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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.

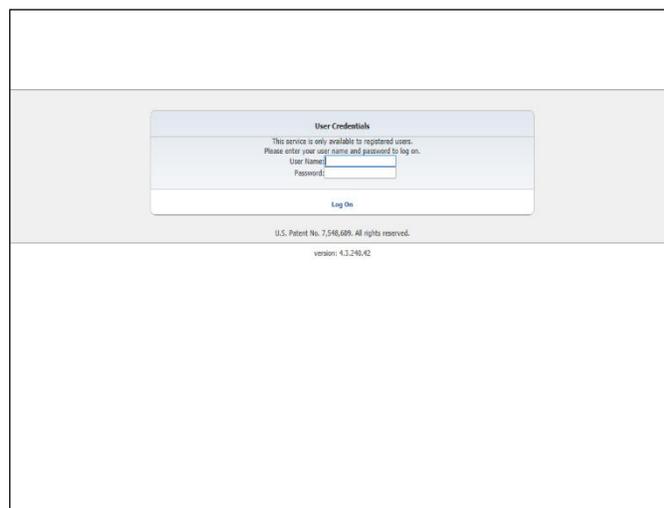
Logging On

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 auto-generated by the application and emailed directly to you. Once you have access to the application, you have the ability to change your password using the Change Password link. You are then able to select a password of your choice. Passwords are initially auto-generated because Administrators and Providers are not allowed to know the passwords of the Users they create.

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

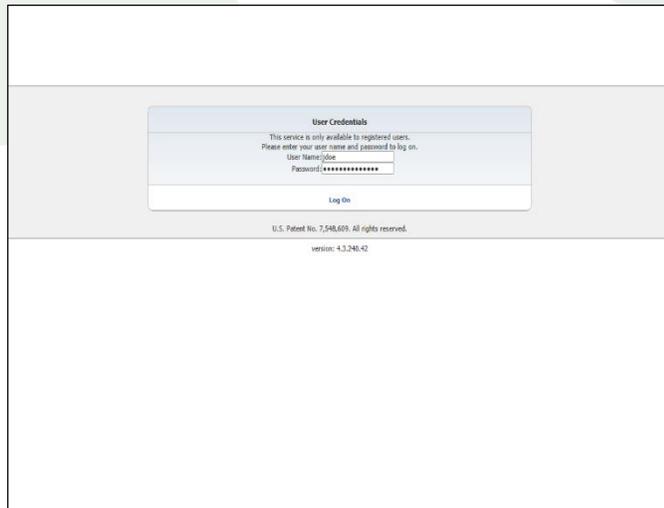
The latest version and one version prior are supported for each browser.

2. Enter the call recorder URL.



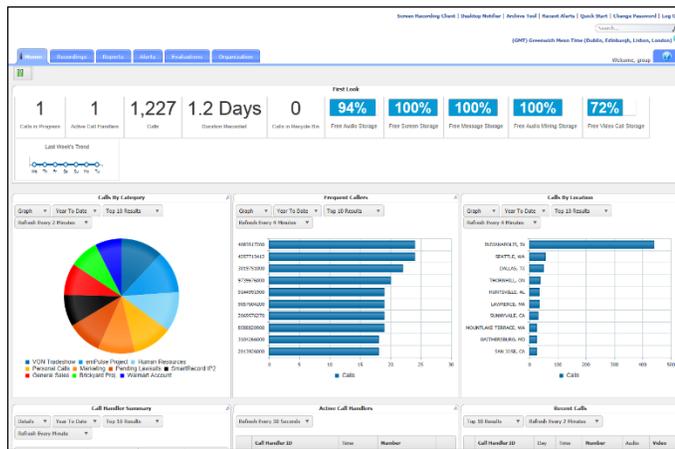
The screenshot shows a web browser window displaying a login page. The page has a light gray background. At the top, there is a header area with the text "User Credentials" and "This service is only available to registered users. Please enter your user name and password to log on." Below this, there are two input fields: "User Name:" and "Password:". A "Log On" button is located below the password field. At the bottom of the page, there is a footer area with the text "U.S. Patent No. 7,540,685. All rights reserved." and "version: 4.3.249.02".

3. Enter your User Name and Password.



4. Click Logon.

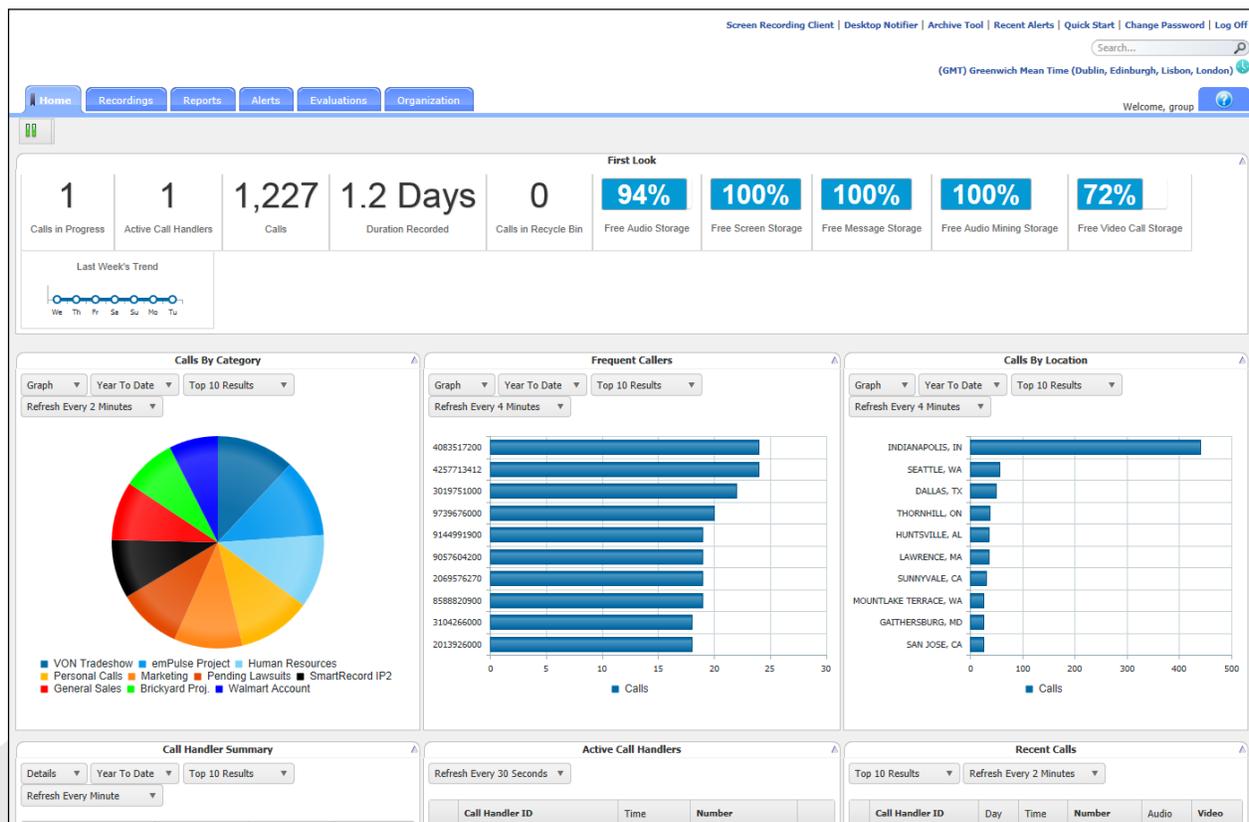
Note: A logo is optional and may or may not be assigned to your particular account. Logos are assigned by the Administrator or Provider in the Administrator Interface.



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 (Pause) button.



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

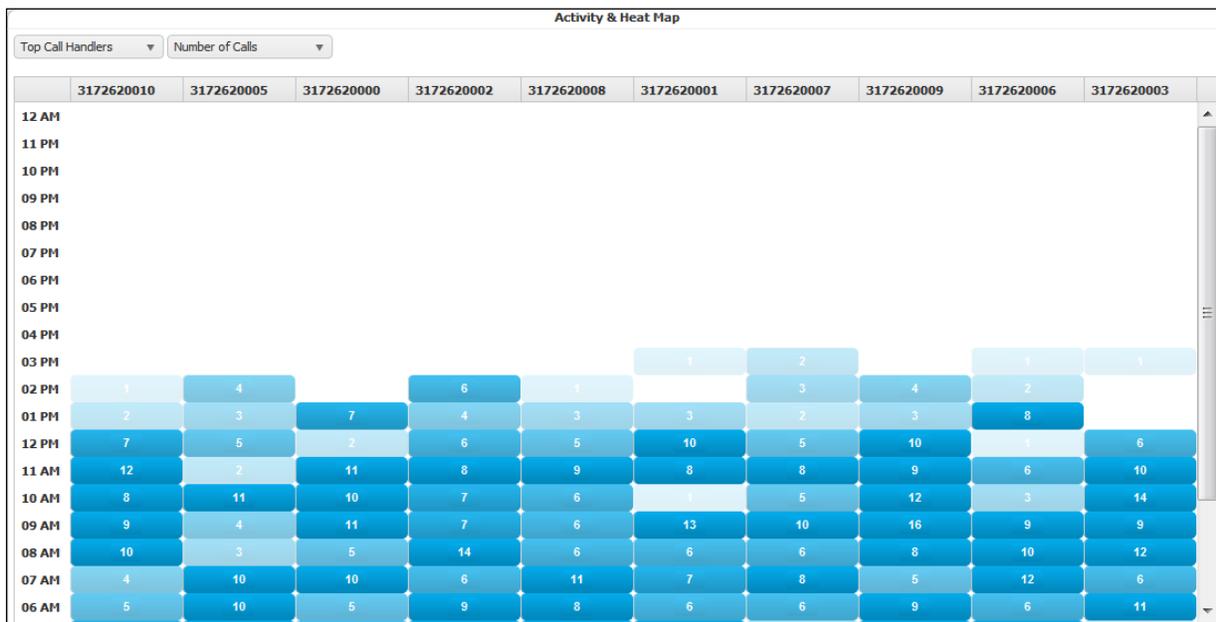
The Active Call Handlers pane displays the call handlers/numbers that are currently on calls and the number of the other party. Users that have access are able to monitor an active call handler's call in progress by clicking on the monitor button. Additionally, you are able to adjust the number of results 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 you are able to view the call activity, listen to the recording, add a comment, etc.



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  button 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).

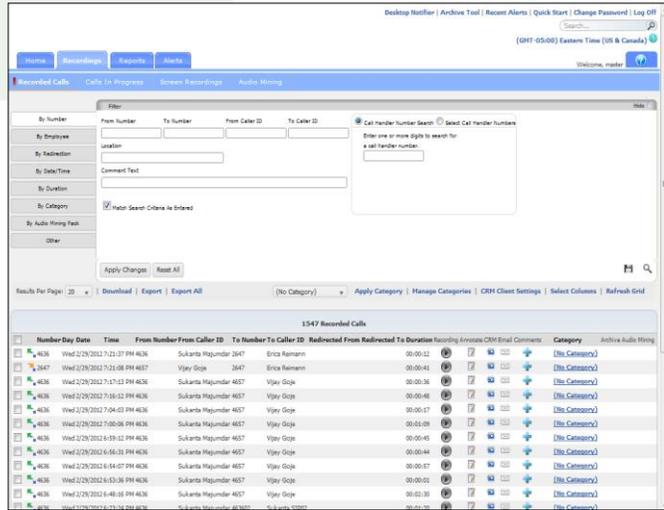
Enter or select the applicable information for each filter and click Apply Changes. To return to the default information, click Reset All. Click Hide to close the Filter window.

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

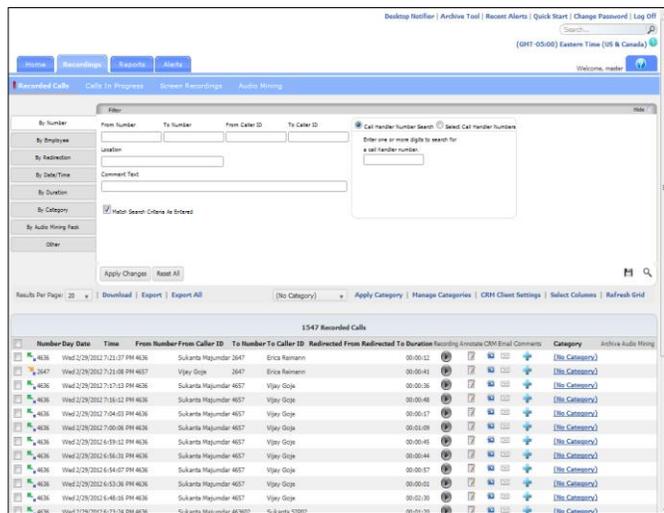
The Payment Card Industry Data Security Standard (PCI DSS) is a set of requirements designed to ensure that all companies that process, store **or** transmit credit card information maintain a secure environment. Therefore, when a customer is set to read their credit card number over the phone, the PCI 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.

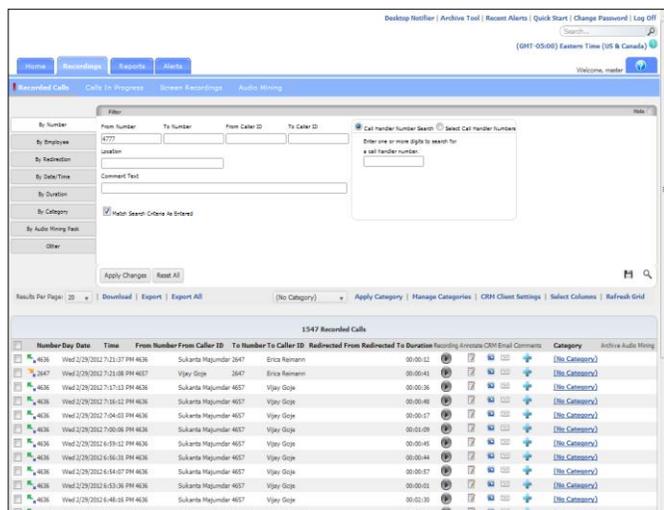


2. If it isn't already selected, select the **By Number** tab.

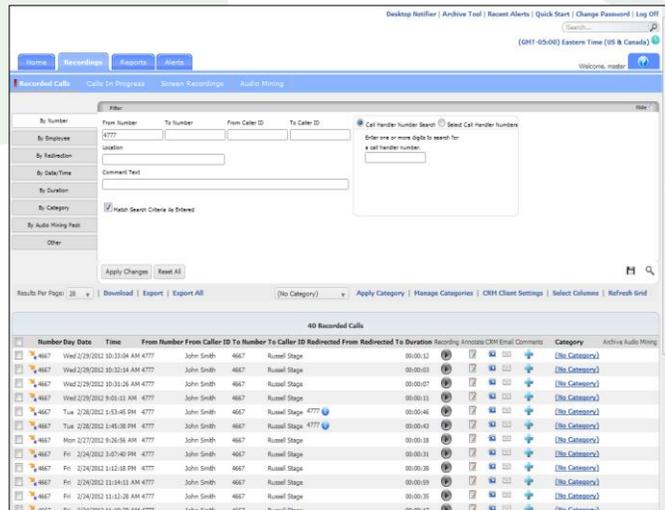


3. Enter the following information:

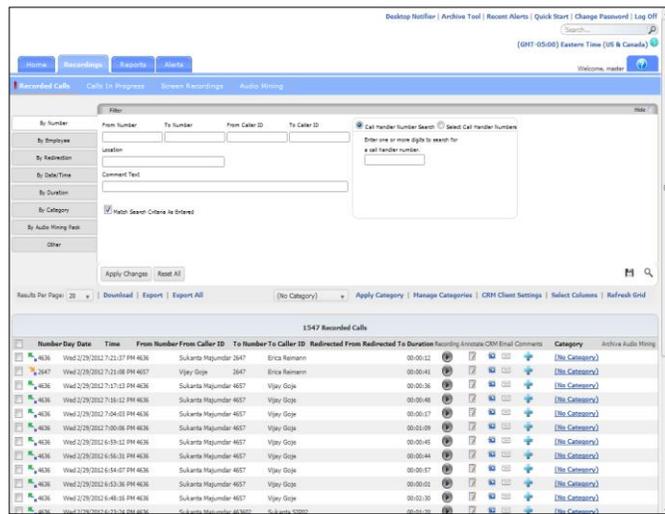
- **To Number** – enter a number that appears under the **From Number** column of the list of Recorded Calls.



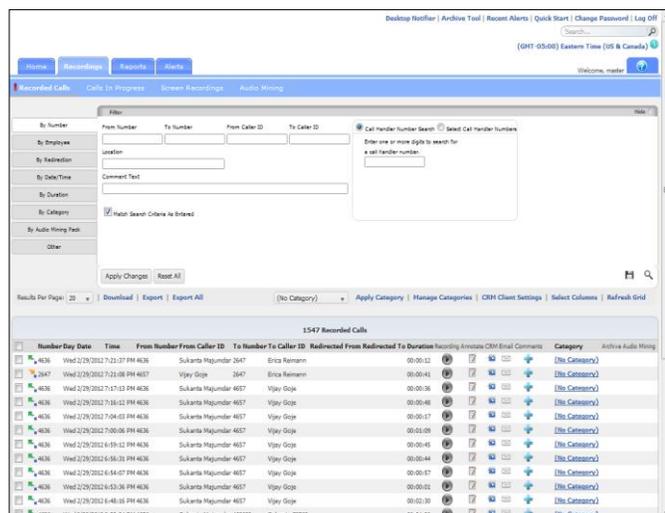
- Click **Apply Changes** to apply the filter to the list of Recorded Calls.



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

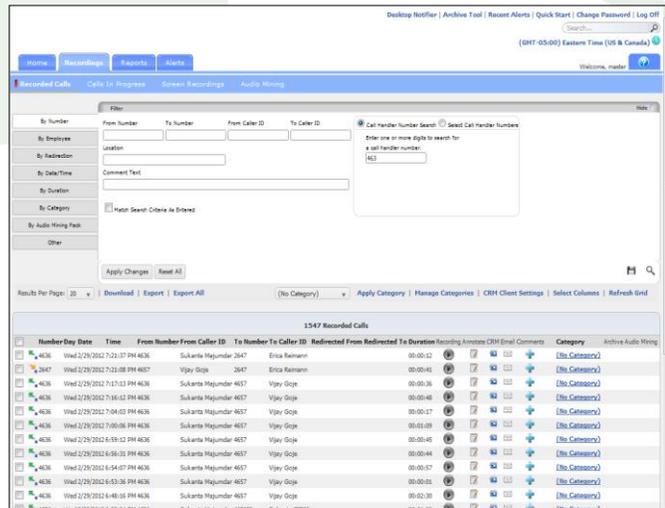


- If it isn't already selected, select the **By Number** tab.

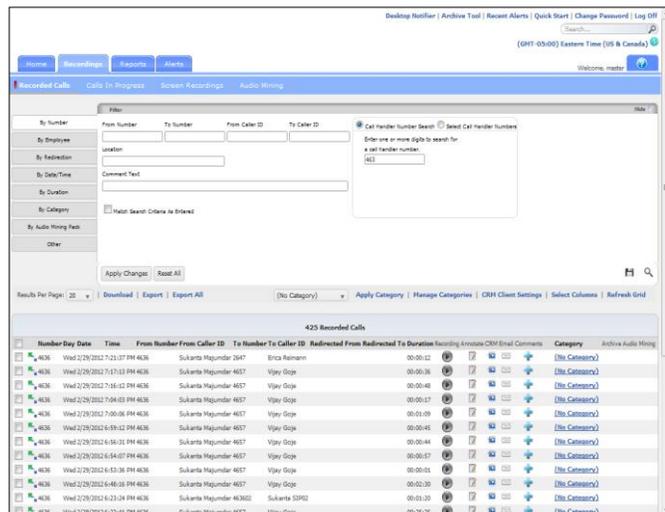


7. Click in the **Call Handler Number Search** option box and enter the following:

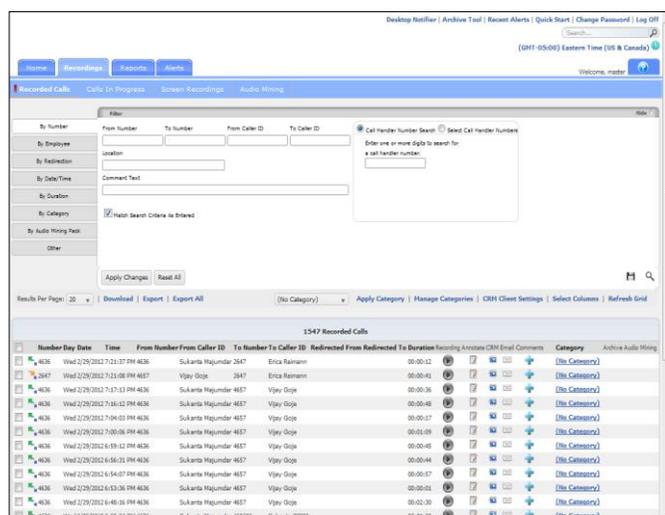
- Enter one or more digits to search for a call handler number – **enter 3 to 4 numbers from a number found on the recorded calls tab.**



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



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



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

The screenshot shows the 'Recorded Calls' interface with the 'By Date/Time' filter selected. The filter dropdown is set to 'Last 30 Days'. The table below shows a list of recorded calls with columns for Number, Day, Date, Time, From Number, From Caller ID, To Number, To Caller ID, Redirected From, Redirected To, Duration, Recording, Annotate, CRM, Email, Comments, Category, and Active Audio Mixing.

Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirected From	Redirected To	Duration	Recording	Annotate	CRM	Email	Comments	Category	Active Audio Mixing
4636	Wed	2/29/2012	7:21:37 PM	4636	Sukanta Majumdar	2647	Erica Rasmann			00:00:12						[No Category]	
2647	Wed	2/29/2012	7:23:08 PM	4637	Vijay Goje	2647	Erica Rasmann			00:00:45						[No Category]	
4636	Wed	2/29/2012	7:17:13 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:36						[No Category]	
4636	Wed	2/29/2012	7:16:12 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:46						[No Category]	
4636	Wed	2/29/2012	7:04:03 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:17						[No Category]	
4636	Wed	2/29/2012	7:00:08 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:01:09						[No Category]	
4636	Wed	2/29/2012	6:59:12 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:45						[No Category]	
4636	Wed	2/29/2012	6:56:35 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:44						[No Category]	
4636	Wed	2/29/2012	6:54:07 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:17						[No Category]	
4636	Wed	2/29/2012	6:53:36 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:05						[No Category]	
4636	Wed	2/29/2012	6:48:16 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:02:39						[No Category]	
4636	Wed	2/29/2012	6:43:24 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:01:20						[No Category]	

11. Select **Last Week** from the drop down list.

The screenshot shows the 'Recorded Calls' interface with the 'By Date/Time' filter selected. The filter dropdown is set to 'Last Week'. The table below shows a list of recorded calls with columns for Number, Day, Date, Time, From Number, From Caller ID, To Number, To Caller ID, Redirected From, Redirected To, Duration, Recording, Annotate, CRM, Email, Comments, Category, and Active Audio Mixing.

