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SmartRecord®

End User Interface User's Guide

V4 SP7

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Introduction

This guide provides information about the End User Interface features, functions, and reports presented as tools to be used to solve your business management requirements. We've focused on some of the most common tasks such as managing recorded calls and calls in progress. Where possible we have included step-by-step procedures and/or examples of how to complete the functions within the application.

The End User Interface allows Users of the system to manage calls by number. Users of the system might be characterized as managers or supervisors of contact centers, members of law offices, or financial institutions. Users are assigned numbers by which they are then able to manage calls in progress and recorded calls.

Logging On

In order to access the application, you must logon with a user name and password. The user name is assigned by the Group Administrator that created them in the End User Interface. Passwords are autogenerated by the application and emailed directly to you. Once you have access to the application, you have the ability to change your password using the Change Password link. You are then able to select a password of your choice. Passwords are initially auto-generated because Administrators and Providers are not allowed to know the passwords of the Users they create.

- Open an Internet session. Supported browsers and versions include the following and should be HTML 5 compliant:
 - IE
 - Firefox
 - Google Chrome
 - Safari

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

2. Enter the call recorder URL.



3. Enter your User Name and Password.



4. Click Logon.

Note: A logo is optional and may or may not be assigned to your particular account. Logos are assigned by the Administrator or Provider in the Administrator Interface.



Home Tab (Dashboard)

The Home Tab or Dashboard, provides you with a real-time view of the system data including information about the total number of calls in progress, active call handlers, calls, duration recorded, calls in the recycle bin, free audio storage, free video storage, free screen storage, etc. The Dashboard is divided into eight distinctive panes that give you a pictorial and data overview of your company's current call usage: First Look, Calls by Category, Frequent Callers, Calls by Location, Call Handler Summary, Active Call Handlers, Recent Calls, and Activity & Heat Map. Where applicable, the panes can be viewed as data or as a graph. Additionally, the panes can be reorganized or relocated by clicking on a pane, dragging it, and dropping it in the desired location on the Dashboard. Each pane can also be collapsed by clicking on the arrow in upper right corner of the applicable pane.

With the exception of First Look, Active Call Handlers, Recent Calls, and Activity & Heat Map charts, you have the ability to view each pane as either a text or graphical display. Additionally, all panes have one field you can click on to drill down into the details of that information or play a call recording. The default is for the Dashboard to refresh every 30 seconds; however, you can reset the refresh value for each element individually except for the First Look pane. Refresh can be temporarily stopped by clicking the [1] (Pause) button.

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First Look

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

- Calls in Progress identifies the total number of calls in the system that are not terminated, by Group and/or User.
- Active Call Handlers displays the total number of extensions with an active call. Active Call Handlers displays information by Group and then by User. Groups and Users will only see information based on extensions to which they have access.
- Calls identifies the total number of completed calls for the user that is currently logged in and that have a recording associated with them. This value is accumulative over the lifetime of the Group. However, the number will adjust accordingly when call files are deleted and/or routinely swept from the application.
- Duration Recorded identifies the sum of duration for recorded calls that have a recording associated with them, by Group and User. This value is accumulative over the lifetime of the Group.
- Calls in Recycle Bin identifies the total number of calls that have a recording associated with them and that are pending deletion. This value is accumulative over the lifetime of the Group. However, the number will adjust accordingly when call files are deleted and/or routinely swept from the application.
- Free Audio Storage identifies the total amount of free audio storage, by Group only.
- Free Video Storage identifies the total amount of free video storage, by Group only.
- Last Week's Trend provides a visual display of the call history for the previous week.

Calls by Category

The Calls by Category pane displays total calls by custom category. Categories are specific to the user. The calls included in the totals are determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Calls by Category pane can be displayed as text or a graph by selecting Details or Graph from the drop down list. You can drill down into the specific recorded calls by clicking on a specific category. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.

Frequent Callers

The Frequent Callers pane displays the total number of calls by calling number for the most frequently called numbers. The Frequent Callers chart displays inbound calls only. The number of frequent callers displayed in the pane will be determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Frequent Callers pane can be displayed as text or a graph by selecting Details or Graph from the drop down list. You can drill down into the specific recorded calls by clicking on a specific frequent caller. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.

Calls by Location

The Calls by Location pane displays total calls by each location as determined by the NPA/NXX. The calls included in the totals will be determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Calls by Location pane can be displayed as text or as a pie chart by clicking on the View Graph link. You can drill down into the specific recorded calls by clicking on a location under the Location column. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.

Call Handler Summary

The Call Handler Summary pane displays the maximum duration, average duration, and total number of calls by call handler/number for the duration determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Call Handler Summary pane can be displayed as text or as a pie chart by clicking on the View Graph link. You can drill down into the specific recorded calls by clicking on a call handler ID under the Call Handler ID column. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.

Active Call Handlers

The Active Call Handlers pane displays the call handlers/numbers that are currently on calls and the number of the other party. Users that have access are able to monitor an active call handler's call in progress by clicking on the monitor button. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.

Recent Calls

The Recent Calls pane displays the most recent calls, incoming and outgoing, by call handler. The number of recent calls displayed in the pane will be determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Recent Calls pane can be displayed as text or a graph by selecting Details or Graph from the drop down list. You can play a recorded call by clicking on the recorded call icon. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop down list.

Activity & Heat Map

The Activity & Heat Map displays the call activity for the top 10 numbers by hourly intervals over a 24 hour period. The Activity & Heat Map can be filtered by Call Handlers, Calling Parties, or Called Parties. Additionally, the call activity can be displayed as Number of Calls or Call Duration (in minutes). The darker coloured blocks represent the higher volume call activity while the lighter coloured blocks represent the lower volume call activity. Each individual colour block is clickable and will take you directly to the Recorded Calls tab where are you able to view the call activity, listen to the recording, add a comment, etc.

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12 PM		5	2	6	5	10	5	10	1	6	
11 AM	12	2	11	8	9	8	8	9	6	10	
10 AM	<u>8</u>	11	10	7	6	<u> </u>	5	12	3	14	
09 AM	9	4	11	7	6	13	10	16	9	9	
08 AM	10	3	5	14	6	6	6	8	10	12	
07 AM	4	10	10	6	11		8	5	12	6	
06 AM	5	10	5	9	8	6	6	9	6	11	-

Recorded Calls

When logged in as the Group Administrator, the Recorded Calls screen displays all completed recorded calls for all Users. However, when logged in as an End User, you are only able to see completed recorded calls that belong to you or your user ID. In order to better manage this screen, all column headers can be sorted by clicking on the applicable column header. Click once to sort the column in ascending order and click one more time to sort the column in descending order. The following information is displayed on the Recorded Calls screen:

- Number the number or description associated with the call
- Day the day of the week the call took place
- Date the actual date the call took place
- Time the time the call originated
- From Number the originating number
- From Caller ID displays the name or number of the person that originated the call, if caller ID is available
- To Number the terminating number
- To Caller ID displays the name or number of the To Number, if caller ID is available
- Redirected From displays the number of the person or group transferring the call
- Redirected To displays the number to which the call was transferred
- Duration the length of the call
- Recording identifies whether or not there is a recording associated with the call
- Annotate comments and markers on calls to indicate where in the call a notable event occurred
- CRM allows the user to upload recorded calls to an interfaced CRM systems such as Sugar and Salesforce.com through the standard API
- Email allows the user to email a recorded call
- · Comments any comments associated with the call
- Category allows the user to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction)
- Classification allows the user to classify calls to restrict access to them to only the user with explicit permissions.
- MD5 identifies whether or not the call has been hashed using MD5 fingerprinting, thus ensuring that the call has not been tampered with and satisfying regulatory requirements
- Archive allows you to view the file path of a particular recorded call
- Evaluate allows Group Administrators to select individual recorded calls and evaluate the call handler's performance during the call
- Audio Mining allows users to view the results of the audio mining pack search

Note: All columns on the Recorded Calls tab may not be available to you depending on what features your Group Administrator was assigned in the Administrative Interface.

When numbers are assigned to Users, the default setting is to record and retain all calls that are made from or to those numbers. This setting can be changed to do not retain recording by the Group Administrator. If the default setting has been preserved for a number and calls are being recorded and

retained, a **(Recordings button) will appear under the Recording column indicating there is a** recorded call file for that particular call. To listen to the recorded call file, click on the Recordings button. Your default media player will open and begin playing the recorded call file (MP3 file). Please be aware that the way in which media players load and play the recorded call files will vary. For instance, QuickTime Player and Windows Media[®] Player will immediately launch the recorded call file (see Appendix A for a list of supported features by media player). However, iTunes[®] will load the recorded call file in the library and you will have to click play to begin listening to the file.

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

Annotations allow you to add comments and markers to specific parts of calls to indicate where in the call a notable event might have occurred. For example: a contact center manager (or any other user) can find

a notable event in a call and mark it for future review with a comment. A 🖾 (Annotate button) indicates there are currently no annotations associated with the corresponding recorded call file. However, a 🖾 (Annotate button) indicates there are annotations associated with the recorded call file. To add an annotation, click on the Annotate button. Select the Play button to begin playing the recorded call. Select Pause when you come to the point in the call that you wish to add an annotation. Enter a subject marker description and any notes to better identify the annotation and click Add Marker. You can also attach external documents to an annotation by clicking Upload Document. You must repeat each step for each annotation you wish to add to the call.

