



Genesys Quality Management 8.1

Call Recording User Guide

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Document Version: 81gqm_us_cr_10-2012_v8.1.501.00



Table of Contents

Chapter 1	Introduction	7
	Document Purpose	8
	Audience	8
	Document Version	8
	Typographical Conventions	9
	Expected Knowledge	9
	Browser Recommendations and Technical Requirements	9
	Internet Explorer Security Settings:	11
	Technical Requirements for Playing Audio and Video Media	11
Chapter 2	Getting Started with Call Recording	13
	Opening Call Recording in Your Browser	14
	Changing the Login Screen Language	15
	Logging in to Call Recording	16
	Changing your password	17
	Logging Out of Call Recording	19
Chapter 3	User Settings	21
	Personal Setup	22
	Language	22
	Time Zone	23
	Column Setup	25
Chapter 4	Using Call Recording	27
	The Recorded CallsTab	28
	Recorded Call Icons	29
	Working with Recorded Calls	30
	Selecting Multiple Calls	30
	Playing Recorded Calls	31
	Listening to Several Calls in a List,	32
	Adding, Deleting or Modifying Notes in the Call Description	33

	Adding Notes using Call information	34
	Playing Conference and Transferred Calls	36
	Playing Screen Capture Video Recordings	36
	Locking Calls	37
	Changing Display Order	37
	Sending Calls to Email	39
	Searching and Using Filters	40
	Understanding Search Filters	41
	Default (Permanent) Search Filter	41
	Using Advanced Searches	43
	Using Saved Filters	44
	Saving Search Filters	45
	Clearing Filters	45
	Deleting Saved Filters	46
	Using Filters in Permanent Rules	46
Chapter 5	Searching for Call Records	47
	Searching for calls by Calling and Called Numbers	49
	Using Wild Cards to Search	51
	Alphanumeric Characters	52
	Searching for Calls by Type	53
	Searching for Calls by Date-Time Range	54
	Searching for Calls by Description	57
	Searching for Calls by Couples Count	58
	Searching for Calls by Call Length	59
	Searching for Calls by Same Numbers	60
	Displaying Call Search Results Randomly	61
	Searching for Calls by External Data	62
	Searching for Calls by Agent Names	62
	Searching with Other External Data	62
Chapter 6	Administering Groups and Users	67
	Opening the Users Tab	68
	Groups in Call Recording	69
	Creating a New Group	70
	Assigning Privileges	71

	Limiting Group Access by Phone Numbers	72
	Limiting Group Access by Boolean Filters	73
	Editing Groups	76
	Deleting Groups	77
	Administering Users	78
	Adding Users to Groups	78
	Limiting User Access by Phone Numbers	79
	Limiting User Access by Boolean Filters	79
	Editing Users	81
	Moving Users between Groups	81
	Adding Users from LDAP	82
	Deleting Users	84
	Deleting multiple users	85
Chapter 7	Recording Rules	87
	Recording Rules Overview	88
	Types of Recording Rules	90
	Rule Order	91
	Using Wild Cards for Recording Rules	92
	Call Identification	93
	Creating a New Recording Rule	94
	Creating a Recording Rule to Record All Calls	96
	Hierarchical Recording Rules	97
	Hierarchical Recording Rules Example	97
	Hierarchical Rule Administration Example	100
	Creating a Recording Rule with External Data	102
	Adding External Data to Recording Rules	105
	Editing recording rules	106
	Deleting recording rules	107
Chapter 8	Using On Demand Prerecording	109
	Prerecording Principles	110
	Working with Calls in Progress	111
	Saving a Call in Progress:	112
	Sending a Call in Progress as an Email Attachment	113
	Saving a Call in Progress and Sending it as an Email Attachment	113

	Sending a Call Recording to a Different Email Address	114
	Saving a Completed Call	115
	Tagging a Call with Call Information (External Data)	116
Chapter 9	Restoring Call Recordings	119
	Restoring an Archived and Deleted Call Recording	120
	Listening to Restored Calls	121
	Canceling Restoration	122
Chapter 10	Live Monitor (Live Monitor)	123
	Understanding Live Monitor	126
	Listening to Live Calls	127
	Saving Live Call Recordings	129
	Emailing Live Call Recordings	130
	Adding Editable External Data to Live Calls	131
	Sorting Live Calls	132
Chapter 11	Advanced Player	135
	Using the Advanced Player	136
	Using Advanced Player Controls	138
	Playing Multiple Calls	139
	Adjusting Call Offsets	140
	Isolating Calls	141
Chapter 12	Request Technical Support	143

Chapter

1

Introduction

This chapter provides an overview of this document, identifies the primary audience, introduces document conventions, and lists related reference information.

This chapter contains the following sections:

[Document Purpose](#)

[Audience](#)

[Document Version](#)

[Typographical Conventions](#)

[Expected Knowledge](#)

[Browser Recommendations and Technical Requirements](#)

[Internet Explorer Security Settings:](#)

[Technical Requirements for Playing Audio and Video Media](#)

Document Purpose

This document describes the Genesys Call Recording 8.1.50x user interface and contains guides for all its features.

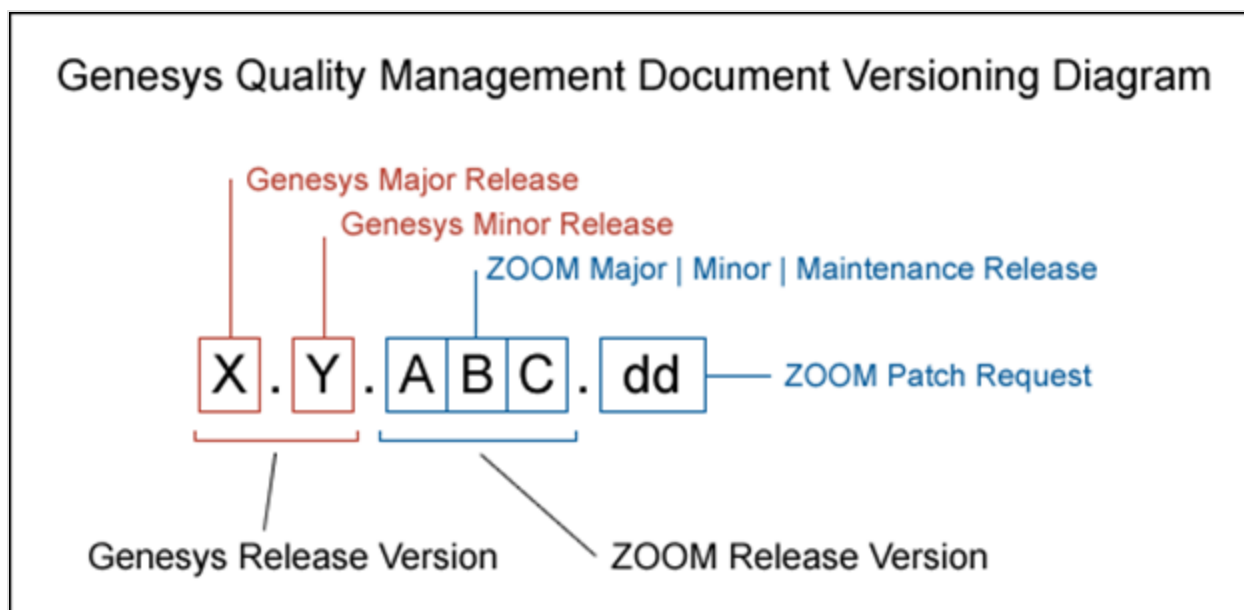
Audience

This document is intended for Users and administrators of Genesys Call Recording.

Document Version

The Genesys Quality Management products are provided by a partnership between Genesys and ZOOM International. The Genesys Quality Management products use a versioning format that represents a combination/joining of the versions used by these two separate entities. Although the Genesys Quality Management products and documentation use this combined versioning format, in much of the software and logs you will see the ZOOM versioning alone. You need to be aware of this, for example, when communicating with Technical Support.

The version for this document is based on the structure shown in the following diagram:



Typographical Conventions

Names of functions and buttons are in bold. For example: **Upload**.

File names, file paths, command parameters and scripts launched from the command line are in `non-proportional font`.

Referred documents are in italics. For example: see the document *This is a Document* for more information.

Code is placed on a gray background and bordered

Hyperlinks are shown in blue and underlined:

<http://genesyslab.com/support/contact>.

Expected Knowledge

Readers of this document are expected to have the following skills or knowledge:

- Basic internet browser knowledge.
- Basic IPT terminology knowledge is recommended.

Browser Recommendations and Technical Requirements

A minimum screen resolution of 1024 x 768 is necessary to use the GQM applications comfortably.

The following supported browsers are recommended for the Web GUI. The Windows Media Player is needed for Call Recording. The Java plugin is required for Universal Player in Quality Manager.

Important:

Use Java 6 with *Internet Explorer* or use another Browser. There is a known issue with Java 7 which causes *Internet Explorer* to freeze.

The browsers for PCs are shown in order of preference. The fastest performing browsers are first:

1. *Google Chrome*: Please download the latest version. Check issues using the latest browser version before reporting them. You must install the *Windows Media Player* plugin below:

<http://www.google.com/support/chrome/bin/answer.py?hl=en&answer=95697>

2. *Internet Explorer 9*

3. *Internet Explorer 8* with *Google Chrome Frame* plugin. The *Google Chrome Frame* plugin can be obtained here:

<http://code.google.com/chrome/chromeframe/>

4. *Internet Explorer 7* with *Google Chrome Frame* plugin. This version of IE should be upgraded to IE9 as soon as possible.

5. *Firefox 3.6.16+* Admin rights required for installation. You must install the *Windows Media Player* plugin below:

<http://www.interoperabilitybridges.com/windows-media-player-firefox-plugin-download>

6. *Opera 9+*

7. *Safari 5*

8. *Internet Explorer 8* without the *Google Chrome Frame* plugin. The performance is slow.

The following browsers are not recommended:

Internet Explorer 7 without the *Google Chrome Frame* plugin runs too slowly.

Internet Explorer 6 is not supported.

Important:

Use Safari or Firefox with Mac OS 10. There is a known issue with Chrome that causes problems with Universal player.

Web browsers require a media player plug-in (*Windows Media Player 9+* for Windows PCs, *VLC* for Macs and Linux) for audio and video media review, and at least *Adobe Flash Player 9.x* runtime installed for viewing reports.

Internet Explorer Security Settings:

Windows XP

The following recommendations are encouraged for the Web GUI running on Windows XP:

- Check that the Call Recording URL is included in the "Trusted sites". If not, include it there. If the user doesn't have administrator privileges, contact the system administrator or set security level of the zone that contains the server to Low.
- Check that there is no proxy enabled in the web browser. If there is, try to disable it. The proxy can affect the functionality.
- Set the security level of trusted sites to Low.

Windows 7

The following recommendations are encouraged for the Web GUI running on Windows 7:

- Check that the Call Recording URL is included in "Trusted sites". If not, include it there. If the user doesn't have administrator privileges, contact the system administrator or set security level of the zone that contains the server to Low.
- Check that there is no proxy enabled in the web browser. If there is, try to disable it.
- Set the security level of trusted sites to Low.
- Disable protected mode for all zones. If protected mode is Enabled for the internet zone, it will affect the functionality, even if the server is in trusted sites (Internet Explorer only).

Technical Requirements for Playing Audio and Video Media

The following media players are recommended for successful video and audio playback. Please see the Screen Capture Administration Guide for more information about media player configuration.

The media players are listed in order of preference, for the reasons supplied below:

1. *Microsoft Windows Media Player*: Plays all audio and video media on the Windows 7 OS. Previous versions of Windows, for example, Vista and XP, need additional codecs to play video media.
Download the K-Lite Codec Pack (BASIC or BASIC Mirror versions) from: http://www.free-codecs.com/K_Lite_Codec_Pack_download.htm.
2. *VLC*: Plays combined video and audio recordings, including dual-screen recordings of 1920x1080 or larger. It is not integrated into browsers, for example, *Internet Explorer* and *Firefox*, for audio playback. *VLC* is recommended for Macs and Linux-based systems for combined audio and video reviewing. *VLC* can be downloaded at: <http://www.videolan.org/vlc/>.
3. *QuickTime*: Plays audio and is integrated into *Internet Explorer*, but does not support playing mp3 audio and H.264 format video together for combined audio and video playback.

Chapter

2

Getting Started with Call Recording

This chapter describes how to open Call Recording, log in, change the language and log out.

This chapter contains the following sections:

[Opening Call Recording in Your Browser](#)

[Changing the Login Screen Language](#)

[Logging in to Call Recording](#)

[Changing your password](#)

[Logging Out of Call Recording](#)

Opening Call Recording in Your Browser

The system administrator determines the Call Recording URL address.

The URL below is just an example.

Type the Call Recording URL in the browser address box.

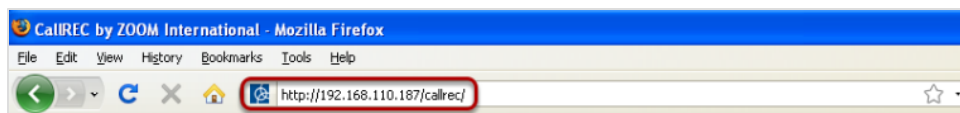


Figure 1: The Browser Address Box

The Login screen opens.

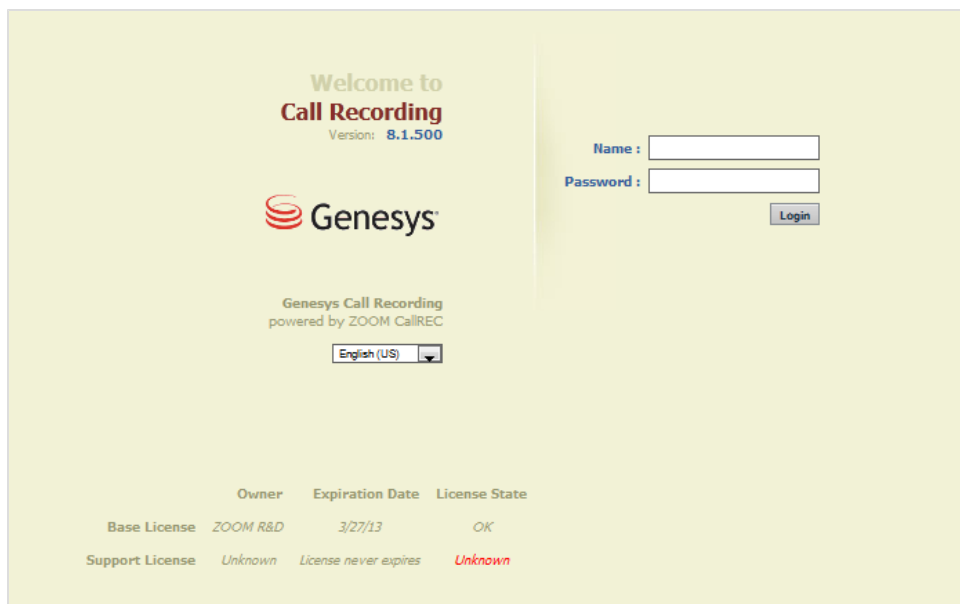


Figure 2: Opening Call Recording in the Browser

Changing the Login Screen Language

To change the login screen language before login, choose the display language of the login screen from the drop down list. This language setting only controls the login page, and does not affect the display of the rest of Call Recording.

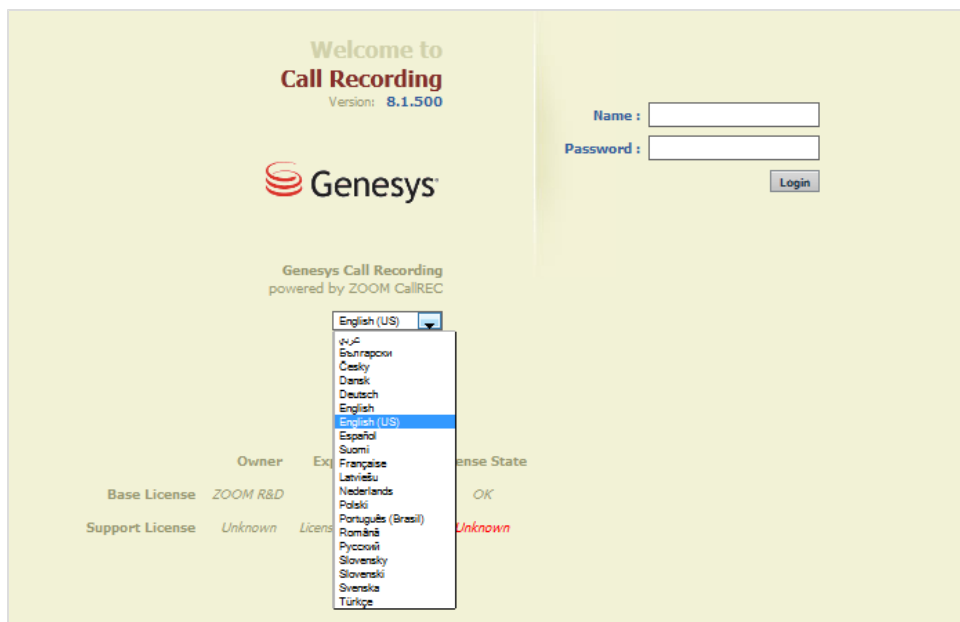


Figure 3: Login Screen Language

For languages that Genesys Call Recording 8.1.500+ supports see the Datasheet.

Logging in to Call Recording

	Owner	Expiration Date	License State
Base License	ZOOM R&D	3/27/13	OK
Support License	Unknown	License never expires	Unknown

Figure 4: Logging into Call Recording

To log in to Call Recording:

1. Type your name in the **Name** box.
2. Type your password in the **Password** box.
3. Click **Login**.

Call Recording opens to the **Recorded Calls** tab, and you can begin listening to calls immediately.

Important:

Names and passwords are case sensitive.

Changing your password

You can change your password after you have entered the system.

To change your password:

Navigate to **Users**:

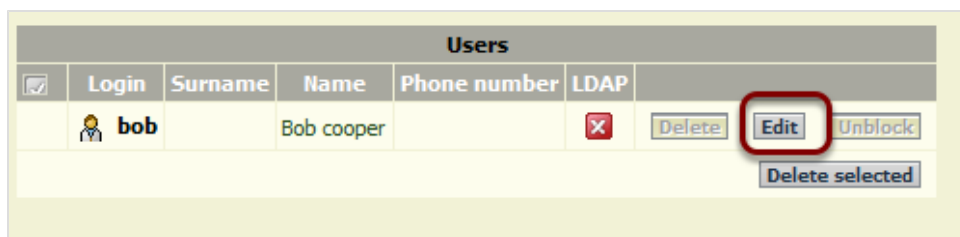


Figure 5: From Users Tab

Click **Edit**.

