Call Recording

User Guide

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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

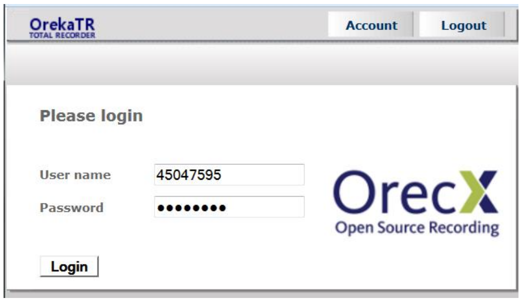
- Enable call recording for specific lines
- Live call monitoring (listen to calls as they happen)
- Selective recording
- Tagging the entire recording or sections of it
- Powerful and flexible search capabilities that allow for immediate and accurate retrieval of required recordings.
- Statistical reports 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:

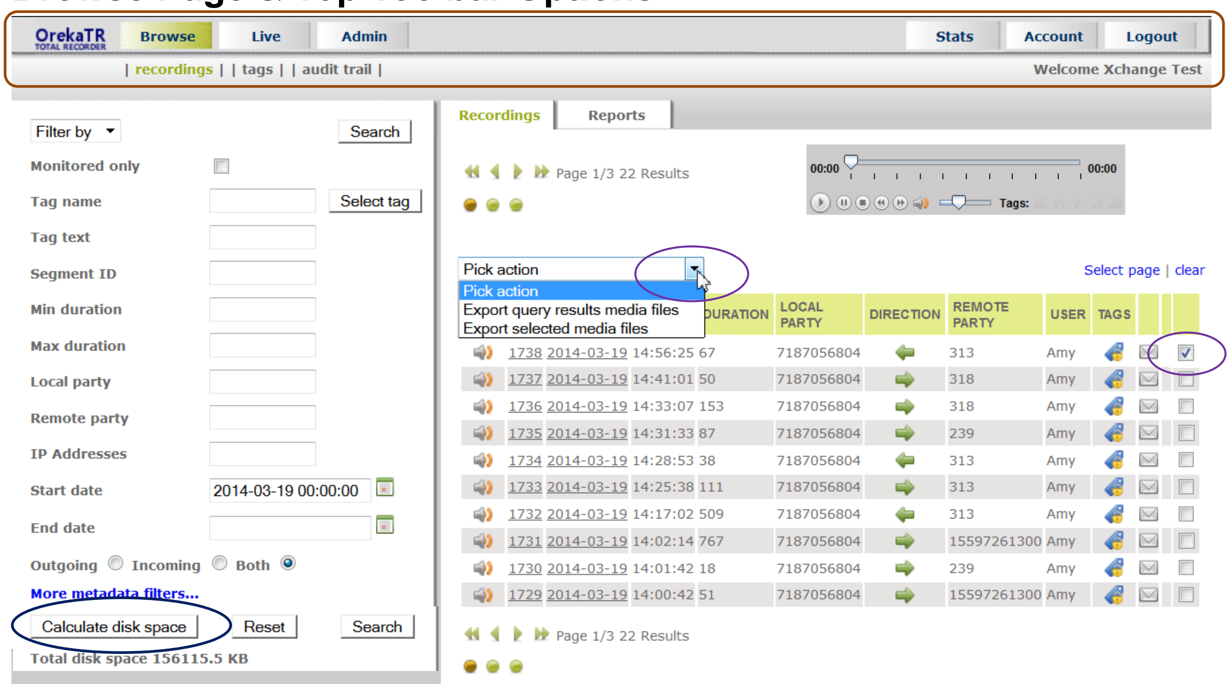
1. System related administrative tasks to make sure the business is setup correctly, such as; creating groups and users, assigning the users to their proper groups, and setting user access levels and limits, perform troubleshooting and review auditing trails.
2. End User management tasks are limited 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.