Note: Pausing or resuming a recording will automatically create an annotation for the call.

You have the option to upload recorded calls from the Recorded Calls tab to a CRM application. This functionality allows you to connect the recording system with CRM applications such as Sugar or Salesforce.com to upload recorded call files to specific contacts in the CRM application.

Note: You can only have one active connection to a CRM application at a time. If you want to log into another CRM application, click CRM Client Settings, select the CRM application, and enter the credentials.

To upload a recorded call to a CRM, select CRM Client Settings link. The CRM Client Settings Link can be accessed from the toolbar on the Recorded Calls tab or from the Archive to CRM dialog box. Select the CRM application from the drop down list and enter or select the URL, username, and password to that CRM application. Click Test Connection. A message is displayed notifying you if the connection was successful or failed. If the connection was successful, click Save.

Select the 🔤 (CRM button) that corresponds to the call that you want to upload.

Note: The number of the recorded call must be a number that belongs to at least one contact in the CRM application in order to perform the upload.

If the contact, account, or case you want to upload the call to does not appear, enter new criteria in the CRM Search field and click Search. If multiple contacts, accounts, or cases deselect the ones you don't need by clicking in the option boxes to remove the checkmark. Enter a subject and a note about the recorded call file and click Archive to CRM.

Additionally, situations will occur where you need to send a specific recorded call to a person that may not have access to the application or just for emphasis. In these instances, you have the ability to email the recorded call to that recipient. To send a recorded call file via email, select the 🔤 (Email button) that corresponds to the call that you want to send. A new email page will open with the recorded call link displayed in the text area. Select your recipients and send the email.

Note: There will not be an email option for any calls that have been deleted. You will still see the call detail but there will not be a recording associated with it.

From the Recorded Calls screen you can also add comments to each of the recorded call files. A **•** (Add Comment button) indicates there are currently no comments associated with the corresponding recorded call file. A **•** button indicates there are currently comments associated with the corresponding recorded call file. To add comments to a recorded call file, click on the Add Comment button and enter the applicable text in the text field. Click Submit. This is the point at which the Add Comment button changes to the **•** button.

The ability to create categories for calls is beneficial to call handlers and managers, allowing them to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction). You are then able to filter calls or run reports based upon these call categories. Click on the Category link and select the specific category from the drop down list.

Note: Categories are specific to the user. Therefore, the categories that you create and assign to your recorded calls cannot be seen by other users.

Once an audio mining pack has been added and released and a filter has been applied, you have the ability to view the results of the filter and listen to the calls, if necessary. The application also rates the returned calls in order of confidence, or how sure the application is that the word or phrase is contained in the recording. To view the audio mining results, click the solution that corresponds to the recorded call for which you wish to view results.

MD5 is a technique used to ensure that a file has not been altered in any way. When the call is recorded, we take an MD5 hash of it, outputting a string of random characters. The point is that if MD5 fingerprinting is applied to the same call at a later point, it will create the same string of characters, unless the call file has changed. If a different string of characters that don't match the original is created, you know the call has been modified. The default is to hash all calls. Hovering your mouse over the MD5 icon for a specific call will reveal the hash string. If you have the recorded call file downloaded or available in another location, click on the MD5 icon to open the Verify Recording dialog box. Upload the recorded call file to verify the file has not been tampered with.

Clicking on specific (Archive) button will display a list of ISO images that contain specific call recordings. The ISO image will identify the user that archived the call, the date and time, and the file path to where it was archived.

Number, Redirection, Date, Time, Category, or Other (or a combination of all four) filters located below the Recorded Calls, Recycle Bin, Calls in Progress, and Reports navigation tabs can be applied to the screen to assist in searching and displaying only the information pertinent to your current needs. Select the filter you wish to apply by clicking on Filter and then selecting the Number, Redirection, Date, Time, Category, or Others tab(s).

Enter or select the applicable information for each filter and click Apply Changes. To return to the default information, click Reset All. Click Hide to close the Filter window.

Note: You do not have the option to filter by category under the Reports tab.

The Payment Card Industry Data Security Standard (PCI DSS) is a set of requirements designed to ensure that all companies that process, store **or** transmit credit card information maintain a secure environment. Therefore, when a customer is set to read their credit card number over the phone, the PCI Compliance feature allows you to disable the call recorder briefly so that the credit card information is not recorded. At the time they begin to read their credit card number, you can enter a series of numbers on your touch pad to temporarily disable the recorder. Once they are done giving their credit card number you will re-enable the call recorder by entering the same numbers.

Example: Applying a filter

1. Click on the Filter toolbar to expand it.

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8. Click **Apply Changes** to apply the filter to the list of Recorded Calls.

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9. Click **Reset All** to remove the filter from the list of Recorded Calls.



10. Select the **By Date/Time** tab.

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11. Select Last Week from the drop down list.

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12. Click **Apply Changes** to apply the filter to the list of Recorded Calls.



13. Click **Reset All** to remove the filter from the list of Recorded Calls.

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- 18. Enter the following information under the By Time filter:
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19. Click **Apply Changes** to apply the filter to the list of Recorded Calls.

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20. Click 💾 (Save Filter) button to save the filter criteria.

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21. Enter the filter name and click **Save** Filter.

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22. Click **Reset All** to remove the filter from the list of Recorded Calls.

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23. Select Q (Apply Saved Filter).

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Example: Managing the Recorded Calls tab columns

 Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.

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2. Select the **Select Columns** link at the top or bottom of the Recorded Calls page.

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- 3. Select the following option boxes:
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4. Select the **Update** link.

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5. Select the **Select Columns** link at the top or bottom of the Recorded Calls page.

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- 6. Select the following option boxes:
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7. Select the **Update** link.

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1	4025551211	Mon	4/11/2011	6:26:32 PM	4025551211	1211 402	4025551213			00:00:22	۲	12	82	2	۰.	(No Category)	<i>w</i>
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Example: Playing recorded audio

1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.

Note: This example is shown using QuickTime Player.

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Home	ordings	Reports	Alerts											Wekome, efink
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Results Per Page: 2	Down	ier oad Export	Export All				(No C	itegory) 💌 Apply Categ	ny Ha	nage Cab	opories	CRH Ch	nt Settings Select	Stow Columns Refresh Gr
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4025551130	Tue 4/12/2011	11:58:08 AM	1127	402 1127	4025551130	402 1130		00:00:44	6	17	10	a 🔶	(No Category)	-
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2. Select a call and click on the (Recording button) that corresponds to that call.

Your default media player will open and begin playing the recorded call file (MP3 file).

Note: The way in which media players load and play the recorded call files will vary. For instance, QuickTime Player and Windows Media[®] Player will immediately launch the recorded call file. However, iTunes[®] will load the recorded call file in the library and you will have to click play to begin listening to the file.

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	355 1002	Wed	8/20/2014	11:39:48 AM	1001				1002			00:01:00			1	-	+	
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	555 1002	Wed	8/20/2014	10:06:37 AM	1002				1001	1001 😈		00:03:48		٠		115	+	
	355 1004	Wed	8/20/2014	10:06:36 AM	1002				1004			00:00:48		•	1	22	+	(No Category)
	555 1002	Wed	8/20/2014	10:05:51 AM	1002				1001			00:00:42			12	005	+	

3. Click the browser's **Back** button to return to the Recorded Calls screen.

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Example: Playing recorded video

 Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.

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234	3678910																		

5. Select a call and click on the (video button) that corresponds to that call.

The media player will appear and begin playing the video.



• The toggle screen buttons E elow the videos, on the right, will show or hide the left, right, or both videos.



- The skip buttons on the lower left to skip forward ^(C) or backward ^(D) 15 seconds.
- The stop button will stop the recording and return to the beginning of the call.
- The pause button **II** will pause the recording.

- Toggling the volume button
 will mute and unmute the call; the slider will adjust the volume.
- 6. Click **Close** button to return to the Recorded Calls screen.

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5 2000	Th	0 9/11/2014	9:03:55 PM	2000	Daotu	3172630000	Sukanta	2000 😏	00:00:17	×	•	1	1	22	+	(No Category)	順		Class7
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Example: Adding an annotation to a recorded call

1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.

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Г	402 1001	Tue 12/4/2012	9:36:31 PM	1001		1002		00:00:37	۲	1	-	1	+	(No Category)	
	402 1001	Tue 12/4/2012	8:00:46 PM	1001		1002		00:00:19	۲	1	-	193		(No Category)	
Г	402 1001	Tue 12/4/2012	7:58:32 PN	1001		1002		00:00:30	۲	17	-			(No Category)	
Г	402 1001	Tue 12/4/2012	7:30:36 PM	1001		1002		D0:00:22	۲	12	12		+	(No Category)	
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	402 1001	Tue 12/4/2012	4:18:07 PM	1001		1002		00:00:19	۲	12	62	123		(No Category)	
Г	402 1001	Tue 12/4/2012	3:52:43 PM	1001		1002		00:00:25	۲	2	12	-	+	(No Category)	
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Г	402 1001	Tue 12/4/2012	2:59:10 PM	1004		1001		00:01:23	۲	17	-	153		(No Category)	
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Г	355 1020	Tue 12/4/2012	2:22:00 PM	+1402555104		+1402555102		00:00:44	۲	1	-	123		(No Category)	
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Г	555 1020	Tue 12/4/2012	2:21:59 PM	+1402555103		+1402555102		00:00:45	()		-	12	+	(No Category)	

 Select a call and click on the (Annotate button) that corresponds to that call.