The **Edit User** form opens.

Edit user

Login:	<input type="text" value="bob"/>	Password:	<input type="password"/>	
Blocked:	<input type="checkbox"/>	Password confirmation:	<input type="password"/>	
Name:	<input type="text" value="Bob cooper"/>	Surname:	<input type="text"/>	
E-mail:	<input type="text"/>	Phone number:	<input type="text"/>	
LDAP user	<input type="checkbox"/>			
Choose filter:	<input type="text" value="Choose filter"/>	<input type="button" value="END"/>		
Group:	<input type="text" value="user"/>	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	

Figure 6: Edit User Form

1. Type in your new password in the **Password** and **Password confirmation** fields.
2. Click **Save**.

If you have forgotten your user name or password, contact your system administrator.

Important :

If the **Password** is already filled when the Edit User form opens, it has been filled by your browser automatically. We recommend that you disable the **Remember password for sites** option in your browser.

Logging Out of Call Recording

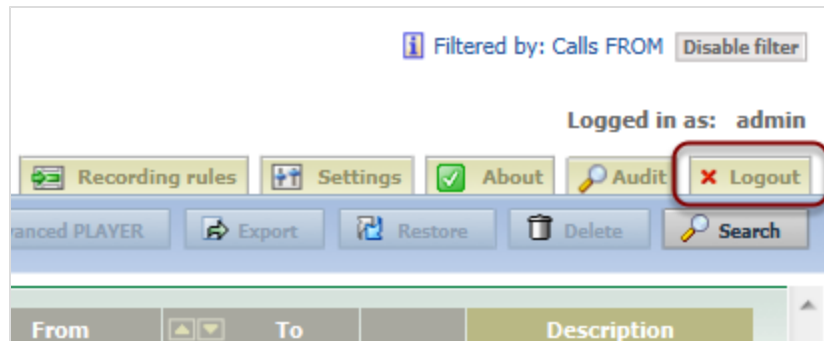


Figure 7: Logout of Call Recording

To log out of Call Recording Click **Logout**. Closing your browser also logs you out of Call Recording.

Chapter

3

User Settings

The Settings tab contains administration tools. System Administrators use the tools on the Settings tab for configuring and maintaining Call Recording and related systems.

Most users only have access to their Personal setup (Language and Time Zone). Column setup functions may be available if the Administrator has allowed this. To learn more about other Administrative tools, see the Genesys Call Recording *Administrator's Guide*.

This chapter contains the following sections:

[Personal Setup](#)

[Column Setup](#)

Personal Setup

Language

The initial Call Recording Web UI login screen allows you to select a language. This language setting only controls the login page, and does not affect the display of the rest of Call Recording.

To change the default Call Recording language for the main application:

Log in to Call Recording.

Navigate to **Settings > User Setup > Personal Setup**.

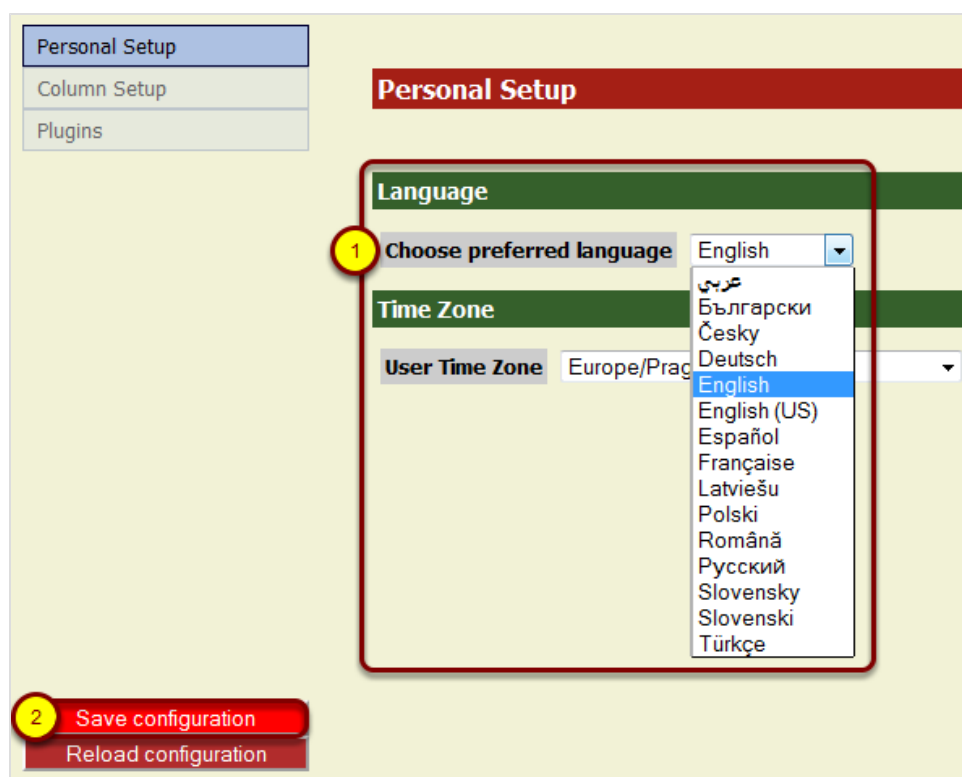


Figure 8: Changing the Default Language

1. Select the language from the **Choose preferred language** drop down list.
2. Click **Save configuration**.

Refresh the web page by clicking on another tab in Call Recording, or by clicking **Refresh** in your web browser.

The labels in Call Recording display in the language you selected. Some user interface elements may not change language because of naming restrictions and integration with other systems

Time Zone

The **Time Zone** setting affects all dates and times displayed in the Call Recording Web UI when logged in with your profile. The only exceptions are dates and times used for Recording Rules, which are always set to the server time.

To change the default Call Recording Web UI time zone for your profile:

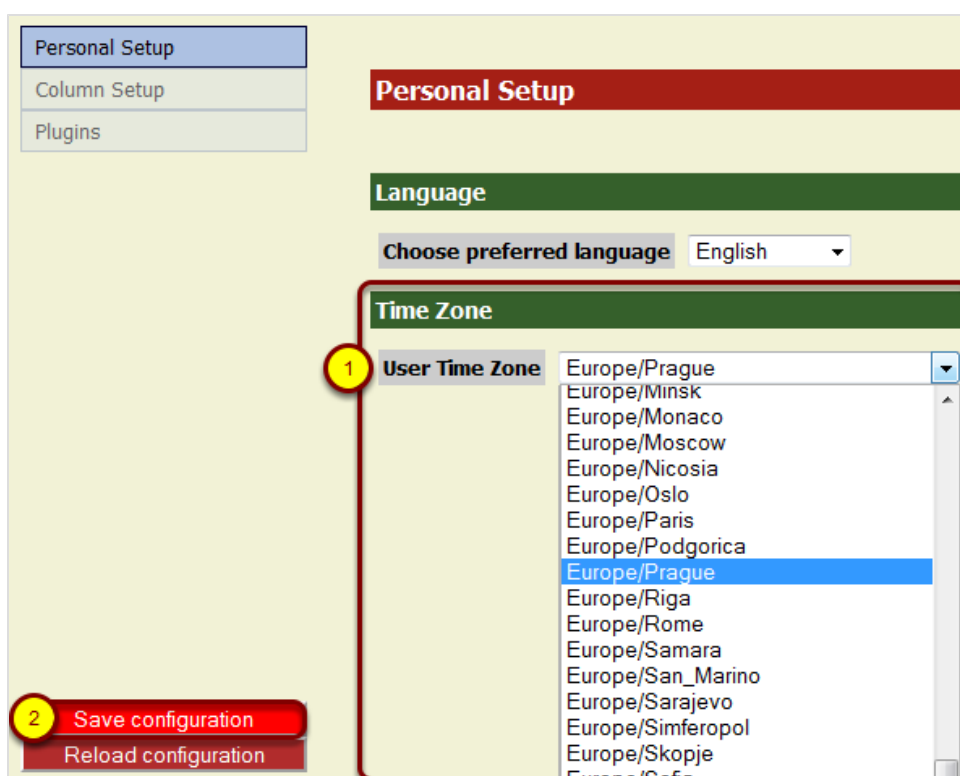


Figure 9: Changing the Default Time Zone

1. Select your time zone from the **User Time Zone** drop down list.
2. Click **Save configuration**.

Refresh the web page by clicking on another tab in Call Recording, or by clicking **Refresh** in your web browser.

Important:

Changing the language and time zone only affects the profile of the logged in user. You can choose your own default language and time zone without affecting any other user.

Column Setup

This option is available only if the System Administrator allows users to change the column set-up. The current status of setup rights is shown below the **Setup rights** section on this screen.

The Call Recording **Recorded Calls** tab contains call information to help you select which calls to play. You can expand or reduce this view by adding or subtracting columns. Changing these selections only affects your own view of listed calls.

The number and type of columns available for selection depends on your system configuration, and is set by the System Administrator.

Navigate to **Settings > User Setup > Columns setup**.

Personal Setup

Column Setup

Plugins

Columns Global Setup

Setup rights

Settings below will affect column view if this checkbox is checked ☒

Basic columns

Column name	Visible	Description
Date	<input checked="" type="checkbox"/>	
Call start time	<input checked="" type="checkbox"/>	
Call end time	<input type="checkbox"/>	
Length of call	<input type="checkbox"/>	
Calling number	<input checked="" type="checkbox"/>	
Called number	<input checked="" type="checkbox"/>	
Description	<input checked="" type="checkbox"/>	

LiveMON columns

Column name	Visible	Description
Duration	<input checked="" type="checkbox"/>	
Calling number	<input checked="" type="checkbox"/>	
Called number	<input checked="" type="checkbox"/>	

Save configuration

Reload configuration

Figure 10: User's Setup - Columns

1. Select the columns to display in your **Recorded Calls** tab.
2. Click **Save Configuration**.

The columns you selected will now be displayed in the **Recorded Calls** tab.

Chapter

4

Using Call Recording

This Chapter describes how to use Call Recording and deals with how to listen to calls, add notes and search for calls.

This chapter contains the following sections:

[The Recorded CallsTab](#)

[Recorded Call Icons](#)

[Working with Recorded Calls](#)

[Searching and Using Filters](#)

The Recorded CallsTab

When you log in to Call Recording, the **Recorded Calls** tab opens first.

The **Recorded Calls** tab displays calls recorded by Call Recording. Change the **Count** to increase or decrease the number of calls displayed on one web page.

Click << or >> to move through the pages of recorded calls.

The screenshot shows the 'Recorded Calls' tab interface. At the top, there are navigation controls (1) and a 'Count' dropdown set to 25 (2). Below the navigation bar is a table of recorded calls. The table columns are: Date (3), Beginning (4), End (5), Length (6), From (7), To, and Description. The table contains 14 rows of call data, each with a checkbox on the left and action icons on the right. The 'From' and 'To' columns show caller and callee information, including device IDs like '5508 (Dev 5508 SLR)'.

	Date	Beginning	End	Length	From	To	Description
<input type="checkbox"/>	21-Jul-2011	10:13:06	10:13:26	0:20	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	
<input type="checkbox"/>	21-Jul-2011	10:10:23	10:10:52	0:29	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	
<input type="checkbox"/>	21-Jul-2011	10:06:31	10:09:47	03:16	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	
<input type="checkbox"/>	21-Jul-2011	9:25:58	9:27:53	01:55	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	
<input type="checkbox"/>	21-Jul-2011	9:16:10	9:18:11	02:01	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	
<input type="checkbox"/>	21-Jul-2011	8:40:07	8:42:48	02:42	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	
<input type="checkbox"/>	20-Jul-2011	22:55:14	22:55:33	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	
<input type="checkbox"/>	20-Jul-2011	22:54:41	22:55:00	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	
<input type="checkbox"/>	20-Jul-2011	22:54:09	22:54:28	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	
<input type="checkbox"/>	20-Jul-2011	22:53:37	22:53:56	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	
<input type="checkbox"/>	20-Jul-2011	22:53:05	22:53:24	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	
<input type="checkbox"/>	20-Jul-2011	22:52:33	22:52:52	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	
<input type="checkbox"/>	20-Jul-2011	22:52:01	22:52:19	0:19	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)	

Figure 11: List of Recorded Calls

There may be additional fields set by the system administrator in Column Setup.

Standard call information includes:

1. **Date:** Date of call
2. **Beginning:** Call start time
3. **End:** Call end time
4. **Length:** Length of Call
5. **From:** CallerID (Number, Name, or IP Address)
6. **To:** CallerID (Number, Name, or IP Address)
7. **Description:** Text notes

Recorded Call Icons

































	Date	Beginning	End	Length	From	To		Description
<input type="checkbox"/>	21-Jul-2011	10:13:06	10:13:26	0:20	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	   	
<input type="checkbox"/>	21-Jul-2011	10:10:23	10:10:52	0:29	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	   	
<input type="checkbox"/>	21-Jul-2011	10:06:31	10:09:47	03:16	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	   	
<input type="checkbox"/>	21-Jul-2011	9:25:58	9:27:53	01:55	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	   	

Figure 12: Recorded Call Icons

-  - Play the call: Launches the media player so you can listen to the call.
-  - Insert a note: Opens the information window so you can add text and see call details.
-  - Export: Allows you to open or save the call file.
-  - Play the video recording: Exports the call to the user's computer, and launches the media player to play the call screen recording.
-  - Only one stream recorded warning icon. Warns that you will only hear one side of the conversation.
-  - Warning icon: Move the mouse pointer over the warning icon for more information. A tool tip appears with the reason for the warning. Reasons include, for example, "No stream recorded."
-  - Archived call: The call is archived.
-  - Deleted call: The call is deleted.
-  - Deleted call available for restore: Restores deleted and archived calls so you can open them again.
-  - Restoring call: Shows that the call is in the process of being restored.
-  - Restored call: Shows the call is restored and available for playing.
-  and  - Call unlocked or locked: Protects a call from deletion (locked).
-  and  - Synchronized and used, or synchronized and not used: This shows the status of synchronized calls in a multi-server environment.
-  - Export video (no voice): This shows that a Screen Capture video recording is available for the call, but the audio for the call associated with the video is not available.

Working with Recorded Calls
















<input type="checkbox"/>	Date	Beginning	End	Length	From	To		Description
<input type="checkbox"/>	21-Jul-2011	10:13:06	10:13:26	0:20	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	  	
<input type="checkbox"/>	21-Jul-2011	10:10:23	10:10:52	0:29	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	  	
<input type="checkbox"/>	21-Jul-2011	10:06:31	10:09:47	03:16	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	  	
<input type="checkbox"/>	21-Jul-2011	9:25:58	9:27:53	01:55	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	  	

Figure 13: Recorded Call Icons

Click the speaker icon  to enable a media player to play a call. The media player will appear at the bottom of the screen. To end the playback press stop or pause on the media player.

Click the play video icon  to watch any screen capture video associated with the call. When you click this icon, a separate window will open to play the call, usually showing a Windows Media Player icon. Remember that when you play a screen recording, the call is first exported and then played. This means that if your security settings have not been adjusted in your browser, the playback may not function as expected.

Click the info icon  to see basic data relating to the call in the **Couple Information** section, and external call data in the **External Data** section. The top part of the window has a text entry field which allows you to add notes to the recording, and will be added to the recorded call's **Description** field. For more information about adding descriptions to calls, see the [Adding Notes to the Call Description](#) section.

Selecting Multiple Calls

<div> << >> 1 2 3 4 5 ... </div> <div> Count: 10 1 - 10 from over 100 (query took 0.07 seconds) </div>								
<input type="checkbox"/>	Date	Beginning	End	Length	From	To		Description
<input checked="" type="checkbox"/>	16-Apr-2012	15:06:28	15:06:36	0:07	5507 (Dev 5507 SLR)	5687 (Peter)	  	
<input checked="" type="checkbox"/>	16-Apr-2012	15:06:16	15:06:21	0:06	5507 (Dev 5507 SLR)	5687 (Peter)	  	
<input type="checkbox"/>	16-Apr-2012	10:35:22	10:35:29	0:06	5507 (Dev 5507 SLR)	5687 (Peter)	  	
<input type="checkbox"/>	16-Apr-2012	10:35:04	10:35:11	0:07	5507 (Dev 5507 SLR)	5687 (Peter)	  	
<input type="checkbox"/>	16-Apr-2012	07:54:16	07:54:23	0:07	5507 (Dev 5507 SLR)	5687 (Peter)	  	


Figure 14: Selecting Multiple Recorded Calls

Call Recording allows you to work with many calls at once.

1. To select more than one call, select multiple check boxes on the left hand side of the recorded calls table.
2. When the calls are selected, the buttons along the blue bar above the recorded calls table become active. Users can then send the selected recordings via email, play them using the Advanced Player, export them to

the local computer, restore them if they are archived, or delete them. The buttons available to the user are defined by the user permissions.

Playing Recorded Calls

Click the speaker icon  to launch the integrated player and open the call's stereo recording. The media player uses standard playback controls. You can play, pause, stop, fast forward, and adjust the volume.

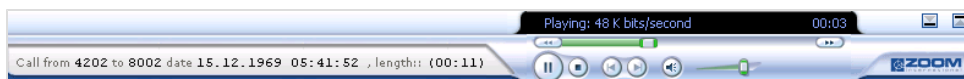


Figure 15: Integrated Player - Internet Explorer and Media Player

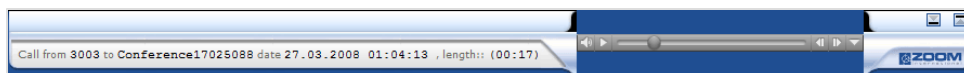


Figure 16: Integrated Player - Other Browsers and Apple QuickTime

Listening to Several Calls in a List,

1. Select the calls by clicking the check boxes.
2. Click **Advanced Player**. The Advanced Player window opens.
3. Drag and drop the calls to adjust the order and mix of call playback.