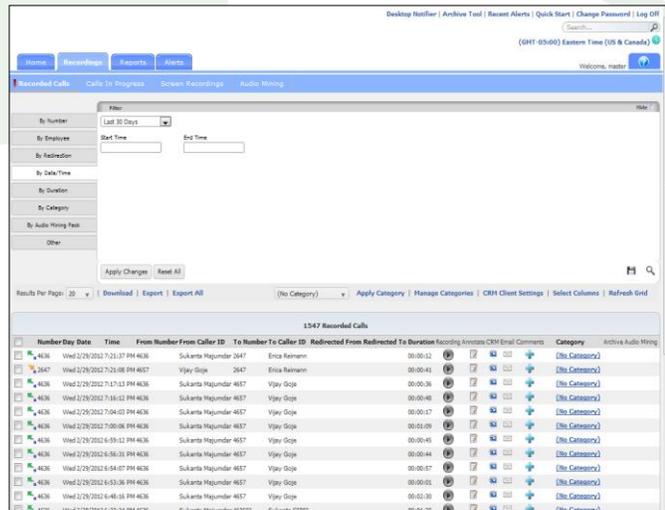
Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirected From	Redirected To	Duration	Recording	Annotate	CRM	Email	Comments	Category	Active Audio Mixing
4636	Wed	2/29/2012	7:21:37 PM	4636	Sukanta Majumdar	2647	Erica Rasmann			00:00:12						[No Category]	
2647	Wed	2/29/2012	7:23:08 PM	4637	Vijay Goje	2647	Erica Rasmann			00:00:45						[No Category]	
4636	Wed	2/29/2012	7:17:13 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:36						[No Category]	
4636	Wed	2/29/2012	7:16:12 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:46						[No Category]	
4636	Wed	2/29/2012	7:04:03 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:17						[No Category]	
4636	Wed	2/29/2012	7:00:08 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:01:09						[No Category]	
4636	Wed	2/29/2012	6:59:12 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:45						[No Category]	
4636	Wed	2/29/2012	6:56:35 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:44						[No Category]	
4636	Wed	2/29/2012	6:54:07 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:17						[No Category]	
4636	Wed	2/29/2012	6:53:36 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:00:05						[No Category]	
4636	Wed	2/29/2012	6:48:16 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:02:39						[No Category]	
4636	Wed	2/29/2012	6:43:24 PM	4636	Sukanta Majumdar	4637	Vijay Goje			00:01:20						[No Category]	

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

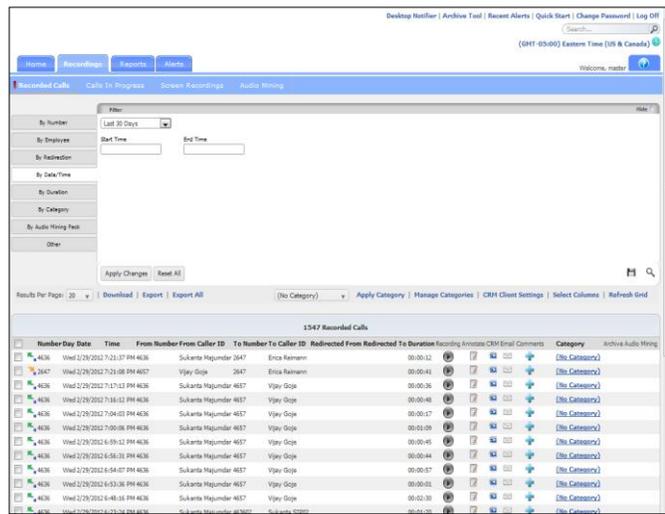
The screenshot shows the 'Recorded Calls' interface with the 'By Date/Time' filter selected. The filter dropdown is set to 'Last Week'. The 'Apply Changes' button is highlighted. The table below shows a list of recorded calls with columns for Number, Day, Date, Time, From Number, From Caller ID, To Number, To Caller ID, Redirected From, Redirected To, Duration, Recording, Annotate, CRM, Email, Comments, Category, and Active Audio Mixing.

Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirected From	Redirected To	Duration	Recording	Annotate	CRM	Email	Comments	Category	Active Audio Mixing
2646	Fri	2/24/2012	5:58:54 PM	2647	Erica Rasmann	2646	Jessie Rasmann			00:00:04						[No Category]	
2647	Fri	2/24/2012	5:58:32 PM	2647	Erica Rasmann	2647	Jessie Rasmann			00:00:39						[No Category]	
262665	Fri	2/24/2012	5:55:16 PM	2647	Erica Rasmann	262665	Jeff Thompson			00:00:25						[No Category]	
2647	Fri	2/24/2012	5:54:49 PM	2647	Erica Rasmann	2646	Jessie Rasmann			00:01:29						[No Category]	
2646	Fri	2/24/2012	5:54:49 PM	2647	Erica Rasmann	2646	Jessie Rasmann			00:01:12						[No Category]	
2646	Fri	2/24/2012	5:52:10 PM	2647	Erica Rasmann	2646	Jessie Rasmann			00:00:36						[No Category]	
2647	Fri	2/24/2012	5:52:10 PM	2647	Erica Rasmann	2646	Jessie Rasmann			00:00:36						[No Category]	
2647	Fri	2/24/2012	5:50:12 PM	2647	Erica Rasmann	2646	Jessie Rasmann			00:00:42						[No Category]	
2646	Fri	2/24/2012	5:48:33 PM	2647	Erica Rasmann	2646	Jessie Rasmann			00:01:03						[No Category]	
2647	Fri	2/24/2012	5:48:33 PM	2647	Erica Rasmann	2646	Jessie Rasmann			00:01:06						[No Category]	
2646	Fri	2/24/2012	5:48:08 PM	2647	Jessie Rasmann	2646	Jeff Crilly			00:00:18						[No Category]	

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

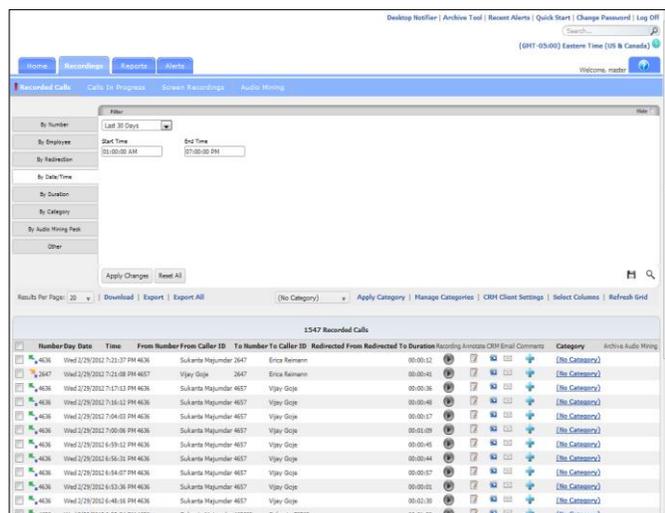


14. Select the **By Date/Time** tab.

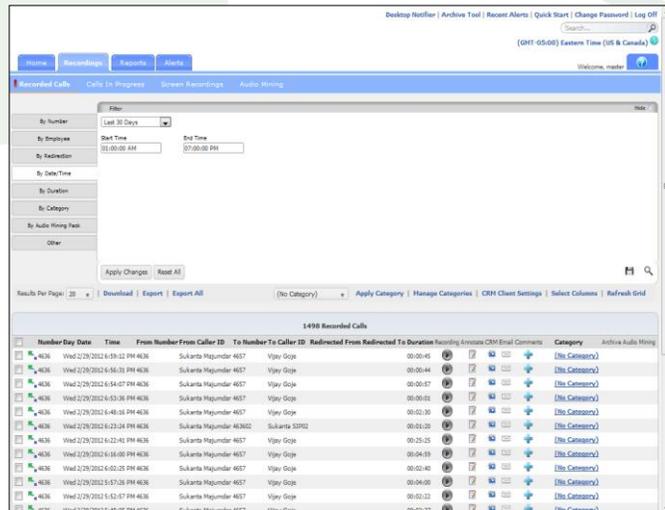


15. Enter the following information:

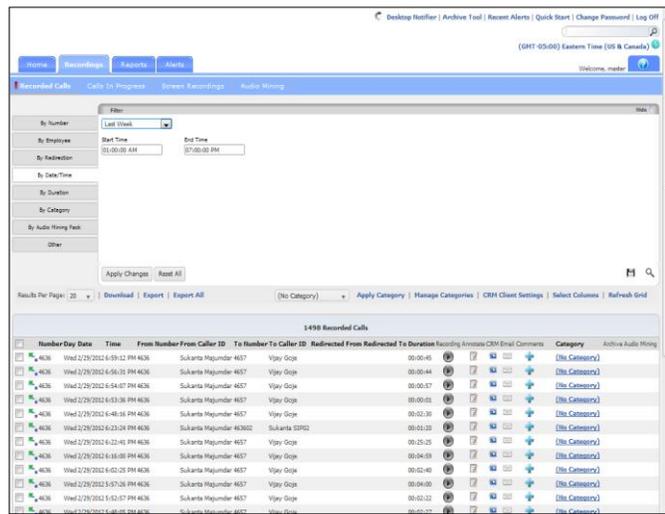
- Start Time – **select 01:00:00 a.m.**
- End Time – **select 07:00:00 p.m.**



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

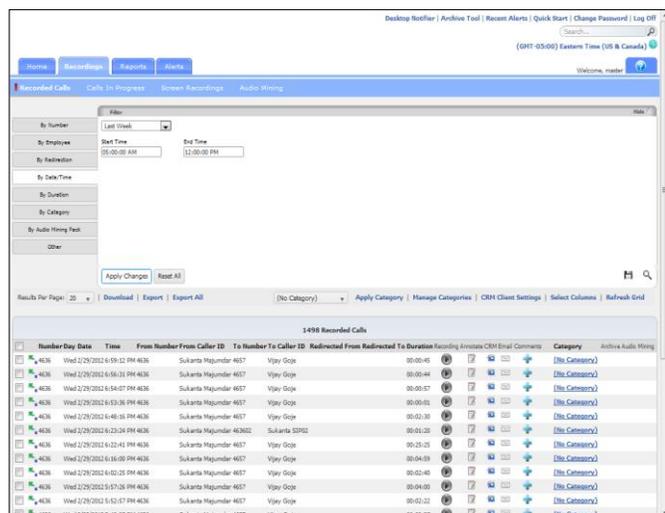


17. Select **Last Week** from the drop down list.

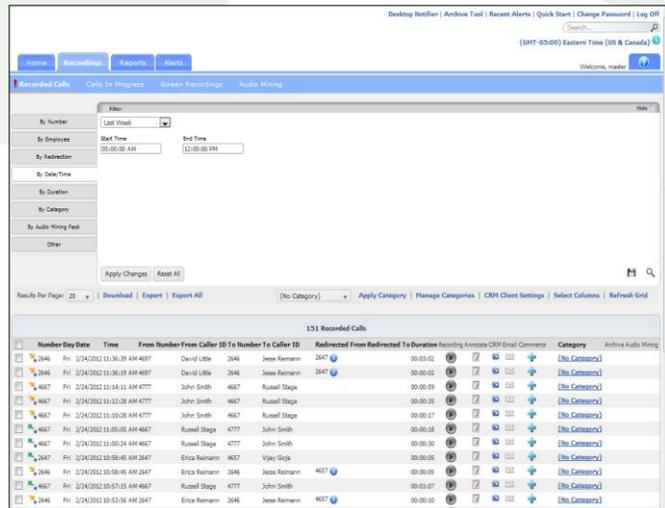


18. Enter the following information under the By Time filter:

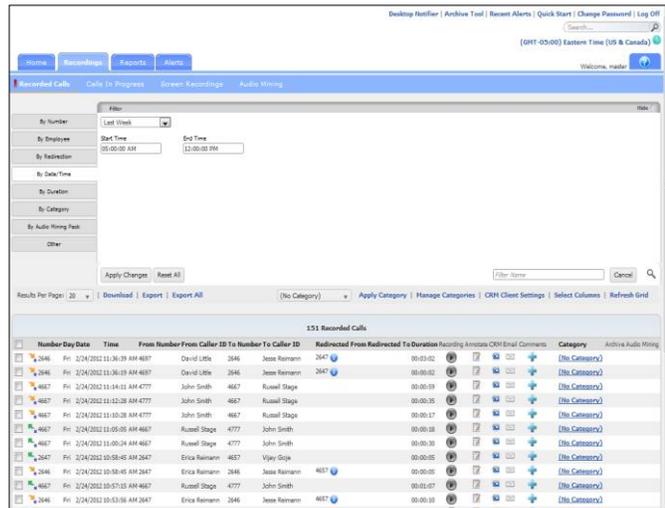
- From – **select 05:00:00 a.m.**
- To – **select 12:00:00 p.m.**



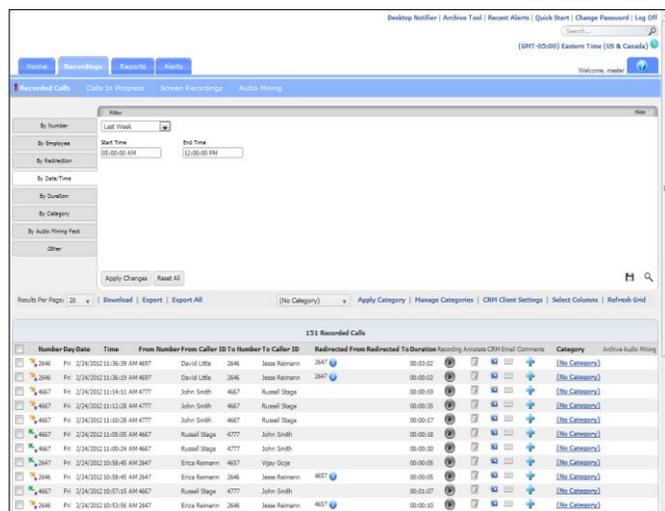
19. Click **Apply Changes** to apply the filter to the list of Recorded Calls.



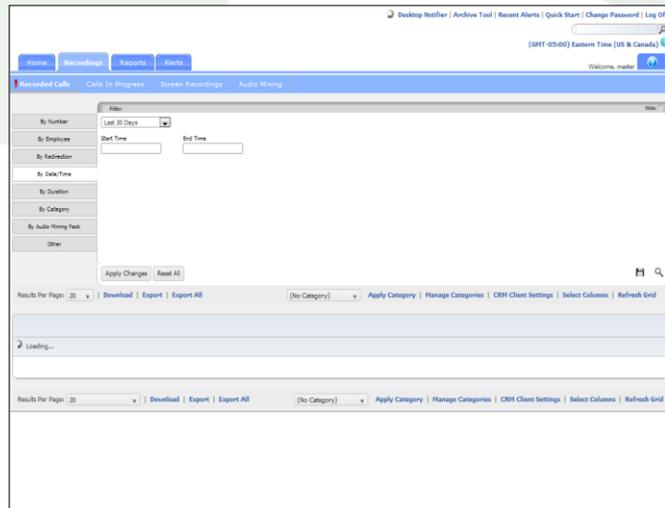
20. Click **H** (Save Filter) button to save the filter criteria.



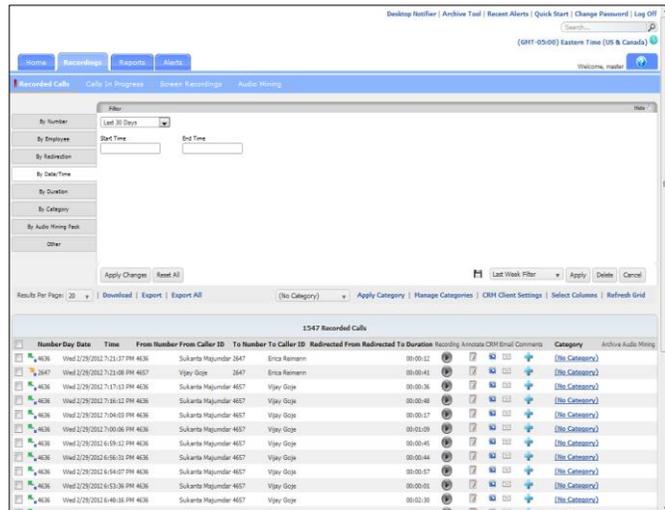
21. Enter the filter name and click **Save Filter**.



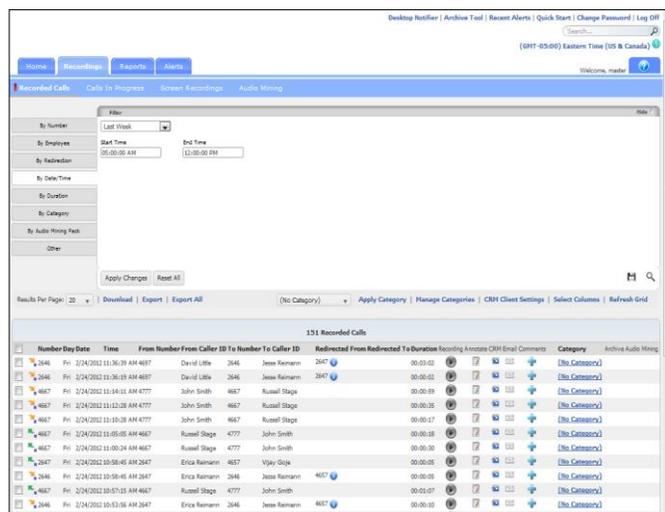
22. Click **Reset All** to remove the filter from the list of Recorded Calls.



23. Select (Apply Saved Filter).

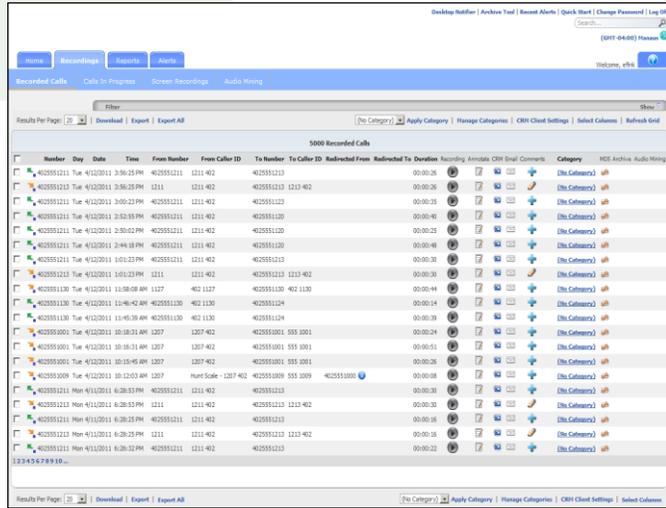


24. Select **Last Week Filter** from the drop down list and click **Apply**.

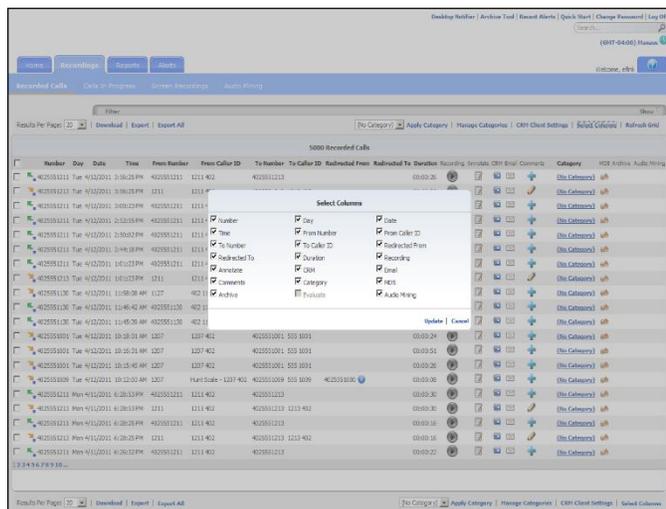


Example: Managing the Recorded Calls tab columns

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

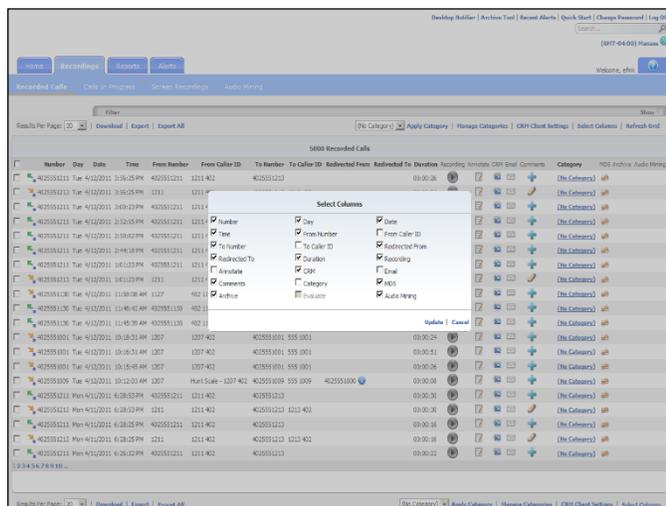


2. Select the **Select Columns** link at the top or bottom of the Recorded Calls page.

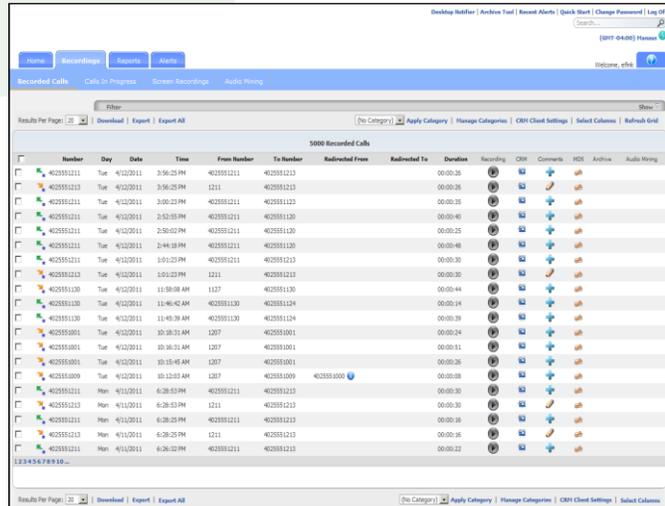


3. Select the following option boxes:

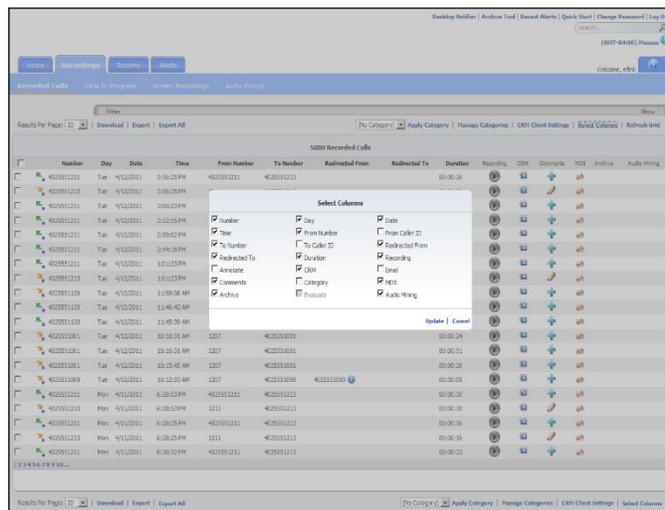
- **Annotate**
- **To Caller ID**
- **Category**
- **From Caller ID**
- **Email**



4. Select the **Update** link.

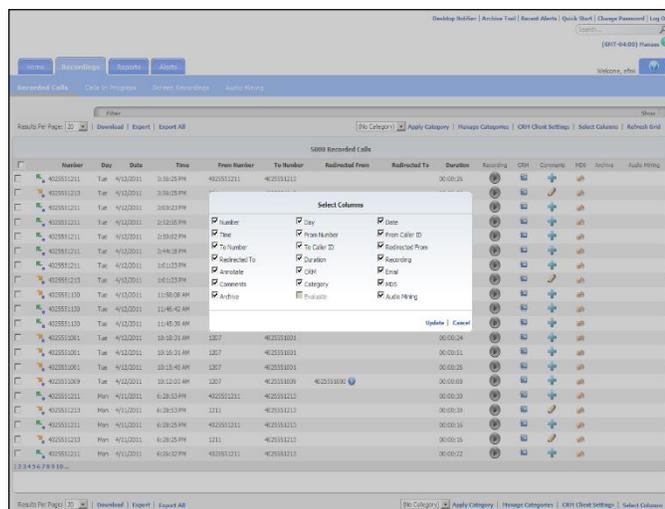


5. Select the **Select Columns** link at the top or bottom of the Recorded Calls page.



6. Select the following option boxes:

- **Annotate**
- **To Caller ID**
- **Category**
- **From Caller ID**
- **Email**



7. Select the **Update** link.

The screenshot displays the SmartRecord interface with a table of recorded calls. The table has the following columns: Number, Day, Date, Time, From Number, From Caller ID, To Number, To Caller ID, Redirected From, Redirected To, Duration, Recording, Annotate, CRM, Email, Comments, Category, and MDC. The 'Category' column contains the text '(No Category)' for each row. The 'Update' link is highlighted in blue in the 'Category' column of the first row.

Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirected From	Redirected To	Duration	Recording	Annotate	CRM	Email	Comments	Category	MDC
402551211	Tue	4/12/2011	3:56:25 PM	402551211	1211 402	402551213	1213 402			00:00:26	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551213	Tue	4/12/2011	3:56:25 PM	1211	1211 402	402551213	1213 402			00:00:26	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551211	Tue	4/12/2011	3:50:23 PM	402551211	1211 402	402551123				00:00:35	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551211	Tue	4/12/2011	2:52:55 PM	402551211	1211 402	402551120				00:00:40	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551211	Tue	4/12/2011	2:50:02 PM	402551211	1211 402	402551120				00:00:25	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551211	Tue	4/12/2011	2:46:38 PM	402551211	1211 402	402551120				00:00:48	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551211	Tue	4/12/2011	1:01:23 PM	402551211	1211 402	402551213				00:00:38	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551213	Tue	4/12/2011	1:01:23 PM	1211	1211 402	402551213	1213 402			00:00:38	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551120	Tue	4/12/2011	11:58:08 AM	1237	402 1127	402551120	402 1120			00:00:44	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551120	Tue	4/12/2011	11:46:42 AM	402551120	402 1120	402551124				00:00:14	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551120	Tue	4/12/2011	11:46:39 AM	402551120	402 1120	402551124				00:00:39	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551001	Tue	4/12/2011	10:38:31 AM	1207	1207 402	402551001	555 5001			00:00:24	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551001	Tue	4/12/2011	10:38:31 AM	1207	1207 402	402551001	555 5001			00:00:51	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551001	Tue	4/12/2011	10:35:45 AM	1207	1207 402	402551001	555 5001			00:00:26	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551009	Tue	4/12/2011	10:12:03 AM	1207	Hunt Scale - 1207 402	402551009	555 5009	402551001		00:00:08	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551211	Mon	4/11/2011	6:28:53 PM	402551211	1211 402	402551213	1213 402			00:00:30	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551213	Mon	4/11/2011	6:28:53 PM	1211	1211 402	402551213	1213 402			00:00:30	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551211	Mon	4/11/2011	6:28:53 PM	402551211	1211 402	402551213	1213 402			00:00:36	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551213	Mon	4/11/2011	6:28:53 PM	1211	1211 402	402551213	1213 402			00:00:36	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah
402551211	Mon	4/11/2011	6:28:52 PM	402551211	1211 402	402551213	1213 402			00:00:32	[Icon]	[Icon]	[Icon]	[Icon]	[Icon]	(No Category)	ah

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.

Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redacted From	Redacted To	Duration	Recording	Announce	CRM	Email	Comments	Category	NCS Archive	Audio Mxing
402551211	Tue	4/12/2011	3:56:23 PM	1211	1211 402	402551213	1211 402			00:00:26						[The Category]		
402551211	Tue	4/12/2011	3:56:23 PM	1211	1211 402	402551213	1211 402			00:00:26						[The Category]		

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).

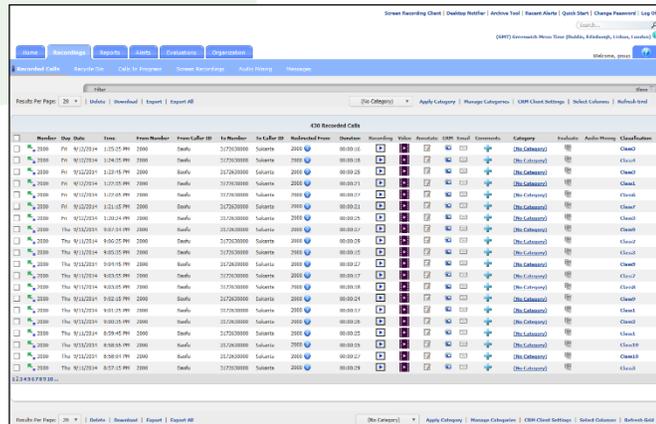
Note: The way in which media players load and play the recorded call files will vary. For instance, QuickTime Player and Windows Media® Player will immediately launch the recorded call file. However, iTunes® will load the recorded call file in the library and you will have to click play to begin listening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

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

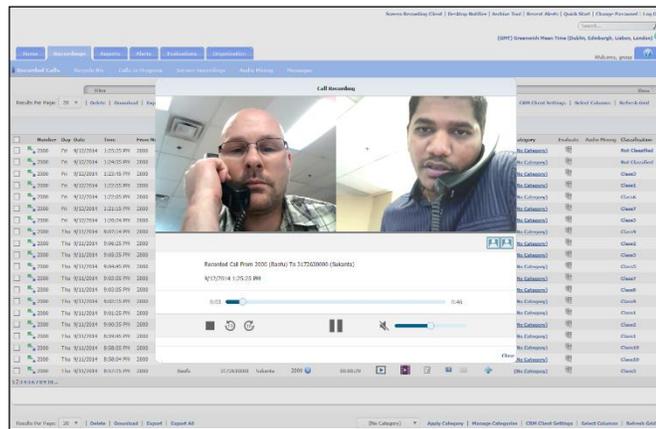
Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redacted From	Redacted To	Duration	Recording	Available	CRM Email	Comments	Category	NCE Archive	Audio History
402551211	Tue	4/12/2011	3:56:23 PM	402551211	1211 402	402551213	1211 402			00:00:26	7	7			[No Category]		
402551211	Tue	4/12/2011	3:56:23 PM	1211	1211 402	402551213	1213 402			00:00:26	7	7			[No Category]		
402551211	Tue	4/12/2011	3:56:23 PM	1211	1211 402	402551213	1211 402			00:00:26	7	7			[No Category]		
402551211	Tue	4/12/2011	3:58:53 PM	402551211	1211 402	402551120				00:00:40	7	7			[No Category]		
402551211	Tue	4/12/2011	3:58:53 PM	402551211	1211 402	402551120				00:00:21	7	7			[No Category]		
402551211	Tue	4/12/2011	3:58:53 PM	402551211	1211 402	402551120				00:00:41	7	7			[No Category]		
402551211	Tue	4/12/2011	3:58:53 PM	402551211	1211 402	402551213				00:00:30	7	7			[No Category]		
402551211	Tue	4/12/2011	3:58:53 PM	1211	1211 402	402551213	1213 402			00:00:26	7	7			[No Category]		
402551120	Tue	4/12/2011	11:09:08 AM	1207	402 1120	402551120	402 1120			00:00:44	7	7			[No Category]		
402551120	Tue	4/12/2011	11:46:42 AM	402551120	402 1120	402551124				00:00:14	7	7			[No Category]		
402551120	Tue	4/12/2011	11:46:39 AM	402551120	402 1120	402551124				00:00:28	7	7			[No Category]		
402551001	Tue	4/12/2011	10:18:31 AM	1207	1207 402	402551001	555 0001			00:00:24	7	7			[No Category]		
402551001	Tue	4/12/2011	10:15:45 AM	1207	1207 402	402551001	555 0001			00:00:51	7	7			[No Category]		
402551001	Tue	4/12/2011	10:15:45 AM	1207	1207 402	402551001	555 0001			00:00:28	7	7			[No Category]		
402551009	Tue	4/12/2011	10:12:03 AM	1207	Plant Scale - 1207 402	402551009	555 1009	402551000		00:00:08	7	7			[No Category]		
402551211	Mon	4/11/2011	6:28:53 PM	402551211	1211 402	402551213				00:00:30	7	7			[No Category]		
402551211	Mon	4/11/2011	6:28:53 PM	1211	1211 402	402551213	1213 402			00:00:30	7	7			[No Category]		
402551211	Mon	4/11/2011	6:28:23 PM	402551211	1211 402	402551213				00:00:16	7	7			[No Category]		
402551211	Mon	4/11/2011	6:28:23 PM	1211	1211 402	402551213	1213 402			00:00:16	7	7			[No Category]		
402551211	Mon	4/11/2011	6:26:32 PM	402551211	1211 402	402551213				00:00:22	7	7			[No Category]		

Example: Playing recorded video

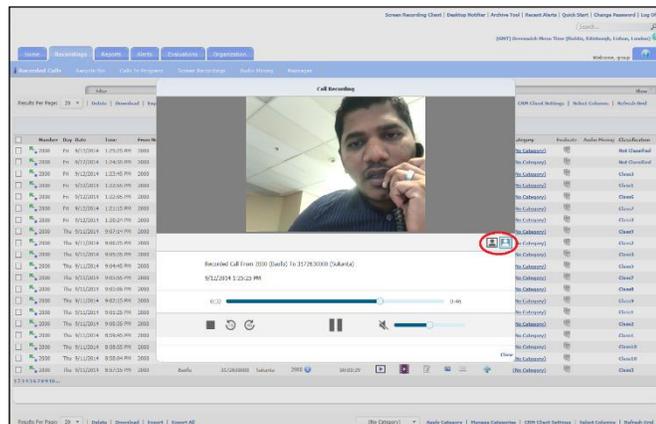
- Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



- 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  below 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  or backward  15 seconds.
- The stop button  will stop the recording and return to the beginning of the call.
- The pause button  will pause the recording.

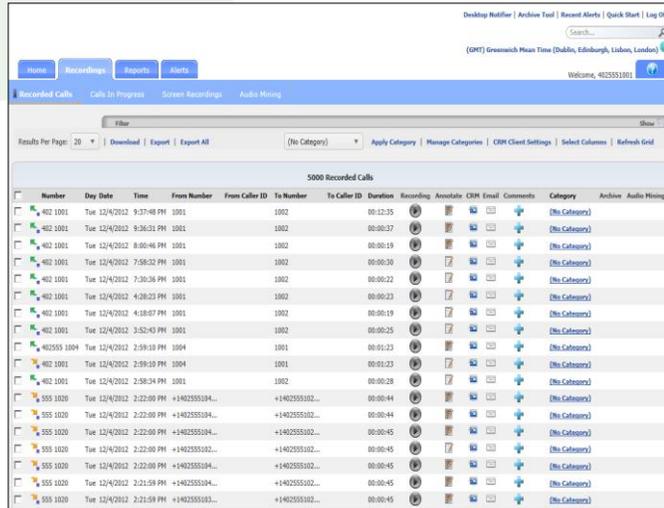
- Toggling the volume button  will mute and unmute the call; the slider will adjust the volume.

6. Click **Close** button to return to the Recorded Calls screen.

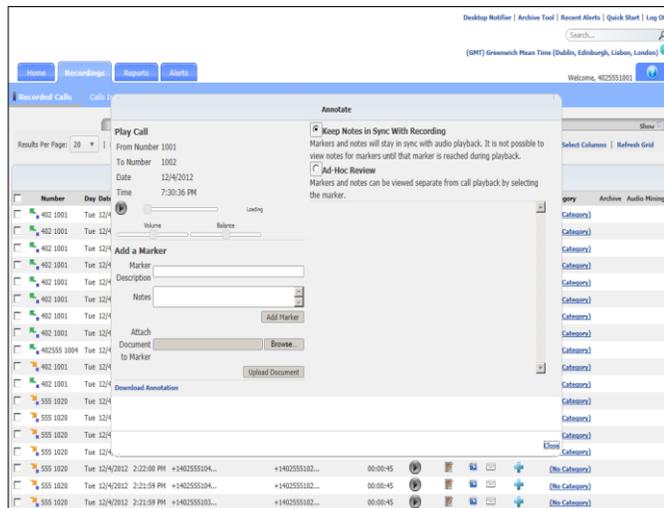
Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redacted From	Duration	Recording	Video	Audio	CRM	Email	Comments	Category	Evaluate	Audio Playback	Classification
2000	Fr	9/12/2014	1:22:22 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:28							(No Category)			Class1
2000	Fr	9/12/2014	1:24:35 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:18							(No Category)			Class4
2000	Fr	9/12/2014	1:23:45 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:25							(No Category)			Class3
2000	Fr	9/12/2014	1:22:55 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:21							(No Category)			Class5
2000	Fr	9/12/2014	1:23:05 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:27							(No Category)			Class8
2000	Fr	9/12/2014	1:21:53 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:25							(No Category)			Class7
2000	Fr	9/12/2014	1:21:24 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:25							(No Category)			Class2
2000	Thu	9/11/2014	9:07:14 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:27							(No Category)			Class9
2000	Thu	9/11/2014	9:06:35 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:28							(No Category)			Class6
2000	Thu	9/11/2014	9:05:55 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:15							(No Category)			Class10
2000	Thu	9/11/2014	9:04:45 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:27							(No Category)			Class11
2000	Thu	9/11/2014	9:03:55 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:17							(No Category)			Class7
2000	Thu	9/11/2014	9:03:05 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:18							(No Category)			Class8
2000	Thu	9/11/2014	9:02:15 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:24							(No Category)			Class12
2000	Thu	9/11/2014	9:01:25 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:17							(No Category)			Class4
2000	Thu	9/11/2014	9:00:35 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:26							(No Category)			Class3
2000	Thu	9/11/2014	8:59:45 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:25							(No Category)			Class1
2000	Thu	9/11/2014	8:58:55 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:23							(No Category)			Class5
2000	Thu	9/11/2014	8:58:04 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:27							(No Category)			Class10
2000	Thu	9/11/2014	8:57:15 PM	2000	Barfa	1870200000	Sabatia	2000	00:00:29							(No Category)			Class11

Example: Adding an annotation to a recorded call

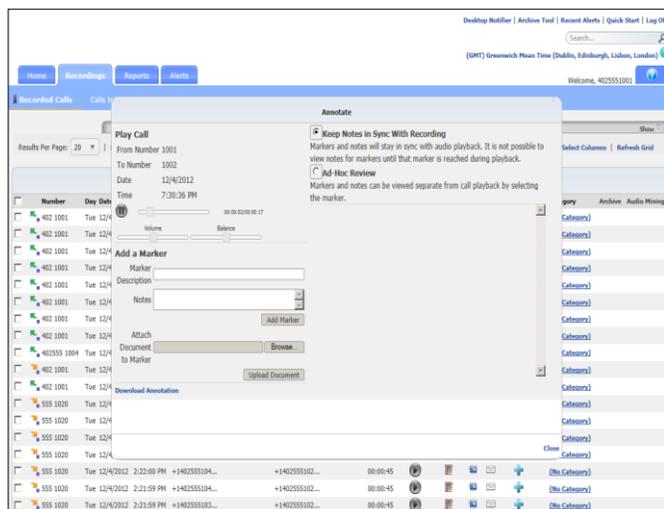
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



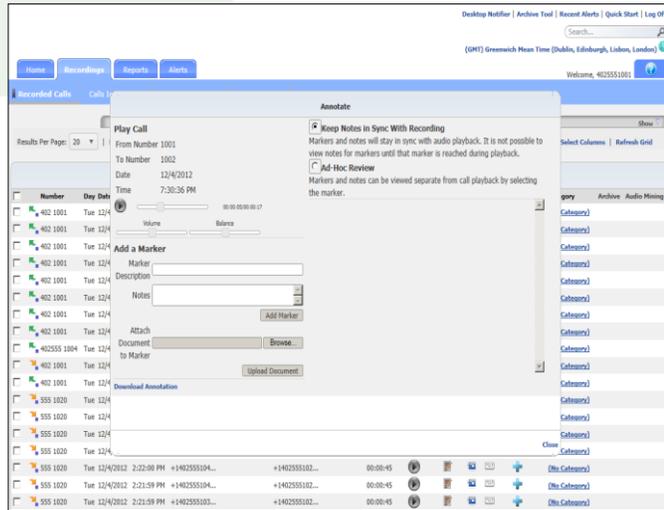
2. Select a call and click on the  (Annotate button) that corresponds to that call.



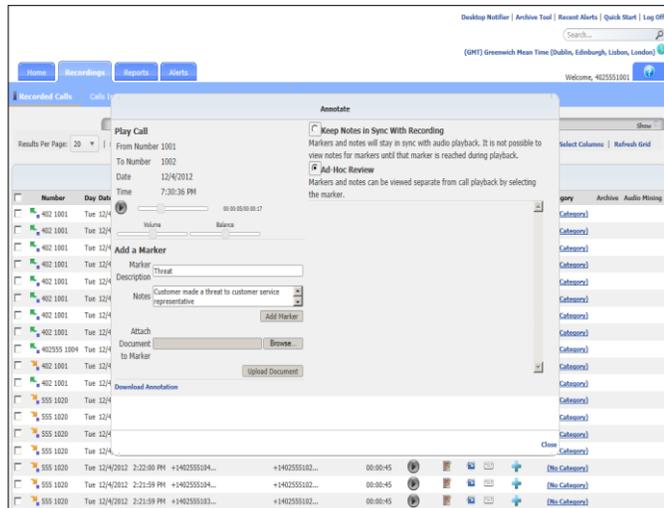
3. Select the **Play** button to begin playing the recorded call.



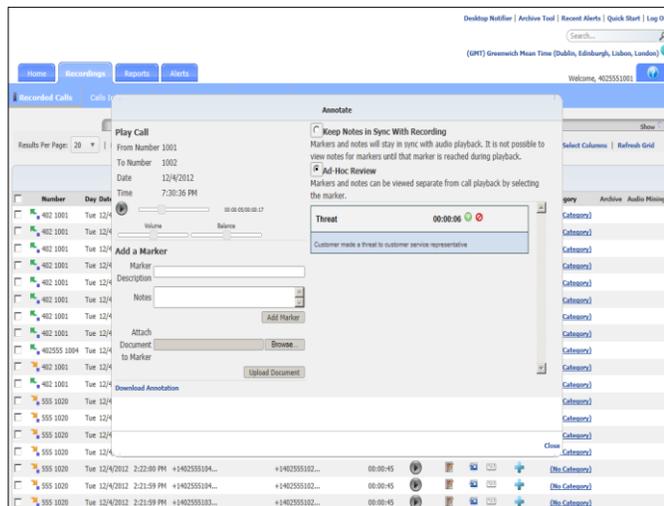
4. Select **Pause** when you come to the point in the call that you wish to annotate.



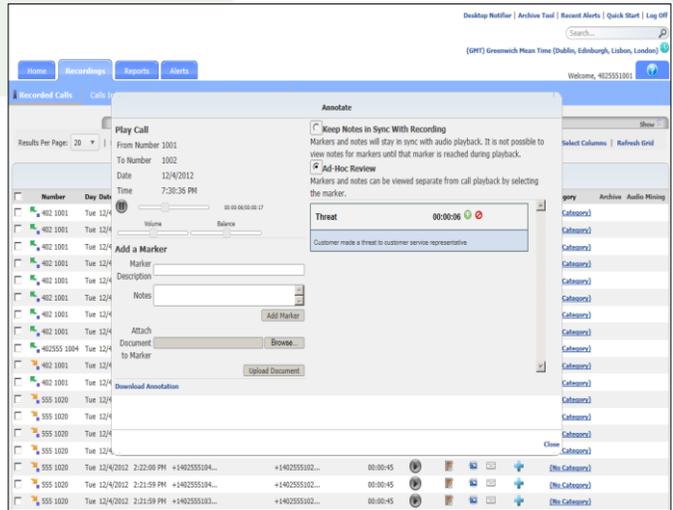
5. Enter the following information:
 - Marker Description – **Threat**
 - Notes – **Customer made a threat to customer service representative**



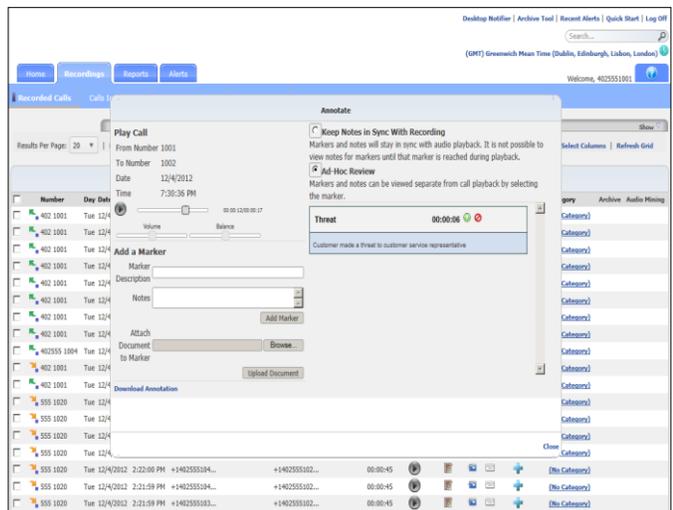
6. Click the **Add Marker** button.



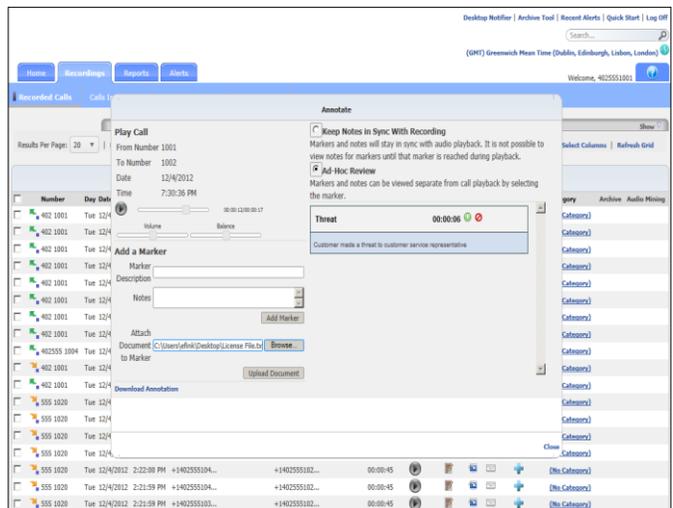
7. Select the **Play** button to begin playing the recorded call.



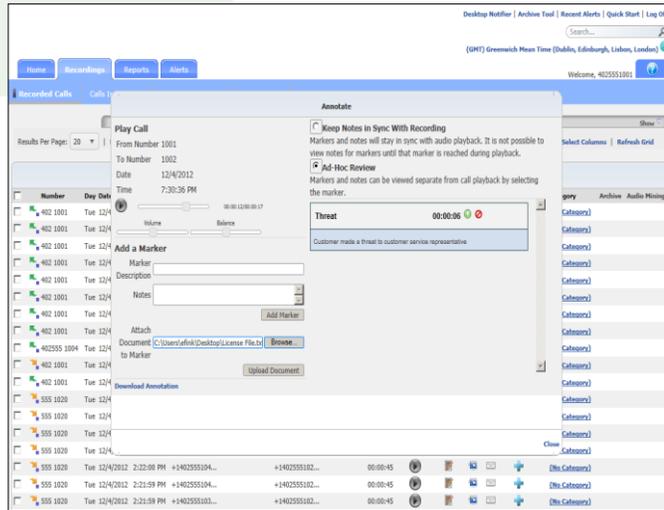
8. Select **Pause** when you come to the point in the call that you wish to annotate.



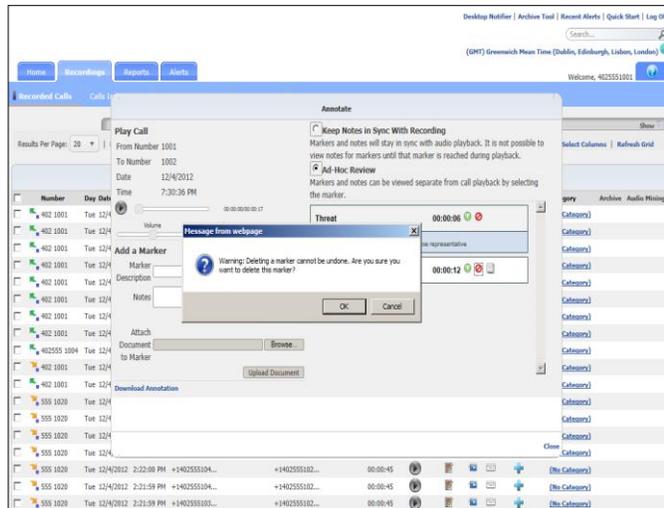
9. Click the **Browse** button and select a document.



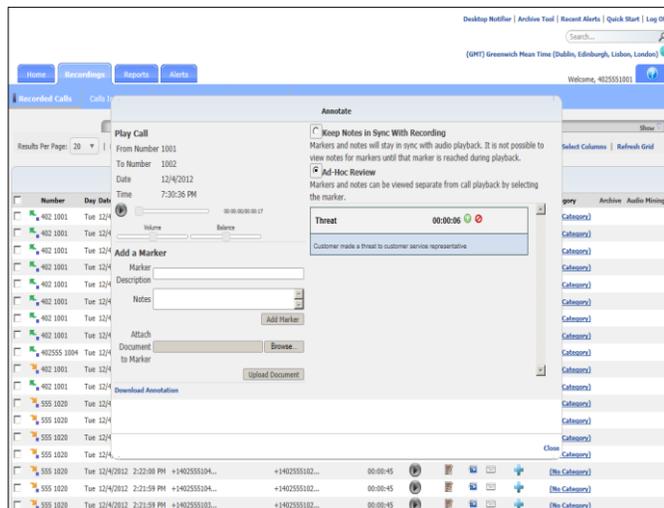
10. Click the **Upload Document** button.



