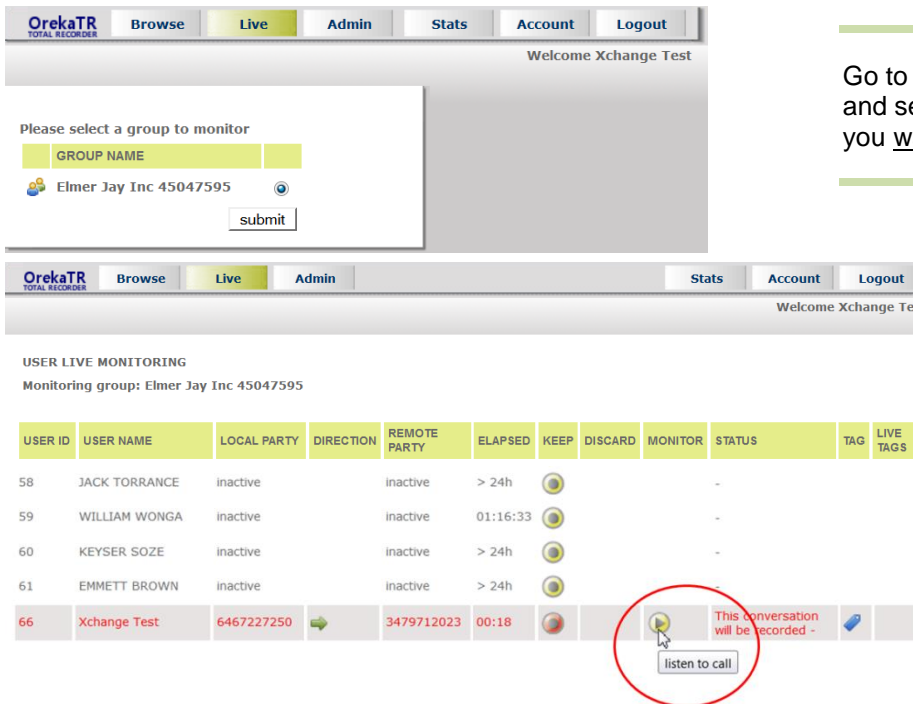
Tags can be used when searching for calls.

8. Audit Trail

The Audit Trail lists all system related actions in chronological order.



9. Live Monitoring



Go to the **Live Tab** and select the group you want to monitor.

The Live Monitoring Screen lists all of the users in your group.

Calls in progress are highlighted in **red**.

Click on the play icon you want to monitor.