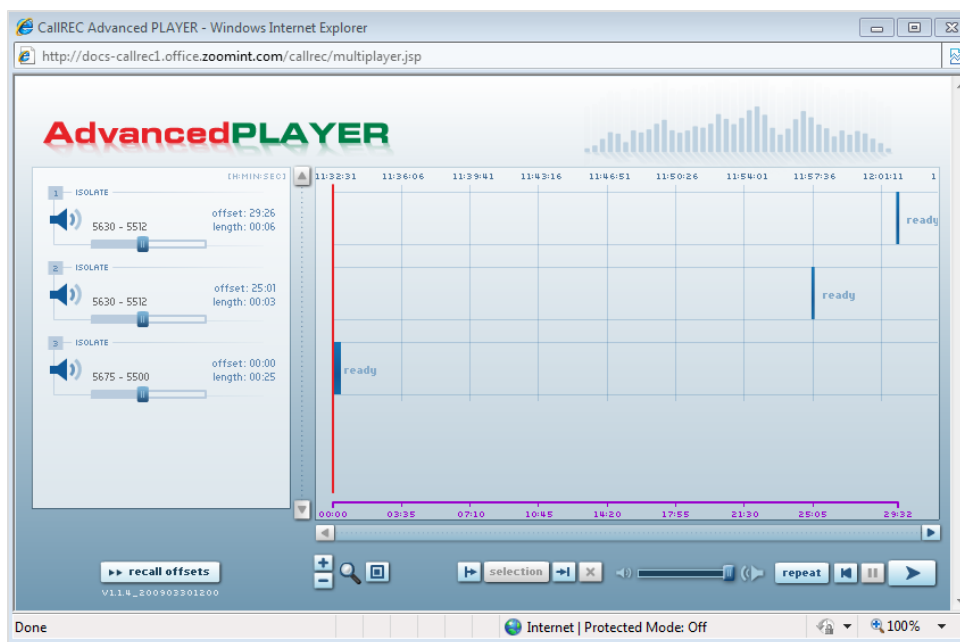


Figure 17: The Advanced Player Window

For more information about using the Advanced Player, please see the [Advanced Player](#) section of this guide.

Adding, Deleting or Modifying Notes in the Call Description

Logged in as: Victor Meldrew

Recorded calls | Restored calls | Users | LiveMON | ScoreCARD | Settings | About | Audit | Logout

Count: 25 | 1 - 25 from 114 (query took 0.18 seconds)

Send to email | Advanced PLAYER | Export | Restore | Search

	Date	Beginning	From	To		Description
<input type="checkbox"/>	21-Jul-2011	10:13:06	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)		
<input type="checkbox"/>	21-Jul-2011	10:10:23	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)		
<input type="checkbox"/>	21-Jul-2011	10:06:31	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)		
<input type="checkbox"/>	21-Jul-2011	9:25:58	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)		
<input type="checkbox"/>	21-Jul-2011	9:16:10	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)		
<input type="checkbox"/>	21-Jul-2011	8:40:07	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)		
<input type="checkbox"/>	20-Jul-2011	22:55:14	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)		
<input type="checkbox"/>	20-Jul-2011	22:54:41	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)		
<input type="checkbox"/>	20-Jul-2011	22:54:09	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)		
<input type="checkbox"/>	20-Jul-2011	22:53:37	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)		
<input type="checkbox"/>	20-Jul-2011	22:53:05	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)		
<input type="checkbox"/>	20-Jul-2011	22:52:33	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)		
<input type="checkbox"/>	20-Jul-2011	22:52:01	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)		
<input type="checkbox"/>	20-Jul-2011	22:51:28	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)		
<input type="checkbox"/>	20-Jul-2011	22:50:56	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)		
<input type="checkbox"/>	20-Jul-2011	22:50:24	5507 (Dev 5507 SLR)	5508 (Dev 5508 SLR)		

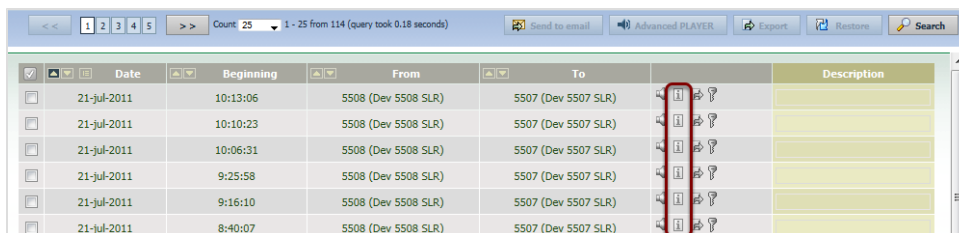
Figure 18: Description of Fields on RHS

You can add descriptive text notes to a call recording, if you have the appropriate privileges to do so. These notes are visible to all users who have access to the call recording. It is recommended that each user add their initials to the notes to avoid potential confusion.

To add, delete, or modify text in the description field, click inside the description field.

Adding Notes using Call information


You may also add, delete or modify notes to the Call Description whilst displaying call information.

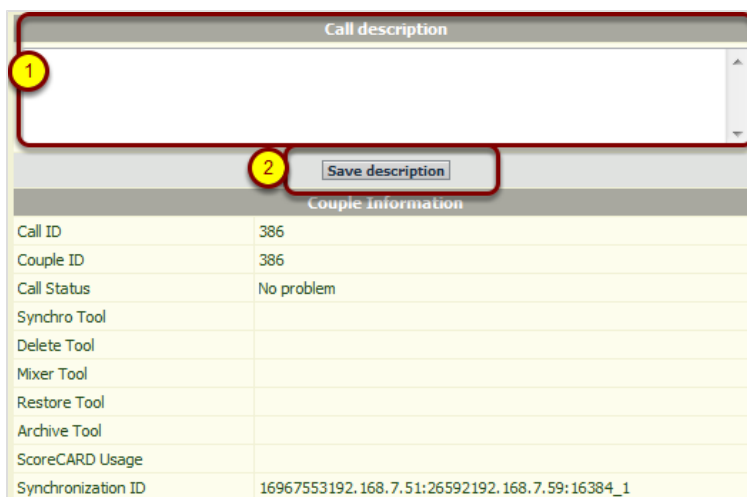


The screenshot shows a table with call records. The columns are Date, Beginning, From, To, and Description. The first five rows show calls from 21-Jul-2011. The 'To' column contains phone numbers in parentheses. The 'Description' column is empty. A red box highlights the information icon (an 'i' in a square) in the first row of the table.

	Date	Beginning	From	To	Description
<input type="checkbox"/>	21-Jul-2011	10:13:06	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	
<input type="checkbox"/>	21-Jul-2011	10:10:23	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	
<input type="checkbox"/>	21-Jul-2011	10:06:31	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	
<input type="checkbox"/>	21-Jul-2011	9:25:58	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	
<input type="checkbox"/>	21-Jul-2011	9:16:10	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	
<input type="checkbox"/>	21-Jul-2011	8:40:07	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)	

Figure 19: The Information Buttons

Click the information icon . A new window opens that displays call data and allows you to add text notes.



The screenshot shows a window titled 'Call description'. It has a large text area for notes, a 'Save description' button, and a section titled 'Couple Information' with a table of call details. A red box highlights the text area, and a yellow circle with the number '1' is next to it. Another red box highlights the 'Save description' button, and a yellow circle with the number '2' is next to it.

Couple Information	
Call ID	386
Couple ID	386
Call Status	No problem
Synchro Tool	
Delete Tool	
Mixer Tool	
Restore Tool	
Archive Tool	
ScoreCARD Usage	
Synchronization ID	16967553192.168.7.51:26592192.168.7.59:16384_1

Figure 20: Call Description Window

1. Click inside the **Call description** box. Type your notes.
2. Click **Save description**.

The information is added to the call data record and stored on the database.

Important:

You can search saved call descriptions and find specific calls. Using consistent terms, like “sale”, “complaint”, and “training” is highly recommended. Genesys also recommends that each user includes his or her initials to notes. This helps avoid confusion when identical notes are flagged during a search.

To delete or modify a note:

1. Click the call information icon  .
2. Click inside the **Call description** box. Delete or modify your notes.
3. Click **Save description**.

The information is updated to the call data record and stored on the database.

Playing Conference and Transferred Calls

Call Recording records data traffic between pairs of connected telephones. A conference call or transferred call is actually a series of these pairs.

- Recording 1 – call between the caller and the operator.
- Recording 2 – call between the operator and the called party.
- Recording 3 – call between the caller and called party.

To listen to the entire call, you must open all pairs together in the advanced player. Select the check boxes of the calls to be reviewed, and click **Advanced Player**.

Call Recording identifies conference calls with a `ConferenceNumber` identifier. The `ConferenceNumber` is the same for the entire collection of call pairs.

<input type="checkbox"/>	May 15, 2008	3:36:26 AM	1001	Conference 16803309	26093	16803309			
<input type="checkbox"/>	May 15, 2008	3:36:26 AM	1113	Conference 16803309	26093	16803309			
<input type="checkbox"/>	May 15, 2008	3:36:26 AM	1112	Conference 16803309	26093	16803309			

Figure 21: Identifying Conference Calls

Transferred calls are kept as independent, but related, recordings (couples). To sort related calls so that they will appear together in the recorded calls list, click the **Order Calls** icon at the top of the **Date** column.



Figure 22: Order by Related Calls Icon

Playing Screen Capture Video Recordings

Genesys Screen Capture allows you to watch a video recording of an agent's desktop while listening to the call recording. You can see and hear what the agent saw and heard.





1. Click the video icon .
2. Click **Open** to launch the video, or click **Save** to store the file on your computer.

Important:

You must have the H.264 video codec installed to launch videos. For more information, consult your system administrator or the Screen Capture Administration Guide.

Locking Calls

Locking a recorded call means that it cannot be deleted from the database.

- Click the Key icon  to lock a call. The Locked icon  appears.
- Click on the Locked  icon to unlock a call. The Key icon  appears.

When calls are archived, they may be deleted from the active database. The lock function prevents this.

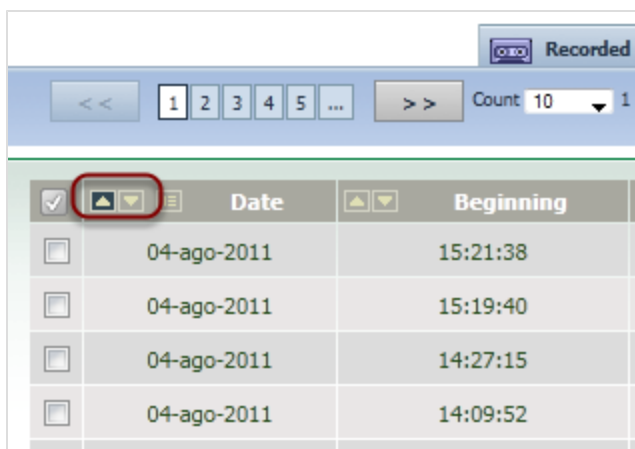
Changing Display Order

Figure 23: Up and Down Controls for Changing the Recording Order

Calls automatically display in date and time order, with the most recent calls first.

You can change the order by using the up and down arrows at the top of each column.

Important:

The calls displayed in Call Recording depend on the filters saved on your system. Clearing all filters from your Search screen displays all available records.

Sending Calls to Email

You can email Call Recording recorded calls as .mp3 file attachments.

Select one or more recorded calls by clicking their check boxes in the first column.

Click **Send to mail**. The **Send calls to email** window opens.

Start	From	To	Media type (file name)	Size(kB)	Attach
4/17/09 12:22 PM	6003	6001	AUDIO (1239963751687_6003_6001_6.mp3)	3	<input checked="" type="checkbox"/>
4/17/09 12:22 PM	6001	6003	AUDIO (1239963735265_6001_6003_4.mp3)	27	<input checked="" type="checkbox"/>
4/16/09 2:07 PM	6003	6001	AUDIO (1239883640903_6003_6001_8.mp3)	26	<input checked="" type="checkbox"/>

Attachment size(kB): 56

Receipients: andrew@aardvark.com, bob@bear.com, catherine@cat.com

Message body: Here are the CallREC phone call mp3s I promised.

Send Discard

Figure 24: Sending Calls to Email

1. Type email addresses in the **Recipients** field (use commas to separate emails).
2. Type the message you want in your email in the **Message body** field.
3. Click **Send**.

Call Recording sends the attached calls to all the email addresses entered.

Searching and Using Filters

Genesys Call Recording uses search filters to identify call records.

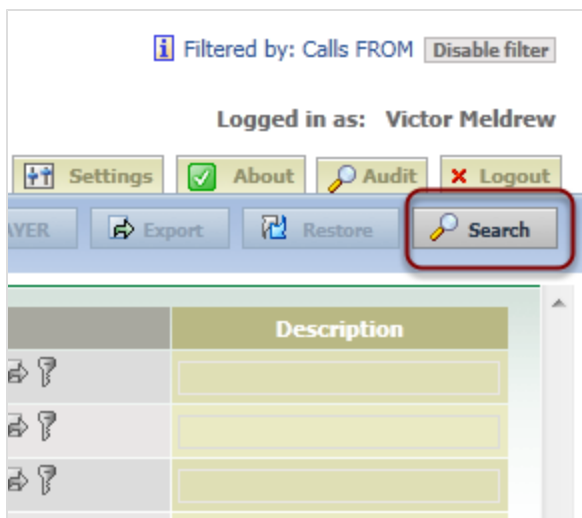


Figure 25: The Search Button

To search for calls and video recordings, click **Search**. The **Search filter** dialog opens.

 A screenshot of the "Search filter" dialog box. It has a title bar with a magnifying glass icon and a "Close" button. The dialog is divided into several sections. The top section is for "Filters" with a "Choose filter" dropdown, a "Filter name:" text field, and "Delete", "Load", and "Save" buttons. Below this are fields for "Calling numbers:", "Called numbers:", "Description", "Case sensitive:", "Type of call", "Couples count:", "Random selection", "Call length" (with "Min.:" and "Max.:" fields), "Locked only:", and "Calls with the same number from" (with "to" and "or both" options). The middle section contains two calendar views for "From:" and "To:" with month and year selectors (June 2011 and July 2011). Below the calendars are "Daily hours from" and "Daily hours to" fields. The bottom section is labeled "Problem Status:" and contains a list box with options: "No problem", "Just one stream recorded.", "No stream recorded.", and "Unknown codec."

Figure 26: Search Filter

Understanding Search Filters

The Call Recording Search functionality relies on user-generated search filters. Search filters allow users to find calls within the Call Recording database, and the same filters can be used to define user access rights within the Users tab. For more information see [Limiting User Access by Boolean Filters](#).

In most installations, the system administrator provides basic recording and search filters during set-up. Each group and user can be provided with default filters specific to their roles. For example, a supervisor could have a filter that only displays calls handled by a group of agents. The supervisor will only see calls from those agents in the Call Recording user interface.

To search for a specific call or screen recording, the supervisor identifies call attributes, like an agent's phone number, and a time range. Call Recording only displays the agent's calls that were recorded during that time range.

If the supervisor uses the same searches repeatedly, they can save the search as a filter to be used at a later time. This search filter can be made available to other users of the Call Recording system. A filter can not be deleted while in use.

Filters identify calls based on call attributes.

Call attributes include:

- Signaling information, such as which IP addresses and telephones were used in the calls.
- Date/time information, such as when calls start and stop.
- Duration of call.
- Type of call.
- Call recording status, such as locked calls only.

Advanced searches allow you to set filters based on external information, including customer name, skills type, wrap up code and agent evaluation data fields added to the database by the system administrator.

Default (Permanent) Search Filter

After Call Recording installation, a permanent (un-removable) filter is added to limit the search range of calls to 31 days by default, to improve search performance. This filter prevents a gap of more than 31 days between the **To** and **From** search parameters; an error will be displayed if a longer search period is specified.

On a lightly used system (with thousands rather than millions of recorded calls per year), this value can be increased by an administrator to a higher value (maximum: 3000 - around a 7 year search period) in the Call Recording Web GUI (**Settings > Configuration > Web UI > Web Interface > User Interface View Setting > Max search days**).


Conversely, it may be necessary to reduce this **Max search days** value on a system with millions of recorded calls per year.

You may also search for a Particular Problem Status.

Without any problem status selected, the search includes calls with all statuses Choose from:




- No problem.
- Just one stream recorded.
- No stream recorded.
- Unknown codec.
- Decoding error.
- Error communicating with recorder.
- Cannot capture files.
- Decoder failure (IO error).
- Different codecs for each stream.
- The file exceeds its maximum size.
- Unavailable destination of decoding.
- License problem.
- Incomplete stream saved.

Using Advanced Searches


Search filter
Close

Filters:

Choose filter: Choose filter
Filter name:

 Delete
 Load
All users ☐
 Save

Calling numbers: ☒ and ☐ or Called numbers:
 Description: Case sensitive: ☐ Type of call: All
 Couples count: < Random selection ☐
 Call length: Min.: Max.: Locked only: ☐
 Calls with the same number from ☐ to ☐ or both ☒ which occurred more than 0

From: No filter

< June > < 2011 >

Wk	Su	Mo	Tu	We	Th	Fr	Sa
22				1	2	3	4
23	5	6	7	8	9	10	11
24	12	13	14	15	16	17	18
25	19	20	21	22	23	24	25
26	26	27	28	29	30		
27							

6/21/11 12:00:00 AM
 Daily hours from

To: No filter

< July > < 2011 >

Wk	Su	Mo	Tu	We	Th	Fr	Sa
26						1	2
27	3	4	5	6	7	8	9
28	10	11	12	13	14	15	16
29	17	18	19	20	21	22	23
30	24	25	26	27	28	29	30
31	31						

Daily hours to

Problem Status:

No problem
 Just one stream recorded.
 No stream recorded.
 Unknown codec.

Condition connecting data above and below ☒ and ☐ or

Advanced search:
 Condition between options below ☒ and ☐ or
 Case ☒ insensitive ☐ sensitive
 Called Stream Payload



 Cancel
 Search

Figure 27: Advanced Search Fields

Defining custom search criteria in **Advanced search** extends the search capabilities to include external data available in your call management system (for example, UCCE). System administrators define advanced search criteria. Added external data fields for Advanced search appear under the calendar controls in the search window.

Using Saved Filters

Figure 28: Search

To use a saved filter:

Saved filters appear in the **Choose filter** drop down list. Selecting a pre-existing filter allows you to use recurring search criteria. Filters can be created by users, and shared, or they can be set-up by system administrators.

1. Select a filter from the **Choose filter** drop down list.
2. Click **Load**. The filter settings appear in the Search window.
3. Click **Search**.

Only calls matching your filters display in Call Recording. To see all calls, clear the filters.

Tip:

When you apply a filter, only matching recordings display in the Recorded Calls list.

Saving Search Filters

To create a filter that displays only certain calls, you must choose search criteria in the search window. Saving this search criteria creates a re-usable filter.

1. Select your search attributes. If you use the **From** date you must also use **To** date with a separation not more than 31 days otherwise the dates will not be saved.
2. Type a Filter Name.
3. Click **Save**.

Your filter is now added to the filter drop down list.

Important:

Selecting All Users makes saved filters available to all users of the system. Otherwise, saved filters are available only to the user who created the filters.

Clearing Filters

Call Recording displays the search criteria that are currently active at the top right of the screen next to the **Filtered by:** indicator.