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3. Select the **Play** button to begin playing the recorded call.

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4. Select **Pause** when you come to the point in the call that you wish to annotate.

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- 5. Enter the following information:
 - Marker Description Threat
 - Notes Customer made a threat to customer service representative

	Desktop Notifier Archive Tool	Recent Alerts Quick Start Log Off
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To Number 1002	view notes for markers until that marker is reached during playback.	
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6. Click the Add Marker button.



7. Select the **Play** button to begin playing the recorded call.

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8. Select **Pause** when you come to the point in the call that you wish to annotate.

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9. Click the **Browse** button and select a document.

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10. Click the **Upload Document** button.

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11. Click the *O* (Delete Marker) button that corresponds to the uploaded document.

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12. Click OK.

13. Click the () (Seek) button to jump to the annotated spot in the call.

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14. Click the **Download Annotation** link.

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15. Click the in the right corner of the AnnotatedCall.zip dialog box.

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16. Click the **Close** link at the bottom of the Annotation dialog box.

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Example: Uploading a recorded call to a CRM

Note: If your company does not interface with a CRM application, this use case will not apply.

 Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.

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1	4025551211	Mon 4/1	1/2011 6:26	:32 PM	4025551211	1211 402	4025551213			00:00:22	۲	7	-		٠	(No Category)	<i>w</i> h
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2. Click on the **CRM Client Settings** link found at the top or bottom of the Recorded Calls tab.

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3. Select a CRM application from the drop down list.

Note: You can only have one active connection to a CRM application at a time. If you want to log into another CRM application, click CRM Client Settings, select the CRM application, and enter the credentials.

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- 4. Enter or select the following information:
 - URL the URL where the CRM application is located
 - User Name your user name used to access the CRM application
 - Password your password used to access the CRM application

Note: Once you have performed steps 3 & 4 the first time, you will not be asked to enter the information again.

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5. Click Test Connection.

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6. Click Save to save your credentials.

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 Select a call and click on the (CRM) button that corresponds to that call.

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8. If applicable, enter new search criteria in the CRM Search field. Select or deselect Contacts, Accounts, or Cases depending on what you want to upload this call to. Click Search.



9. If multiple contacts, accounts, or cases deselect the ones you don't need by clicking in the option boxes to remove the checkmark.

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- 10. Enter the following information:
 - Subject Please Remove
 - Note Customer would like to be removed from contacts

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11. Select the Archive to CRM link.
12. Select the **Close** link to close the CRM dialog box.

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Example: Emailing a recorded call

 Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.

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 Select a call and click on the (EMail) button that corresponds to that call.

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 Enter the email address(es) of the person(s) to which you wish to send the recorded call



4. Click Send.

Example: Adding comments to a recorded call

 Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.

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 Select a call and click on the T (Add Comment) button that corresponds to that call.

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- 3. Enter the following information:
 - Comment This call is to be used for training. Please ask the helpdesk personnel to listen to the recorded call.

Note: Comment text cannot be greater than 1024 characters.

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	4025551211 Tue 4/	12/2011 3:56:25 PM	402	Dav:	fue						+	(No Category)	-
	🍡 4025551213 Tue 4/	12/2011 3:56:25 PM	121	Date:4	/12/2011						9	(No Category)	
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Г	4025551211 Tue 4/	12/2011 2:52:55 PM	402	From Number:	025551211 1211 402						+	(No Category)	<i>w</i>
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Г	4025551211 Tue 4/	12/2011 2:44:18 PM	402	Duration:	10:00:25						+	(No Category)	
	4025551211 Tue 4	12/2011 1:01:23 PM	402	Comment Text	his call is to be used for train	ng. Please ask the helpdesk p	ersannel to listen t	the reco	rded cal	14	+	(No Category)	-
Г	🍡 4025551213 Tue 4/	12/2011 1:01:23 PM	121								9	(No Category)	-
0	🍡 4025551130 Tue 4/	12/2011 11:58:08 A	M 112								+	(No Category)	10
П	4025551130 Tue 4/	12/2011 11:46:42 A	M 402							-	+	(No Category)	-
	4025551130 Tue 4/	12/2011 11:45:39 A	M 402		late: Comment fest cannot be i	nore than 1024 characters (921)					+	(No Category)	
	🍬 402555 9001 Tue 4/	12/2011 10:18:31 A	M 120		iave						+	(No Category)	-
	🍡 4025559001 Tue 4/	12/2011 10:16:31 A	M 120								+	(No Category)	-
Г	¥ 4025553001 Tue 4	12/2011 10:15:45 A	M 120								+	(No Category)	-
	📲 4025551009 Tue 4/	12/2011 10:12:03 A	M 1207	Hunt Scale - 1/0 / 40	2 4025551009 555 1009	4025551000	00:00:08	G	10	-	÷ +	(No Category)	-
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 Click Save. Notice that the Add Comment button has changed to a
 button indicating that there is a comment associated with this call.

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Г	Number Day	Date Time	From Number	From Caller ID	To Number T	o Caller ID	Redirected From Redirect	ed To Duration 8	acording A	Annotate	CRM Email	Comments	Category	MDS Archive Audio Mining
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 Position your mouse pointer over the button. Notice that part of the comment is displayed as a tooltip.

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6. Click on the \checkmark button.

			Desktop Notifier Ard	hive Tool	Recent Ale	ts Quick Start	Change Password Log Off
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4025551211 Tue 4/12/2011 3:56:25 PM 402	Day: Tue				+	(No Category)	*
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4025551211 Tue 4/12/2011 2:44:18 PM 402	Duration: 00:00:25				+	(No Category)	*
4025551211 Tue 4/12/2011 1:01:23 PM 402	Comment: Text This call is to be used for training	ing. Please ask the helpdesk personnel to liste	n to the recorded call.	14	÷	(No Category)	uh .
4025551213 Tue 4/12/2011 1:01:23 PM 121					9	(No Category)	
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- 7. Review the comment, select it, and enter the following:
 - Comment Customer very agitated, call had to be transferred to a manager.

				Des	ktop Notif	fier Arc	thive Tool	Recent Aler	ts Quick Start	Change Password Log Off
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8. Click **Save** to save your changes.

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4025551211 Mon 4	11/2011 6:26:32 PM	4025551211	1211 402	4025551213			00:00:22	۲	1	10	8	r.	(No Category)	ø

9. Click on the *I* button.

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Bumber Day Date Time Fro	Number: 4025551211				Comments	Category	NDS Archive Audio Mining
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4025551213 Tue 4/12/2011 3:56:25 PM 121	Date: 4/12/2011				9	(No Category)	<i>w</i>
4025551211 Tue 4/12/2011 3:00:23 PM 402	Time: 2:50:02 PM				+	(No Category)	<u>م</u>
4025551211 Tue 4/12/2011 2-52-55 PM 402	From Number: 4025551211 1211 402				+	(No Category)	*
4025551211 Tue 4/12/2011 2:50:02 PM 402	To Number: 4025551120				9	(No Category)	÷
4025551211 Tue 4/12/2011 2:44:18 PM 402	Duration: 00:00:25				+	(No Category)	÷
4025551211 Tue 4/12/2011 1:01:23 PM 402	Comment Text Customer very agitated, call had to b	be transferred to a manager.		*	+	(No Category)	uh .
4025551213 Tue 4/12/2011 1:01:23 PM 121					9	(No Category)	<u>م</u>
4025551130 Tue 4/12/2011 11:58:08 AM 112					+	(No Category)	¢
4025551130 Tue 4/12/2011 11:46:42 AM 402				-	+	(No Category)	<u>م</u>
4025551130 Tue 4/12/2011 11:45:39 AM 402	Note: Comment text cannot be more th	han 3004 characters (960)			+	(No Category)	*
4025551001 Tue 4/12/2011 10:18:31 AM 120	Save				+	(No Category)	<i>w</i>
4025551001 Tue 4/12/2011 10:16:31 AM 120					+	(No Category)	<i>a</i>
4025551001 Tue 4/12/2011 10:15:45 AM 120					+	(No Category)	<u>به</u>
T 14025551009 Tue 4/12/2011 10:12:03 AM 1207	unt scale - 1207 402 4025551009 555 3009 4025	1555 1000 🕥 00 100 108	W	M L	+	(No Category)	<i>w</i>
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- 4025551211 Mon 4/11/2011 6:26:32 PM 4025551211 1	211 402 4025551213	00:00:22	•	1	+	(No Category)	æ
12345678910							

10. Delete the comment from the Comment field by selecting it and clicking the Delete button on your keyboard.

				Des	ktop Noti	fier Ar	chive Tool	Recent Aler	ts Quick Start) (Search.	Change Password Log Of
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Results Per Page: 20 . Devenlend Expert Expert All			(No Category)	Apply Catego	ry Har	nage Cat	egories	CRH Client S	ettings Select (alumns Refresh Grid
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4025551130 TUE 4/12/2011 11:45:39 AM 402		iove						- T	(No.Category)	**
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Click Save to save your changes.
 Notice that the *I* button has changed back to the Add Comment button.