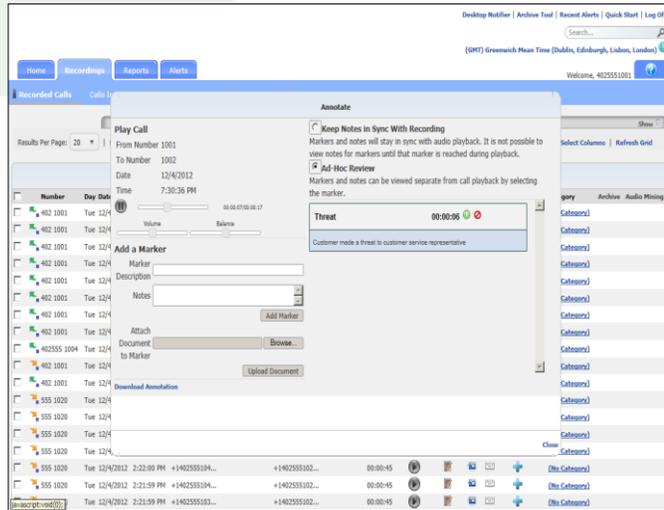
11. Click the  (Delete Marker) button that corresponds to the uploaded document.



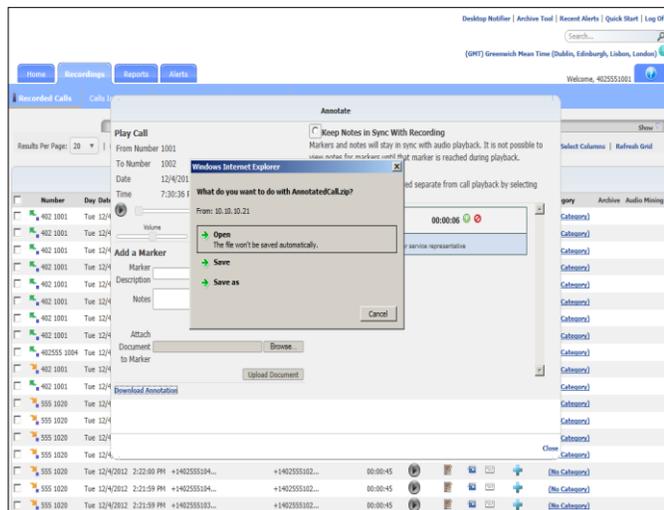
12. Click **OK**.



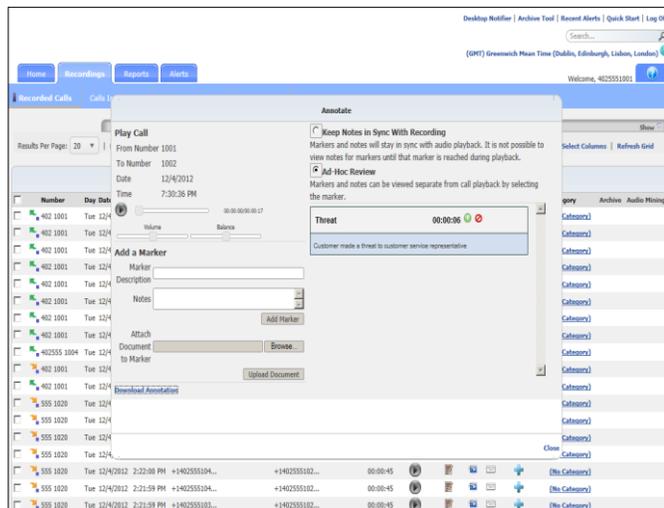
- Click the (Seek) button to jump to the annotated spot in the call.



- Click the [Download Annotation](#) link.



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



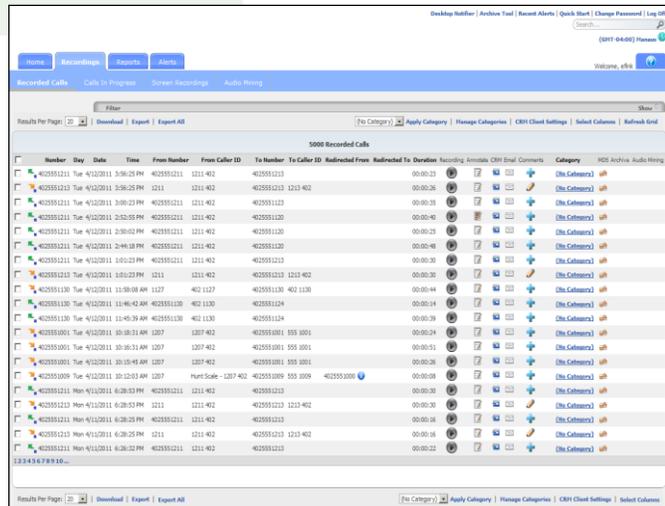
- Click the **Close** link at the bottom of the Annotation dialog box.

Number	Day Date	Time	From Number	From Caller ID	To Number	To Caller ID	Duration	Recording	Annotate	CDR	Email	Comments	Category	Archive	Audio Mixing
402 1001	Tue 12/4/2012	9:37:48 PM	1001		1002		00:13:35						(No Category)		
402 1001	Tue 12/4/2012	9:36:51 PM	1001		1002		00:00:37						(No Category)		
402 1001	Tue 12/4/2012	8:00:46 PM	1001		1002		00:00:19						(No Category)		
402 1001	Tue 12/4/2012	7:50:32 PM	1001		1002		00:00:30						(No Category)		
402 1001	Tue 12/4/2012	7:30:36 PM	1001		1002		00:00:22						(No Category)		
402 1001	Tue 12/4/2012	4:28:23 PM	1001		1002		00:00:23						(No Category)		
402 1001	Tue 12/4/2012	4:18:07 PM	1001		1002		00:00:19						(No Category)		
402 1001	Tue 12/4/2012	3:52:43 PM	1001		1002		00:00:25						(No Category)		
402555 1004	Tue 12/4/2012	2:59:10 PM	1004		1001		00:01:23						(No Category)		
402 1001	Tue 12/4/2012	2:59:10 PM	1004		1001		00:01:23						(No Category)		
402 1001	Tue 12/4/2012	2:50:34 PM	1001		1002		00:00:28						(No Category)		
555 1020	Tue 12/4/2012	2:22:00 PM	+1402555104...		+1402555102...		00:00:44						(No Category)		
555 1020	Tue 12/4/2012	2:22:00 PM	+1402555104...		+1402555102...		00:00:44						(No Category)		
555 1020	Tue 12/4/2012	2:22:00 PM	+1402555104...		+1402555102...		00:00:45						(No Category)		
555 1020	Tue 12/4/2012	2:22:00 PM	+1402555104...		+1402555102...		00:00:45						(No Category)		
555 1020	Tue 12/4/2012	2:22:00 PM	+1402555104...		+1402555102...		00:00:45						(No Category)		
555 1020	Tue 12/4/2012	2:21:59 PM	+1402555104...		+1402555102...		00:00:45						(No Category)		
555 1020	Tue 12/4/2012	2:21:59 PM	+1402555103...		+1402555102...		00:00:45						(No Category)		

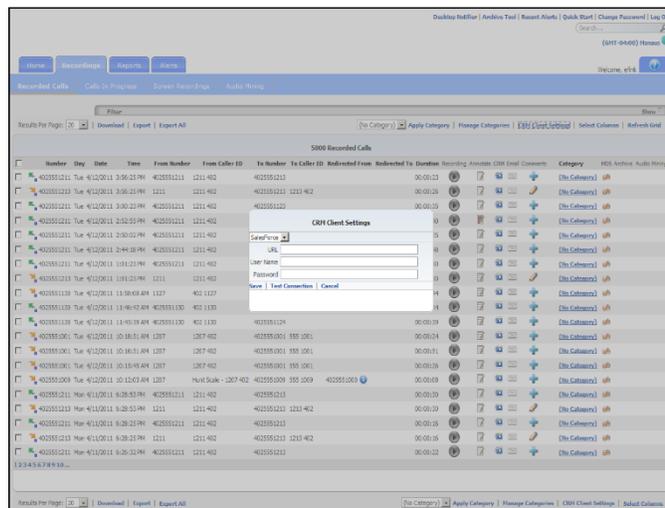
Example: Uploading a recorded call to a CRM

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

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

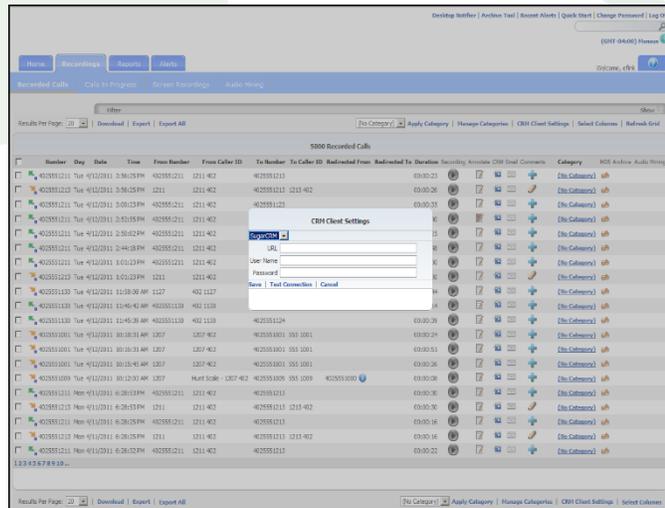


2. Click on the **CRM Client Settings** link found at the top or bottom of the Recorded Calls tab.



- Select a CRM application from the drop down list.

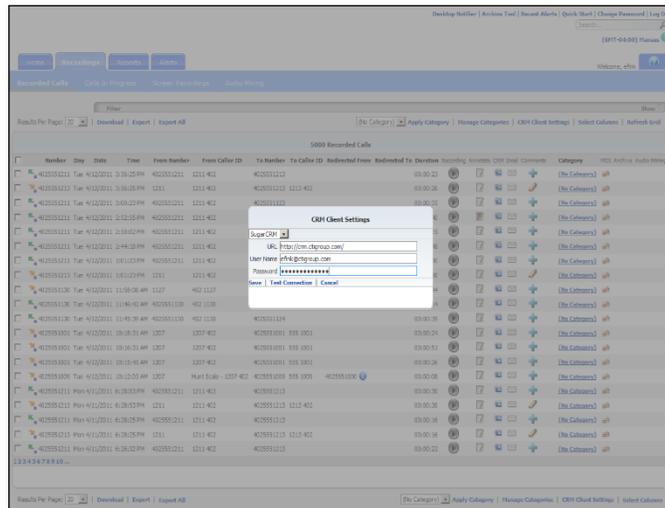
Note: You can only have one active connection to a CRM application at a time. If you want to log into another CRM application, click CRM Client Settings, select the CRM application, and enter the credentials.



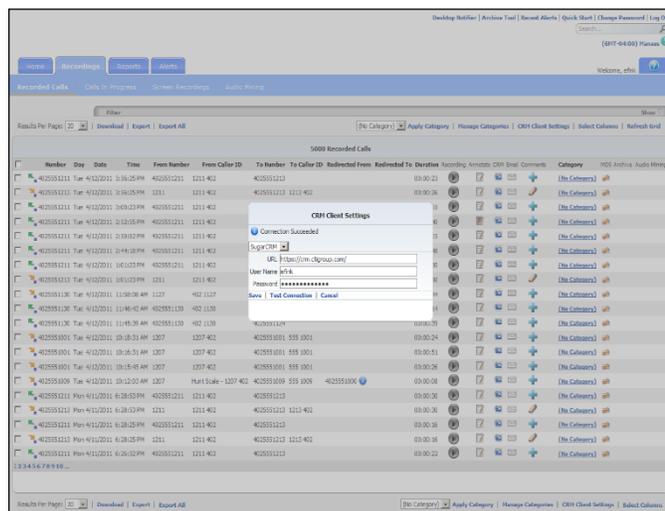
- Enter or select the following information:

- 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

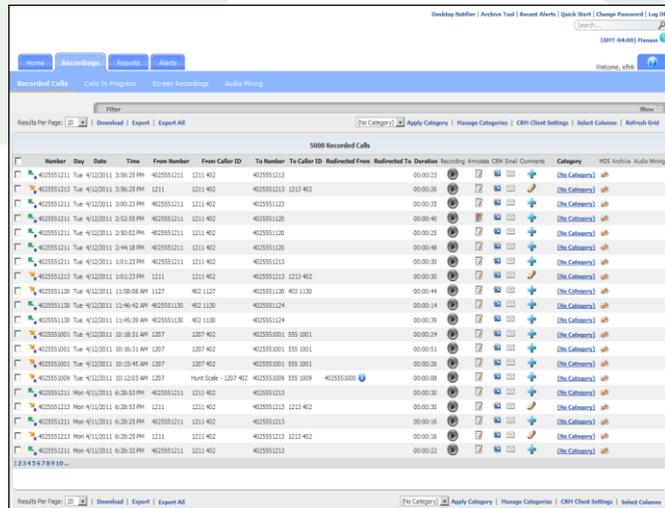
Note: Once you have performed steps 3 & 4 the first time, you will not be asked to enter the information again.



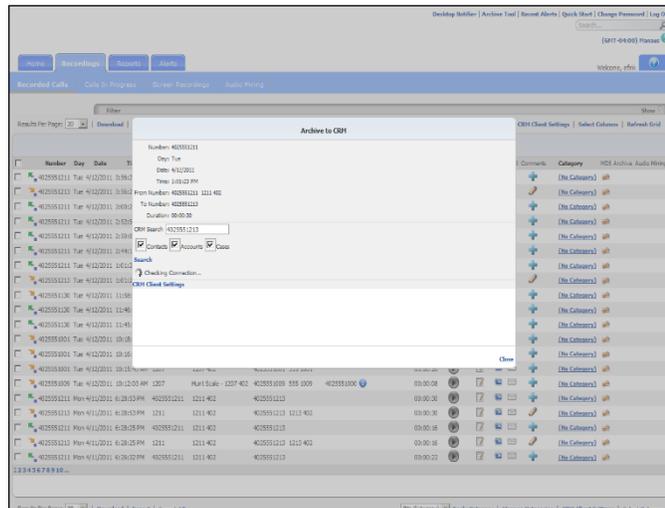
- Click **Test Connection**.



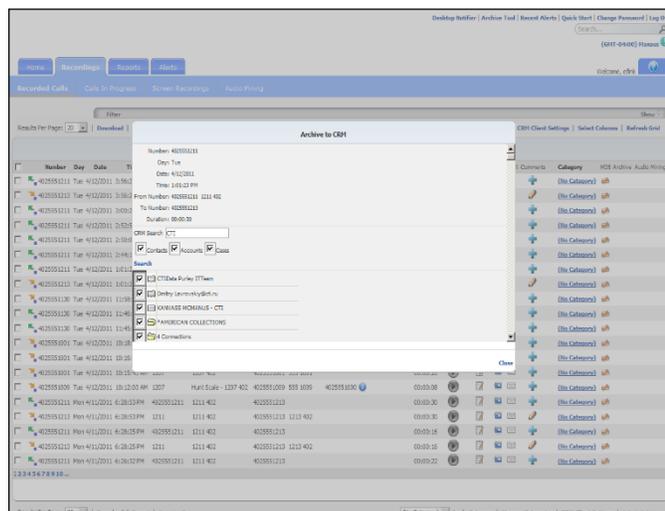
6. Click **Save** to save your credentials.



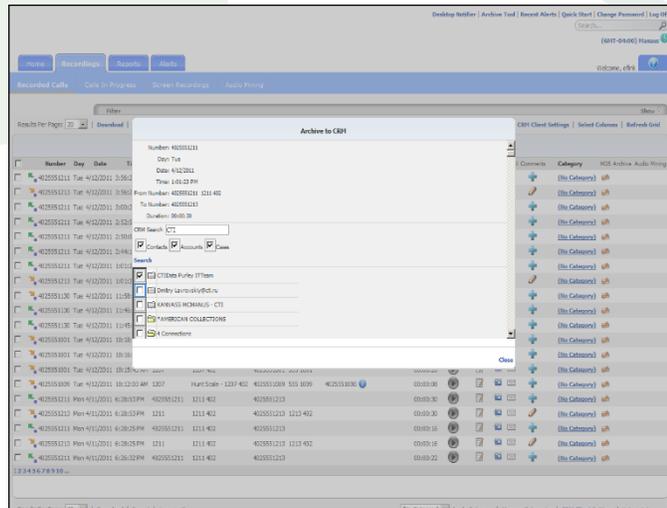
7. Select a call and click on the (CRM) button that corresponds to that call.



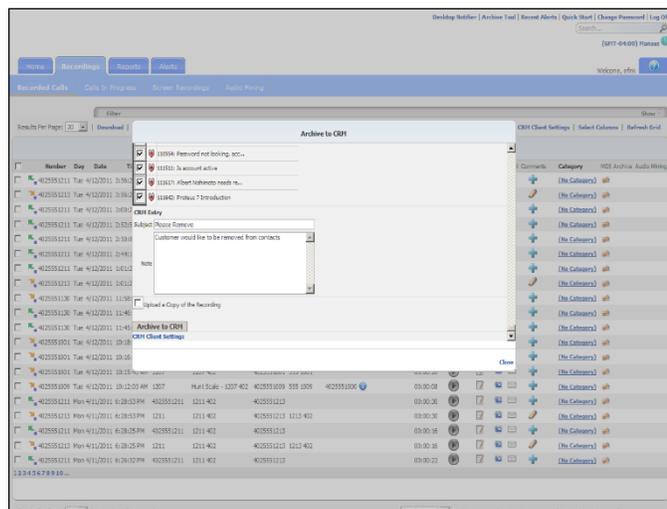
8. If applicable, enter new search criteria in the CRM Search field. Select or deselect Contacts, Accounts, or Cases depending on what you want to upload this call to. Click **Search**.



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



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



- Select the **Archive to CRM** link.

- Select the **Close** link to close the CRM dialog box.

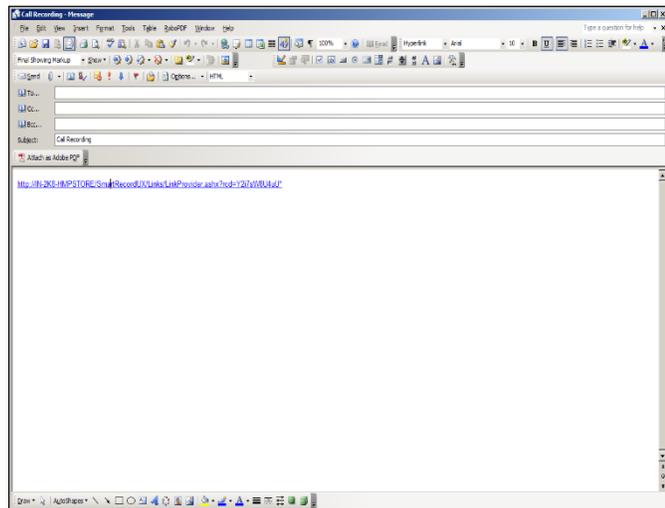
Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirected From	Redirected To	Duration	Recording	Annotate	CRM Deal	Comments	Category	M3I Archive Audio M3ring
402551211	Tue	4/12/2011	3:56:25 PM	402551211	1211 402	402551213	1213 402			00:00:23	🔊	🔍			Uts Callcenter	🗑️
402551213	Tue	4/12/2011	3:56:25 PM	1211	1211 402	402551213	1213 402			00:00:26	🔊	🔍			Uts Callcenter	🗑️
402551211	Tue	4/12/2011	3:58:23 PM	402551211	1211 402	402551123				00:00:35	🔊	🔍			Uts Callcenter	🗑️
402551211	Tue	4/12/2011	2:52:55 PM	402551211	1211 402	402551120				00:00:40	🔊	🔍			Uts Callcenter	🗑️
402551211	Tue	4/12/2011	2:30:02 PM	402551211	1211 402	402551120				00:00:25	🔊	🔍			Uts Callcenter	🗑️
402551211	Tue	4/12/2011	2:44:38 PM	402551211	1211 402	402551120				00:00:48	🔊	🔍			Uts Callcenter	🗑️
402551211	Tue	4/12/2011	1:01:23 PM	402551211	1211 402	402551213				00:00:30	🔊	🔍			Uts Callcenter	🗑️
402551213	Tue	4/12/2011	11:01:59 AM	1211	1211 402	402551213	1213 402			00:00:38	🔊	🔍			Uts Callcenter	🗑️
402551120	Tue	4/12/2011	11:58:58 AM	1207	402 1207	402551120	402 1208			00:00:44	🔊	🔍			Uts Callcenter	🗑️
402551120	Tue	4/12/2011	11:46:42 AM	402551120	402 1208	402551124				00:00:14	🔊	🔍			Uts Callcenter	🗑️
402551120	Tue	4/12/2011	11:40:39 AM	402551120	402 1208	402551124				00:00:39	🔊	🔍			Uts Callcenter	🗑️
402551001	Tue	4/12/2011	10:38:31 AM	1207	1207 402	402551001	555 5001			00:00:24	🔊	🔍			Uts Callcenter	🗑️
402551001	Tue	4/12/2011	10:38:31 AM	1207	1207 402	402551001	555 5001			00:00:31	🔊	🔍			Uts Callcenter	🗑️
402551001	Tue	4/12/2011	10:15:45 AM	1207	1207 402	402551001	555 5001			00:00:26	🔊	🔍			Uts Callcenter	🗑️
402551009	Tue	4/12/2011	10:12:03 AM	1207	1207 402	402551009	555 5009	402551005		00:00:08	🔊	🔍			Uts Callcenter	🗑️
402551213	Mon	4/11/2011	6:28:53 PM	402551213	1213 402	402551213				00:00:30	🔊	🔍			Uts Callcenter	🗑️
402551213	Mon	4/11/2011	6:28:53 PM	1211	1211 402	402551213	1213 402			00:00:30	🔊	🔍			Uts Callcenter	🗑️
402551211	Mon	4/11/2011	6:28:25 PM	402551211	1211 402	402551213				00:00:16	🔊	🔍			Uts Callcenter	🗑️
402551213	Mon	4/11/2011	6:28:25 PM	1211	1211 402	402551213	1213 402			00:00:36	🔊	🔍			Uts Callcenter	🗑️
402551211	Mon	4/11/2011	6:28:12 PM	402551211	1211 402	402551213				00:00:22	🔊	🔍			Uts Callcenter	🗑️

Example: Emailing a recorded call

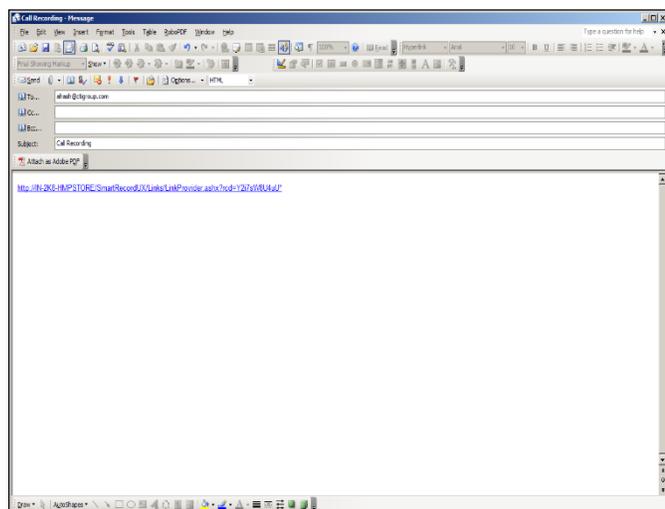
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.

Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirection From	Redirection To	Duration	Recording	Announce	CRM Email	Comments	Category	HD Archive	Audio Streaming
402551211	Tue	4/12/2011	3:36:23 PM	402551211	1211 402	402551213				00:00:23					Uts Callcenter	ah	
402551213	Tue	4/12/2011	3:36:25 PM	1211	1211 402	402551213	1213 402			00:00:26					Uts Callcenter	ah	
402551211	Tue	4/12/2011	3:00:23 PM	402551211	1211 402	402551123				00:00:26					Uts Callcenter	ah	
402551211	Tue	4/12/2011	2:52:59 PM	402551211	1211 402	402551120				00:00:40					Uts Callcenter	ah	
402551211	Tue	4/12/2011	2:30:51 PM	402551211	1211 402	402551120				00:00:25					Uts Callcenter	ah	
402551211	Tue	4/12/2011	2:44:58 PM	402551211	1211 402	402551120				00:00:48					Uts Callcenter	ah	
402551211	Tue	4/12/2011	1:01:23 PM	402551211	1211 402	402551213				00:00:30					Uts Callcenter	ah	
402551213	Tue	4/12/2011	1:01:23 PM	1211	1211 402	402551213	1213 402			00:00:30					Uts Callcenter	ah	
402551130	Tue	4/12/2011	11:58:08 AM	1127	402 1127	402551130	402 1130			00:00:44					Uts Callcenter	ah	
402551130	Tue	4/12/2011	11:46:39 AM	402551130	402 1130	402551124				00:00:14					Uts Callcenter	ah	
402551130	Tue	4/12/2011	11:46:39 AM	402551130	402 1130	402551124				00:00:39					Uts Callcenter	ah	
402551001	Tue	4/12/2011	10:38:31 AM	1207	1207 402	402551001	555 2001			00:00:24					Uts Callcenter	ah	
402551001	Tue	4/12/2011	10:38:31 AM	1207	1207 402	402551001	555 2001			00:00:31					Uts Callcenter	ah	
402551001	Tue	4/12/2011	10:15:45 AM	1207	1207 402	402551001	555 2001			00:00:26					Uts Callcenter	ah	
402551009	Tue	4/12/2011	10:12:02 AM	1207	402 1207	402551009	555 2009	402551009	402551009	00:00:38					Uts Callcenter	ah	
402551213	Mon	4/11/2011	6:28:53 PM	402551211	1211 402	402551213				00:00:30					Uts Callcenter	ah	
402551213	Mon	4/11/2011	6:28:53 PM	1211	1211 402	402551213	1213 402			00:00:30					Uts Callcenter	ah	
402551213	Mon	4/11/2011	6:28:53 PM	402551211	1211 402	402551213				00:00:16					Uts Callcenter	ah	
402551213	Mon	4/11/2011	6:28:53 PM	1211	1211 402	402551213	1213 402			00:00:16					Uts Callcenter	ah	
402551211	Mon	4/11/2011	6:26:32 PM	402551211	1211 402	402551213				00:00:22					Uts Callcenter	ah	

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



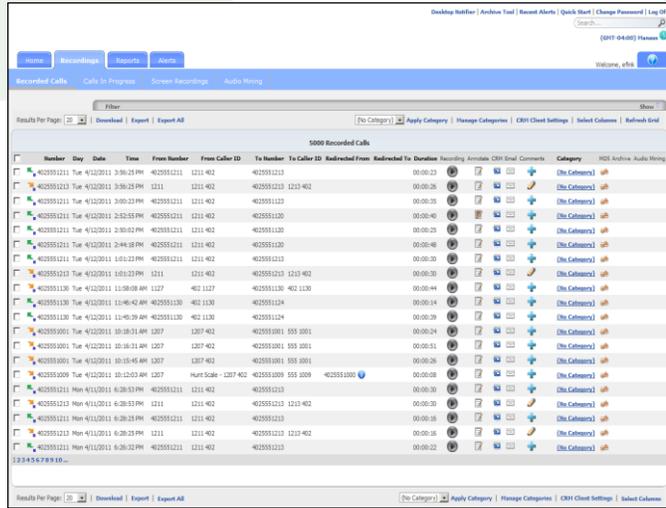
3. Enter the email address(es) of the person(s) to which you wish to send the recorded call



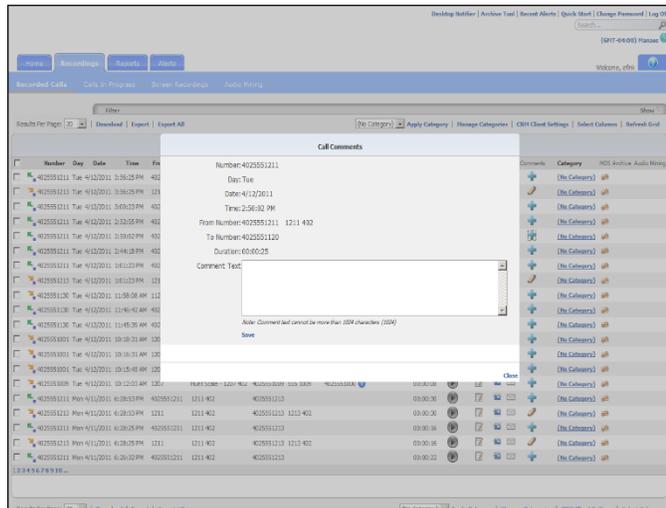
4. Click **Send**.

Example: Adding comments to a recorded call

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

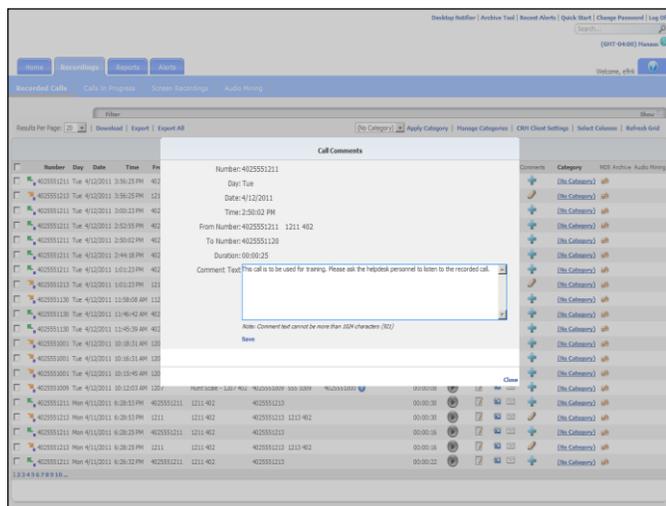


2. Select a call and click on the **+** (Add Comment) button that corresponds to that call.

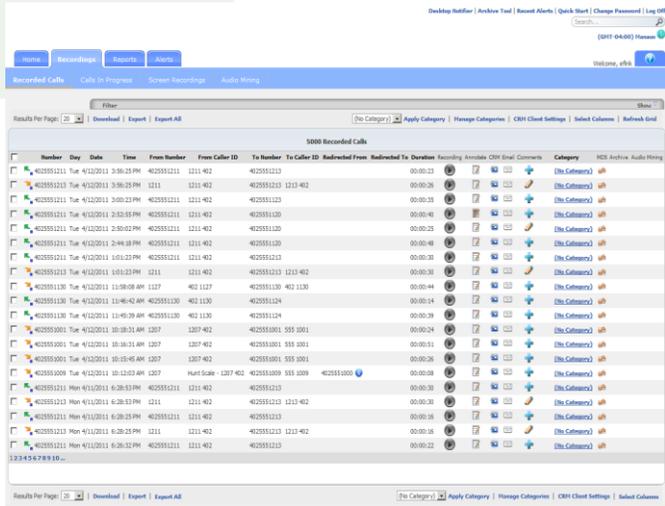


3. Enter the following information:
 - **Comment – This call is to be used for training. Please ask the helpdesk personnel to listen to the recorded call.**

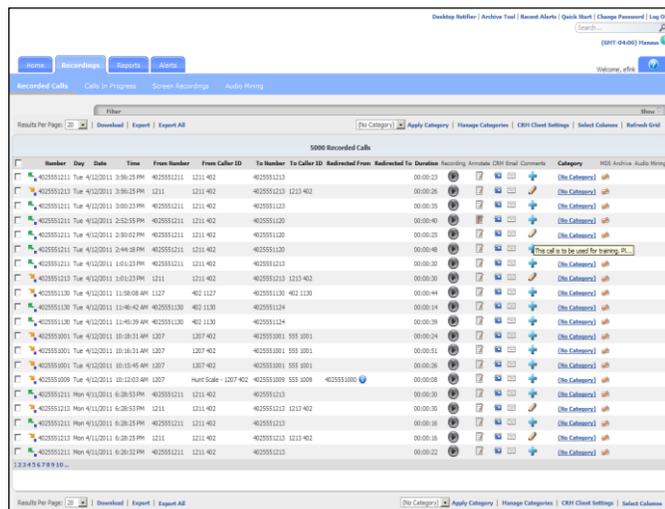
Note: Comment text cannot be greater than 1024 characters.



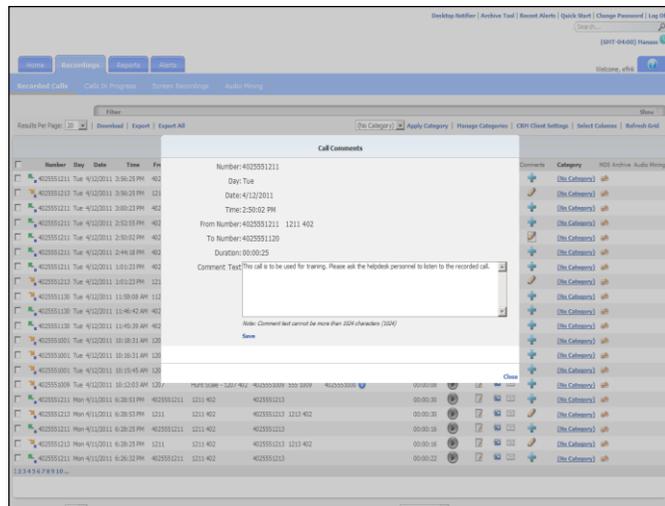
- Click **Save**. Notice that the Add Comment button has changed to a button indicating that there is a comment associated with this call.



- Position your mouse pointer over the button. Notice that part of the comment is displayed as a tooltip.

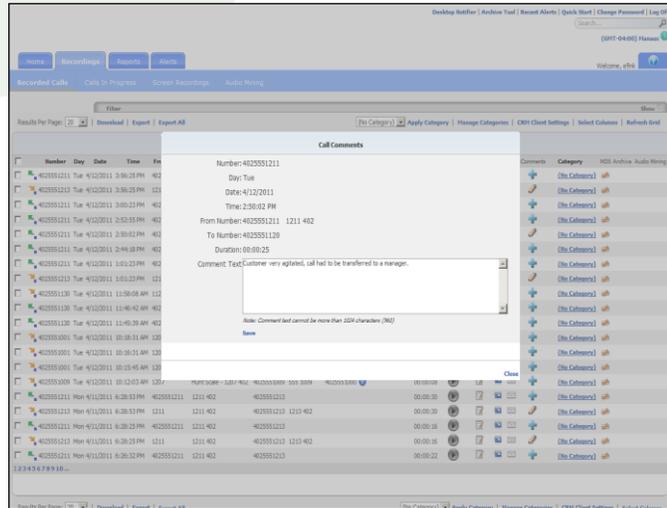


- Click on the button.

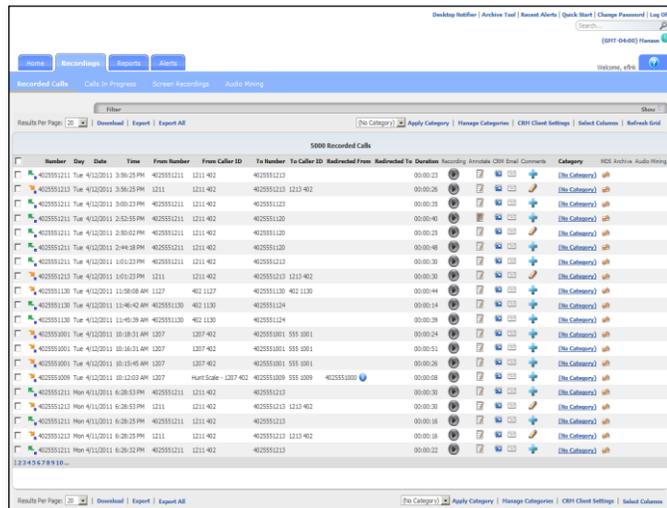


7. Review the comment, select it, and enter the following:

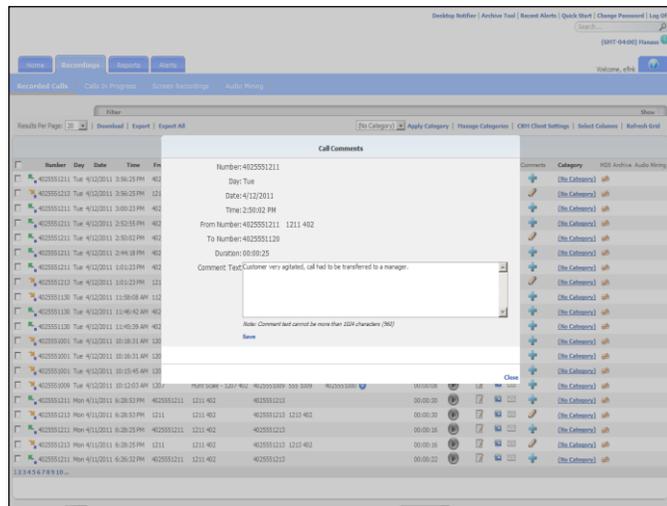
- Comment – **Customer very agitated, call had to be transferred to a manager.**



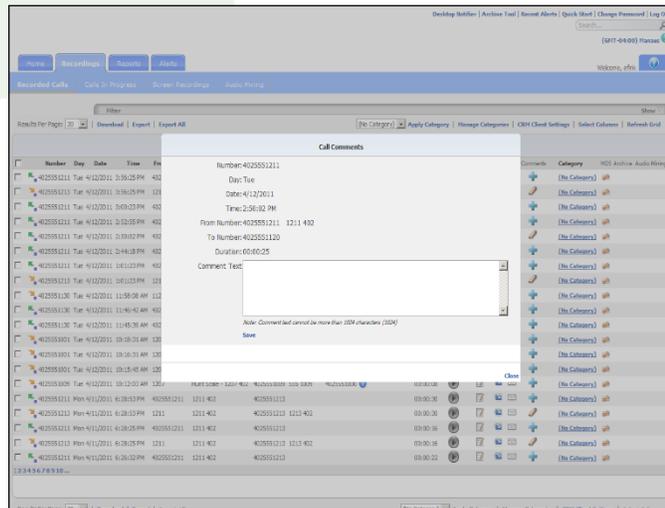
8. Click **Save** to save your changes.



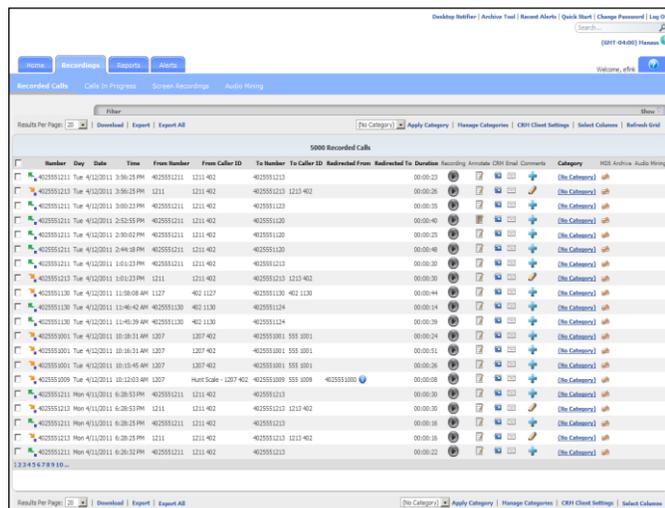
9. Click on the  button.



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

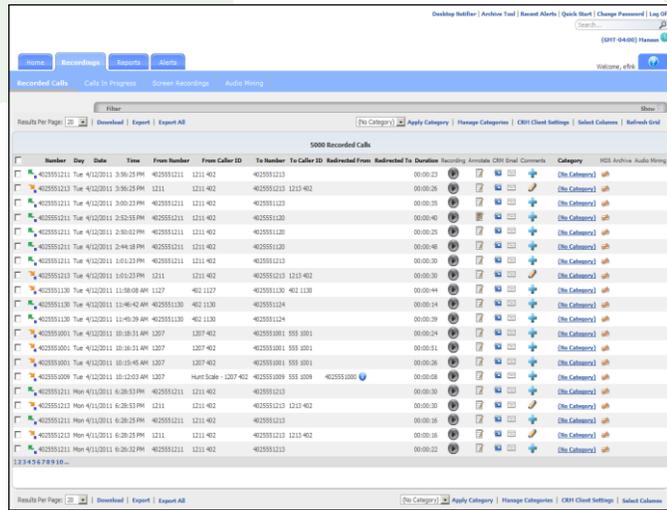


- Click **Save** to save your changes. Notice that the  button has changed back to the Add Comment button.

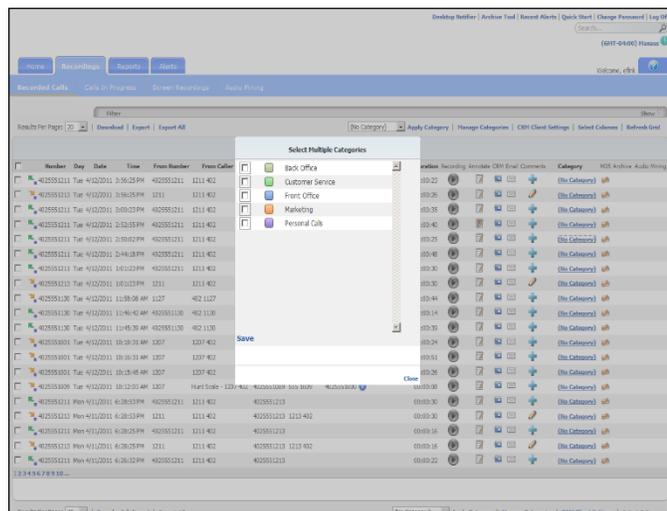


Example: Categorizing a recorded call

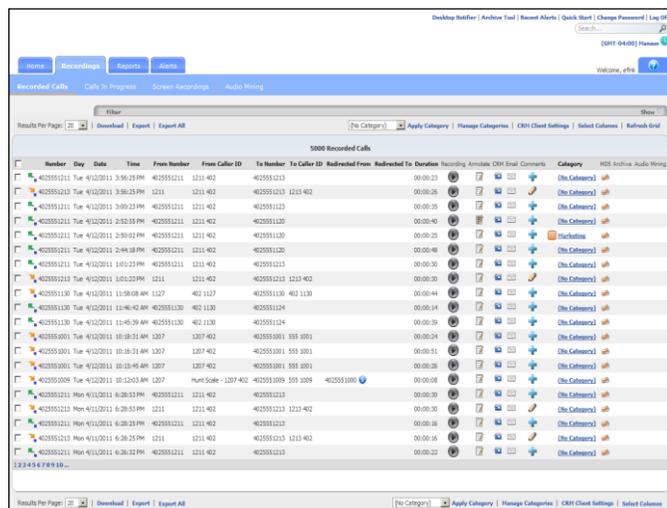
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



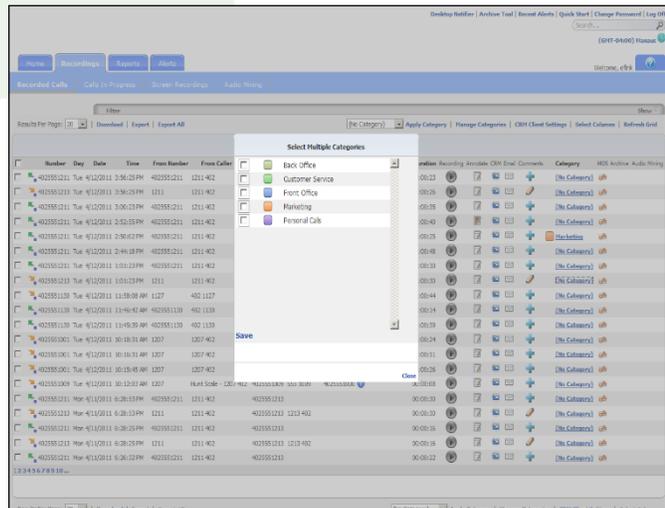
2. Select the **Category** link that corresponds to the call that you wish to categorize.



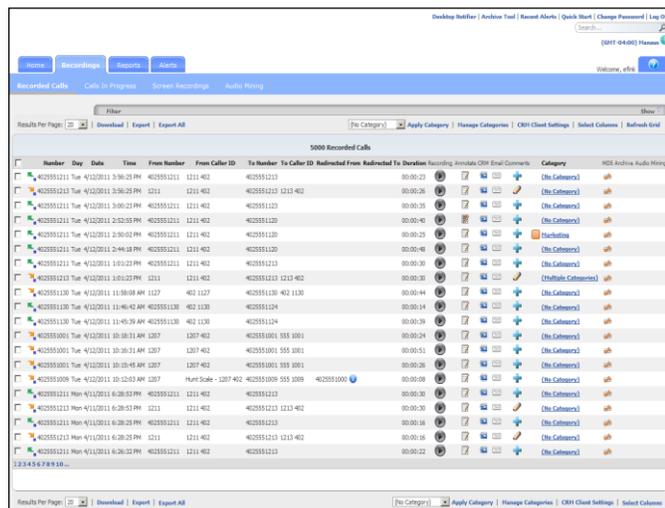
3. Select one category to apply to the call by clicking in the corresponding option box and click **Save**.



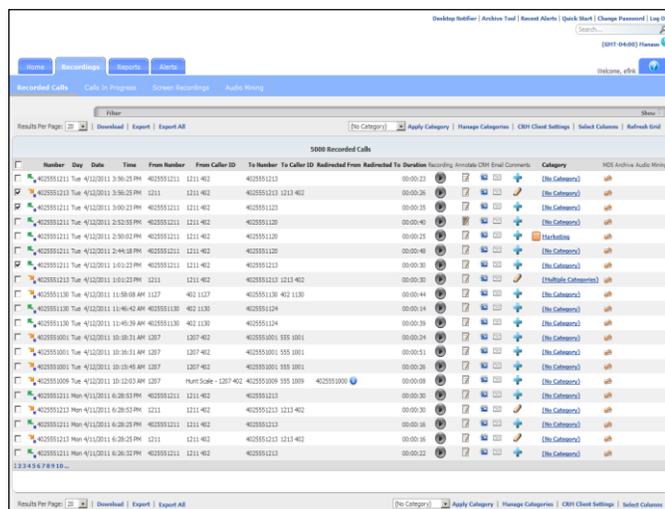
- Select the **Category** link that corresponds to another call that you wish to categorize.



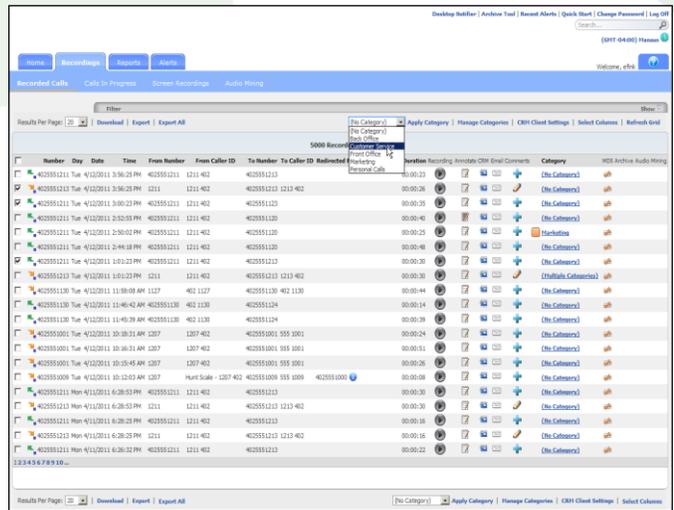
- Select several categories to apply to the call by clicking in the corresponding option boxes and click **Save**.



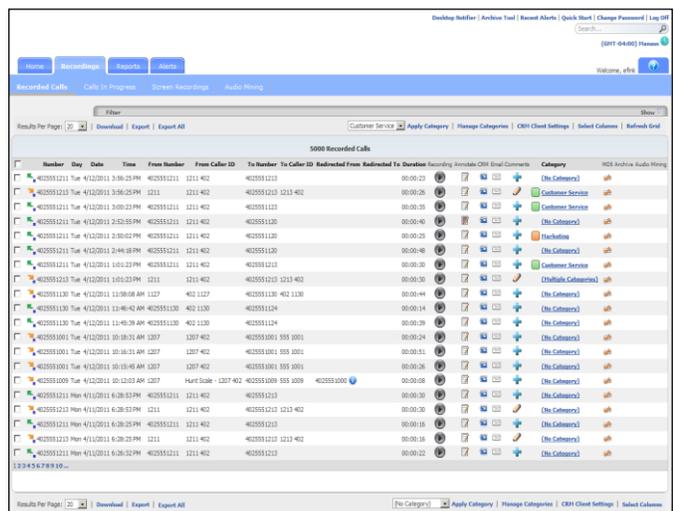
- Select two or three recorded call option boxes (located to the left of the recorded calls).