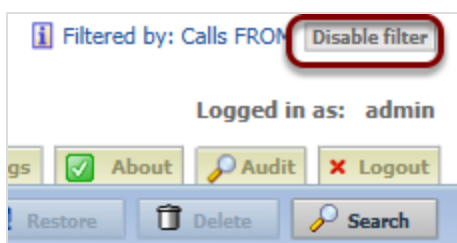


Figure 29: Clearing Filters

To return to displaying all records, click **Disable filter**.

Important:

A permanent **Calls FROM** filter improves search performance by limiting the search range (to a default of 31 days). This filter is visible and cannot be disabled, but the range value can be changed by an administrator. See [Default \(Permanent\) Search Filter](#).

Deleting Saved Filters

1. Select a filter from the **Choose Filter** drop down list.
2. Click **Delete**.

The filter is no longer available in the filter drop down list.

Important:

If the filter is being used by other users of the system, Call Recording does not allow you to delete the user who created the filter.

Using Filters in Permanent Rules

Filters can also be used as rules for restricting access to recorded calls. Supervisors and administrators can assign saved filters to Groups and Users. When filters are assigned to a group, then only those filtered recorded calls are available to the users within that group.

Permanent rule filters can be assigned to a group through the Users tab. For more information about the Users tab, please see the [Users Tab](#) section of this guide.

Open a group, and click **Edit Filters**.

Multiple permanent rule filters can be assigned to a group by editing the group, and choosing saved filters from the Choose filter drop down list. Use Boolean operators (**And/Or**) to combine filters. When you save the group, the permanent filters apply to all members of that group.

Chapter

5

Searching for Call Records

Genesys Call Recording provides you with a powerful search tool that allows you to combine several search parameters into a single filter. When you click **Search**, you apply this filter to your displayed calls list. The more parameters you use, the narrower the search. Search filters can be used in conjunction with each other to return more appropriate results. For example, you may wish to search for calls to or from a specific user, within a specific date range, and with a minimum call length.

You can search for data stored in Call Recording, and if your system is properly configured, you can also search using external data. External data includes the **Agent Name** and any notes or comments that have been added to a call record. Your system administrator can add additional fields to the **Advanced search** list, depending on your system configuration.

This chapter contains the following sections:

[Searching for calls by Calling and Called Numbers](#)

[Using Wild Cards to Search](#)

[Alphanumeric Characters](#)

[Searching for Calls by Type](#)

[Searching for Calls by Date-Time Range](#)

[Searching for Calls by Description](#)

[Searching for Calls by Couples Count](#)

[Searching for Calls by Call Length](#)

[Searching for Calls by Same Numbers](#)

[Displaying Call Search Results Randomly](#)

[Searching for Calls by External Data](#)

Searching for calls by Calling and Called Numbers

If you know the number of either the calling or called phones, you can search for all the calls from and to those numbers. In the **Recorded Calls** tab click **Search**.

Figure 30: Searching by Calling and Called Numbers

To find Calling and Called numbers

1. Type the calling number in the **Calling numbers** box. Use the wildcards “?” and “*” for ranges of numbers. The example above gives calling numbers from 1240-9 and any called number beginning in 4, that is from 4000 to 4999.
2. Select the operator value **and** or **or**. Using **and** will return records from the calling number range and called number range, using **or** will return records that contain either. This is often used when setting filters to listen to calls made or received by a specific user. The calling number and the called number would be the same number separated by **or** operator, this would return all calls that a certain agent had either made or received.
3. Type the called number in the **Called numbers** box. Use wildcards “*” and “?” for ranges of numbers.

4. Click **Search**.

Only recorded calls found using the numbers, or range of numbers, that you typed in the **Calling numbers** and **Called numbers** boxes display in the Recorded Calls list. You can use this for setting filters to listen to calls that were made or received by a specific user. The calling number and the called number would be the same value, separated by **OR**. This would then return all calls that the user has either made or received.

To return to displaying all recorded calls, click **Disable Filter** at the top right of the screen.

Using Wild Cards to Search

Wild card characters can be used in find fields as follows:

- ? character represents an arbitrary character
- * character represents an arbitrary string

Examples of the use of wild cards are as follows:

- Specifying a range: 200? selects the numbers from 2000 to 2009;
- 20?? selects the numbers from 2000 to 2099
- Specifying all numbers: 2* selects all phone numbers which start with the number 2;
- *2 selects all phone numbers which end with the number 2

Alphanumeric Characters

GQM supports extensions, DNs and terminals that include alphanumeric characters. The following characters are supported:

Character Type	Valid Characters
Letters	A-Z, a-z
Numbers	0-9
Symbols	@ & + \$ % ' . , : ; ! ~ () [] # - _

Table 1: Valid Alphanumeric Characters for Extensions, DNs and Terminals

Ranges can only use numeric characters, for example: 1234-5678, or a regular expression. Multiple ranges must be separated by commas (,) with no additional spaces, for example: 1000-1900, 2000-2700, 3200-3500.

Searching for Calls by Type

Call Recording is able to distinguish call patterns and determine that recordings belong to a type of call, such as a conference call between three different callers. The types of calls that you can search for include the following:

- All
- Normal
- Conference

To Search for Calls by their Type

1. Select the **Type of call** from the drop down list.
2. Click **Search**.

Only recorded calls of the type you selected display in the Recorded Calls list.

To return to displaying all recorded calls, click **Disable Filter**.

Searching for Calls by Date-Time Range

All calls are identified by their date, time, and duration. Call Recording uses standard calendar controls to allow you to identify your own time ranges. You can also use pre-configured time ranges, or search during hourly ranges.

To search for Pre-configured time ranges:

The screenshot shows the 'Search filter' dialog box. The 'From' and 'To' date pickers are highlighted with red boxes and numbered 1 and 2 respectively. The 'From' date picker is open, showing a list of pre-configured time ranges: 'No filter', '10 minutes ago', '30 minutes ago', 'One hour ago', 'Three hours ago', 'Six hours ago', 'Last 24 hours', and 'Last 48 hours'. The 'To' date picker is also open, showing a list of pre-configured time ranges: 'No filter', '10 minutes ago', '30 minutes ago', 'One hour ago', 'Three hours ago', 'Six hours ago', 'Last 24 hours', and 'Last 48 hours'. The 'Search' button is highlighted with a red box and numbered 2.

Figure 31: Search Pre-configured Time Range

1. Select a pre-configured range from the **From** drop down list or the **To** drop down list.
2. Click **Search**.

Only recorded calls from the time range you selected display in the Recorded Calls list.

To return to displaying all recorded calls, click **Disable Filter**.

To search for Custom Time Ranges:

Figure 32: Search Date Range

1. Select a starting date-time in the **From** calendar control.
2. You must also select an ending date-time in the **To** calendar control.
3. Click **Search**.

Only recorded calls in the date-time range you selected display in the Recorded Calls list.

To return to displaying all recorded calls, click **Disable Filter**.

To search for Daily Hours:

To display calls that were recorded during a standard daily time range, such as calls between 8 am and 10 am, use **Daily Hours** to find the recorded calls.

Note: Use the time format HH:MM:SS AM/PM.

Figure 33: Search Time Range

1. Type the **Daily Hours From** starting time.
2. Type the **Daily Hours To** ending time.
3. Click **Search**.

Only recorded calls that are within the Daily Hours range selected display in the Recorded Calls list.

Check the fields below the calendars to ensure that the selection criteria have been registered correctly. Call Recording reads the fields below the calendars for the selected date and time ranges, and not the calendars themselves.

To return to displaying all recorded calls, click **Disable Filter**.

Searching for Calls by Description

The **Recorded calls** tab in Call Recording displays comments typed in the **Description** column in call records by users. You can search for calls using these comments.

Figure 34: Search by Description

1. Type your search terms in the **Description** box.
2. Select **Case Sensitive** if your search must match upper and lower case.
3. Click **Search**.

Only recorded calls containing comments matching your terms display in the Recorded Calls list.

To return to displaying all recorded calls, click **Disable Filter**.

Important:

Comments in the **Description** column must use standard terminology to make searching for calls more accurate.

Searching for Calls by Couples Count

Each call has at least one couple. A couple is a pair of RTP streams that correspond to the two directions of media in a telephone conversation. A couple is created at the start of a call (or call section) and ends when an event in the call signaling closes the RTP stream. When you transfer a call, or have a conference call, each new connection is a new call couple. These related call couples can be found by describing the number of couples.

Tip:

Transferred calls are > (greater than) 1. Conference calls are > (greater than) 2.

1. Select <(less than) = (equal to) or >(greater than) from the drop down list.
2. Type the number of call couples.
3. Click **Search**.

Only recorded calls with the number of call couples you selected display in the Recorded Calls list.

To return to displaying all recorded calls, click **Disable Filter**.

Searching for Calls by Call Length

Call Recording allows you to find calls based on their total length.

1. Type the minimum call length in the Min: box (hh:mm:ss).
2. Type the maximum call length in the Max: box (hh:mm:ss).

Note: You can combine Min: and Max: or only use one value.

3. Click **Search**.

Only recorded calls within the length you selected display in the Recorded Calls list.

To return to displaying all recorded calls, click **Disable Filter**.

Searching for Calls by Same Numbers

Call Recording allows you to find phone numbers that are repeatedly connected to each other. So if you have a customer who calls repeatedly, or an agent who makes many calls to the same number, you can find these patterns.

1. Select **Calls from the same number**.
 - **From**: The same number calls the call center repeatedly.
 - **To**: The same agent calls outside repeatedly.
 - **Both**: The same number calls the same agent repeatedly.
2. Type a number in the **which occurred more than** box.
3. Click **Search**.

Only recorded calls that meet your criteria display in the Recorded Calls list.

To return to displaying all recorded calls, click **Disable Filter**.

Displaying Call Search Results Randomly

The call search results randomizer helps a call quality controller to have a more objective perspective on call search results. To display your search results in random order, instead of by date-time order, select the **Random selection** check box.

Searching for Calls by External Data

When Call Recording is integrated with other applications, such as a Cisco Unified Communications Manager or UCCE, additional data can be passed from the external application to Call Recording. Call Recording can then use this data to find call records.

Important:

The System Administrator must enable Advanced Search, and add external data fields to Call Recording before you can search for external data.

Searching for Calls by Agent Names

In many call centers, agents are allowed to sit at any terminal. Each agent can have a unique identifier in the Call Manager (name or ID number), which allows call activity to be attributed to the agent, and not the terminal.

1. In **Advanced Search**, select or type an **Agent Name**.
2. Click **Search**.

Only recorded calls involving the Agent you selected display in the Recorded Calls list.

To return to displaying all recorded calls, click **Disable Filter**.

Searching with Other External Data

Your system administrator can add additional fields, depending on the external data stored in systems that are integrated with Call Recording.

The screenshot displays a search configuration interface with multiple rows for defining search criteria. Each row consists of a table with columns: Item key, Text, Type, Match, and Sort. Below the Item key column is a dropdown menu that is currently open, showing a list of available external data items. The items listed include:

- CCX_Variable_ZIPCode
- CCX_CFG_FullName
- CCX_FullName
- CALLED_STREAM_PAYLOAD
- CALLED_URL
- CALLING_STREAM_PAYLOAD
- CALLING_URL
- CCX_ANI
- CCX_ApplicationID
- CCX_CallID
- CCX_CallType
- CCX_CFG_Extension
- CCX_CFG_FirstName
- CCX_CFG_FullName
- CCX_CFG_LastName
- CCX_CFG_LoginID
- CCX_CSQID
- CCX_Variable_AccountNumber
- CCX_Variable_ActivationDate
- CCX_Variable_Amount
- CCX_Variable_BillingInquiry
- CCX_Variable_ContractAmount
- CCX_Variable_ContractRenewal
- CALLED_STREAM_PAYLOAD

The dropdown menu is currently showing 'CALLED_STREAM_PAYLOAD' as the selected item. Below the dropdown menu, there are buttons for 'Up', 'Down', and 'Remove'. The interface also includes a 'New' button at the bottom left. The status 'Used in #filters/#view restrictions: Not used.' is displayed for each row.

Figure 35: Selecting Data for Search Dropdown

The figure shows an example of the types of external data available in the **Item key** drop down list. For full instructions on how to configure the searches, see the Call Recording Administration Guide section *Advanced Search with External Data*.

The screenshot shows the 'Search filter' dialog box. It has a 'Filters' section at the top with a 'Choose filter' dropdown, a 'Filter name' text field, and buttons for 'Delete', 'Load', 'All users', and 'Save'. Below this are fields for 'Calling numbers', 'Called numbers', 'Description', 'Case sensitive', 'Type of call', 'Couples count', and 'Call length'. There are also 'From' and 'To' date pickers with calendar views for March 2010 and May 2012. A 'Problem Status' dropdown is present. The 'Advanced search' section is highlighted with a red box and contains several fields: 'Condition connecting data above and below' with 'and' and 'or' radio buttons (annotated with a red circle and '1'), 'Condition between options displayed below' with 'and' and 'or' radio buttons (annotated with a red circle and '2'), 'Case' with 'insensitive' and 'sensitive' radio buttons, and a list of external data sources: 'CCX ANI', 'CCX Login ID', 'CCX Activation Date', 'CCX Zip Code', 'JTAPI_CISCO_ID', 'CCX Call Type', 'CCX Account Number', 'CCX Service Type', 'CCX Full Name', and 'Couple start reason'. The 'CCX Full Name' dropdown is open, showing 'Collections', 'Insurance', and 'Sales' (annotated with a red circle and '3'). At the bottom right, there are 'Cancel' and 'Search' buttons (annotated with a red circle and '4').

Figure 36: Search with External Data

These fields display in the Advanced Search area below standard searches.

1. Select **and** or **or** in the section **Condition connecting data above and below**.

Selecting **and** means that the search will only return calls that satisfy both the criteria in the top of the form and the Advanced Search criteria.

Selecting **or** means that the search will return calls that satisfy either the criteria in the top of the form or the criteria in the Advanced Search or both.

2. Select **and** or **or** in **Condition between the options displayed below**.

Selecting **and** means that the search will only return calls that satisfy all the selected criteria in the Advanced Search criteria.

Selecting **or** means that the search will return calls that satisfy at least one of the Advanced Search Criteria.

Select case **insensitive** if the data does not need to match the case in the external data selected or **sensitive** if it does need to match the case in the external data selected.

3. Depending on how each External data Key has been set up, type the criteria or select from the dropdown lists for each key to be searched for.
4. Click **Search**.

Chapter

6

Administering Groups and Users

This chapter describes how to administer groups and users.

This chapter contains the following sections:

[Opening the Users Tab](#)

[Groups in Call Recording](#)

[Administering Users](#)

Opening the Users Tab

Call Recording uses Groups to grant system access privileges and determining recording and filtering rules. Individual users are assigned to a group, and inherit the group's access privileges and rules. To configure these privileges and rules click the **Users** tab.

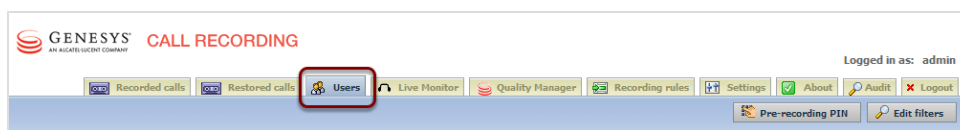


Figure 37: The Users Tab

Groups in Call Recording

The group with the most complete set of access rights is always called Admin. All the other groups are subordinate to Admin. Users in the Admin group inherit all access rights, including setting recording rules and filters.

1. The figure shows the full list of privileges. Any changes in a group's rights are reflected for all sub-groups and users assigned to that group. A subordinate group cannot have more Privileges than it's parent group.
2. The Tree view of Groups. You can set up unlimited Groups and Users, each using its own recording rules and filters. Practically speaking, this gives you very flexible control over which calls are recorded and who has access to those calls.
3. The figure shows that Group A only has one user presently with a full set of privileges.

Creating a New Group



Figure 38: Creating a New Group

To create a new group:

In the Users tab, click **Insert new group**. The **Add new group** window opens.

A screenshot of the 'Add new group' dialog box. The dialog has a title bar 'Add new group'. It contains several fields and a list of privileges. The fields are: 'Name:' (1), 'Parent group:' (3) with a dropdown menu showing 'Group A', 'Phone number:' (2), and 'Description:' (4) with a large text area. The 'Privileges:' section (5) is a list of checkboxes, all of which are checked: 'Pause and Resume Calls', 'Display Incorrect Calls', 'Edit Note', 'Display Video Calls', 'Changing of couple protection', 'Export', 'LiveMON', 'Restored Calls', 'Audit', 'Send calls to email', and 'Call List'. At the bottom, there is a 'Choose filter:' dropdown (6) with 'Choose filter' selected, and an 'END' dropdown (7) with 'END' selected. To the right of these are two buttons: 'Insert new group' (7) and 'Cancel'.

Figure 39: Adding a New Group

1. Type the group **Name**.
2. Type the group **Phone number**. The phone number value is usually a mask indicating a range of numbers. Wild cards are valid. To include all numbers beginning with 6, type "6*". To include all numbers in the system (that is, to use the settings of the parent group with no filter applied), use the wildcard "*" or leave the field blank.

Tip: Alphanumeric Characters

GQM supports alphanumeric character input if your Contact Center system supports alphanumeric characters in extensions, DNs or terminals. Refer to the section on [Alphanumeric Characters](#) for more information.

3. Select the **Parent group** from the drop down list.
4. Type a **Description** of the group. (Optional)
5. Select **Privileges** for the group. These privileges cannot be greater than the rights of the parent group.
6. Filtering is optional. You can select multiple pre-existing filters, combining the filters with Boolean operators to restrict call recordings displayed for the group. See [Searching and Using Filters](#).
7. Click **Insert new group** to save your new group.

The new group displays in the tree view of groups. You can now add users to this group.

Assigning Privileges

Privileges are inherited by all members of the group and any subgroups.

Privilege	Definition
Recording Rules	Add, and Edit recording rules.
Pause and Resume calls	Pause and Resume calls
Display Incorrect calls	Display calls that are not recorded correctly, for example, calls which contain signaling data for the call but no audio recording. Recommended only for system administrators.
Edit Note	Add, Edit call notes— ability to add comments to call data records.
Display Video Calls	Allows viewing of Screen Capture recordings.

Privilege	Definition
Changing of couple protection	Ability to remove protection from, for example, undeletable couples.
Display Nondecoded calls	Displays calls which are not yet decoded and calls waiting to be decoded from the original format (PCAP) to the final format. (MP3 or WAV).
Users and Roles	Ability to administer groups, users and access rights.
Export	Ability to export recordings in selected audio format.
Live Monitor	Access to live call monitoring.
Restored calls	Access to restored recordings from backup and archive.
Audit	Access to audit information, for example, logs .
Other settings	Access to system and configuration settings. Recommended only for system administrators.
Send calls to email	Ability for the user to send call recordings to specified email addresses.
Call list	Ability to play recordings. Disabling this option also disables Edit note, Export and Call deletion.
Call deletion	Ability to delete recordings.