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

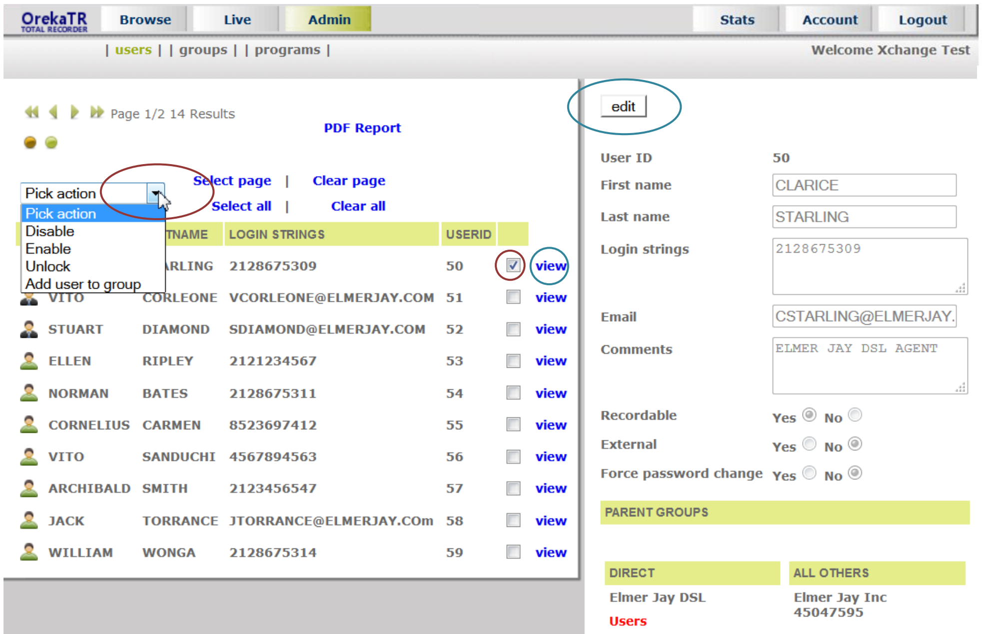
Either run a search or check the box at the end of the recordings and select an option from the drop down list to export the recordings.

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

For your current disk usage click on the "Calculate disk space" button

4. Managing User Accounts

4.1. Setting User Status & Account Editing

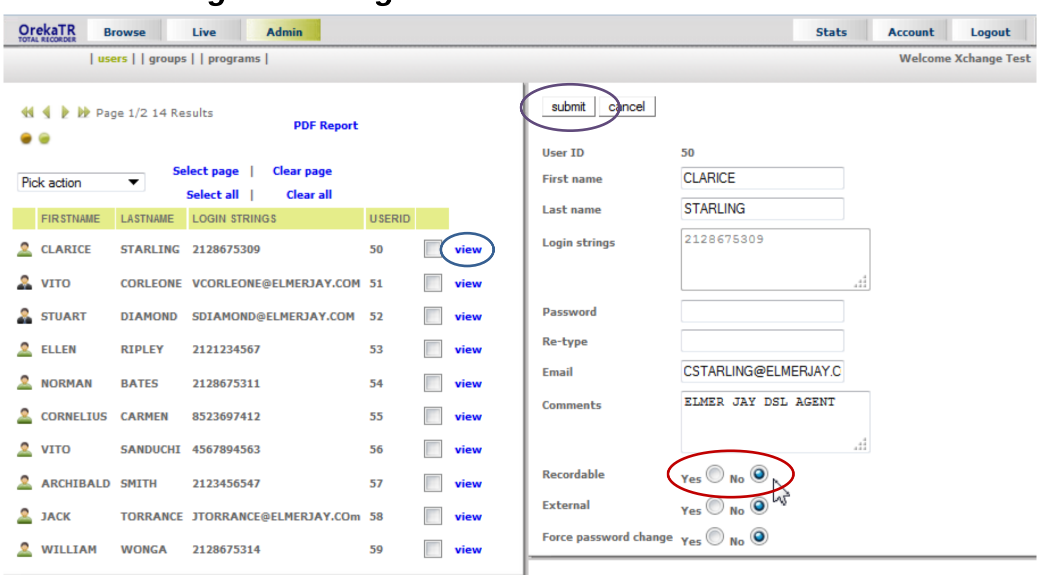


The Users screen allows you to manage the users' account and their system settings.