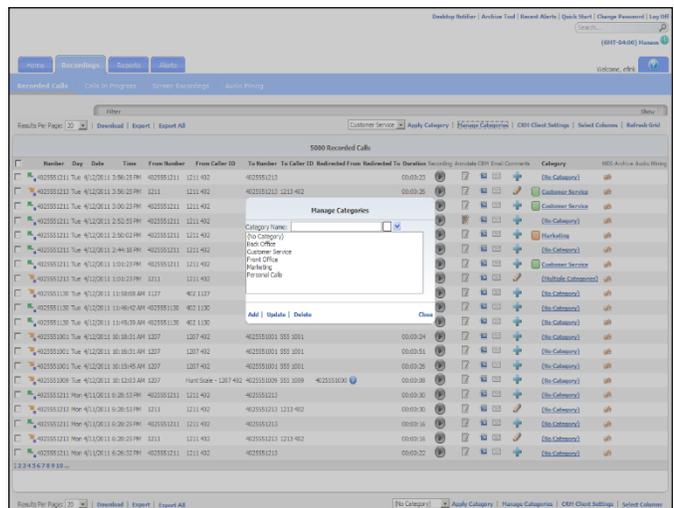
- Select the category you wish to apply from the drop down list found at the top or bottom of the Recorded Calls page.



- Select the **Apply Category** link.

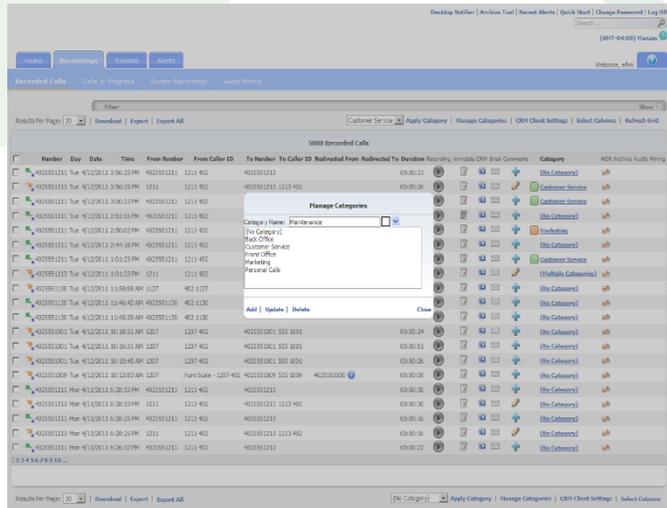


- Select the **Manage Categories** link.

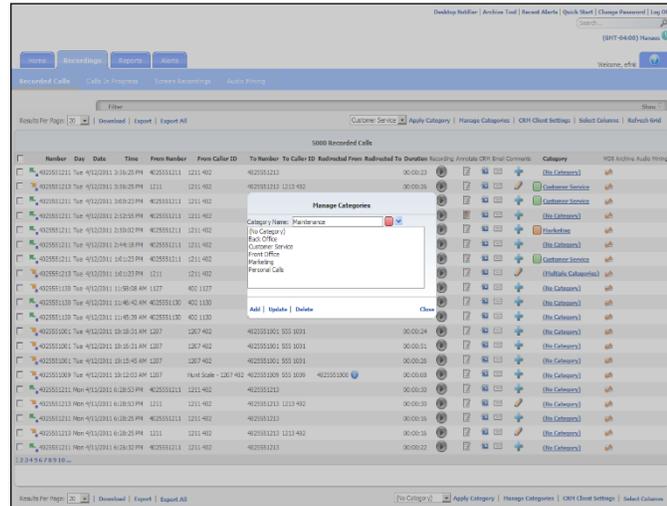


10. Enter the following:

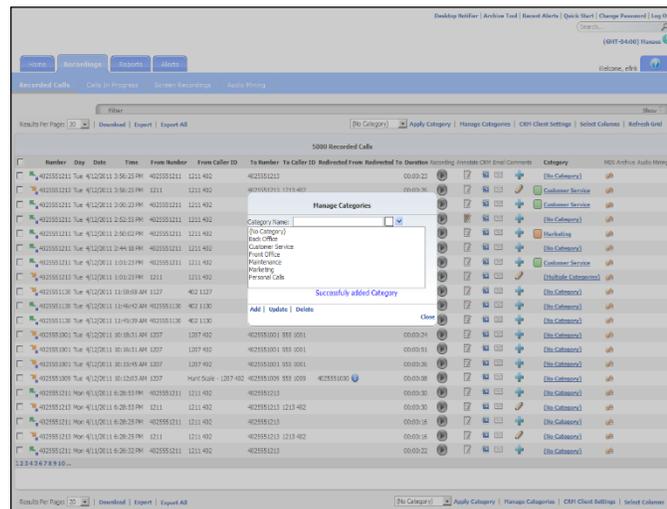
- Category Name – **Maintenance**



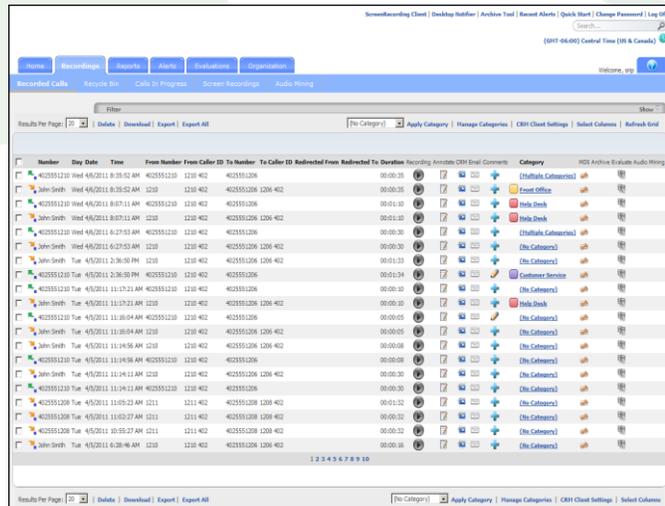
11. Select the drop down arrow to the right of the Category Name field and select the color red.



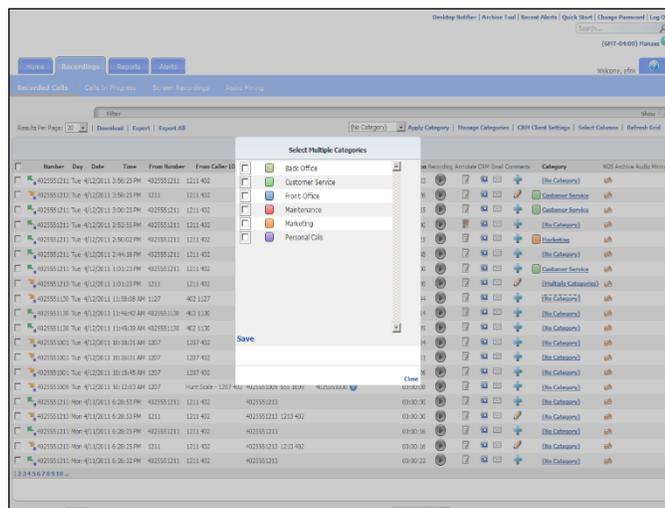
12. Select the **Add** link.



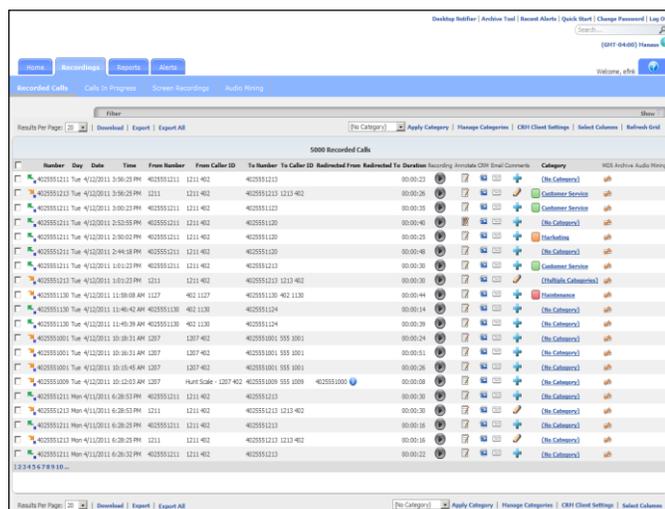
- Select the **Close** link to close the Manage Categories dialog box.



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



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



Example: Classifying a recorded call

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

The screenshot shows the 'Call Classification' dialog box in the SmartRecord interface. The dialog contains the following information:

- Number: 2029
- Day: Fri
- Date: 7/18/2014
- Time: 2:34:48 PM
- From Number: 2094618444 FW Gazette
- To Number: 2029 CTI Group - 2029
- Duration: 00:01:08
- Classification: Not Classified

The dialog has a 'Save' button at the bottom. In the background, a table of recorded calls is visible, with the 'Classification' column showing 'Not Classified' for the selected call.

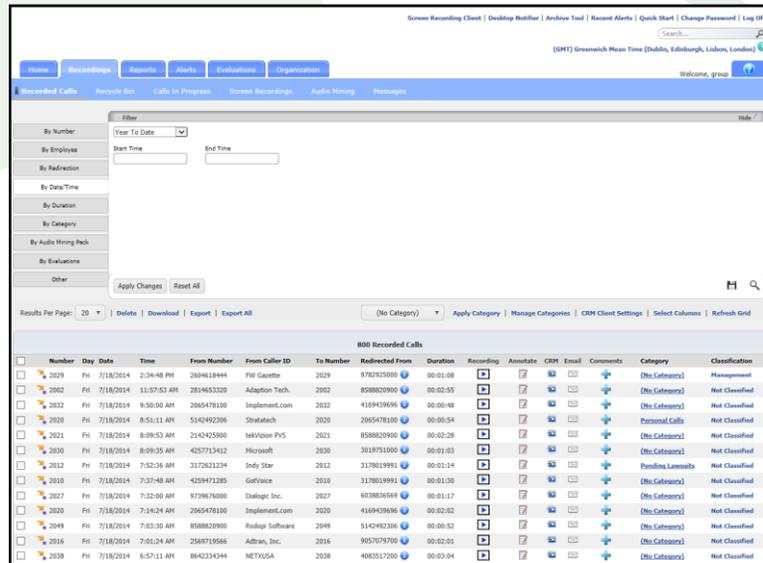
3. Select a classification from the **Classification** drop down.

The screenshot shows the 'Call Classification' dialog box in the SmartRecord interface. The 'Classification' dropdown is now set to 'Management'. The dialog contains the following information:

- Number: 2029
- Day: Fri
- Date: 7/18/2014
- Time: 2:34:48 PM
- From Number: 2094618444 FW Gazette
- To Number: 2029 CTI Group - 2029
- Duration: 00:01:08
- Classification: Management

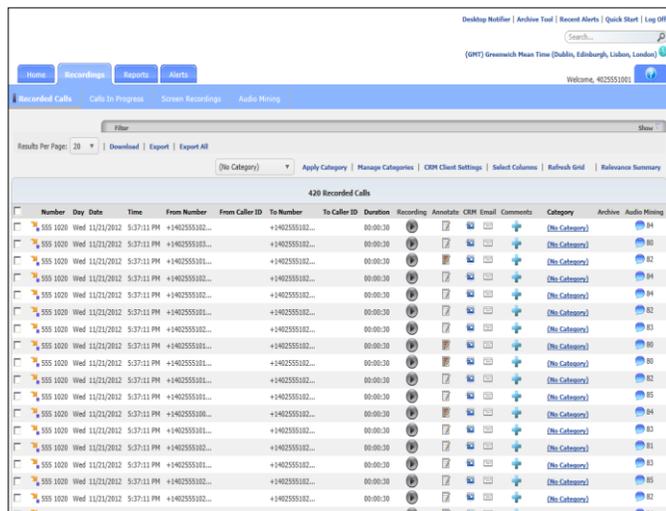
The dialog has a 'Save' button at the bottom. In the background, a table of recorded calls is visible, with the 'Classification' column showing 'Management' for the selected call.

- Click **Save**.
The **Edit Classification** window closes.
The recorded call is now classified.

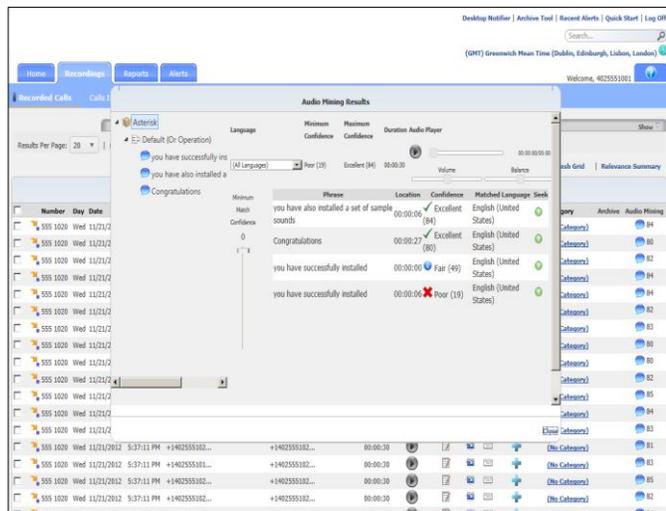


Example: Viewing audio mining results

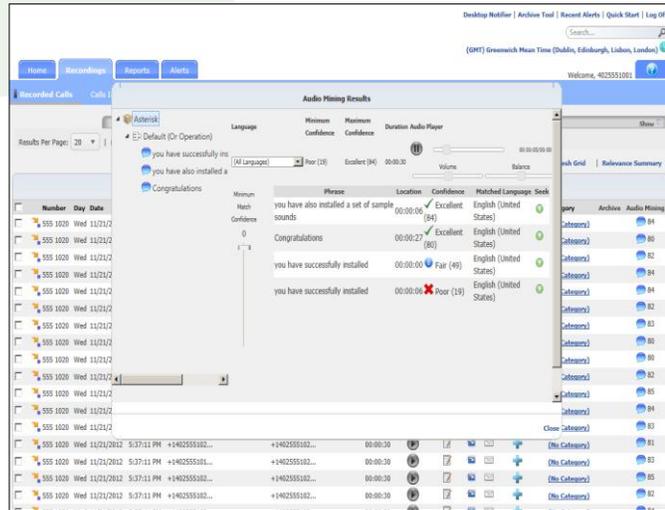
- Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



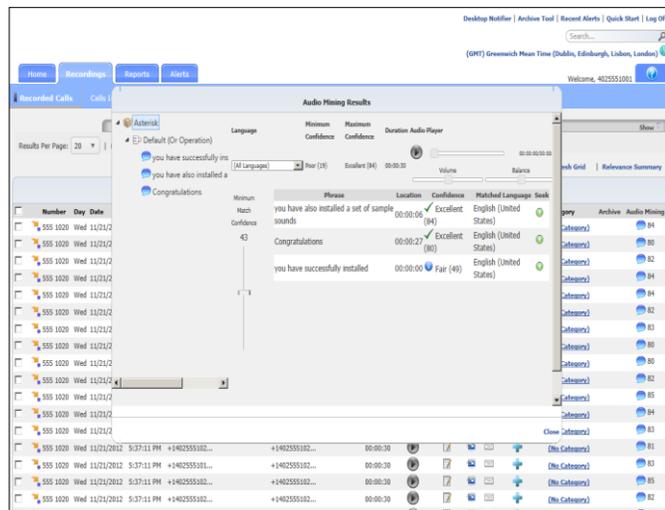
- Select the **Audio Mining** button that corresponds to the call for which you wish to view results.



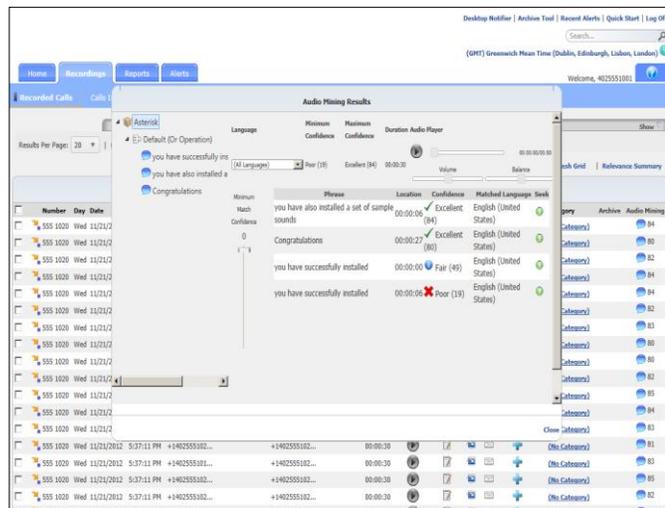
- Click the **Seek** button that corresponds to a specific audio mining pack to jump to the point where the audio mining pack is mentioned in the recorded call.



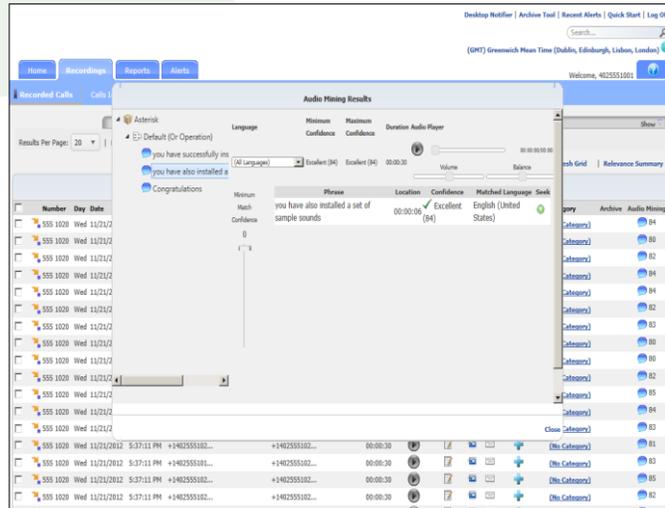
- Filter the results by Confidence Level by clicking on the **Minimum Match Confidence** control and sliding it down.



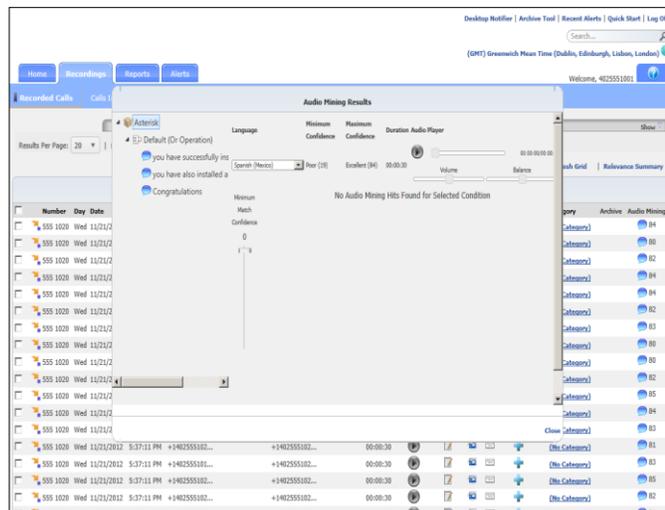
- Return the **Minimum Match Confidence** control back to its original level by sliding it up until it reaches 0.



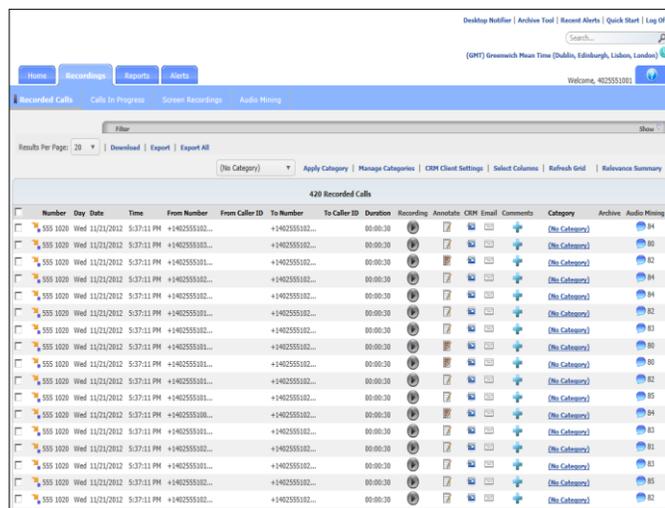
- If there are multiple audio mining pack operations, select one by clicking on it.



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

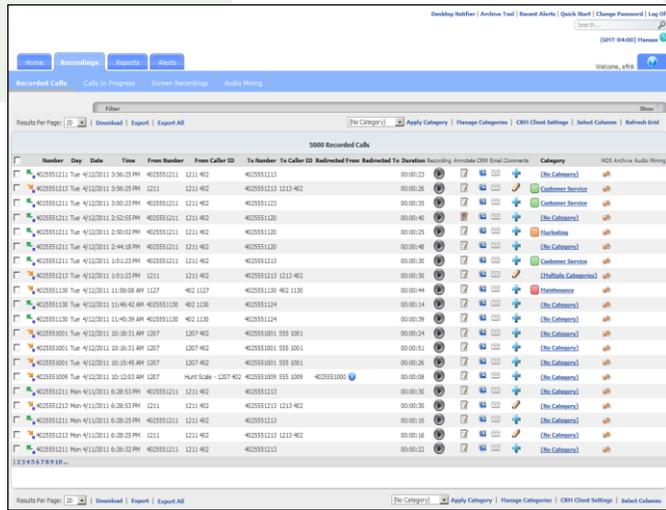


- Click **Close**.

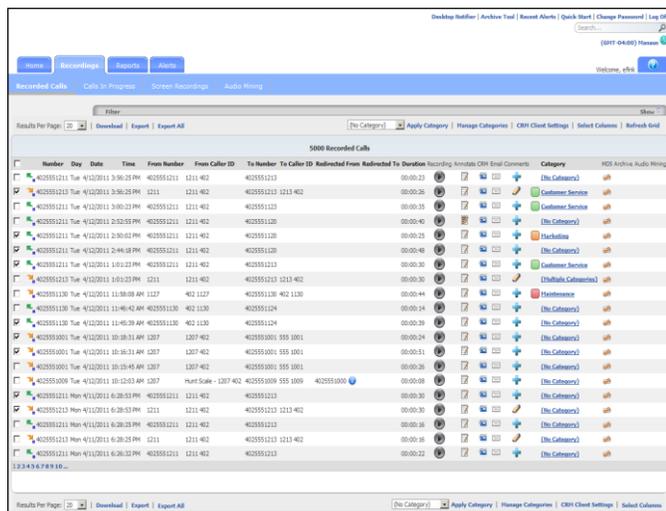


Example: Downloading a recorded call

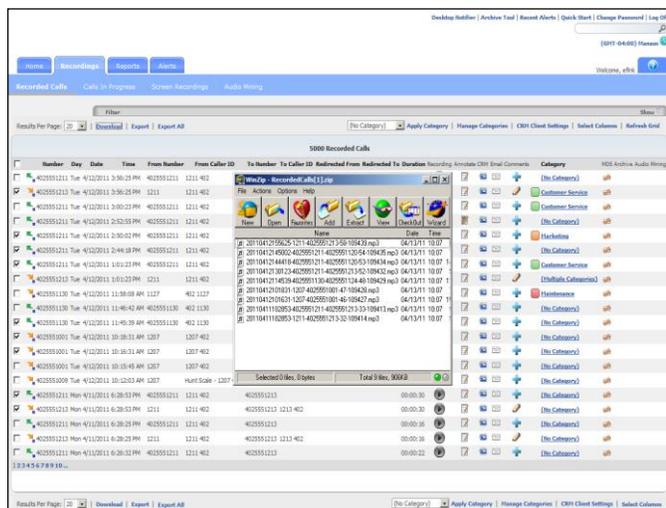
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



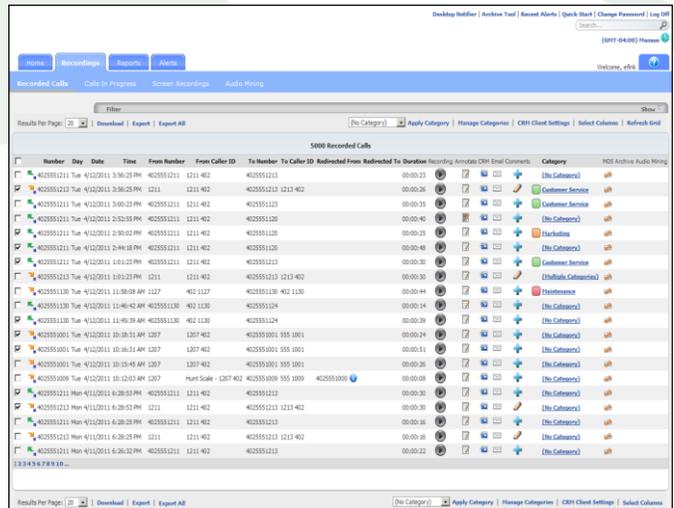
2. Select the recorded calls you wish to download by clicking in the corresponding option box to the left of the Number column.