Table 2: External Data for Recording Rules

Limiting Group Access by Phone Numbers

Users inherit access rights from their group. You can restrict access rights further by specifying a phone number filter for the group. This can be a single phone number, for example 2435, or a range of numbers, for example, 24??. Wild cards are valid.

Important:

These settings also apply to the calls displayed in Live Monitor.

Limiting Group Access by Boolean Filters

Boolean operators allow you to combine several pre-existing filters together and display only the results to the members of the group. Tree view of groups, users, and access rights

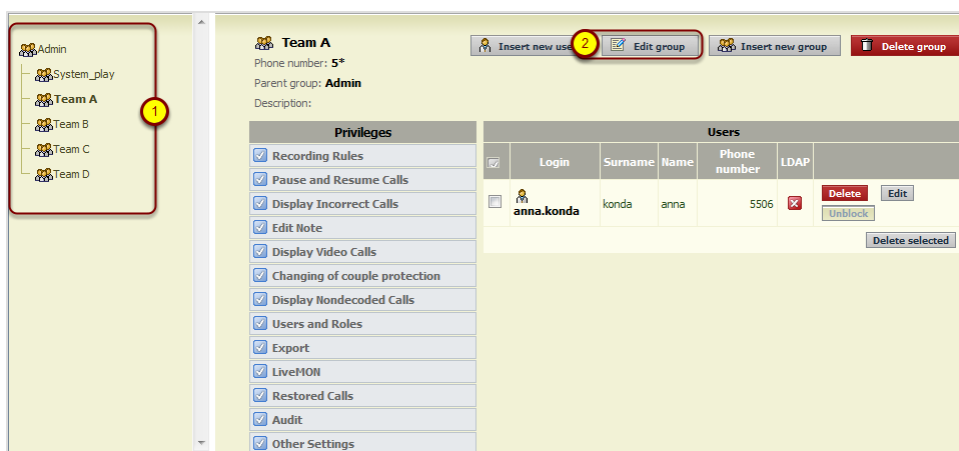


Figure 40: Edit Group

1. Select a Group from the Tree view of groups on the left hand side of the screen.
2. Click **Edit Group**. The Edit group form appears.

Edit group Team A

Name: Team A **Parent group:** Admin

Phone number: 5*

Description:

Privileges:

- ☒ Recording Rules
- ☒ Pause and Resume Calls
- ☒ Display Incorrect Calls
- ☒ Edit Note
- ☒ Display Video Calls
- ☒ Changing of couple protection
- ☒ Display Nondecoded Calls
- ☒ Users and Roles
- ☒ Export
- ☒ LiveMON
- ☒ Restored Calls
- ☒ Audit
- ☒ Other Settings
- ☒ Send calls to email
- ☒ Call List
- ☒ Call Deletion

Filter Definition:

Choose filter: DavidLuiz (admin) **OR** Filter115 (admin) **END**

Save **Cancel**

Figure 41: Edit Group Form

1. Choose a filter from the **Choose filter** drop down list.
2. If this is the only filter needed then select **END**. To use more than one filter, then select a **AND** or **OR** to link the next filter. Using **AND** the group will only be able to see calls that satisfy both filters, using **OR** the group will see all the calls from the first filter and all the calls from the second filter.
3. If you chose **AND** or **OR** an extra Choose filter dropdown list appears. Choose additional filters, connecting them with operators until you have defined the filter. The final Boolean operator must always be **END** to complete the filter definition.
4. Click **Save**.

The filter is applied to all members of the group and its subgroups.

Users may also apply filters to their individual view of recorded calls. The Group filters are applied first, and then the User filters. The result is that the viewer sees only a restricted set of recorded calls.

Important:

If you apply a filter using SIP, you must define the mask for the whole SIP number. For example, 12345@*.

Important:

These settings do not apply to the list of calls displayed in Live Monitor. It will only affect the list of calls displayed in the Recorded calls list.

Editing Groups

The screenshot shows the 'Edit group' interface for 'Group A'. The interface is divided into several sections:

- Name:** A text field containing 'Group A'.
- Parent group:** A dropdown menu showing 'Agents'.
- Phone number:** A text field containing '5***', highlighted with a red circle and a yellow circle with the number 2.
- Description:** A large empty text area.
- Privileges:** A list of permissions with checkboxes, highlighted with a red circle and a yellow circle with the number 1. The list includes:
 - ☐ Recording Rules
 - ☒ Pause and Resume Calls
 - ☒ Display Incorrect Calls
 - ☒ Edit Note
 - ☒ Display Video Calls
 - ☒ Changing of couple protection
 - ☐ Display Nondecoded Calls
 - ☐ Users and Roles
 - ☒ Export
 - ☒ LiveMON
 - ☒ Restored Calls
 - ☒ Audit
 - ☐ Other Settings
 - ☒ Send calls to email
 - ☒ Call List
 - ☐ Call Deletion
- Choose filter:** A dropdown menu showing 'Choose filter'.
- END:** A dropdown menu showing 'END'.
- Save:** A button highlighted with a red circle and a yellow circle with the number 3.
- Cancel:** A button next to the 'Save' button.

Figure 42: Group Editing

Click **Edit Group**. Make your changes.

1. For example, select or deselect **Privileges**.
2. Or change the **Phone number** range.
3. Click **Save**.

The changes are saved and are inherited by all members of the group and any of its subgroups.

Deleting Groups

Important:

When you delete a group, you also delete all its members and recording rules. Once a group has been deleted, it cannot be restored.

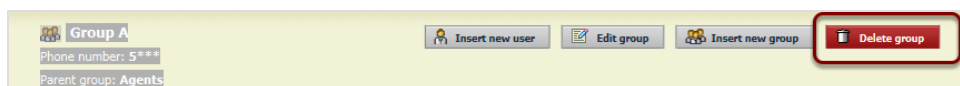


Figure 43: Group Deletion

Select a Group from the Tree view of Groups on the left hand side of the screen. Click **Delete Group**.

Click **OK** to confirm deletion of the group.

The group and all its members are deleted from the system.

Important:

Deletion takes effect immediately. It cannot be undone. If a user has created a filter, and if the filter is in use then the user who created the filter cannot be deleted.

Administering Users

You only need to create user profiles for staff that actively use Call Recording. Users can only be created within Groups. Users inherit the privileges and filters assigned to the group. You can assign additional filters to the users, further restricting their access to recorded calls.

When Users are in the system, they can be assigned to a different group. You can also delete users from the system or edit their settings. Users can change their own password when they are logged in to the system. Administrators and Supervisors can also edit user passwords.

Adding Users to Groups

Open a group from the Tree view of Groups on the left hand side of the screen, and then create users to fill the group. users inherit the rights of their group.

Click **Insert New User**. The Add new user window opens.

The screenshot shows the 'Add new user' window with the following fields and callouts:

- 1**: Login field containing 'anne.agent'
- 2**: Password field (masked with dots) and Password confirmation field (masked with dots)
- 3**: Name field containing 'Anne' and Surname field containing 'Agent'
- 4**: E-mail field containing 'Ann.Agent @CallCom' and Phone number field containing '5506'
- 5**: Choose filter dropdown menu showing 'Choose filter' and 'END'
- 6**: LDAP user checkbox (unchecked) and Insert new user button

Figure 44: Window for Adding a New User

1. Type the Username in the **Login** field.
2. Type the User's Password in the **Password** field. Confirm the User's Password in the **Password confirmation** field.
3. Type the User's Name and Surname in the **Name** and **Surname** fields. Type the user's email in the **E-mail** field. Type the user's phone number or range of numbers in the **Phone Number** field. If it is blank, the user inherits the group phone number.

Tip: Alphanumeric Characters

GQM supports alphanumeric character input if your Contact Center system supports alphanumeric characters in extensions, DN's or terminals. Refer to the section on [Alphanumeric Characters](#) for more information.

4. Choose filters assigned to this user. Add Boolean operators **AND** , **OR**, or **END** to connect multiple filters the last operator must always be **END**. See [Searching and Using Filters](#).
5. If the user is found in the LDAP and Call Recording is configured to access the LDAP, the LDAP user check box will be selected. Otherwise, leave this blank
6. Click **Insert New User** to add the user to the group.

The user is now a member of the group and inherits all its privileges, recording rules, and filters.

Limiting User Access by Phone Numbers

Users inherit access rights from their group. You can further restrict access rights by specifying a phone number filter for the user. This can be a single phone number, or a range of numbers. Wild cards are valid. This affects the list of calls in Recorded Calls

Important:

These settings also apply to the calls displayed in Live Monitor.

Limiting User Access by Boolean Filters

Users inherit group access rights and filters. You can add additional filters to a user, further limiting access. Call Recording allows you to set and save filters, and then apply the filters to individual users. By combining these pre-existing filters with Boolean operators, you can restrict user access to a very specific level.

1. Choose a filter from the drop down list.
2. Select a Boolean operator.
3. Choose additional filters, connecting them with operators until you have defined the filter.
4. Click Save.

The user has access only to the calls allowed by the filters.

The group filters are applied first, and then the user filters. The result is that the user sees only a highly restricted set of recorded calls.

Note: If you apply a filter using SIP numbers, you must define the mask for the whole SIP number. For example, 12345@*.

Important:

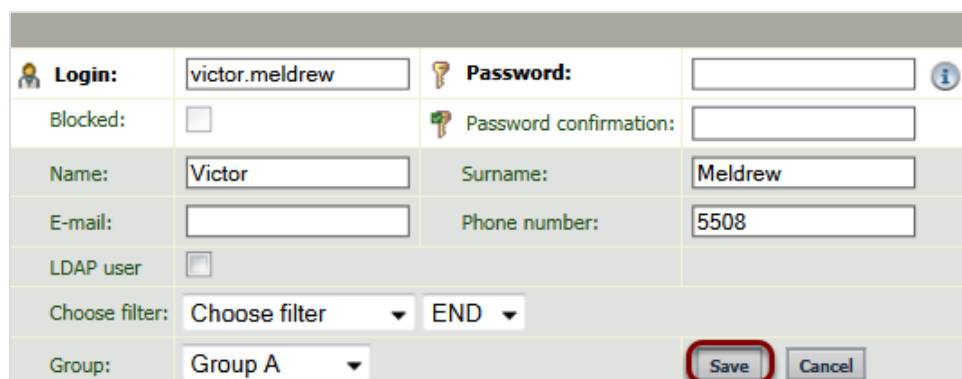
These settings do not apply to the list of calls displayed in Live Monitor. It will only affect the list of calls displayed in the Recorded calls list.

Editing Users

Administrators, supervisors, and users themselves can change user information, depending on access permissions.

Open the User's Group from the Tree list on the left hand side of the screen. A list of Users displays.

Find the User in the list, and click **Edit**.







 Login:	<input type="text" value="victor.meldrew"/>	 Password:	<input type="password"/>	
Blocked:	<input type="checkbox"/>	 Password confirmation:	<input type="password"/>	
Name:	<input type="text" value="Victor"/>	Surname:	<input type="text" value="Meldrew"/>	
E-mail:	<input type="text"/>	Phone number:	<input type="text" value="5508"/>	
LDAP user	<input type="checkbox"/>			
Choose filter:	<input type="text" value="Choose filter"/>	<input type="text" value="END"/>		
Group:	<input type="text" value="Group A"/>	<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	

Figure 45: Editing a user

Make your changes. Click **Save**. Your changes are applied to the user immediately.

Moving Users between Groups

When you edit a user's data, you can also change the user's group.

Open the User's Group from the Tree list on the left hand side of the screen.

Find the User in the list, and click **Edit**.

Choose a group from the **Group**: drop down list.

Click **Save**.

The user is now a member of the group you selected and inherits all that group's rights, recording rules, and filters.

Adding Users from LDAP

Important:

To add users to Call Recording from LDAP, your system administrator must configure both Call Recording and the LDAP so they communicate together.

Using LDAP to add users to Call Recording allows you to import information for several users simultaneously, and to maintain user information in the LDAP so it is updated in Call Recording automatically.

Open a Group form the Tree list on the left hand side of the screen.

Click **Insert New User**.

Click **Insert from LDAP**.

The **Insert LDAP** user window opens.



Insert LDAP user				
	Surname	Name	Login	E-mail
<input type="checkbox"/>	Administrator	Administrator	Administrator	Administrator@testdomain.cz
<input checked="" type="checkbox"/>	Akio Saico	saico	saico	
<input checked="" type="checkbox"/>	Ando Masahashi	masahashi	masahashi	
<input type="checkbox"/>	Branicky Pivovar	branik	branik	branik@testdomain.cz
<input type="checkbox"/>	callrec	callrec	callrec	
<input type="checkbox"/>	callrec callrec	callrecldap	callrecldap	callrecldap@testdomain.cz
<input type="checkbox"/>	Fuji No Benitaka Go Suzuwa	suzuwa	suzuwa	
<input type="checkbox"/>	Guest	Guest	Guest	

Figure 46: Inserting Users from LDAP

Select Users to insert. Click **Insert**.

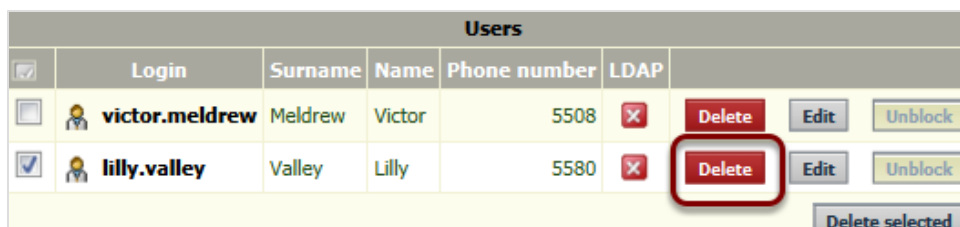
The LDAP information is imported into Call Recording, and the LDAP users are inserted into the group, inheriting the group's rights, recording rules, and filters.

Important:

If you change any information in Call Recording, such as the user's password, this information is NOT changed in the LDAP. Information changed in LDAP is imported into Call Recording, so make any required changes to user information directly in the LDAP.

Deleting Users

To delete a user:







Users					
<input type="checkbox"/>	Login	Surname	Name	Phone number	LDAP
<input type="checkbox"/>	 victor.meldrew	Meldrew	Victor	5508	
<input checked="" type="checkbox"/>	 lilly.valley	Valley	Lilly	5580	

Figure 47: Deleting a User

Open the **Users Group** in the Tree list in the left hand side of the screen the list displays.

Find the User in the list, click **Delete**.

The user is deleted and no longer has any access to the Call Recording system.

Important:

Deleting users cannot be undone.

If a user has created a filter, and that filter is utilized by any other user of the system, the user who created the filter cannot be deleted.

Deleting multiple users

To delete Multiple Users:

1. Open the **User** tab.
2. Open the Users Group from the Tree list on the left hand side of the screen.
3. Find the Users in the list.
4. Select the check boxes for users to be deleted.
5. Click **Delete Selected**.

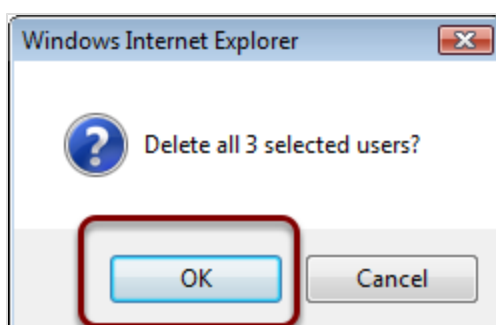


Figure 48: Deleting confirmation

6. Click **OK** to confirm the deletion.

All the users you selected are deleted and no longer have access to the Call Recording system.

Important:

Deleting users cannot be undone.

Important:

If a user has created a filter, and that filter is utilized by any other user of the system, the user who created the filter cannot be deleted.

Chapter

7

Recording Rules

This chapter describes how to create and implement recording rules. Recording rules allow you to determine which calls are recorded by Call Recording. This allows you to manage the load on the Call Recording system and avoid wasting system resources on unwanted recordings.

This chapter contains the following sections:

[Recording Rules Overview](#)

[Types of Recording Rules](#)

[Rule Order](#)

[Using Wild Cards for Recording Rules](#)

[Call Identification](#)

[Creating a New Recording Rule](#)

[Creating a Recording Rule to Record All Calls](#)

[Hierarchical Recording Rules](#)


[Creating a Recording Rule with External Data](#)

[Adding External Data to Recording Rules](#)

[Editing recording rules](#)

[Deleting recording rules](#)


Recording Rules Overview


Group A

Phone number:

Parent group: Admin

Description:

Insert new rule

Apply changes










Recording rules																
Rule	Rule type	Mask	Usage (%)	Days of week							From (hh:mm)	Till (hh:mm)	Priority	ScreenREC	ScreenREC Usage (%)	
				Mo	Tu	We	Th	Fr	Sa	Su						
 Do not record	Phone number	685?	100%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00:00	24:00			100%	<div>DeleteEdit</div>
 Record	Phone number	6*	100%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00:00	24:00	 	<input checked="" type="checkbox"/>	100%	<div>DeleteEdit</div>
 Record	Phone number	5+	100%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00:00	24:00			100%	<div>DeleteEdit</div>

Figure 49: Recording Rules Overview

Recording rules are always associated with groups of users, and identify which calls to record or not to record for those users. The recording rules in each group are processed in sequence in the order that they appear in the list from the top to the bottom. If there is no rule for the call or the condition is not met for the call, the processing is passed on to all subgroups. Processing takes place in all branches of the hierarchy in parallel.

Sequential processing of each group can be prevented by applying a mask filter, which limits the telephone numbers (and therefore processing), assigned to a group that would normally be always included in sequential rule processing. Additionally, the special Ignore rule is used for immediate switching of processing to remaining subgroups.

If a call doesn't match any rule in any of the groups or subgroups then it is not recorded.

Recording rules can be set for a range of phone numbers as well as a single phone number. Wild cards are valid when creating recording rules, and are described later in this section of the document.

Important:

Dates and times entered or displayed in recording rules always use the server time zone. All other dates and times in the Call Recording Web UI use the time zone specified in **Settings > User Setup > Personal Setup**.

Types of Recording Rules

There are four main types of recording rules that can be defined:

- **Record:** The system records incoming and outgoing calls from the specified number, or range of phone numbers.
- **Pre-record:** The system records the calls, but does not save the recording unless the user sends a request.
- **Do not record:** The system does not record any calls from or to the specified number, or range of phone numbers.
- **Ignore:** A rule that stops the process of rule evaluation in the current group and passes the processing to subgroups. This rule is deprecated and is unnecessary unless you have a complicated hierarchy of rules.