					Deal	ktop Notil	fier Arc	hive Tool	Recent Ale	rts Quick Start (Search	Change Password Log 0
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tesuits Per Page: 20 🗾 Downloo	d Export Expo	t All		(\$40 Ca	tegory) 💽 Apply Catego	ey Plar	age Cate	ngories	CRH Client	lettings Select	Columns Refresh Grid
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4025551213 Tue 4/12/2011 3	:56:25 PM 1211	1211 402	4025551213 1213 402		00:00:26	(9)	17	1	1	(No Category)	*
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Example: Categorizing a recorded call

 Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.

											Desktop	lobher A	rchive	Tool	Recent Ale	rts Quick Start Search.	Change Password
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less	ts Per Page:	2 <u>-</u>	Dowslo	ed Expert	Export All				(No Ci	rtegory) · Apply Cal	legery	Hanage Ca	tegori	ies C	RH Client	Settings Select (Columns Refres
								500	0 Recorded Calls								
	Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller 10	Redirected From	Redirected To Durati	en Record	ing Annotai	a CRH	(Enal)	Comments	Category	NDS Archive Aud
1	4025551211	Tue 4	/12/2011 3	1:56:25 PM	4025551211	1211 402	4025551213			00:00:	3 🖲	1	-		+	(No Category)	
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	4025551211	Tue 4	(12/2011 2	2:50:02 PM	4025551211	1211 402	4025551120			00:00:	5 🖲	1	-		+	(No Category)	*
	4025551211	Tue 4	/12/2011 2	244: 18 PM	4025551211	1211 402	4025551120			00:00:	. 🖲) 📝	-		+	(No Category)	
8	4025551211	Tue 4	/12/2011 1	L:01:23 PM	4025551211	1211 402	4025551213			00:00:	» 🖲		-		+	(No Category)	*
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1	4025551130	Tue 4	/12/2011 1	L1:58:08 AM	1127	402 1127	4025551130	402 1130		00:00:	H 🖲		-		+	(No Category)	*
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7	4025551001	Tue 4	/12/2011 1	10:18:31 AM	1207	1207 402	4025551001	555 2001		00:00:	м 🖲) 📝	-		+	(No Category)	
7	4025551001	Tue 4	(12/2011 1	10:16:31 AM	1207	1207 402	4025551001	555 1001		00:00:5	51 🕑	1	1		+	(No Category)	*
7	4025551001	Tue 4	/12/2011 1	10:15:45 AM	1207	1207 402	4025551001	555 3001		00:00:	8 🖲) 📝	-		+	(No Category)	
7	4025551009	9 Tue 4	/12/2011 1	10:12:03 AM	1207	Hunt Scale - 1207 402	4025551009	555 1009	4025551000 🕥	00:00:	a 🕑) 🛛	1		+	(No Category)	
	4025551211	Mon 4	/11/2011 6	1:28:53 PM	4025551211	1211 402	4025551213			00:00:	10 🖲) 📝	-		+	(No Category)	*
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2. Select the **Category** link that corresponds to the call that you wish to categorize.



3. Select one category to apply to the call by clicking in the corresponding option box and click **Save**.

	Home Recordings Reports	Alerts												Velcone, efrik
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	uits Per Page: 20 1 Deveload Even	L EmeriAL				Dia Cateor	(v) Analy Catana	or L Ba	name Cal	marie	1.0	th Client	Sattines Salart C	alamas Refres
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	4025551211 Tue 4/12/2011 3:56:25 PM	4025551211	1211 402	4025551213			00:00:23	B	1	-		*	(No Category)	*
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	4025551130 Tue 4/12/2011 11:46:42 AM	4025551130	402 1130	4025551124			00:00:14	۲	1	-		۰.	(No Category)	
	4025551130 Tue 4/12/2011 11:45:39 AM	4025551130	402 1130	4025551124			00:00:39	۲	1	-		۰.	(No Category)	*
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	4025551211 Mon 4/11/2011 6:28:25 PM	4025551211	1211 402	4025551213			00:00:16	۲	2	-		٠	(No Category)	*
	34025551213 Mon 4/11/2011 6:28:25 PM	1211	1211 402	4025551213	1213 402		00:00:15			-	-	9	(No Category)	*
	4025551211 Mon 4/11/2011 6:26:32 PM	4025551211	1211 402	4025551213			00:00:22	۲	2	-		٠	(No Category)	*
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4. Select the **Category** link that corresponds to another call that you wish to categorize.

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				Select Hulti	ple Categories								
T Bumber Day Date Time Fr	rom Humber	From Caller		Back Office		4	aretion F	lecording A	innobele	CRM Email	Comments	Cebegory	HDS Archive Audio Mining
4025551211 Tue 4/12/2011 3:56:25 PM 400	25551211	1211 402		Customer Ser	vice		:00:23	•	1	•	•	(No Category)	a
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5. Select several categories to apply to the call by clicking in the corresponding option boxes and click **Save**.

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Home	ecordings	Reports	Alerts										Midana af	
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402555121	1 Tue 4/12/20	L1 3:56:25 PM	4025551211	1211 402	4025551213		00:00:23	ø	N.	10		(No Cabegory)		
4025551213	3 Tue 4/12/20	L1 3:56:25 PM	1211	1211 402	4025551213 1213 402		00:00:26		8	-	9	(No Category)	*	
402555121	1 Tue 4/12/30	L1 3:00:23 PM	4025551211	1211 402	4025551123		00:00:35	B	N.	-		(Ne Calegory)		
402555121	1 Tue 4/12/20	L1 2:52:55 PM	4025551211	1211 402	4025551120		00:00:40		2	-		(No Category)	*	
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6. Select two or three recorded call option boxes (located to the left of the recorded calls).

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7. Select the category you wish to apply from the drop down list found at the top or bottom of the Recorded Calls page.

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8. Select the Apply Category link.

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9. Select the Manage Categories link.

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11. Select the drop down arrow to the right of the Category Name field and select the color red.

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13. Select the **Close** link to close the Manage Categories dialog box.

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14. Select the **Category** link that corresponds to a call that is not already categorized.

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15. Select the Maintenance category that we just added by clicking in the corresponding option box and click Save.

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Example: Classifying a recorded call

- 1. Click the **Recordings** Tab.
- Click the Not Classified link in the Classification column of one of your recorded calls. The Edit Classification window appears.

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3. Select a classification from the **Classification** drop down.

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						Date: 7/19/201										
	By Category					Time: 2:34:48.1										
	By Audio Mining	Pack			Fr	om Number: 2604618	444 FW Ga	zette								
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	7 2032	Fri	7/18/2014	9:50:00 AM									Close	+	(No Category)	Not Classified
	7 2020	Fri	7/18/2014	8:51:11 AM	0145435300	SUBGROUT	2020	10034/0100 O	00000094	_	10	-		+	Personal Calls	Not Classified
	7 2021	Fri	7/18/2014	8:09:53 AM	2142425900	tekVizion PVS	2021	8588820900 🕡	00:02:28	►		-		+	(No Category)	Not Classified
	2030	Fri	7/18/2014	8:09:35 AM	4257713412	Microsoft	2030	3019751000 ህ	00:01:03	Þ		92	19	+	(No Category)	Not Classified
	7 2012	Fri	7/18/2014	7:52:36 AM	3172621234	Indy Star	2012	3178019991 🕕	00:01:14	►	8	-	-	+	Pending Lawsuits	Not Classified
	7 2010	Fri	7/18/2014	7:37:48 AM	4259471285	GotVoice	2010	3178019991 🕖	00:01:30	Þ	2	-	-	+	(No Category)	Not Classified
	2027	Fri	7/18/2014	7:32:00 AM	9739676000	Dialogic Inc.	2027	6038836569 💽	00:01:17	Þ	1	- 10	111	+	(No Category)	Not Classified
	2020	Fri	7/18/2014	7:14:24 AM	2065478100	Implement.com	2020	4169439696 🕖	00:02:02	Þ	8	22	-	+	(No Category)	Not Classified
	2049	Fri	7/18/2014	7:03:30 AM	8588820900	Rodopi Software	2049	5142492306 🕖	00:00:52			83	10	+	(No Category)	Not Classified
	2016	Fri	7/18/2014	7:01:24 AM	2569719566	Adtran, Inc.	2016	9057079700 🕡	00:02:01		8	-	-	+	(No Category)	Not Classified
	2038	Pri	7/18/2014	6:57:11 AM	8642334344	NETXUSA	2038	4083517200 🕕	00:03:04		12	- 92	1993		(No Category)	Not Classified

4. Click Save.

The Edit Classification window closes. The recorded call is now classified.