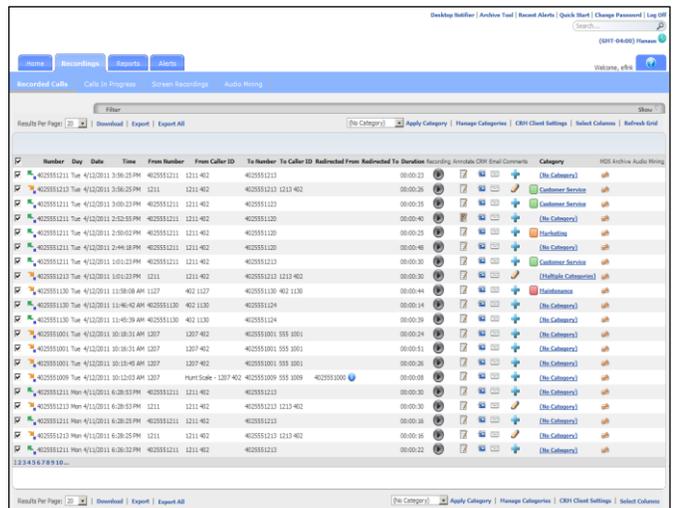
3. Select the **Download** link at the top or bottom of the Recorded Calls page.



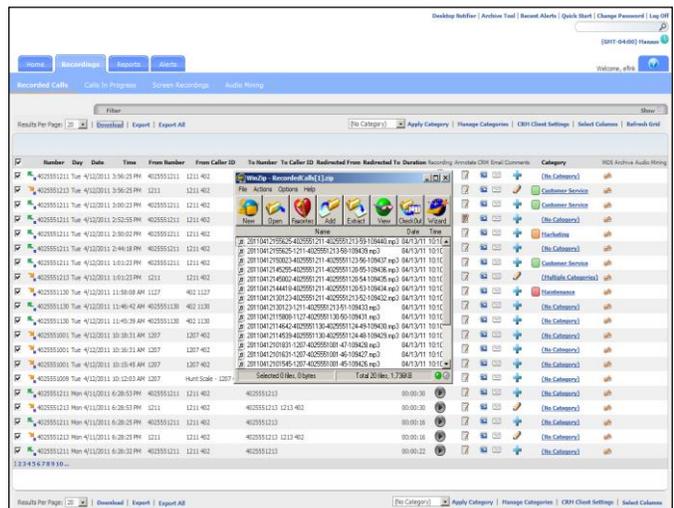
- Normally you would choose to extract the files and save them to the location of your choice. For the purposes of this example, click the  in the right corner of the RecordedCalls.zip dialog box.



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



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



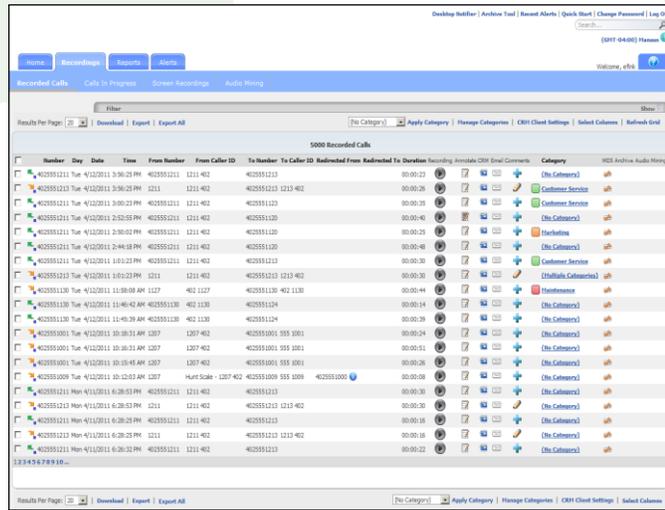
- Normally you would choose to extract the files and save them to the location of your choice. For the purposes of this example, click the in the right corner of the RecordedCalls.zip dialog box.

The screenshot displays the 'Recorded Calls' section of the SmartRecord v4 SP7 interface. The interface includes a navigation bar with 'Home', 'Recordings', 'Exports', and 'Alerts'. Below the navigation bar, there are tabs for 'Recorded Calls', 'Calls In Progress', 'Screen Recordings', and 'Audio Mining'. A search bar and user information are visible in the top right corner. The main area contains a table of recorded calls with columns for 'Number', 'Day', 'Date', 'Time', 'From Number', 'From Caller ID', 'To Number', 'To Caller ID', 'Redacted From', 'Redacted To', 'Duration', 'Recording', 'Analytics', 'CRM', 'Email', 'Comments', 'Category', 'MOS', 'Archive', and 'Audio Mining'. The table lists various call records with their respective details and icons for actions like play, delete, and download.

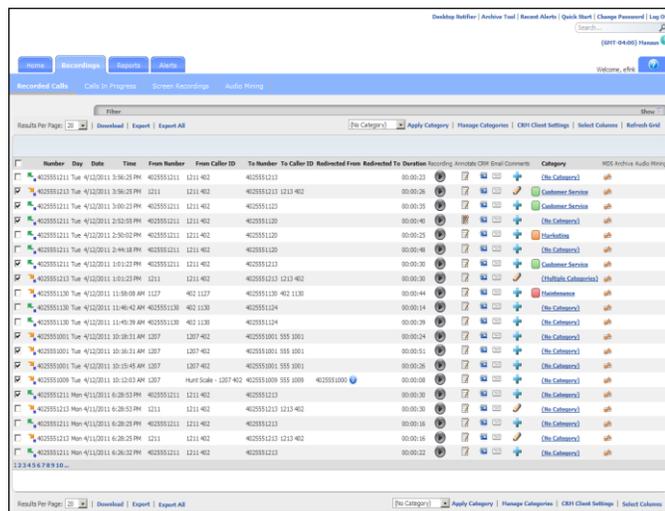
Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redacted From	Redacted To	Duration	Recording	Analytics	CRM	Email	Comments	Category	MOS	Archive	Audio Mining
402551211	Tue	4/12/2011	3:56:23 PM	402551211	1211 402	402551213	1211 402			00:00:23						(No Category)			
402551212	Tue	4/12/2011	3:56:23 PM	1211	1211 402	402551213	1212 402			00:00:26						Customer Service			
402551211	Tue	4/12/2011	3:00:23 PM	402551211	1211 402	402551213	1211 402			00:00:35						Customer Service			
402551211	Tue	4/12/2011	2:52:55 PM	402551211	1211 402	402551120				00:00:40						(No Category)			
402551211	Tue	4/12/2011	2:50:42 PM	402551211	1211 402	402551120				00:00:25						Marketing			
402551211	Tue	4/12/2011	2:49:38 PM	402551211	1211 402	402551120				00:00:48						(No Category)			
402551211	Tue	4/12/2011	1:03:23 PM	402551211	1211 402	402551213				00:00:30						Customer Service			
402551212	Tue	4/12/2011	1:03:23 PM	1211	1211 402	402551213	1212 402			00:00:30						Customer Service			
402551120	Tue	4/12/2011	11:08:48 AM	1237	402 1120	402551120	402 1120			00:00:44						Business			
402551120	Tue	4/12/2011	11:06:42 AM	402551120	402 1120	402551124				00:00:14						(No Category)			
402551120	Tue	4/12/2011	11:05:39 AM	402551120	402 1120	402551124				00:00:39						(No Category)			
402551001	Tue	4/12/2011	10:58:21 AM	1207	1207 402	402551001	555 3001			00:00:24						(No Category)			
402551001	Tue	4/12/2011	10:58:21 AM	1207	1207 402	402551001	555 3001			00:00:51						(No Category)			
402551001	Tue	4/12/2011	10:58:45 AM	1207	1207 402	402551001	555 3001			00:00:26						(No Category)			
402551009	Tue	4/12/2011	10:12:03 AM	1207	PH41 5048 - 1207 402	402551009	555 3009	402551000		00:00:08						(No Category)			
402551211	Mon	4/11/2011	6:28:53 PM	402551211	1211 402	402551213				00:00:30						(No Category)			
402551212	Mon	4/11/2011	6:28:53 PM	1211	1211 402	402551213	1212 402			00:00:30						(No Category)			
402551211	Mon	4/11/2011	6:28:23 PM	402551211	1211 402	402551213				00:00:16						(No Category)			
402551212	Mon	4/11/2011	6:28:23 PM	1211	1211 402	402551213	1212 402			00:00:16						(No Category)			
402551211	Mon	4/11/2011	6:28:23 PM	402551211	1211 402	402551213				00:00:22						(No Category)			

Example: Exporting a recorded call

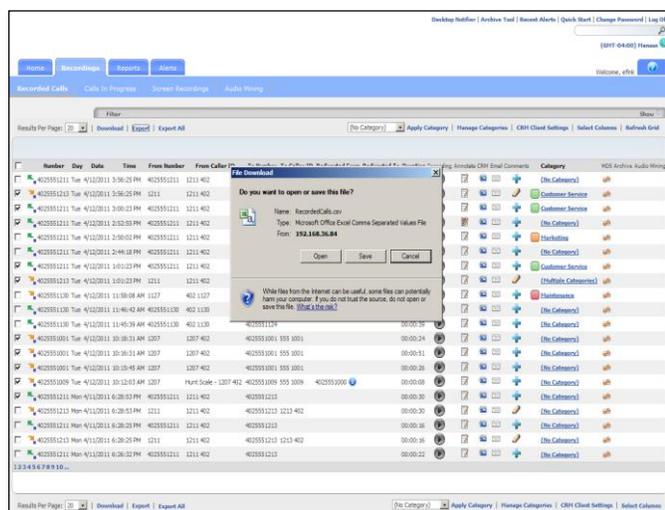
- Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



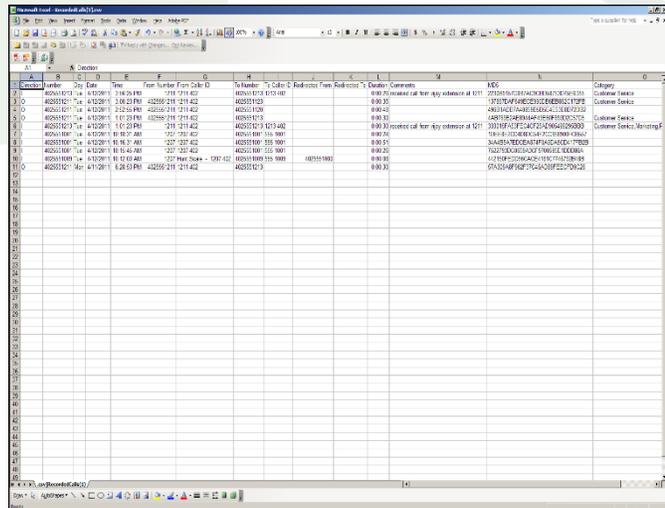
- Select the recorded calls you wish to export by clicking in the corresponding option box to the left of the Number column.



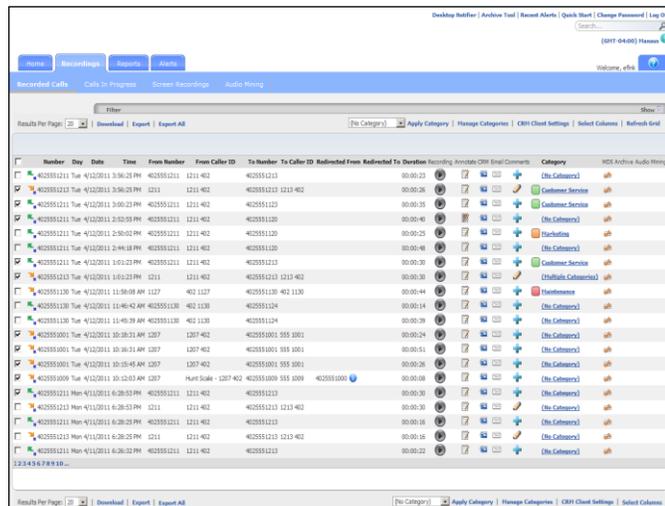
- Select the **Export** link at the top or bottom of the Recorded Calls page.



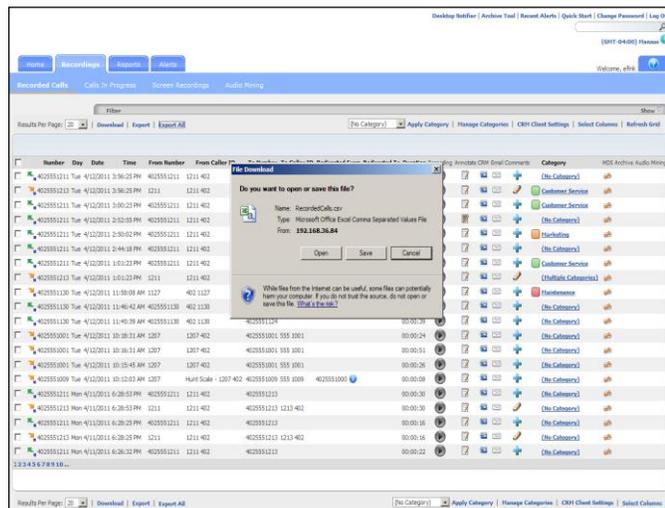
11. Select **Open**.



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



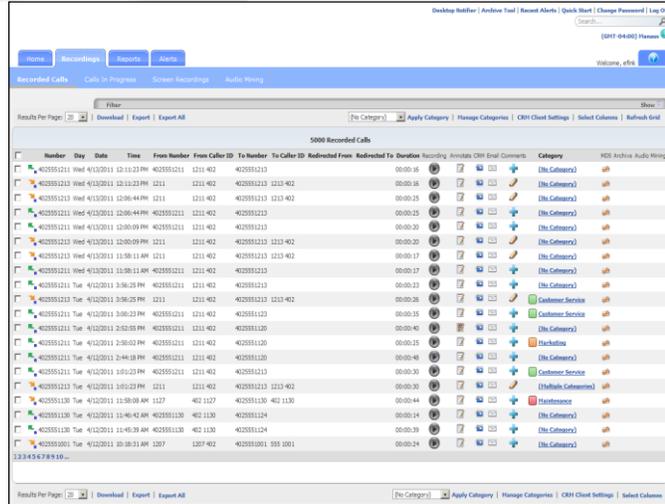
13. Select the **Export All** link at the top or bottom of the Recorded Calls page.



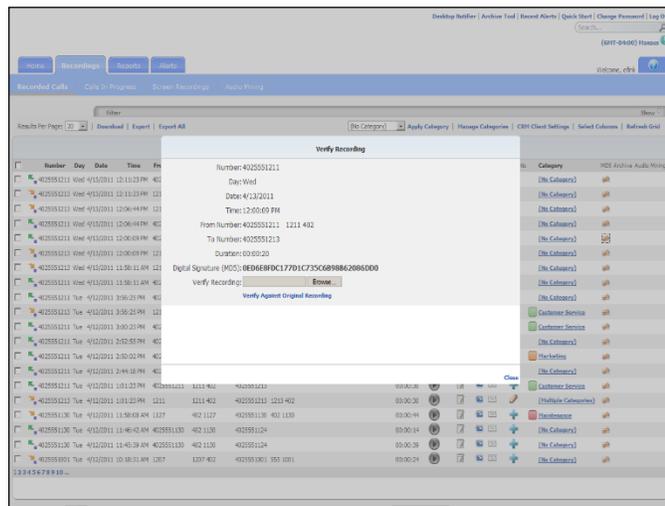
Example: Verifying a recording

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

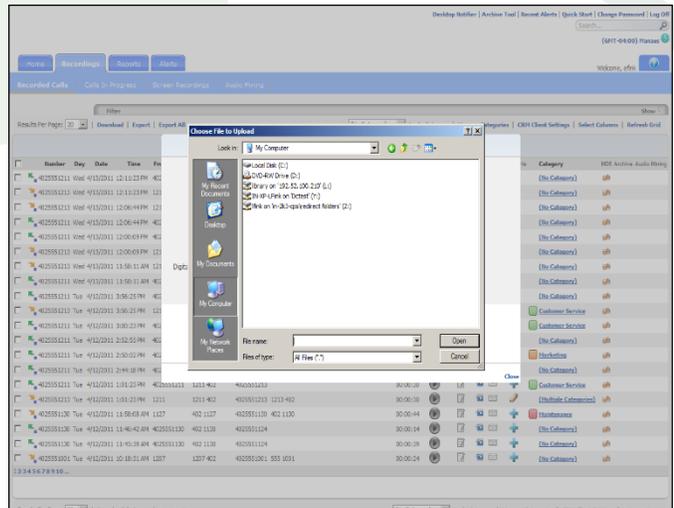
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



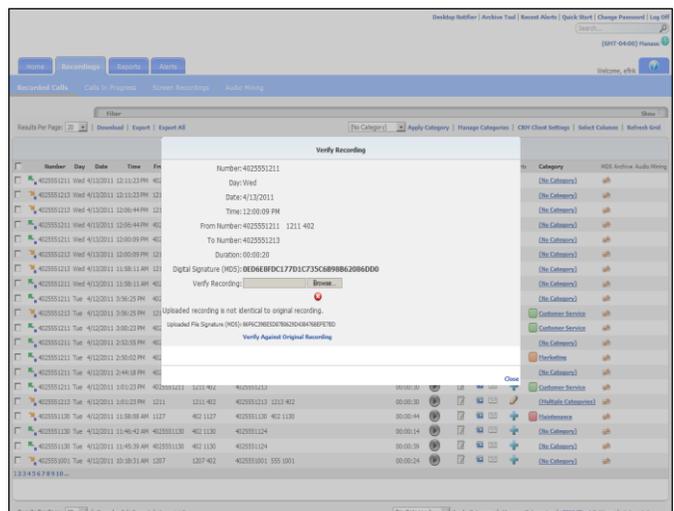
2. Select the recorded call you wish to verify a recording for and click on the corresponding button.



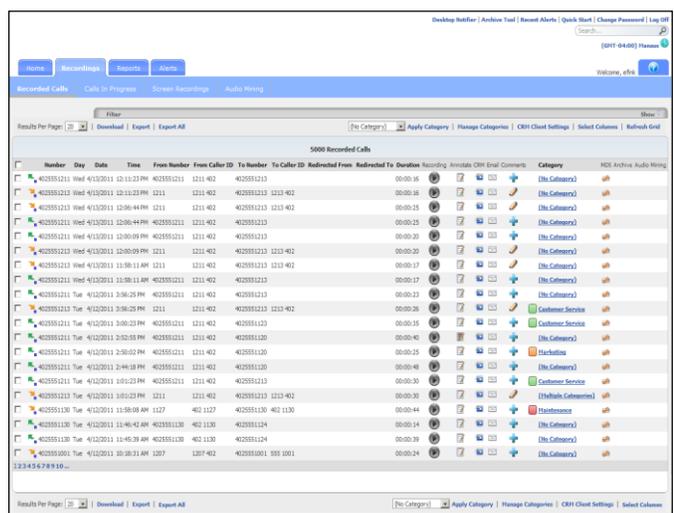
- Click **Browse** to locate the recorded call file.



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



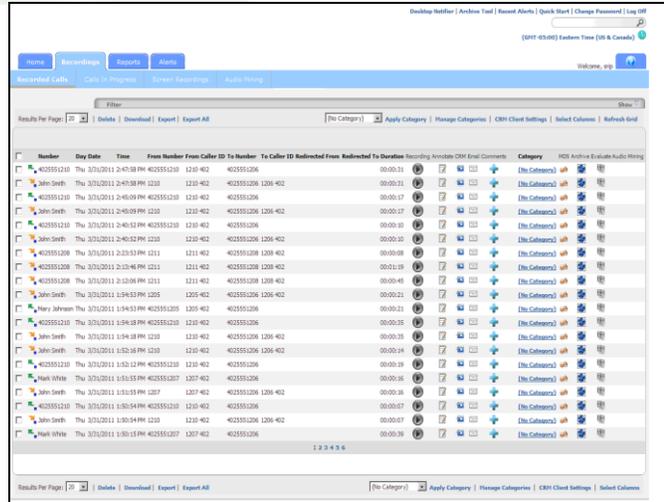
- Click **Close**.



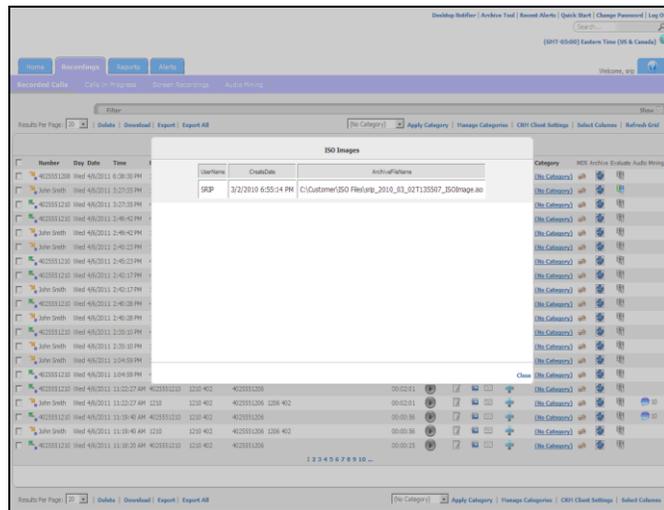
Example: Viewing an archived recorded call

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.

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



2. 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.



3. Select the **Close** link.

The screenshot displays the SmartRecord v4 SP7 interface. At the top, there are navigation tabs for Home, Recordings, Alerts, and a user profile for 'Welcome, wj'. Below the tabs, there are filters and options for 'Results For Page', 'Delete', 'Download', 'Export', and 'Export All'. The main area contains a table of call records with the following columns: Number, Day Date, Time, From Number, From Caller ID, To Number, To Caller ID, Redirected From, Redirected To, Duration, Recording, Annotate, CRM Email, Comments, Category, MDS, Archive, Evaluate, and Audio Hring. The table lists several records, including those from John Smith and Mark White, with various call details and action links.

Number	Day Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirected From	Redirected To	Duration	Recording	Annotate	CRM Email	Comments	Category	MDS	Archive	Evaluate	Audio Hring
402555210	Thu 3/7/2011	2:47:58 PM	402555210	1202 402	402555206				00:00:21	7	7	7		(No Category)				
John Smith	Thu 3/7/2011	2:47:58 PM	1202	1202 402	402555206	1206 402			00:00:51	7	7	7		(No Category)				
402555210	Thu 3/7/2011	2:48:09 PM	402555210	1202 402	402555206				00:00:51	7	7	7		(No Category)				
John Smith	Thu 3/7/2011	2:48:09 PM	1202	1202 402	402555206	1206 402			00:00:51	7	7	7		(No Category)				
402555210	Thu 3/7/2011	2:48:52 PM	402555210	1202 402	402555206				00:00:45	7	7	7		(No Category)				
John Smith	Thu 3/7/2011	2:48:52 PM	1202	1202 402	402555206	1206 402			00:00:45	7	7	7		(No Category)				
402555208	Thu 3/7/2011	2:53:53 PM	1211	1211 402	402555208	1208 402			00:00:08	7	7	7		(No Category)				
402555208	Thu 3/7/2011	2:53:46 PM	1211	1211 402	402555208	1208 402			00:01:05	7	7	7		(No Category)				
402555208	Thu 3/7/2011	2:53:06 PM	1211	1211 402	402555208	1208 402			00:00:45	7	7	7		(No Category)				
John Smith	Thu 3/7/2011	1:54:53 PM	1205	1205 402	402555206	1206 402			00:00:21	7	7	7		(No Category)				
Mary Johnson	Thu 3/7/2011	1:54:53 PM	402555205	1205 402	402555206				00:00:21	7	7	7		(No Category)				
402555210	Thu 3/7/2011	1:54:48 PM	402555210	1202 402	402555206				00:00:25	7	7	7		(No Category)				
John Smith	Thu 3/7/2011	1:54:48 PM	1202	1202 402	402555206	1206 402			00:00:15	7	7	7		(No Category)				
John Smith	Thu 3/7/2011	1:52:16 PM	1202	1202 402	402555206	1206 402			00:00:14	7	7	7		(No Category)				
402555210	Thu 3/7/2011	1:52:12 PM	402555210	1202 402	402555206				00:00:10	7	7	7		(No Category)				
Mark White	Thu 3/7/2011	1:51:55 PM	402555207	1207 402	402555206				00:00:16	7	7	7		(No Category)				
John Smith	Thu 3/7/2011	1:51:55 PM	1207	1207 402	402555206	1206 402			00:00:16	7	7	7		(No Category)				
402555210	Thu 3/7/2011	1:50:54 PM	402555210	1202 402	402555206				00:00:07	7	7	7		(No Category)				
John Smith	Thu 3/7/2011	1:50:54 PM	1202	1202 402	402555206	1206 402			00:00:07	7	7	7		(No Category)				
Mark White	Thu 3/7/2011	1:50:15 PM	402555207	1207 402	402555206				00:00:30	7	7	7		(No Category)				

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.