Important:

If no recording rules are set, no calls are recorded

Rule Order





































Recording rules																
Rule	Rule type	Mask	Usage (%)	Days of week							From (hh:mm)	Till (hh:mm)	Priority	ScreenREC	ScreenREC Usage (%)	
				Su	Mo	Tu	We	Th	Fr	Sa						
 Do not record	Phone number	665?	100%								00:00	24:00			100%	 
 Record	Phone number	6*	100%								00:00	24:00			100%	 
 Record	Phone number	5*	100%								00:00	24:00			100%	 

Figure 50: Recording Rules Order

Recording rules are applied from top to bottom. The rule that appears at the top of the rules list is processed first, and then the second and so on. It is important to be aware that rules are applied in the following hierarchy:

1. **Record.**
2. **Pre-record.**
3. **Do not record.**

Order the recording rules so that the “No” rules (do not record) are positioned above the “Yes” rules (record). For example, if you position a rule to record all calls above a rule to record a specific range of numbers, then all calls will still be recorded. However, if you position the rule to record a specific range of numbers above the rule to record all calls, then the result is that all calls are recorded from the range of numbers.

To move rules up or down, use the up and down arrow buttons as highlighted in the screenshot above.

Add global rules to the admin group and group-specific rules to the appropriate subgroup.

Using Wild Cards for Recording Rules

Recording rules																	
Rule	Rule type	Mask	Usage (%)	Days of week							From (hh:mm)	Till (hh:mm)	Priority	ScreenREC	ScreenREC Usage (%)		
				Su	Mo	Tu	We	Th	Fr	Sa							
 Do not record	Phone number	665?	100%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00:00	24:00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	100%	<input type="button" value="Delete"/>	<input type="button" value="Edit"/>
 Prerecord	Phone number	445?	100%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00:00	24:00	<input type="button" value="▲"/> <input type="button" value="▼"/>	<input checked="" type="checkbox"/>	100%	<input type="button" value="Delete"/>	<input type="button" value="Edit"/>
 Record	Phone number	6*	100%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00:00	24:00	<input type="button" value="▲"/> <input type="button" value="▼"/>	<input checked="" type="checkbox"/>	100%	<input type="button" value="Delete"/>	<input type="button" value="Edit"/>
 Record	Phone number	5*	100%	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00:00	24:00	<input type="button" value="▲"/>	<input checked="" type="checkbox"/>	100%	<input type="button" value="Delete"/>	<input type="button" value="Edit"/>

Figure 51: Recording Rules Example

Setting the range: 200? selects the numbers from 2000 to 2009; 20?? selects the numbers from 2000 to 2099.

Setting all numbers: Entering 2* selects all phone numbers which start with the number 2. Entering *2 selects all phone numbers which end with the number 2.

Incoming and outgoing: The special character > sets the range for specifying incoming or outgoing phone calls. For example: 2005> selects all calls made from the number 2005 and >2005 selects all calls which were made to the number 2005.

From To: The special character = specifies calls made between two phone numbers. For example 2005=3000 selects calls made between 2005 and 3000.

Wild cards can be combined. For example 20??> selects all outgoing calls from numbers 2000 to 2099.

Call Identification

Before you set recording rules, you must be aware of which type of protocol is used for identifying calls.

SIP (Session Initiation Protocol) requires the use of the @ symbol when identifying telephone numbers to create recording rules. For example:

- 1224@*
- 123* @*
- ?????@*

Creating a New Recording Rule

Recording rules are always assigned to groups. You must select a group in the Recording Rules tab before adding or editing recording rules.

Navigate to the **Recording Rules** tab. Select a Group from the Tree list on the left hand side of the screen.

Click **Insert New Rule**. The Insert new rule dialog opens.

The screenshot shows the 'Insert new rule' dialog box. At the top, a red banner states 'All time fields on this page are in following timezone: Europe/Prague'. The dialog is titled 'Insert new rule'. It contains several fields and sections:

- 1**: A dropdown menu labeled 'Rule:' with 'Record' selected.
- 2**: A dropdown menu labeled 'Rule type:' with 'Phone number' selected.
- 3**: A text field labeled 'Mask:' containing '42*'.
- 4**: A section titled 'Days of week' with a grid of buttons for Su, Mo, Tu, We, Th, Fr, Sa, each with a checkbox below it. All checkboxes are checked.
- 5**: Time selection fields. 'From (hh:mm):' is '00:00' and 'Till (hh:mm):' is '24:00'.
- 6**: A checkbox labeled 'ScreenREC:' which is currently unchecked.
- 7**: A text field labeled 'Usage (%)' containing '100'.

 At the bottom, there is a 'Priority:' dropdown set to 'High priority' and two buttons: 'Insert new rule' and 'Cancel'.

Figure 52: Insert a New Rule

1. Select a rule from the **Rule** drop down list; (Record, Do Not Record, Prerecord, Ignore).
2. Select a rule type from the **Rule type** drop down list; (Phone number, IP address, External Data).
3. Type the **Mask**; (a phone number or range of numbers using wildcards). Type the **Usage %**; (for randomly recording only a percentage of all calls).

Tip: Alphanumeric Characters

GQM supports alphanumeric character input if your Contact Center system supports alphanumeric characters in extensions, DNs or terminals. Refer to the section on [Alphanumeric Characters](#) for more information.

4. Select the **Days of the Week**.

5. Type the **From** and **Till** values to identify the daily time range to record calls (use the format HH:MM).
Type the **Screen Capture Usage (%)** value (for randomly recording the screen of only a percentage of all calls).
6. Select the Screen Capture check box to also record agent desktops.
7. Click **Insert New Rule**.

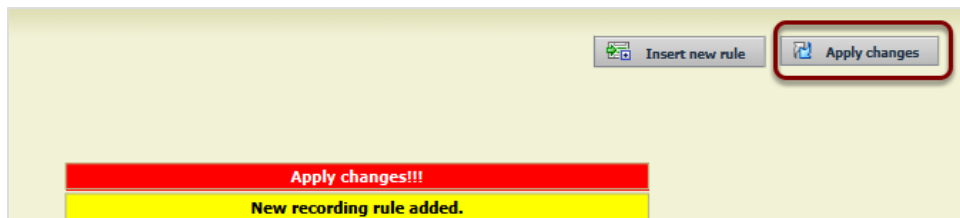


Figure 53: Apply Changes

Click **Apply Changes**. The new recording rule is now active in Call Recording.

Creating a Recording Rule to Record All Calls

At least one recording rule must be defined otherwise no calls will be recorded. The simplest rule mask to record all calls is an asterisk *, as shown in the following screenshot.

Navigate to the **Recording rules** tab.

Click **Insert new rule**.

All time fields on this page are in following timezone: Europe/Prague

Insert new rule

Rule: Record Rule type: Phone number

1 Mask: * Usage (%): 100

Days of week

Su	Mo	Tu	We	Th	Fr	Sa
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

From (hh:mm): 00:00

Till (hh:mm): 24:00

ScreenREC: ☐ ScreenREC Usage (%): 100

Priority: High priority 2 Insert new rule Cancel

Figure 54: Record all Calls Example

1. Type a phone number or asterisk * in the mask.
2. Click **Insert New Rule**.
3. Click **Apply Changes**.

Hierarchical Recording Rules

Recording rules can be defined in every Call Recording group, and groups are arranged in a hierarchy. Higher group recording rules are processed prior to subordinate groups, and therefore the more restrictive rules should be at the top of your rule hierarchy.

Hierarchical Recording Rules Example

In Call Recording groups are defined in a hierarchical order.

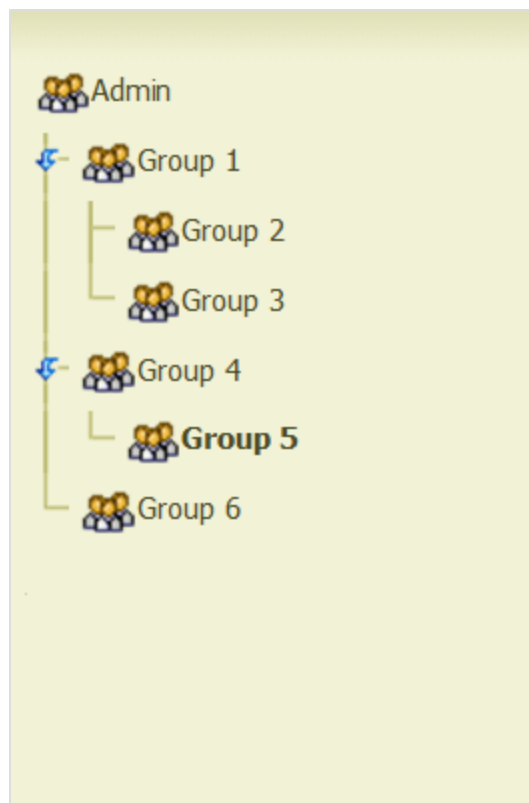


Figure 55: Group Hierarchy Tree Structure

1. The rules defined in the group at the top (**Admin**) have the highest priority.
2. The rules defined in groups 1,4 and 6 are processed next in parallel.
3. The rules defined in groups 2,3 and 5 are processed last in parallel because they have the lowest priority.

The Admin group has highest priority and any recording rule defined for Admin always overrides any recording rule from subordinate groups (first match rule). If a recording rule is defined within a group then the recording rule is passed on to all subordinate groups. If there is no recording rule from the group above then the rules from the subgroups are processed directly.

Groups must be prevented from creating recording rules which can affect groups on the same level

This sequential processing can be prevented by applying a subgroup (mask) filter. In this case the type of recording for this subgroup branch will remain undetermined. This is better illustrated in the following examples:

Example 1:

- There is a rule in Group 4 "do not record calls from 42???"
- Group 5 has a rule "record calls from 4????".

The Group 4 rule has priority over the Group 5 rule so the rule in Group 4 is applied first. Group 5 will not record calls from 4200 to 4299. The result is that Group 5 only records calls from 4000 – 4199 and from 4300 – 4999.

Example 2:

- The rule in Group 2 is to "record calls from 4????".
- The rule in Group 3 is to "pre-record calls from 4????".
- The rule in Group 5 is "do not record calls from 4????".

The Group 2 rule has priority over Group 3 and Group 5 rules. A record rule has priority over a do not record rule. The result is that Calls from 4???? will be recorded.

Example 3:

- The rule in Group 2 is to "record calls from 4????",
- The rule in Group 3 is to "pre-record calls from 4????"
- The rule in Group 5 is "do not record calls from 4????".
- We set the phone number for Group 1 to "42???" this restricts the influence of any rules created by any subordinate groups 2-6 to within the number range of 4200-4299.
- We set the number for Group 2 to "420?" this restricts the influence of group 2 to within the number range 4200-4209 even though the rule set is "record calls from 4????".

The result is calls that from 4200-4209 will be recorded by the rule from Group 2, calls from 4210-4299 will be pre-recorded from the rule in Group 3 and calls from 4000-4199 and 4300-4399 will not be recorded.

Hierarchical Rule Administration Example

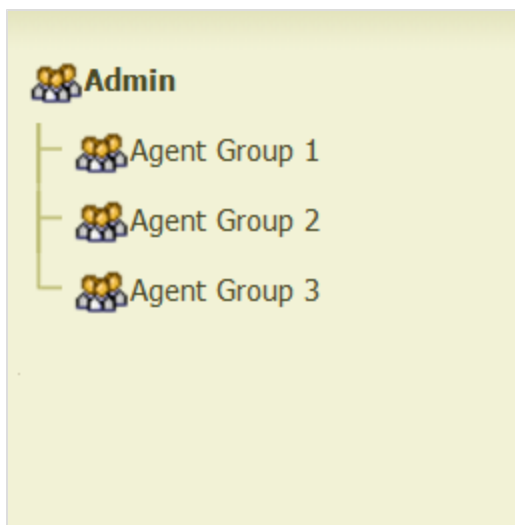


Figure 56: Agent Group

The system administrator wants to delegate rule administration for each main group (groups 1, 2, 3 in the above diagram) to the respective agent group leader. This is accomplished as follows:

Each group is given the appropriate range of extension numbers as its phone number;.

For example:

- Group 1: 42?? covering extensions 4200-4299
- Group 2: 43?? covering extensions 4300-4399
- Group 3: 44?? covering extensions 4400-4499

Three ignore rules are created by the system administrator in the top-level Admin group.

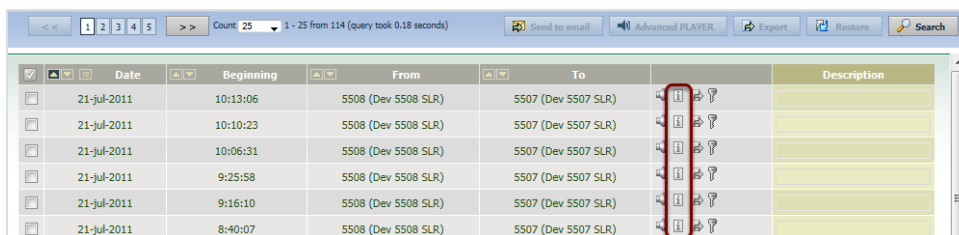
- Ignore 42??
- Ignore 43??
- Ignore 44??

Each group leader creates additional rules for his/her group at the group level (that is, Group 1 leader creates rules when Group 1 is selected on the Recording Rules screen).

When a call is made to/from a group extension, all top-level Admin rules are ignored and only rules within that group are processed.

Creating a Recording Rule with External Data

First open the **Recorded calls** page.










	Date	Beginning	From	To		Description
<input type="checkbox"/>	21-Jul-2011	10:13:06	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)		
<input type="checkbox"/>	21-Jul-2011	10:10:23	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)		
<input type="checkbox"/>	21-Jul-2011	10:06:31	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)		
<input type="checkbox"/>	21-Jul-2011	9:25:58	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)		
<input type="checkbox"/>	21-Jul-2011	9:16:10	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)		
<input type="checkbox"/>	21-Jul-2011	8:40:07	5508 (Dev 5508 SLR)	5507 (Dev 5507 SLR)		

Figure 57: The information Button

Select a record from a number that contains the desired data key and click the information icon . The Call description dialog opens and displays the available call data keys and values.

Call description	
<div></div>	
<button>Save description</button>	
Couple Information	
Call ID	69
Couple ID	69
Call Status	No stream recorded.
Synchro Tool	
Delete Tool	
Mixer Tool	
Restore Tool	
Archive Tool	
ScoreCARD Usage	
Synchronization ID	17521303192.168.7.8:24244192.168.7.7:19814_1
Protected Against Deletion	No
External Data	
Key	Value
CALLED_STREAM_PAYLOAD	G.711 ulaw 64k (1104)
CALLED_URL	192.168.7.7:19814(1104)
CALLING_STREAM_PAYLOAD	G.711 ulaw 64k (1104)
CALLING_URL	192.168.7.8:24244(1104)
COUPLE_END_REASON	NORMAL
COUPLE_START_REASON	NORMAL
GROUP_ID	17521303
JTAPI_CALLED_TERMINAL_SEP	SEP000011120003
JTAPI_CISCO_CALLMANAGER_ID	1
JTAPI_CISCO_GLOBAL_CALL_ID	744087
JTAPI_CISCO_ID	17521303

Figure 58: Call Description

Copy the External data **Key** required from the list (here **GROUP_ID**). The Call Description window is in a separate pop up and so can be kept open for the following step.

Return top the main window, navigate to **Recording Rules** and select the group that the rule will apply to, from the groups on the left hand side (here Group A).

Create new rule for the group: **Group A**

All time fields on this page are in following timezone: Europe/Prague

Insert new rule

2 Rule: Record Rule type: External Data 1

Mask: GROUP_ID_17521303 Usage (%): 100

Days of week

Su	Mo	Tu	We	Th	Fr	Sa
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

From (hh:mm): 00:00

Till (hh:mm): 24:00

ScreenREC: ☐ ScreenREC Usage (%): 100

Priority: High priority 3 Insert new rule Cancel

Figure 59: Recording Rule Based on External Data

1. Select **External Data** in the **Rule** drop down list.
2. In the **Mask** field:
 - Paste the key into the mask then type a blank space after the key (to separate the Key and Value).
 - Go back to the Call Detail pop up and copy the External Data Value then paste it after the blank space in the **Mask** field or type a value (wild cards are valid).

Tip: Alphanumeric Characters

QGM supports alphanumeric character input if your Contact Center system supports alphanumeric characters in extensions, DNs or terminals. Refer to the section on [Alphanumeric Characters](#) for more information.

3. Click **Insert New Rule**.
4. Click **Apply Changes**.

The new recording rule using external data is now active in Call Recording.

To test the rule make a call from a group that should contain the data and check the recorded calls to check that the call has been recorded.

Adding External Data to Recording Rules

Recording rules can be based on external data sources integrated with Call Recording. The following table contains an example of Genesys external data used for defining recording rules:

External Data Key	Sample Value
GEN_CFG_EMPLOYEE_ID	Employee_ID_20
GEN_CFG_FirstName	Jeremy
GEN_CFG_FULLNAME *	Jeremy Johns
GEN_CFG_LastName	Johns
GEN_TEV_AgentID	jjohns
GEN_TEV_CallType	Internal
GEN_TEV_DNIS	7600
GEN_TEV_OtherDN	7600
GEN_TEV_ThisDN	7620

Table 3: Sample external data keys and values

* customizable field created by integration module

Editing recording rules

You must have sufficient access rights to change recording rules. Do not change recording rules without considering the effect on the performance of the system.

Edit the recording rule

All time fields on this page are in following timezone: Europe/Prague

Rule: Record Rule type: Phone number

Mask: 5* Usage (%): 100

Days of week:

Su	Mo	Tu	We	Th	Fr	Sa
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

From (hh:mm): 00:00

Till (hh:mm): 24:00

Active ☒

ScreenREC ☐ ScreenREC Usage (%): 100

Save Cancel

Figure 60: Recording Rule Editing

In the **Recording Rules** tab, navigate to a group that has a recording rule.

Click **Edit**. The **Edit the recording rule** dialog opens.

Edit the rule as required. Click **Save**.

Click **Apply Changes**.

The changes to the recording rule are applied immediately.

Tip:

You can turn a recording rule on and off with the **Active** check box which is only visible in the **Edit the recording rule** dialog.

Deleting recording rules

You must have sufficient access rights to delete recording rules. Do not delete recording rules without considering the effect on the performance of the system.