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	2038	Fri	7/18/2014	6:57:11 AM	8642334344	NETXUSA	2038	4083517200 🕖	00:03:04		1	-		+	(No Category)	Not Classified

Example: Viewing audio mining results

 Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.

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	355 1020	Wed 11/21/2012	5:37:11 PM	+1402555101		+140255	5102	00:00:	30 🕑		12		+	(No Category)	🗩 82
	355 1020	Wed 11/21/2012	5:37:11 PM	+1402555102		+140255	5102	00:00:	30 🕑	17	-		+	(No Category)	94 🥏
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	355 1020	Wed 11/21/2012	5:37:11 PM	+1402555101		+140255	5102	00:00:	30 🕑	1	1		+	(No Category)	90 💭
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	355 1020	Wed 11/21/2012	5:37:11 PM	+1402555101		+140255	5102	00:00:	30 🕑	7	-		+	(No Category)	🥌 82
	7 555 1020	Wed 11/21/2012	5:37:11 PM	+1402555101		+140255	5102	00:00:	30 🕑	7	1		+	(No Category)	985 🥏
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	355 1020	Wed 11/21/2012	5:37:11 PM	+1402555102		+140255	5102	00:00:	30 🕑	17	1		+	(No Category)	🔵 81
	355 1020	Wed 11/21/2012	5:37:11 PM	+1402555101		+140255	5102	00:00:	30 🕑	1			+	(No Category)	58 🥏
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2. Select the **Audio Mining** button that corresponds to the call for which you wish to view results.

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3. Click the **Seek** button that corresponds to a specific audio mining pack to jump to the point where the audio mining pack is mentioned in the recorded call.

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 Filter the results by Confidence Level by clicking on the Minimum Match Confidence control and sliding it down.

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 Return the Minimum Match Confidence control back to its original level by sliding it up until it reaches 0.

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6. If there are multiple audio mining pack operations, select one by clicking on it.

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7. If applicable, select a specific language from the Language drop down list.

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8. Click Close.

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Example: Downloading a recorded call

1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.

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2. Select the recorded calls you wish to download by clicking in the corresponding option box to the left of the Number column.

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3. Select the **Download** link at the top or bottom of the Recorded Calls page.

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 Normally you would choose to extract the files and save them to the location of your choice. For the purposes of this example, click the imes in the right corner of the RecordedCalls.zip dialog box.

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5. Click in the option box that is located to the left of the Number column, in the header to select all recorded calls.

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6. Select the **Download** link at the top or bottom of the Recorded Calls page.

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 Normally you would choose to extract the files and save them to the location of your choice. For the purposes of this example, click the X in the right corner of the RecordedCalls.zip dialog box.

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Example: Exporting a recorded call

8. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.

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9. Select the recorded calls you wish to export by clicking in the corresponding option box to the left of the Number column.

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10. Select the **Export** link at the top or bottom of the Recorded Calls page.

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12. Click the X in the right corner of the RecordedCalls.csv window.

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13. Select the **Export All** link at the top or bottom of the Recorded Calls page.

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15. Click the ⊠ in the right corner of the RecordedCalls.csv dialog box.

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Example: Verifying a recording

Note: To complete this use case, you must have a recorded call downloaded and available for verification.

 Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.

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 Select the recorded call you wish to verify a recording for and click on the corresponding button.

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3. Click **Browse** to locate the recorded call file.



4. Click Verify Against Original Recording. You will receive a message notifying you whether or not the uploaded recording is identical to the original recording.

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Example: Viewing an archived recorded call

Note: Archived calls cannot be viewed from the End User Interface. You are simply viewing the location or path to which the calls were archived.

 Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.

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Select the recorded call you wish to view archiving for and click on the corresponding (Archive) button.
 The ISO Images dialog box opens and displays the Username, Date/Time stamp, and the location of the archived call.

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3. Select the **Close** link.

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Alerts

Do you wish that you could be alerted to any emergency, long duration, international, etc., calls made from within your organization? You can create Alerts based on specific call conditions. When those conditions are met, you will be notified with the pertinent details so that you can address any issues or make any necessary changes to current policies or procedures. Additionally, a history of the alerts that have executed is available from the Alerts tab. You can also view any recent alerts by clicking on the Recent Alerts link on the top right side of the End User Interface window.

Note: Alerts will be temporarily disabled if they begin to cause excessive logging/emailing resulting in possible network congestion. In such cases, an email will be sent to the owner of the alert. Excessive logging/emailing is defined as greater than 1000 alerts per second.

To create an alert click New. Enter a name and brief description for the alert. Alert name can be a maximum of 50 characters. Select the following: Event Type, whether or not the alert is enabled/disabled, and when the alert should run. Your input options will vary depending on your selection.

- Alert on any day the alert will run every day that remains active.
- Days of Week the options Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday will appear. Select the specific days the alert should run. The alert will run on the selected day(s) as long as it remains active.
- Date Enter a specific call date. The alert will only run on this call date.
- Date Range Enter a start and end date. The alert will only run during this date range.

Note: You can select multiple criteria such as Days of the Week and a Date Range.

Enter or select the following:

- Start Time if applicable, select the start time the Alert should begin running on the selected day(s).
- End Time if applicable, select the end time that the Alert should stop running on the selected day(s).
- Time Zone select a time zone that you wish to apply to the alert.
- From Caller ID defines the originating caller ID or partial originating caller ID on which to alert.
- To Caller ID defines the terminating caller ID or partial terminating caller ID on which to alert.
- From Number defines the originating number or partial originating number on which to alert.
- To Number defines the dialed number or partial dialed number on which to alert.
- Redirected From defines the number of the person or group transferring the call.
- Redirected To defines the number to which the call was transferred.
- Location defines the location or partial location on which to report.
- DTMF Digits (only appears when Call Terminated event type is selected) defines whether the on demand alert will be a clip alert or will be triggered only when the DTMF digits are entered. Additionally, this field identifies the DTMF digits used to initiate the on demand alert.
- End Clip DTMF Digits (only appears 1) when Call Terminated event type is selected and 2) when Clip is selected above) identifies the DTMF digits used to end the on demand alert clip.
- DTMF Tolerance (only appears when Call Terminated event type is selected) identifies the amount of time the user has to complete the entry of the DTMF digits to initiate the on demand alert and, if applicable, end the on demand alert clip.

- Audio Mining Pack (only appears when Call Terminated event type is selected) allows the user to identify and alert on a specific audio mining pack.
- Minimum Confidence (only appears when Call Terminated event type is selected) allows the user to identify and alert on the minimum confidence when alerting on audio mining packs.
- Add a Category allows the user to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction). This category will apply to all calls that fall within the alert criteria and will automatically appear on the Recorded Calls tab when the alert is fired.
- Add a Comment allows the user to add comments about the call. These comments will apply to all calls that fall within the alert criteria and will automatically appear on the Recorded Calls tab when the alert is fired.

Note: The From Caller ID, To Caller ID, From Number, To Number, and Location fields must be at least 3 characters long.

Select whether or not you want to be notified by email when an alert occurs by clicking in the Email option box. If you selected to be notified by email, enter the To and From email addresses. Click Save to add the alert to the list of Alerts.

The Alerts dialog box displays a list of alerts that have occurred under the Alerts History section. You can clear the Alert History by selecting the alert(s) and clicking the Clear Selected link. You can also view a list of recent alerts by clicking on the Recent Alerts link located at the top of the application page.

Example: Creating an alert

1. Click the Alerts tab.

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	Alert List		On Demand Alert		
Name		Name: On Dem	and Alert		
On Den	mand Alart View	Description: This aler	Description: This alert is for calls that need to enable on demand alerts.		
On Der	mand Alert2 Vidw	Enabled: [**]	wr3860		
oply		Time Zone: (GMT-05	5:00) Eastern Time (US & Canada)		
		DTMF Digits: 1111	+		
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		Deleta		Edit New	
			Alert History		
Hame	•	Fired At	Hessage		
Emplo	oyee Disconnect	2/29/2012 4:12:11 PM	Employee rstage@ctigroup.com has been disconnected		
Emplo	oyee Disconnect	2/23/2012 2:56:59 PM	Employee rstage@ctigroup.com has been disconnected		
Emplo	loyee Disconnect	2/21/2012 4:03:24 PM	Employee rstage@ctigroup.com has been disconnected		
Emplo	oyee Disconnect	2/21/2012 3:00:21 PM	Employee rstage@ctigroup.com has been disconnected		
lear Selec	cted				

- 2. If applicable, click **New**. Enter the following information:
 - Name Emergency Calls
 - Description This alert is for emergency calls.