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



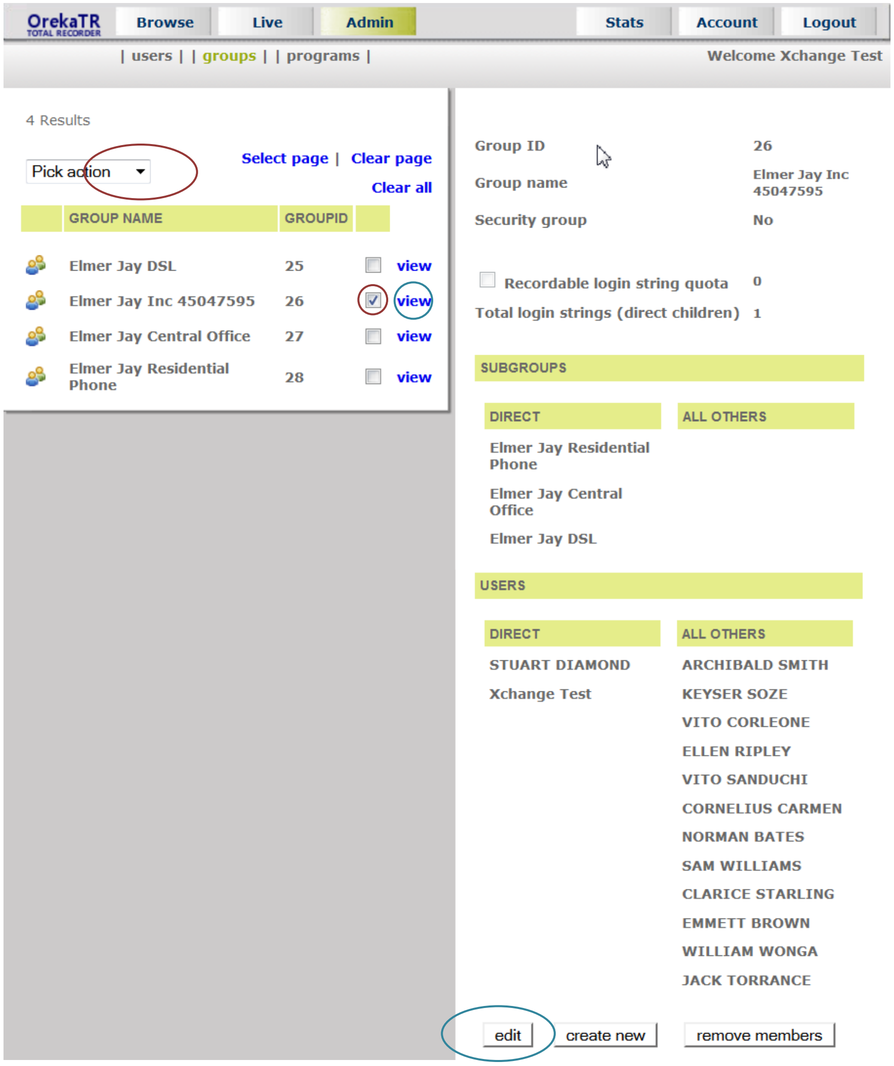
To Enable/Disable recording for a user

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



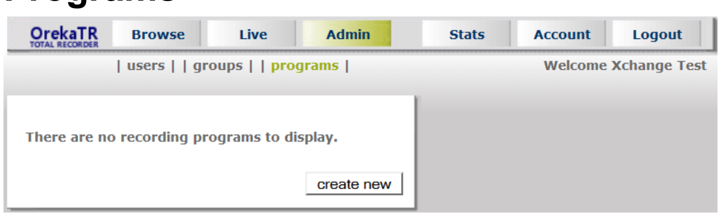
The Groups screen allows you to manage the groups and their users and lists the groups, sub-groups, administrators and users.

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

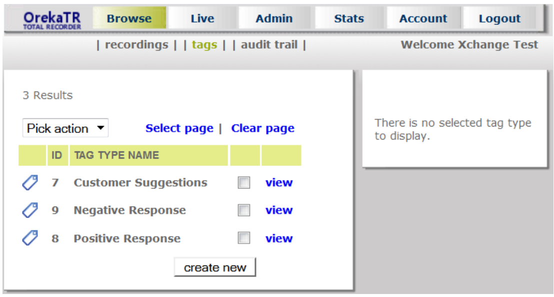


We do **not** recommend using the Programs feature.