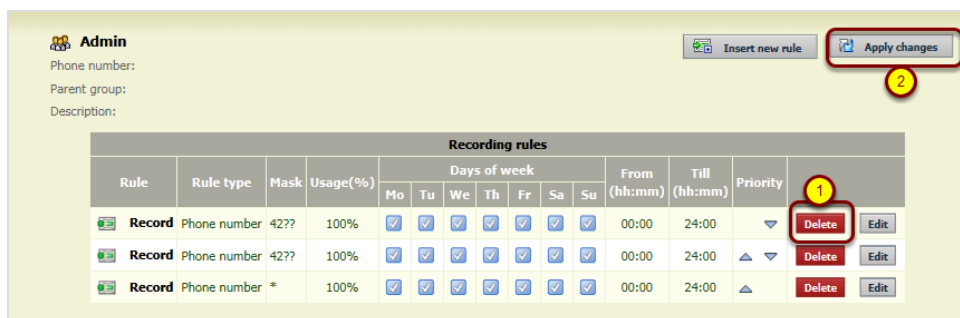


Figure 61: Deleting Recording Rules

In the **Recording Rules** tab, navigate to a group that has a recording rule.

1. Click **Delete**.
2. Click **Apply Changes**.

The recording rule is deleted and calls within the deleted recording rule are no longer recorded unless a new recording rule is created.

Tip:

You can turn a recording rule on and off with the Active check box, which is accessed by clicking on the **Edit** button of the appropriate rule.

Chapter

8

Using On Demand Prerecording

Prerecording allows you to save only the calls you identify. All other calls are recorded, but not saved.

Prerecording differs from regular recording because it is On Demand. You only use it when you need it. Your system administrator must configure prerecording on the system before you can use it.

Prerecording is activated from the Cisco IP Phone user interface.

Important:

Prerecording is only available for Cisco IP phones that support XML services. The system administrator must configure prerecording in both CUCM and Call Recording.

This chapter contains the following sections:

[Prerecording Principles](#)

[Working with Calls in Progress](#)

[Saving a Completed Call](#)

[Tagging a Call with Call Information \(External Data\)](#)

Prerecording Principles

Prerecording is the process of recording all calls, while only permanently saving the recordings identified by the phone user. This means that while a call is in progress, or shortly after a call has been completed, the phone user has the ability to save the call recording. If the user does not save the call within this time, the call recording is discarded.

The amount of time the user has to save the call can be adjusted by the system administrator. The default is 2 minutes.

Working with Calls in Progress

Note: Your Cisco IP phone must be configured to provide prerecording services through Call Recording. Depending on your IP phone model and configuration, some steps may be slightly different than described here. Consult your IP phone documentation and system administrator.

When prerecording is configured for your Cisco IP Phone, you can choose to save any call in progress. You can also choose a call that has been recently completed.

Saving a Call in Progress:

Press the **Services** button on your Cisco IP phone.



Figure 62: Saving Call Recording Services on the Cisco IP Phone

Select Genesys Call Recording from the list of options.



Figure 63: Saving a Call in Progress

Select **Save**.

The call recording is saved to the database, and when it is completed it is available for playback on the **Recorded Calls** tab of Call Recording.

Sending a Call in Progress as an Email Attachment

1. Press the **Services** button on your Cisco IP phone.
2. Select Genesys Call Recording from the list of options.
3. Select **Send by email**.

After the call is completed, Call Recording sends an email with the call recording.

Important:

The email address is set when you configure your Cisco IP Phone to include prerecording.

Saving a Call in Progress and Sending it as an Email Attachment

1. Press the **Services** button on your Cisco IP phone.
2. Select Genesys Call Recording from the list of options.

3. Select **Save and send by email**.

The call recording is saved to the database, and when it is completed is available for playback on the **Recorded Calls** tab of Call Recording. In addition, the call recording is sent to email as an attachment.

Sending a Call Recording to a Different Email Address

1. Press the **Services** button on your Cisco IP phone.
2. Select Genesys Call Recording from the list of options.
3. Select **Send by email to**



Figure 64: Inserting a New E-mail Address

4. Enter the email address. (Note: Use the # key to enter the @ symbol.)
5. Select **Send**.

The call recording is sent as an attachment to the email address you have entered.

Saving a Completed Call

Prerecording allows you to save calls that have already been completed. You'll have a limited amount of time to save completed calls, typically 2-10 minutes.

Note: You must save the call within the period set by the system administrator. Calls that are not saved within this time period cannot be recovered. PIN codes may be required, depending on your system setup.

1. Press the **Services** button on your Cisco IP phone.
2. Select Genesys Call Recording from the list of options.
3. Select **Prerecorded calls**.

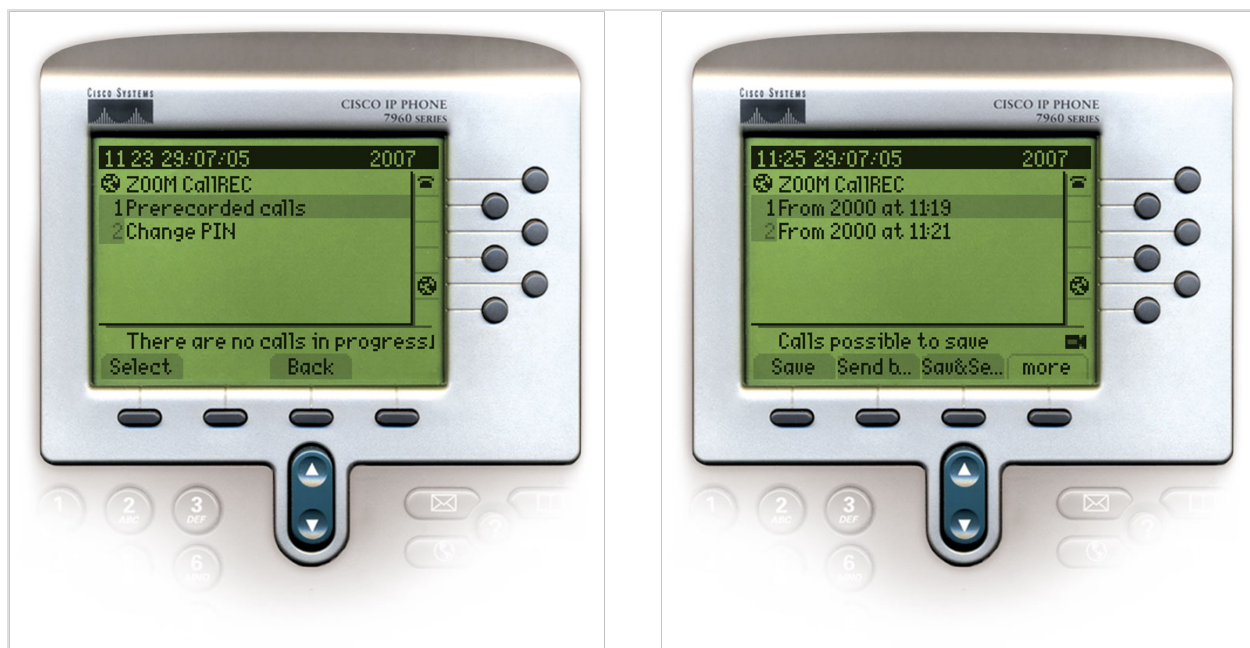


Figure 65: Saving Completed Calls

4. Select the call you want to save from the list.
5. Select **Save**.

The call recording is saved to the database, and is available for playback on the **Recorded Calls** tab of Call Recording.

Tagging a Call with Call Information (External Data)

If configured by your system administrator, you can add supplementary call information to a current (in progress) or completed call through another IP phone service; this action is known as ‘tagging’ a call. Call tagging is often used to categorize a call for later filtering (typical tag options can be for example. “Presales”, “Sales” and “Support”).

Call tagging automatically marks the call for recording and saves the tag data together with the call. Tag information is visible when browsing through recorded calls in the Call Recording user interface.

Call tagging is not enabled by default for prerecording, so must be configured by your system administrator. The call must be tagged within the period set by your administrator.

To tag an in-progress or completed call:

1. Your system administrator will provide the name of the call information IP phone service.
2. Press the **Services** button on your Cisco IP phone.
3. Select the service (for example “Call Recording call-info”) from the list of options.



Figure 66: Tagging a Prerecorded Call

4. Select the appropriate tag value and press **Select**.

5. Call Recording tags the call with this value and marks the call for saving.

Chapter

9

Restoring Call Recordings

Your Call Recording system administrator determines how long Call Recording stores recorded calls in the main database. Call Recording archives older call recordings, storing them offline, and then deleting the call recordings from main database. Only the call data remains available, and is still displayed in Call Recording. When a call has been archived but not deleted, it behaves as a normal call recording.

After a call has been both archived and deleted from the main database, you must *restore* the call to be able to listen to it again. Restoring the call returns the deleted call recording to the database so the recording can be played in the system again.

Archived and deleted calls are identified with the gray arrow icon .


This chapter contains the following sections:

[Restoring an Archived and Deleted Call Recording](#)

[Listening to Restored Calls](#)


[Canceling Restoration](#)

Restoring an Archived and Deleted Call Recording

1. Select archived and deleted calls in the **Recorded calls** tab.
2. Click **Restore**.
3. The yellow arrow icon appears .

Important:

Depending on your system configuration and storage policy, the restored call recordings usually appear in the Restored calls tab within 24 hours. Call Recording sends an email notifying you that the call has been restored.

When the call is restored, the blue arrow icon appears . You can listen to these restored calls normally. Restored calls appear under both the **Restored calls** tab, and the **Recorded calls** tab.



	Date	Beginning	Length	From	To		Description
<input type="checkbox"/>	Jun 12, 2008	9:00:27 PM	0:09	3242 (Mat Kopal)	3031		
<input type="checkbox"/>	Jun 12, 2008	8:42:28 PM	0:52	3031	3242 (Mat Kopal)		
<input type="checkbox"/>	Jun 12, 2008	8:42:09 PM	0:08	3242 (Mat Kopal)	3031		
<input type="checkbox"/>	Jun 12, 2008	8:42:02 PM	0:04	3242 (Mat Kopal)	3031		
<input type="checkbox"/>	Jun 12, 2008	8:41:33 PM	0:13	3242 (Mat Kopal)	3031		
<input type="checkbox"/>	Jun 12, 2008	8:35:15 PM	0:12	3242 (Mat Kopal)	3031		

Figure 67: Selected Records Being Restored

Listening to Restored Calls

To listen to restored calls, click on the call's Speaker icon, or select multiple files and click **Advanced Player**.



	Date	Beginning	Length	From	To	Description
<input type="checkbox"/>	Jun 12, 2008	9:00:27 PM	0:09	3242 (Mat Kopal)	3031	
<input type="checkbox"/>	Jun 12, 2008	8:42:28 PM	0:52	3031	3242 (Mat Kopal)	
<input type="checkbox"/>	Jun 12, 2008	8:42:09 PM	0:08	3242 (Mat Kopal)	3031	
<input type="checkbox"/>	Jun 12, 2008	8:42:02 PM	0:04	3242 (Mat Kopal)	3031	
<input type="checkbox"/>	Jun 12, 2008	8:41:33 PM	0:13	3242 (Mat Kopal)	3031	
<input type="checkbox"/>	Jun 12, 2008	8:35:15 PM	0:12	3242 (Mat Kopal)	3031	

Figure 68: Restored Calls and Archived Calls in the Section “Recorded Calls”

Canceling Restoration

You can cancel a call restoration before it is complete.

1. Open the **Restored Calls** tab.
2. Identify calls to be canceled by selecting their check boxes.

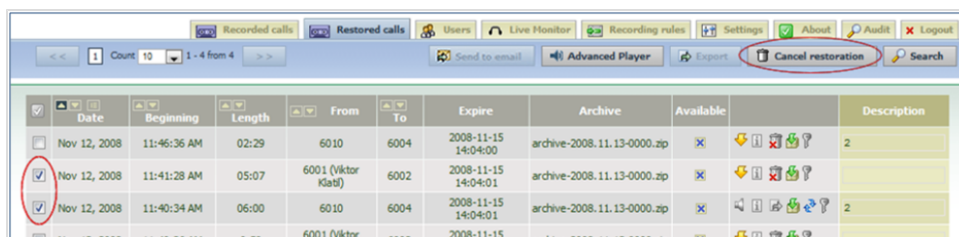


Figure 69: Canceling Call Restoration

3. Click **Cancel Restoration**.
4. Click **OK** to confirm the cancellation.

The call restoration process for these calls is canceled and the calls will not be available for playback unless they are restored again.

Important:

The status icons may require some time to reset, depending on your system configuration.

Chapter

10 **Live Monitor (Live Monitor)**

Live Monitor is a key assessment tool that allows a Call Recording user to monitor an agent's calls in real time. Live Monitor allows the management team to silently listen to a call with the option of recording the call on demand, and then saving or emailing the data.

While the rest of Call Recording is devoted to monitoring saved calls, Live Monitor is specifically designed to allow you to monitor live calls as they occur.

Depending on your system settings, it may take a few moments before Live Monitor launches.

Live Monitor runs as a standalone JAVA application outside your internet browser. You must have JAVA Runtime Environment installed for it to work. Download it free from this URL <http://www.java.com/en/download/>

To run **Live Monitor**:

Click on the **Live Monitor** tab in Call Recording.

A prompt appears to download and open the application.

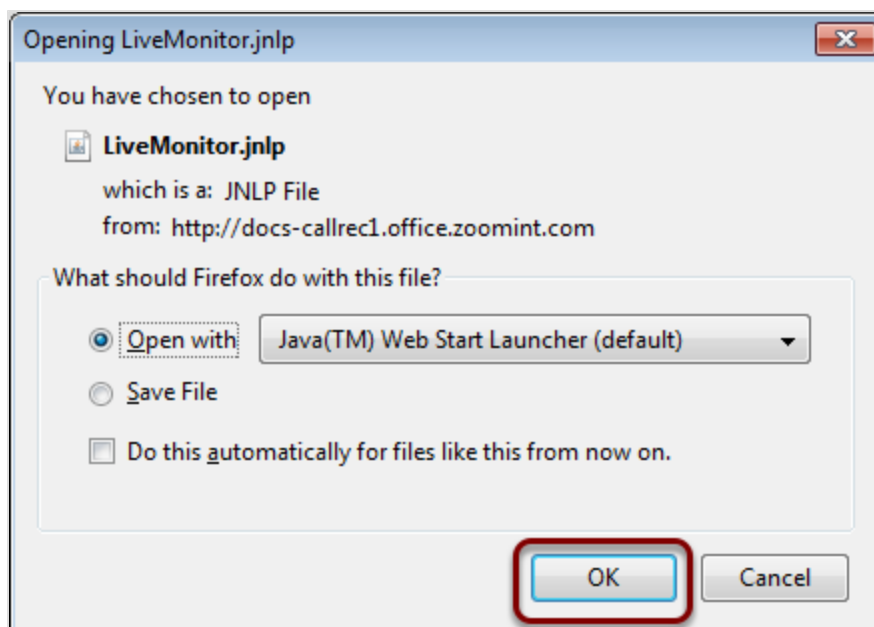


Figure 70: Download Prompt for Live Monitor

Click **OK**. A security warning displays

If you do not have sufficient permissions you may have to contact your system administrator.



Figure 71: Security Warning

Click **Run**.

The Live Monitor User interface opens.

Understanding Live Monitor

Live Monitor only displays calls in progress that are within the defined number range. The number range is specified by the filters for that user in Call Recording. To view more details about editing these filters, please refer to the [Creating a New Group](#) topic.

Since VoIP technologies work in real-time, high network latency can be an issue for Live Monitor.

For example, if Call Recording is deployed on a WAN that uses only T1 lines (@1.5Mbps), the network can have a latency of around 300ms, which makes use of Live Monitor impractical.

In this scenario, Live Monitor cannot be supported by Genesys Labs, Inc..

Once a call is completed, it is no longer displayed in the list. Calls display according to when they started, with earlier calls appearing at the bottom of the list. You can change the display order of Live Monitor by right-clicking in any column heading.

Important:

Live Monitor localization is based on the computer's regional settings that Live Monitor is initialized on. For example, In Windows 7 it is at **Control Panel > Region and Language > Keyboards and Languages**.

Listening to Live Calls

When you launch Live Monitor, all active calls in the system that have an associated recording rule, that you are permitted to view, will display in the list. Supervisors can only view the selected calls within their assigned number range.

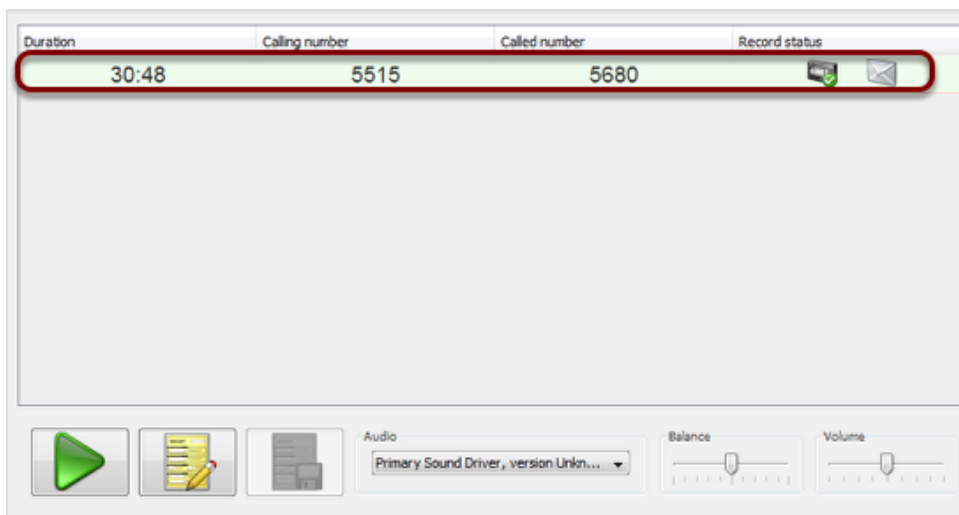


Figure 72: Live Monitor User Interface

Select a call to monitor. In this case there is only one call available.