Poert List				
Name		New Alert		
On Demand Alert	Name:	Emergency Calls		
On Demand Alert2 Vi	Des Cristiana	This alert is for emergency calls.		
ipły	Event Type:	Call Initiated w		
	Enabled:	V		
	Alert on any day Day	s of Week O Date O Date Range		
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	Locations	Contains +		
	Add a Category:	(No Category) *		
	Add a Comment:			
	Notify By:	Web Application		

- 3. Select the following:
 - Event Type Call Initiated



4. If it isn't already selected, click in the **Enabled** option box.

Alert List				New Alert		
Name		Names	Emergency Calls			
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		To Number:	Equal To	*		
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		Add a Category:	(No Category)	*		
		Add a Comment:				
		Notific Dec				
		Houry wy.	V Web Applicatio	n Email		

5. If it isn't already selected, click in the Alert on any day.

				 Welcome, master
Alert List		Name:	New Alert	
On Demand Alert On Demand Alert2	View	Description	this alert is for emergency calls.	
ły		Event Type: Enabled:	Call Initiated w	
		Jah Time End Time Fron Caller Di Tron Caller Di Tron Caller Di Tron Number To Number Redirected From Redirected From Add a Comment	(001 5040) Later Time (M.E. Cardas) Bash To	
		Notify By:	Web Application	

- 6. Enter or select the following information:
 - Start Time **12:00:00 a.m.**
 - End Time 12:00:00 p.m.
 - Time Zone (GMT -05:00) Eastern Time (US & Canada)
 - To Number Equal To 911

				THE COLOR OF THE CASE
Alert List		New Alert		
On Demand Alert View On Demand Alert2 View	Name: Description:	Emergency Calls This alert is for emergency calls.		
ely	Event Type: Enabled:	Cal Initiated +		
	Alert on any day Day Start Time: End Time:	s of Week C Date C Date Range 12:00:00 AM 12:00:00 PM		
	Time Zone:	(GMT-05:00) Eastern Time (US & Canada)	Ŧ	
	To Caller ID:	Equal To +		
	From Number:	Equal To w		
	Redirected From:	Equal To + 911 Equal To +		
	Redirected To:	Equal To +		
	Add a Category	(bis Cuteons) =		
	Add a Comment:	(no conduct) a		
	NOTEY BY:	Web Application Email		

7. Select a category from the Add a Category drop down list.

				Welcome, master
Alert List		New Alert		
On Dermond Kinst M	Namer	Emergency Calls		
On Demand Alert2	Description:	This alert is for emergency calls.		
pły	Event Type:	Call Initiated w		
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	Alert on any day Days	s of Week 💿 Date 💿 Date Range		
	Start Timer	12:00:00 AM		
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	Redirected To:	Equal To +		
	Location	Contains +		
	Add a Category:	Category 3 +		
	Add a Comment:			
	Notify By:	Vitab Application		

- 8. Enter the following information:
 - Add a Comment These calls are emergency calls made from within the building.

Allert List Name On Demand Alert View On Demand Aler2 View oply	Name: Description Event Type:	Emergency Calls This alert is for en	Ne	w Alert			
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	Add & Comments	These cars are en from within the b	ergency uiding.	cals made			
	Notify By:	Wheel toolers	- IT.	Email			
		Applicad	and had				

9. Select **Email** by clicking in the option box.



10. Select Save.

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Con Demand Alert	View	Name: On Dem	and Alert		
On Demand Alert2	View	Event Type: Call Ten	t is for calls that need to enable on demand alerts. ninated		
Emergency Calls	View	Enabled:			
		Time Zones (GHT-05	:00) Eastern Time (US & Canada)		
pply		DTMF Digits: 1111			
		Notify By: Web	Application Email		
		Delete		dit I New	
			Alert History		
Name		Fired At	Message		
Employee Disconnect		2/29/2012 4:12:11 PM	Employee rstage@ctigroup.com has been disconnected		
Employee Disconnect		2/23/2012 2:56:59 PM	Employee relage@ctigroup.com has been disconnected		
Employee Disconnect		2/21/2012 4:03:24 PM	Employee ntage@ctigroup.com has been disconnected		
Employee Disconnect		2/23/2012 3:00:21 PM	Employee rstage@ctigroup.com has been disconnected		
'ear Selected					

Example: Creating an on demand alert

There are two types of on demand alerts: on demand clip alerts and general on demand alerts. Clip alerts will record only a portion of the call identified by the DTMF start and end digits. General on demand alerts record the entire conversation but are initiated when the DTMF digits are entered.

Note: The on demand alert feature is not available to all switch types.

1. Click the Alerts tab.

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- 2. If applicable, click **New**. Enter the following information:
 - Name On Demand
 - Description This alert is for calls that need to enable on demand alerts.



- 3. Select the following:
 - Event Type Call Terminated

Alert List		line Alert	
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4. If it isn't already selected, click in the **Enabled** option box.

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5. If it isn't already selected, click in the Alert on any day.



- 6. Enter or select the following information:
 - DTMF Digits Clip
 - DTMF Digits 1111
 - End Clip DTMF Digits 2222
 - DTMF Tolerance 20 seconds

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7. Select Save.

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- 8. Click **New**. Enter the following information:
 - Name On Demand Alert2
 - Description This alert is for calls that need to enable on demand alerts.



- 9. Select the following:
 - Event Type Call Terminated

Alast List			
Name		New Alert	
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10. If it isn't already selected, click in the **Enabled** option box.

						(GHT-05:00) Eastern Time (US & Canada)
Home Recordings	Reports	Alerts				Welcome, master
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		Add a Comments				
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					Cancel Save	

11. If it isn't already selected, click in the Alert on any day.



- 12. Enter or select the following information:
 - DTMF Digits Contains
 - DTMF Digits 1111
 - DTMF Tolerance 30 seconds

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		To Caller ID:	Equal To	٠			
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		DESCRIPTION OF THE OWNER	Contains	*			
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		DTMF Tolerance	30 Seconds	*			
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		Add a Comment:					

13. Select Save.

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Name					
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Example: Editing an alert

1. Click the Alerts tab.

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2. Select the Edit link.

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		Alet on any day O Da	a of Week Conte Co	ista Ranna		
Apply		Start Time	12:00:00 AM	and range		
		End Time:	12:00:00 PM			
		Time Zone:	(GMT-05:00) Eastern Tim	e (US & Canada)	¥	
		From Caller ID:	Found To			
		To Caler ID:	Read To .			
		Core Municipal	Equal to y			
		From Nonbers	Equal To +			
		To Numbers	Equal To v	911		
		Redirected From:	Equal To 🛛 👻			
		Redirected To:	Equal To +			
		Locations	Contains w			
		Add a Category:	Calannov 3 a			
		Add a Comments	There exists a second s	unter ande		
		Hoo a Commence	from within the building.	cais made		
		Notify By:	Web Application	Email		
		Subject				
		From Name:				
		From Email:	no-reply@ctigroup.com			
		To Name:				
		To Email:	master@ctigroup.com			
		Send as HTML	100			

- 3. Enter the following information:
 - Subject Emergency Alerts
 - From Name enter your name
 - To Name Andrea
 - To Email ahash@abccompany.com



4. Select Save.

	Alert List			formation Calle	
	Name			Energent care	
ĩ	On Demand Alert	View	Name: Emerger	rey Calls	
8	On Demand Alert2	View	Event Type: Cal Inb	ited	
6	Emergency Calls	View	Enabled: 📝		
6	On Demand	View	Call Time: between	12:00:00 AM and 12:00:00 PM	
ř,	On Demand Alternative Alert	View	Time Zone: (GMT-09	i:00) Eastern Time (US & Canada)	
		_	Notify By: UP	1 2 2 2 1 m 2 1 2	
-pl	łγ		C-block's 25-	Application (3.1bmail	
			From Emails "Jane 1	percy were Doe" «no-reply@ctionoup.com»	
			The Recipients are "Joh	n Smith" «mæter@ctigroup.com»	
			Send as HTML		
		Delete		Edit N	lew .
				Alast Michaev	
			Earl As	Henry	
	Hanna		Fires As	nessige	
1	Name Engine of Dimension		2/20/2012 4.12.11 004		
	Name Employee Disconnect		2/29/2012 4:12:11 PM		
	Name Employee Disconnect Employee Disconnect		2/29/2012 4:12:11 PM 2/23/2012 2:56:59 PM	Employee rotage@ctgroup.com has been disconnected	
	Name Employee Disconnect Employee Disconnect Employee Disconnect		2/29/2012 4:12:11 PM 2/23/2012 2:56:59 PM 2/21/2012 4:03:24 PM	Employer mapped agroup com has been disconnected Employee ratage@ctigroup.com has been disconnected Employee ratage@ctigroup.com has been disconnected	
	Name Employes Disconnect Employes Disconnect Employes Disconnect Employee Disconnect		2/29/2012 4:12:11 PM 2/23/2012 2:56:59 PM 2/21/2012 4:00:24 PM 2/21/2012 3:00:21 PM	Employee integreting-top-contrast over decommond Employee integreting-top-contrast over disconnected Employee integreting-top-contrast been disconnected Employee integreting-complexity over the been disconnected	
	Name Employee Disconnect Employee Disconnect Employee Disconnect Employee Disconnect		2/29/2012 4:12:11 PM 2/23/2012 2:56:59 PM 2/21/2012 4:03:24 PM 2/21/2012 3:00:21 PM	Employee magneticity coupling in the test documented Employee magneticity coupling in the test documented Employee magneticity coupling in the test documented Employee magneticity coupling in the test documented	

Example: Enabling and disabling an alert

The obvious reason that an alert may be inactive is that it is no longer being used. Another less obvious reason, an alert is temporarily inactivated by an administrator because it was causing too many emails to be sent out, potentially causing congestion on the email server. Since alerts can be reused, they should not always be deleted.