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



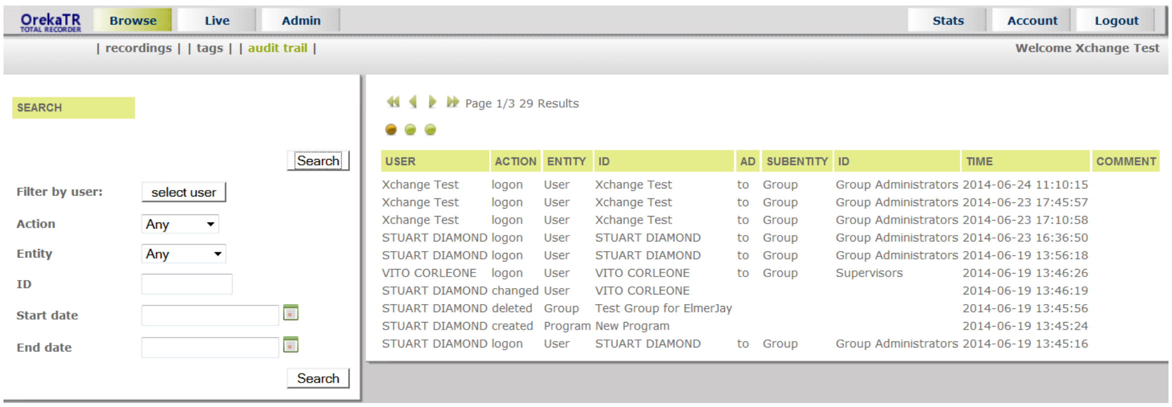
Tags are named bookmarks you can use to mark a point in a call for later review.

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

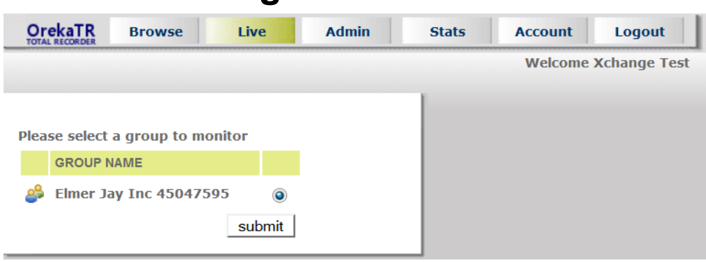
Tags can be used when searching for calls.

8. Audit Trail

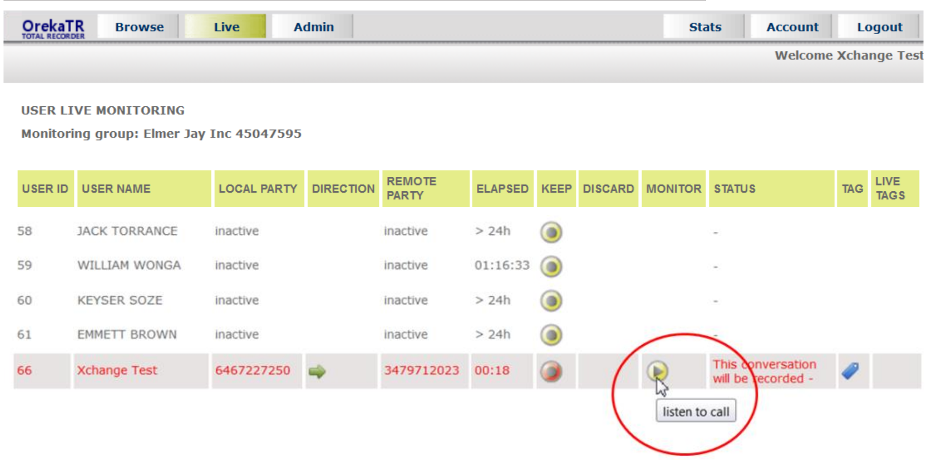
The Audit Trail lists all system related actions in chronological order.



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.