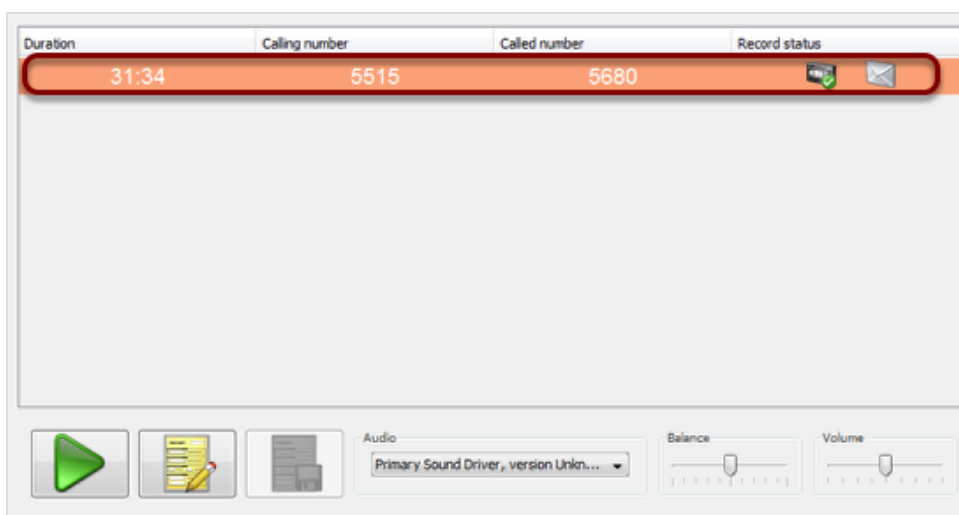





Figure 73: Live Monitor User Interface Call Selected

The background behind the call details will turn orange when selected

Select a call from the list. To listen to the call click  on the user interface. Live Monitor plays the conversation

on your system. While playing the call this is replaced by 

To stop listening to the call click 

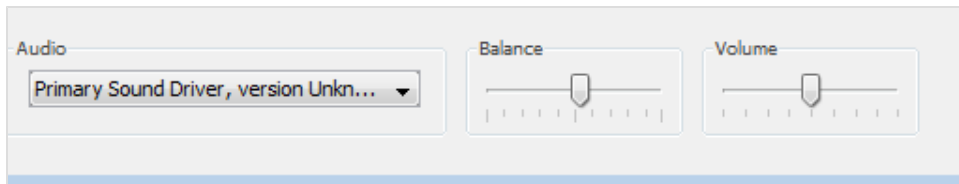


Figure 74: Volume and Balance

You can adjust the call Balance and Volume as appropriate.

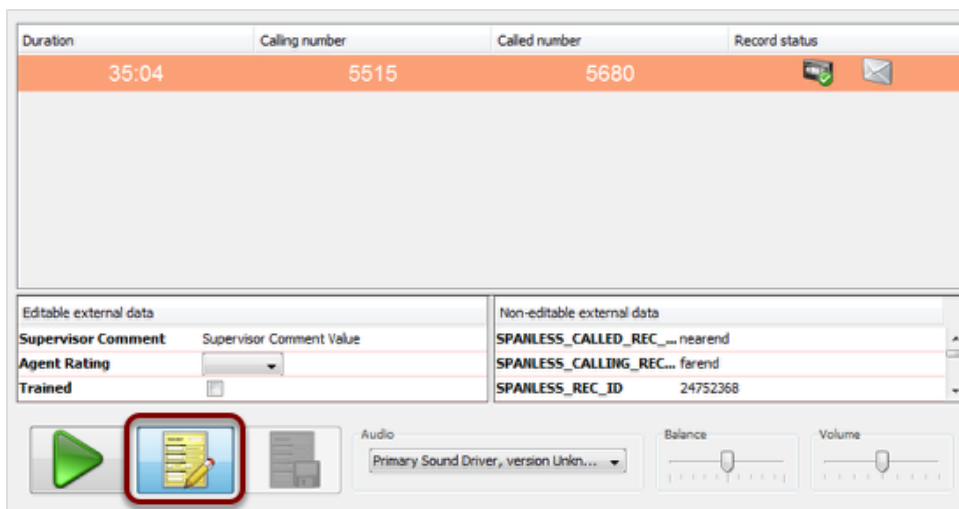




Figure 75: Live MonitorCall External Data

To view the external data related to the call, click the icon on the bottom left as shown, which will display both editable and none-editable external data information panes.

Saving Live Call Recordings

Live Monitor displays the current call recording status for each call within the call monitoring GUI. The status shown will largely depend on the system configuration, however you can select prerecorded calls to save them for later playback.

If a call is being recorded and will be saved, then the  icon is shown under the Record Status header

If it is not possible to save a call due to it not being recorded, then the  icon is shown under the Record Status header

If a call is being prerecorded, then the  icon is shown under the Record Status header for the call

If this is the case, and you would like to save the call for later playback, click this icon. The icon will then change to show that it will be saved, and when the call is completed, it appears in the Call Recording Recorded Calls tab.

Important:

Deselect the call in Live Monitor

When a call is completed, it will not be saved and appear in the recorded calls list in the Call Recording Web UI until it has been deselected in the Live Monitor.client.

Emailing Live Call Recordings

While a call is in progress an email icon is visible on the right of the call details.

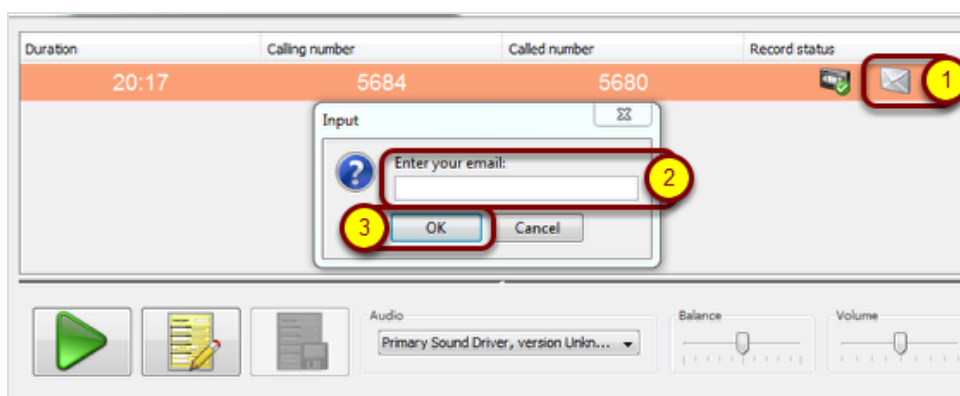


Figure 76: Live Monitor Email Icon

1. Select **Send to Email**.
2. Type your Email Address.
3. Click **OK**.

When the call is completed, the call recording is sent as an attachment to the email address you entered.

Adding Editable External Data to Live Calls

When you select a call, you can add data to the call record. This information stays with the call and can be used to evaluate agents or add notes about the conversation.

Custom data fields can be added to Live Monitor by your system administrator. The administrator must enable External Data Customization for these fields to be editable.

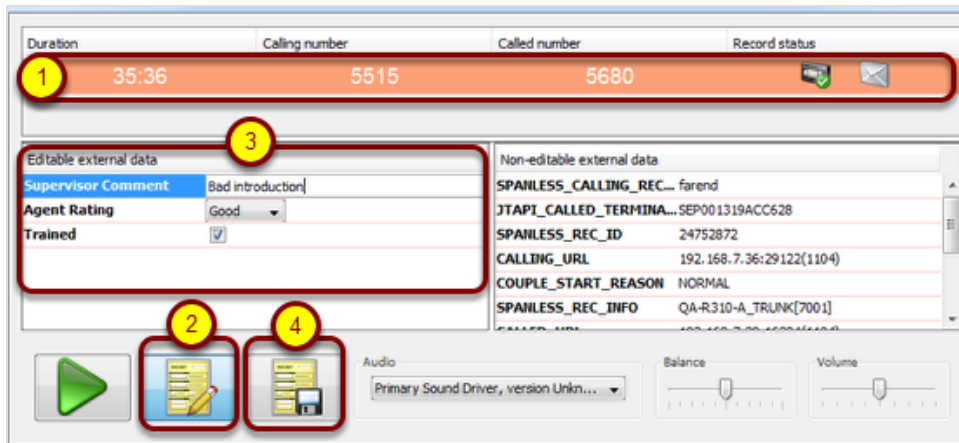


Figure 77: Adding Editable External Call Data

1. Select a call from the list.
2. Click the notes button to display the external data.
3. Add your comments, select from available dropdown lists, or select the appropriate checkboxes.
4. To save the changes, click the save notes button.

When the call is completed this data is available in both Call Recording and Quality Manager, and can be used for filtering and searching for calls.

Sorting Live Calls

You can change the display of Live Monitor by right-clicking in a column heading. This allows you to enter a filter, (wild cards are valid), such as a phone number or agent name, and display only matching calls in your list.

To clear column display settings, and return to viewing all available calls, right-click in a column heading and then press Enter on your keyboard.

Setting duration thresholds:

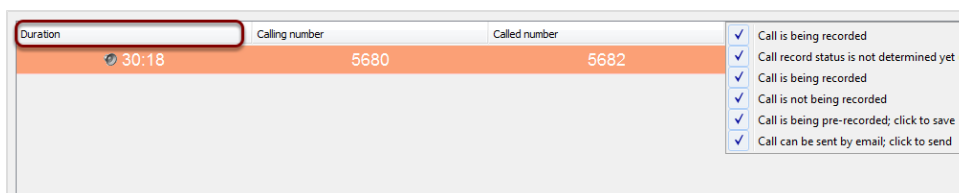


Figure 78: Record status

The Duration column displays calls by how long they have remained connected. To screen out longer or shorter calls, you can change the Duration threshold. Right-click on the **Duration** column heading.



Figure 79: Duration

Select Less than (<) or Greater than (>) and enter the number of minutes. Click ... to apply the Duration threshold.

Only calls under or over your threshold display in the Live Monitor call list.

Displaying calls by Record Status:

By default, Live Monitor displays all calls in the Call Recording system.

To change the display to only show calls with a specific recording status, right click on **Record status** a drop down list appears with the following Options:

- **Call is being recorded**
- **Call record status is not determined yet**
- **Call is not being recorded**

- **Call is being pre-recorded; click to save**
- **Call can be sent by email: click to send**

Chapter

11 **Advanced Player**

This Chapter describes how to use Advanced Player.

This chapter contains the following sections:

[Using the Advanced Player](#)

[Using Advanced Player Controls](#)

[Playing Multiple Calls](#)

[Adjusting Call Offsets](#)

[Isolating Calls](#)

Using the Advanced Player

Genesys Call Recording includes an Advanced Player that allows you to listen to multiple calls, select sections of calls, arrange the order of call playback, and isolate individual call streams.

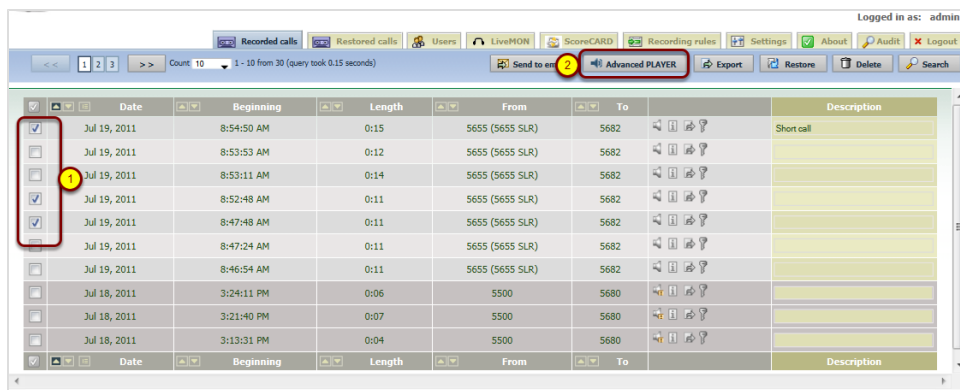


Figure 80: Opening the Advanced PLAYER

To open the Advanced PLAYER:

1. Select one or more call check boxes.
2. Click the **Advanced Player** button. The calls are represented on the timeline as blue bars starting on the left and finishing on the right. The word **ready** appears on each blue bar when the call is downloaded and ready to play.
3. You can click on the calls and drag them across the timeline from right to left to remove any gaps in the calls where no one was speaking. To do this click on a blue bar and drag it to the left until the left hand edge of the latter call is above or below the right hand edge of the preceding call.

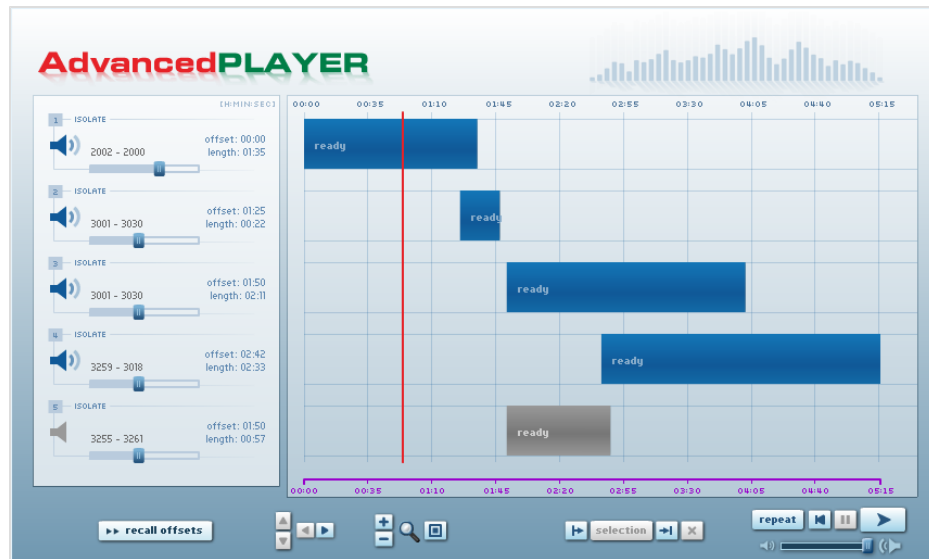


Figure 81: The Advanced PLAYER window

Using Advanced Player Controls

The Advanced PLAYER uses standard audio playback, rewind, and repeat control buttons. The Master volume is controlled with a slider control.

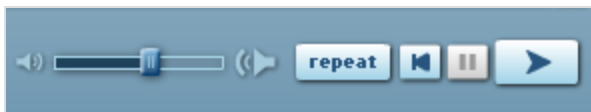


Figure 82: Advanced PLAYER playback controls

You can enlarge the audio track display or make the display smaller, or reset the size to its original position. This allows you to navigate between tracks and move their relative positions when you are replaying multiple call recordings.



Figure 83: Audio track size and reset

To mute an individual call, click the call's speaker icon. To adjust the volume up or down, use the call's volume slider. Click **Isolate** to hear only that call recording.

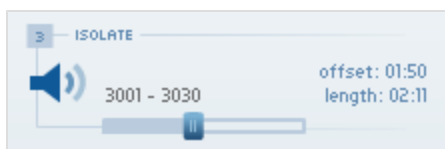


Figure 84: Call's Related Controls

Use the Call Selection controls to identify a section of recordings. Use the red cursor line to select the Start (<) and End (>) points. Only the selection between these points plays when you click **Selection**. Clicking X clears the selection area.



Figure 85: Calls Selection Controls

Playing Multiple Calls

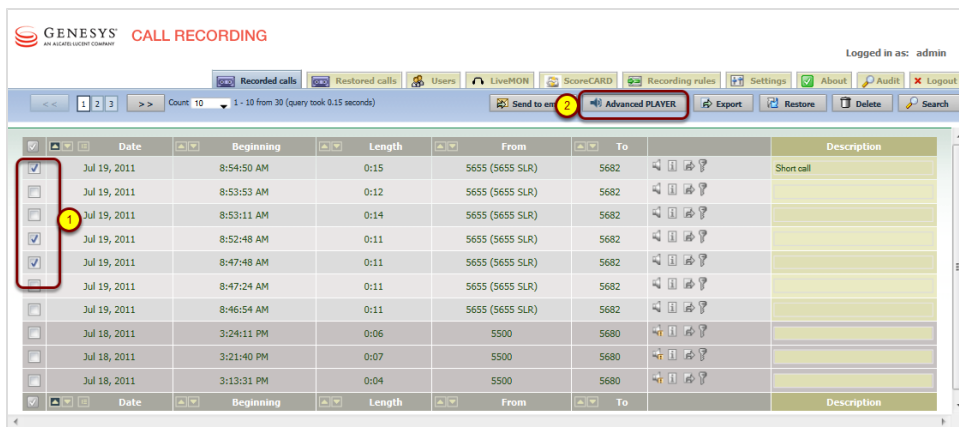


Figure 86: Opening the **Advanced PLAYER**

1. In the **Recorded Calls** tab, select multiple calls by clicking their check boxes.
2. Click **Advanced PLAYER**. The **Advanced PLAYER** window opens with those calls ready to play in sequential order.

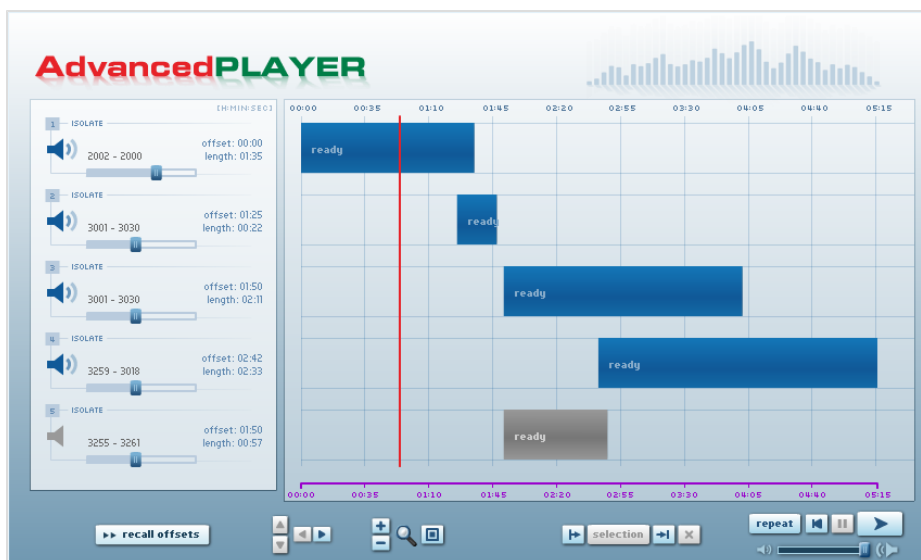


Figure 87: The **Advanced PLAYER** window

Use the red cursor line to move within the recordings. Click the **Play** button to hear the calls.

Adjusting Call Offsets

Call offsets are the gaps between calls. These gaps can be small, less than one second, or large. To close the gaps, use your mouse to drag the call tracks closer together.

To return all the offsets to their original positions, click **recall offsets**.



Figure 88: Recall Offsets Button

Isolating Calls

To hear only one of the selected calls, and mute all other calls, click **ISOLATE** next to the call identification information.

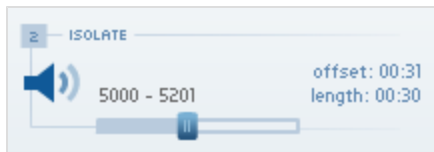


Figure 89: Isolating a Call

Clicking **ISOLATE** again turns all calls back on.

Chapter

12 Request Technical Support

Technical Support from VARs

If you have purchased support from a value-added reseller (VAR), contact the VAR for technical support.

Technical Support from Genesys

If you have purchased support directly from Genesys, please contact <http://genesyslab.com/support/contact> Genesys Technical Support.