Note: If an alert was temporarily inactivated because too many emails were being generated, the alert should be edited before it is reactivated.

1. Click the Alerts tab.

Parte Los			
Namo		Emergency Calls	
On Demand Alert View	Name: Emerger Description: This aler	toy Calls t is for emergency calls.	
On Demand Alert2 View	Event Type: Call Initi	ated	
Emergency Calls View	Enabled: 🕡		
On Demand View	Call Time: between	12:00:00 AM and 12:00:00 PM	
On Demand Alternative Alert View	Time Zone: (GHT-0) Dialed Diales is "811"	1:00) Eastern Time (US & Canada)	
	Notfy By: Wash	Application Filmed	
sterA	Schiertis "Errer	Appication III. Email	
	From Emails "Jane	Doe" «no-reply@ctigroup.com»	
	The Recipients are "Joh	n Smith" «master@ctigroup.com»	
	Send as HTML		
	Delete	Edit No	~
		Alert History	
Name	Fined At	Message	
Employee Disconnect	2/29/2012 4:12:11 PM	Employee ntage@ctigroup.com has been disconnected	
Employee Disconnect	2/23/2012 2156159 PM	Employee ntage@ctigroup.com has been disconnected	
Employee Disconnect	2/21/2012 4:03:24 PM	Employee rstage@ctigroup.com has been disconnected	
Employee Disconnect	2/21/2012 3:00:21 PM	Employee ratage@ctigroup.com has been disconnected	
2 cubeches parentier			

 Click in the option box that corresponds to the Emergency Calls alert found under the Alerts List.



3. Select Apply.

Home Recordings Reports	Alerta		Welcome, master
	r		
Plane		Emergency Calls	
On Demand Alert View	Name: Emerge	tcy Cala	
On Damand Alart2 Vim	Puert Type: Cell Init	t is for energency calls. ated	
Emergency Cals View	Enabled:		
V On Damand View	Call Time: between	12:00:00 AM and 12:00:00 PM	
I On Demand Alternative Alert View	Time Zone: (GMT-0	5:00) Eastern Time (US & Canada)	
	Dialed Digits is "911"		
heely	Chintle Tree	Application (2) Email	
	From Emails 'Jane	percy were Doe" eno-reolv@ctoroup.com>	
	The Recipients are "Joh	n Smith* «master@ctigroup.com»	
	Send as HTML		
	Delete	1	ldit New
		Alert History	
Name	Fired At	Message	
Employee Disconnect	2/29/2012 4:12:11 PM	Employee relage@ctigroup.com has been disconnected	
Employee Disconnect	2/23/2012 2:56:59 PM	Employee ntage@ctigroup.com has been disconnected	
Employee Disconnect	2/21/2012 4:03:24 PM	Employee nstage@ctigroup.com has been disconnected	
Employee Disconnect	2/21/2012 3:00:21 PM	Employee rstage@ctigroup.com has been disconnected	

4. Select Edit.

					Desktop Notifier Ard	hive Tool Rece	nt Alerts Quick Start Change Password Log Off
							Search P
							(GHT-05:00) Eastern Time (US & Canada) 🔍
Home Recordings	Reports	Alerts					Welcome, master
Alert List			Emen	onory Calls			
Name			Concert	ford cars			
On Demand Alert	View	Name:	Emergency Cals				
On Demand Alert2	View	Description	This alert is for emergency	cals.			
Emergency Cells	View						
On Demand	View	Event Type:	Call Initiated v				
On Demand Alternative Alert	View	Enabled					
		Alert on any day. O Da	on of Week C Date C D	ate Banne			
Apply		Start Time:	12:00:00 AM				
		End Time:	12:00:00 PM				
		Time Zoner	(GMT-05:00) Eastern Tim	e (US & Canada)	*		
		From Caller ID	Equal To -				
		To Caller ID					
		To Call the	Equal to +				
		Prom Number:	Equal To v				
		To Number:	Equal To 🛛 👻	911			
		Redirected From:	Equal To v				
		Redirected To:	Equal To +				
		Location	Contains -				
		Add a Colomba	Contains V				
		Add a Category	Category 3 v				
		Add a Comment:	These calls are emergency from within the building.	calls made			
			from work the boliong.				
		Notify By	Want to to to a	e1			
		Subject	Environ Application (E)	emai			
		From Name	Innergency Alerts				
		From Email	Increaly@ctigroup.com				
		To Neme	Inho Smith				
		To Email	mater@ctioroup.com				
		find as 1000	and a second second				

5. Click in the **Enabled** option box.



6. Select Save.

Alert List				
			Emergency Calls	
Name		Name: Emerger	rcy Calls	
On Demand Alert	View	Description: This aler	t is for energency calls.	
On Demand Alert2	View	Event Type: Cell Initia Parabledy 177	sted	
Emergency Cals	View	Enabledr [/]		
On Demand	View	Cell Time: between Time: Zone: (GMT) 01	12:00:00 AM and 12:00:00 PM	
On Demand Alternative Alert	View	Dialed Digits is "911"	and research care for a careful	
lanhi		Notify By: Wat		
		Subjectis "Emer	pency Alerts"	
			Doe" «no-reply@ctigroup.com»	
		The Recipients are "Joh	n Smith" cmatter@ctigroup.com>	
		Send as HTML		
		Delete	E	it New
			Alert History	
Name		Fired At	Message	
Employee Disconnect		2/29/2012 4:12:11 PM	Employee ntage@ctigroup.com has been disconnected	
Employee Disconnect		2/23/2012 2156159 PM	Employee rstage@ctigroup.com has been disconnected	
Employee Disconnect		2/21/2012 4:03:24 PM	Employee rstage@ctigroup.com has been disconnected	
and the second s		2/21/2012 3:00:21 PM	Employee ntage@ctigroup.com has been disconnected	
Employee Disconnect				

Example: Deleting an alert

1. Click the Alerts tab.

Home Recordings Reports	Alerta		
1000000000			Welcone, matter
Alert List		Emergency Calls	
in Rame	Name: Emerge	rey Calls	
Con Demand Alert View	Description: This aler	t is for energency calls.	
Concentration Code View	Enabled: [7]		
Immegancy Case View	Cel Time; between	12:00:00 AM and 12:00:00 PM	
Con Demand Alternative Alert	Time Zone: (GMT-0	(00) Eastern Time (US & Canada)	
	Dialed Digits is "911"		
Apply	Notify By: Wel	Application 🔀 Email	
	Subjects "Errer	gency Alerts"	
	The Recipients are "Joh	n Smith" cmadar@ctigroup.com>	
	Send as HTML		
	Delete		Edit New
		Alert History	
Name	Fired At	Message	
Employee Disconnect	2/29/2012 4:12:11 PM	Employee rstage@ctigroup.com has been disconnected	
Employee Disconnect	2/23/2012 2156159 PM	Employee rstage@ctioroup.com has been disconnected	
Employee Disconnect	2/21/2012 4:03:24 PM	Employee mtage@ctionoup.com has been disconnected	
Employee Disconnect	2/21/2012 3:00:21 PM	Employee nlage@ctigroup.com has been disconnected	

2. Select Delete.



3. Select OK.



Example: Recent alerts

You can view up to 20 of the most recent alerts by clicking on the Recent Alerts link on the top right side of the End User Interface window. The default view is to show 15 recent alerts, however, you can change the default by clicking on the Results Per Page drop down and selecting from the available options. While you have this dialog box open, you will be notified of any new alerts. New alerts will first appear at the bottom of the dialog box and if you are using IE you will also hear a chime.

1. Select the **Recent Alerts** link.

ns Recordings Repo	ts Alerts			Welcome, efink
Alast Lint				
Rame Demand Alert Demand Alert2	Name: On Demand Alert Description: This alert is for calls the Event Type: Call Transmitted Enabled: 107	at need to enable on demand alerts.		
	DTHF Dipls: 1111 DTHF Telerance: 20 Seconds Nobly By: M Vieb Application	III Enal		
	Delete	Fd	t I Now	
		Recent Alerts		
		more a contentry nor accention y		
			Own	
	Results Per Page: 15 .		0.00	
currently no alert history	Results Per Page: 15			
currendy no alert history	Results Per Page: 23.			
currendy no alert history	Fender For Page: 11 .			

2. Select Close.

		A
		Dauktep Robiliar Archiva Teol Recent Alerts Quick Start Change Password Lo
		(Search
		(GHT-04:00) Manas
Home Recordings Reports	Alerts	Welcome, efink
AlertList	On Demand Alert	
I Name	Name: On Demand Alert	
P On Demand Alert Vie	Description: This alert is for calls that need to enable on der	mand alerts.
P On Demand Alert2 Via	Event Type: Call Terminated	
	Brabled: 😿	
hosty	Time Zone: (FMT-04-00) Name is	
	OTME Dials: 1111	
	DTME Tolerance: 20 Seconds	
	Nulle by Francisco Francisco	
	History of Mill Web Application Lenai	
	Delete	Edit New
	Alei	Atlistory
here is currently no alert history		
Clear Selected		

Archive Tool

The Archive Tool allows users to archive call recordings to ISO images. These image files can be burned to CD/DVD at the convenience of the user.

The following describes how to download the Archive Tool via the End User Interface. Once downloaded, the Archive Tool contains a complete help file to instruct you how to use the available features and functions of the tool.

For more information on how to configure the Archive Tool, open the Archive ISO Image tool and click the **Documentation** tab.

Example: Downloading the Archive Tool

1. Click the Archive Tool link.



2. Click Run.



3. Click Run.

- 11 1,547 19.5 Hours 21 14 1 99% Graph + Last 30 C Refresh Every 4 Minutes Refresh Every 30 Seconds + Run Don't Run ¥ M While files from the Internet can be useful, this file type can potentially harm your computer. Only run software from publishers you trust. What's the risk? er Cancel Category 4 Category 5 Category 5 Category 6 Category 3 Call Handl Date + Top 10 Results Top 10 Results v etails v Week T Date v Day Time N Wed 7:21 PM 2647 Wed 7:21 PM 4657 () ()
- 4. Select the defaults for each screen in the wizard.

				5 AL - 1				
14 Calls in Progress	1 Active Call Handlers	1,547	19.5 Hour	s 21 Calls in Recycle Bin	99% Free Audio Storage	97% Free Screen Storage	Last Week	it's Trand
	Calls By Category	,	۲ <u>۲</u>	Active Call Handlers		0	alls By Location	
			A Tr	archiveClientTools ne InstalShield(R) Wizard will aur computer. To continue, cli	install ArchiveClientTook ick Next.			
Category 4 Category 6	Category 5 = Category 3	pry 1 • Cates		urchiveClientTools be InstalSheid(R) Waard wil ur computer. To continue, ch ur computer. To continue, ch ARVENG: This program is pro- ternational treaties.	install ArchiveClentTool ck Hext. tected by copyright law	21 A A A A A A A A A A A A A A A A A A A	4 6 8 10 • Calls	

Passwords

Users are created in the End User Interface by the Group Administrator. The Group Administrator assigns the User a user name during the creation process. Once the user is added, the application will automatically email a temporary password. Users logging in for the first time will be redirected to the expired password dialog to reset the password to something more meaningful and within the company's rules for a valid password. The rules for a valid password are displayed as text on the expired password dialog. The dialog will also display a message identifying the strength of the selected password. It is encouraged that all passwords meet the Excellent strength level. Strong vs. Weak passwords are described by the following:

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

By default, passwords are set to expire 90 days after the date of the last password change. During installation and configuration of the call recorder, your System's Engineer has the option to pick a timeframe other than 90 days or to set the value so that passwords never expire. On the day the password is set to expire, when logging in you will be redirected to the expired password dialog to reset the password.

Note: To complete this use case, you must have a User account created with the email address assigned to you.

Example: Changing your password

1. Click the Change Password link.



- 2. Enter or select the following information:
 - Old Password current password
 - New Password select a new password that meets the password security requirements
 - Confirm enter your new password again

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

3. Click **Submit** to save your new password.

una Recordinos Reports	Alers							(GMT)	Greenwich I	fean T	ime (Da	blin, Edinburgi	Lisbon, Lon
													come, Liz
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							.,	,					
				52 Rec	orded Calls								
Number	Day Date	Time	From Number	From Caller 1D	To Number	Redirected From	Duration	Recording	Annotate	CRM	Email	Comments	Category
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🐾 acmejones@broadworks.lab.local	Thu 12/12/2013	8:05:55 PM	1002		1000		00:00:48	۲	1	- 12	-	+	(No Cate
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🎽 acmesmith@broadworks.lab.local	Thu 12/12/2013	7:48:15 PM	1002		1000		00:00:32	۲	17	-		+	(No Cate
🐾 acmeenith@broadworks.lab.local	Thu 12/12/2013	4:00:56 PM	1000		1002		00:00:19	۲	12	-	5	+	(No Cate
🎽 acmejones@broadworks.lab.local	Thu 12/12/2013	4:00:56 PM	1000		1002		00:00:19	۲	12	- 12		+	(No Cate
Kacmejones@broadworks.lab.local	Thu 12/12/2013	3:58:19 PM	1002		1000		00:00:13	۲	17	-92	5	+	(No Cate
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📲 acmejones@broadworks.lab.local	Thu 12/12/2013	3:15:03 PM	1000		1002		00:00:27	۲	17	- 12	9	+	(No Cate
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Ka acmejones@broadworks.lab.local	Thu 12/12/2013	3:13:21 PM	1002		1000		00:00:42	۲	17	-	-	+	(No Cate

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acmejones@broadworks.lab.local	Thu 12/12/2013	3:13:21 PM	1002		1000		00:00:42	(6)	17	-		+	(No Cal

4. Click **OK** to the confirmation message.

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					52 Reo	orded Calls								
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1	acmesmith@broadworks.lab.local	Thu 12/12/2013	4:00:56 PM	1000		1002		00:00:19	•	12	-	112	+	(No Cates
	🔧 acmejones@broadworks.lab.local	Thu 12/12/2013	4:00:56 PM	1000		1002		00.00:19	•	17	-	22	+	(No Cates
1	acmejones@broadworks.lab.local	Thu 12/12/2013	3:58:19 PM	1002		1000		00:00:13	•	12	62	11	+	(No Categ
	🐛 acmesmith@broadworks.lab.local	Thu 12/12/2013	3150119 PM	1002		1000		00.00:14	•	17	-	03	+	(No Cates
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1	acmejones@broadworks.lab.local	Thu 12/12/2013	3(13)21 PM	1002		1000		00.00+42	•	17	10		+	(No Cates

Example: Changing an expired password

The Your Password has Expired screen will appear on the day that it is set to expire. There will not be any previous warnings. When you attempt to log on, you will be redirected to the Your Password has Expired screen before you can proceed any further in the application.

- 1. Enter or select the following information:
 - Old Password current password
 - New Password select a new password that meets the password security requirements
 - Confirm enter your new password again

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

Your Password	Has Expired
Old Password: ••••• New Password: ••••• Confirm: •••••	Meets Policy? Yes
Subn	nit

2. Click Submit.



Search

The Search feature allows you to search any part of the call record (Number, Duration, Time, Comments, etc.) on the Recorded Calls screen in order to find a specific call record. For example: if there are 10 pages of recorded call files on the Recorded Calls screen and you need to find a specific call record that you know has a comment associated with it that has the word *training* in it, you can search for that word to find that call record.

Example: Searching call records

1. Click the Recorded Calls button.

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-	suts Her Page: 2		Downla	freque Export	Export All					(710 C	aregory	- 40	pay Cal	ingery	Hanag	e Categories (CRH Client)	settings Select Columns

 Select a recorded call file and click on the ⁺



- 3. Enter the following information:
 - Comment This call is to be used for training.

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4. Click Save.

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5. Type the word **training** in the Search field.

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343678910																

6. Click View search results.



7. Click on the \checkmark button.

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Time Zones

The call recording application has 85 standard preloaded time zones. Time zones can be applied to the Recorded Calls and Calls in Progress screens. Time zones will also work in conjunction with date and time filters when applied to the Recorded Calls screen.

Example: Changing time zones

1. Click the Recorded Calls button.

Note: And And And And And And Control of Columnic And And And Control of Columnic And And Control of Columnic And And Control of Columnic And Control of C												Des	ktop No	ifier	Archiv	m Tool II	lecent Alerts Quick Start Search	Change Password
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- Click on the time zone link and select the following from the drop down menu:
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3. Click **Save**. Notice that the time and date (if applicable) change on the Recorded Calls screen.

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- 4. Click on the time zone link and select the following from the drop down menu:
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5. Click **Save**. Notice that the time and date (if applicable) change on the Recorded Calls screen.

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- 6. Click on the time zone link and select the following from the drop down menu:
 - Time Zone (GMT -06:00) Central Time (US & Canada) •
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Home Recordings Reports Alerts

Filter

Day Date Time Fr 5:56:25 AM

7. Click Save. Notice that the time and date (if applicable) change on the Recorded Calls screen.

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FTP

In some cases, it is possible that Users may have access to their recording file (audio and video) via FTP. Access depends on whether or not the Group that created the user was granted FTP access when they were created in the Administrative Interface. FTP access allows you to access any recordings made from any numbers assigned to you, enabling you to download the files to a permanent, remote storage location.

Example: Downloading recording files using FTP

Note: The call recorder's FTP service must be the only FTP service on the host server in order for it to work correctly.

1. Open an Internet session using an IE or Firefox browser and enter the FTP URL or open a command prompt dialog. It is also possible to use many of the popular client tools to download recording files via FTP.

For the purposes of this use case, we will use the command prompt dialog.



2. Log onto the server that houses the call recording application or where your recordings are stored.



3. Go to the directory that contains the recordings that you wish to download or delete.