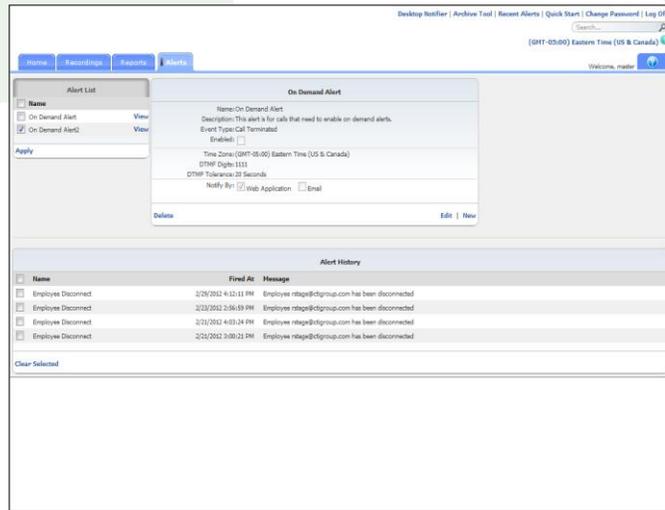
Note: The From Caller ID, To Caller ID, From Number, To Number, and Location fields must be at least 3 characters long.

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.

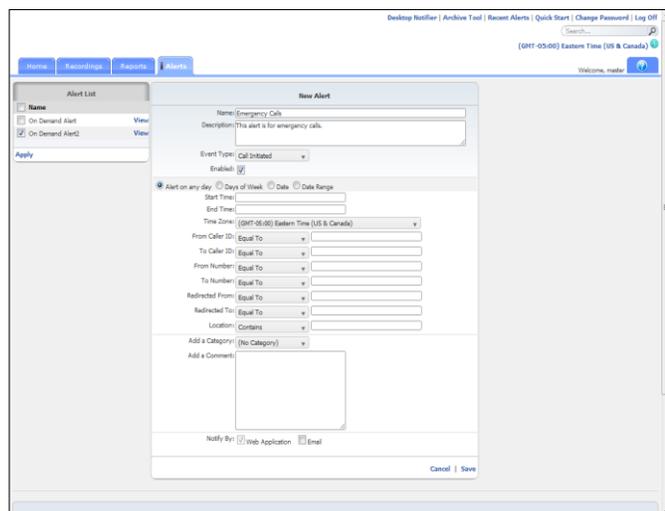
Example: Creating an alert

1. Click the **Alerts** tab.



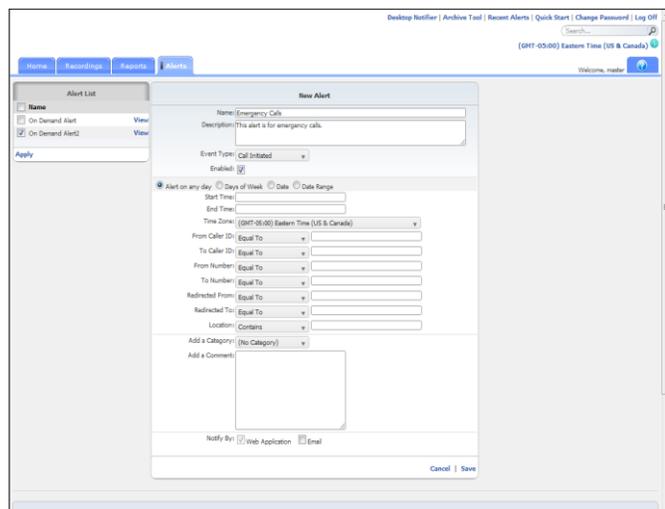
2. If applicable, click **New**. Enter the following information:

- Name – **Emergency Calls**
- Description – **This alert is for emergency calls.**



3. Select the following:

- Event Type - **Call Initiated**



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

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

- 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**

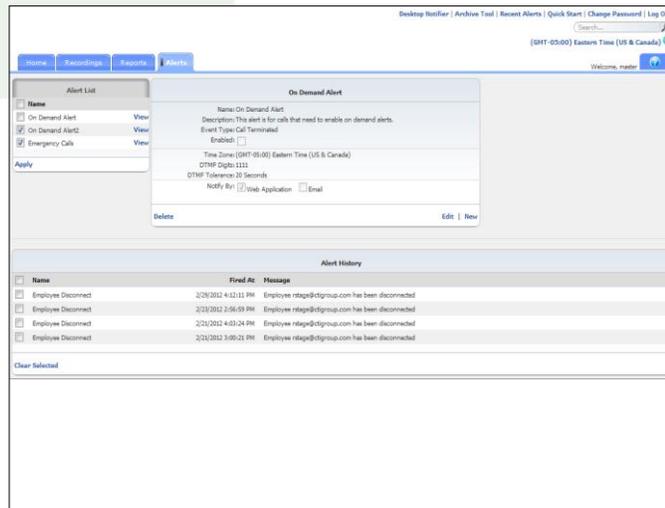
- Select a category from the **Add a Category** drop down list.

- Enter the following information:

- Add a Comment – **These calls are emergency calls made from within the building.**

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

10. Select **Save**.



The screenshot shows the 'On Demand Alert' configuration page in the SmartRecord interface. The page is divided into three main sections:

- Alert List:** A table on the left with columns for Name, On Demand Alert, On Demand Alert, and Emergency Calls. Each row has a 'View' link.
- On Demand Alert:** A configuration form in the center. It includes fields for Name, Description, Enabled (checkbox), Time Zone (GMT-05:00 Eastern Time (US & Canada)), DTMF Digits (111), DTMF Tolerance (20 Seconds), and Notify By (Web Application, Email). There are 'Delete' and 'Edit | New' buttons at the bottom.
- Alert History:** A table at the bottom with columns for Name, Fired At, and Message. It contains four rows of 'Employee Disconnect' events with timestamps and messages.

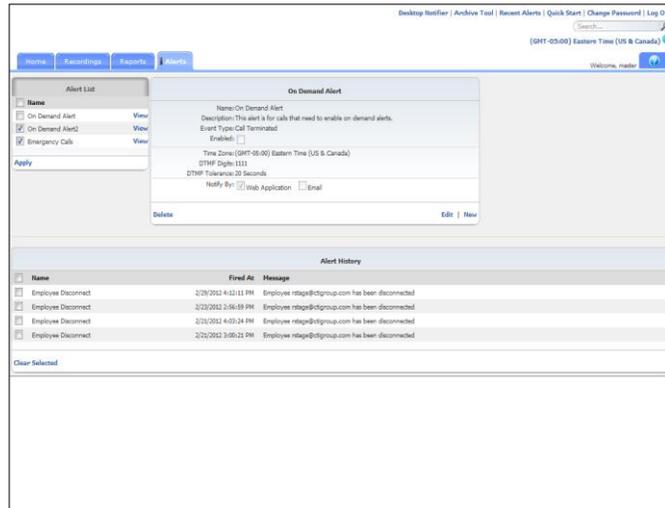
Name	Fired At	Message
Employee Disconnect	2/29/2012 4:12:11 PM	Employee rrtage@tgroup.com has been disconnected
Employee Disconnect	2/29/2012 2:06:03 PM	Employee rrtage@tgroup.com has been disconnected
Employee Disconnect	2/24/2012 4:03:24 PM	Employee rrtage@tgroup.com has been disconnected
Employee Disconnect	2/24/2012 3:00:21 PM	Employee rrtage@tgroup.com has been disconnected

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.

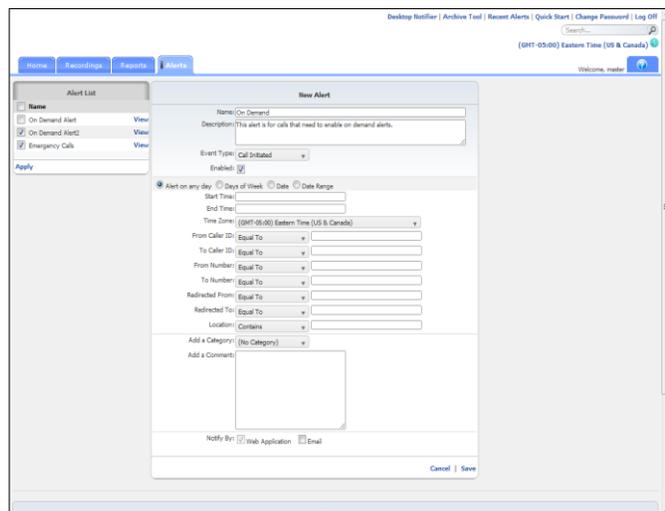
Note: The on demand alert feature is not available to all switch types.

1. Click the **Alerts** tab.

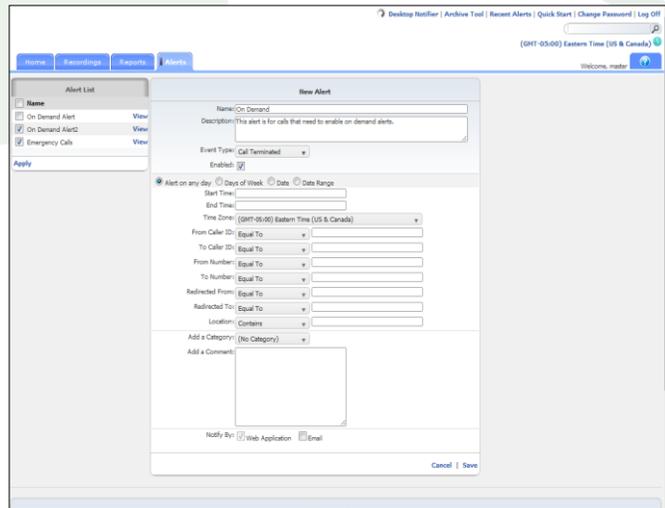


2. If applicable, click **New**. Enter the following information:

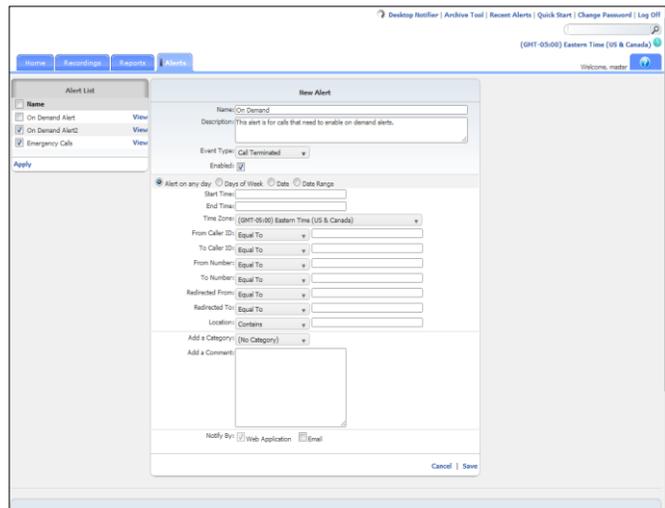
- Name – **On Demand**
- Description – **This alert is for calls that need to enable on demand alerts.**



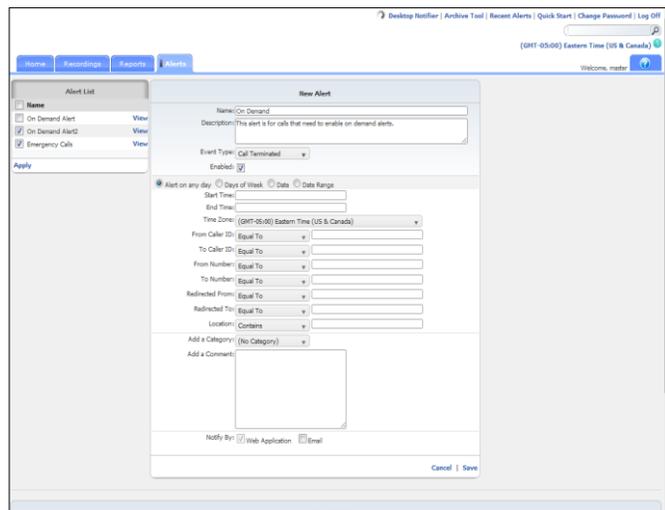
3. Select the following:
 - Event Type - **Call Terminated**



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



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**

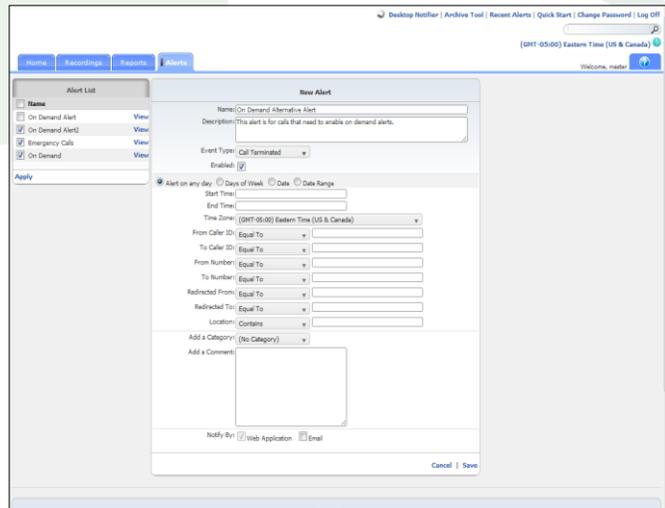
7. Select **Save**.

8. Click **New**. Enter the following information:

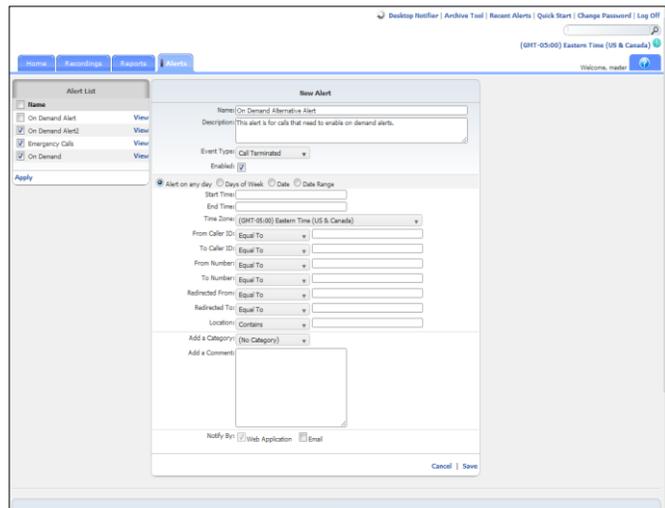
- Name – **On Demand Alert2**
- Description – **This alert is for calls that need to enable on demand alerts.**

9. Select the following:

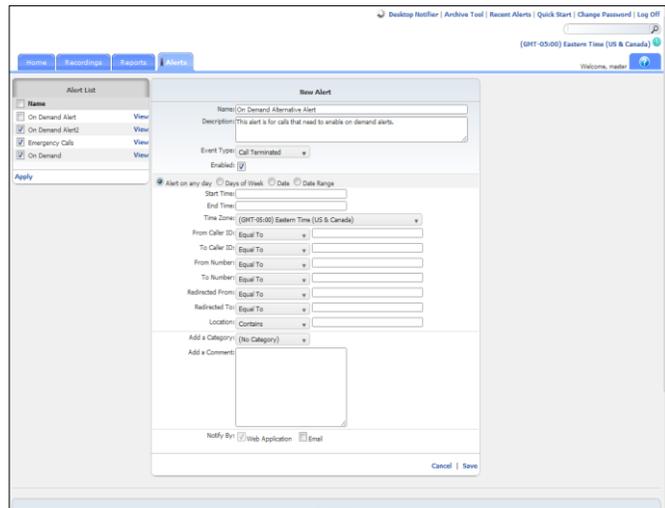
- Event Type - **Call Terminated**



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



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



12. Enter or select the following information:

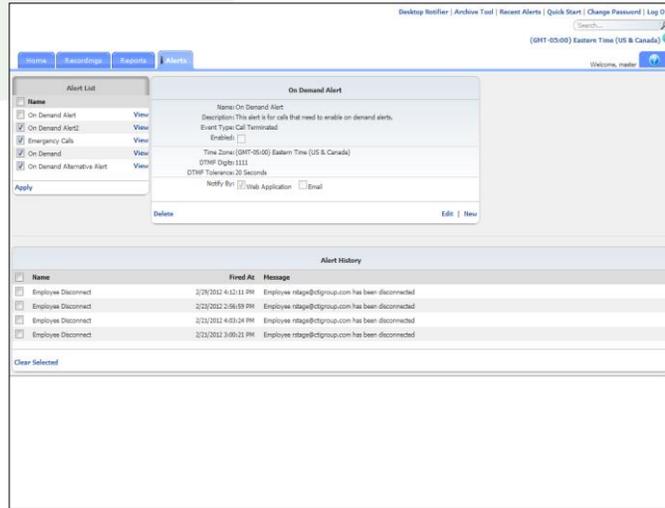
- DTMF Digits – **Contains**
- DTMF Digits – **1111**
- DTMF Tolerance – **30 seconds**

13. Select **Save**.

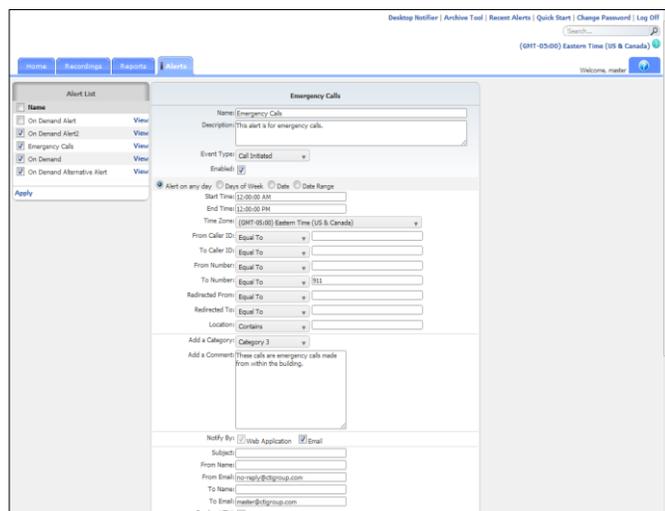
Name	First At	Message
Employee Disconnect	2/29/2012 4:31:11 PM	Employee rbtgr@tdgroup.com has been disconnected
Employee Disconnect	2/29/2012 2:56:59 PM	Employee rbtgr@tdgroup.com has been disconnected
Employee Disconnect	2/29/2012 4:03:26 PM	Employee rbtgr@tdgroup.com has been disconnected

Example: Editing an alert

1. Click the **Alerts** tab.

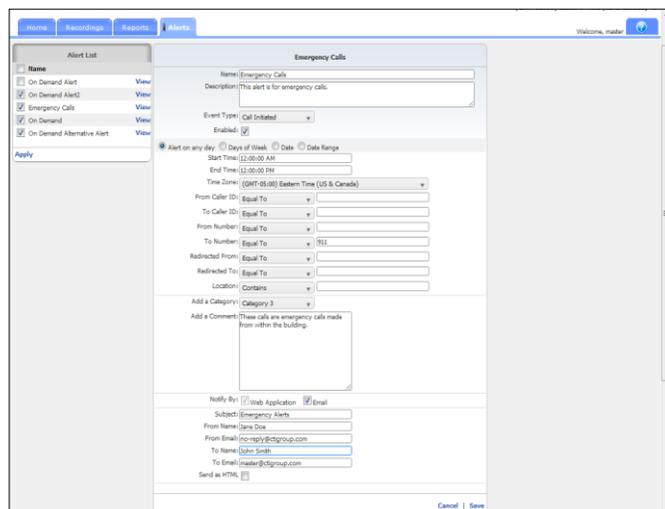


2. Select the **Edit** link.

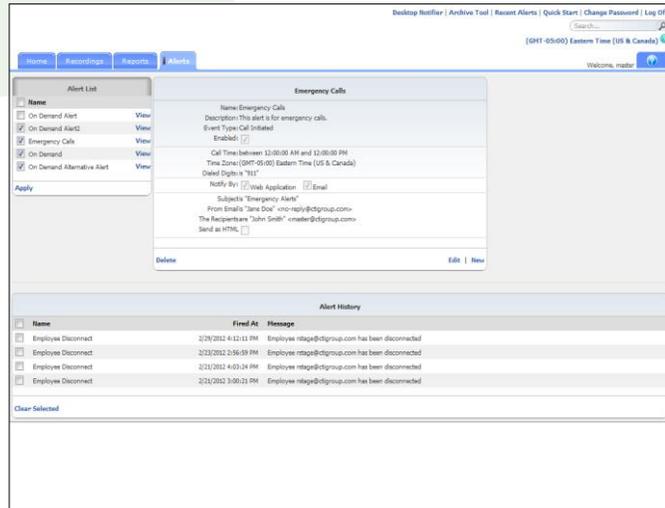


3. Enter the following information:

- Subject – **Emergency Alerts**
- From Name – **enter your name**
- To Name – **Andrea**
- To Email – **ahash@abccompany.com**



4. Select **Save**.

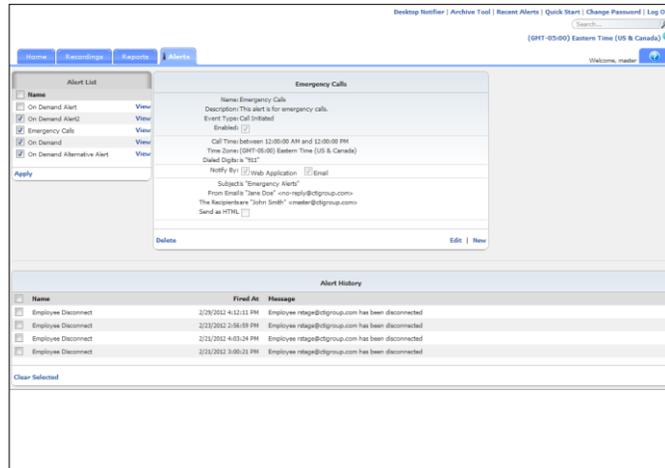


Example: Enabling and disabling an alert

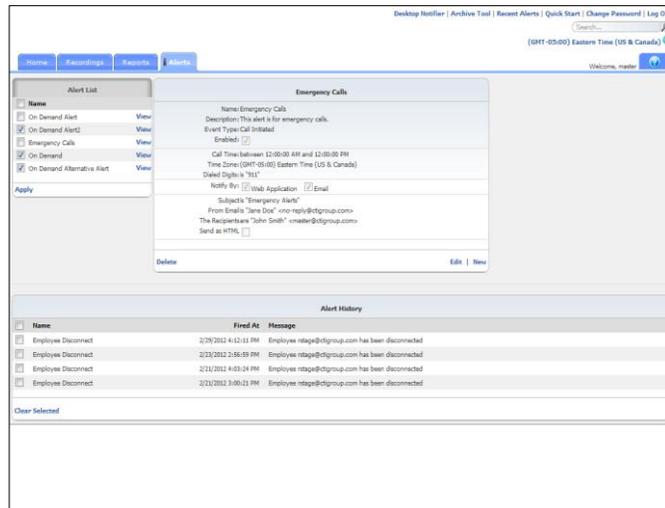
The obvious reason that an alert may be inactive is that it is no longer being used. Another less obvious reason, an alert is temporarily inactivated by an administrator because it was causing too many emails to be sent out, potentially causing congestion on the email server. Since alerts can be reused, 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.

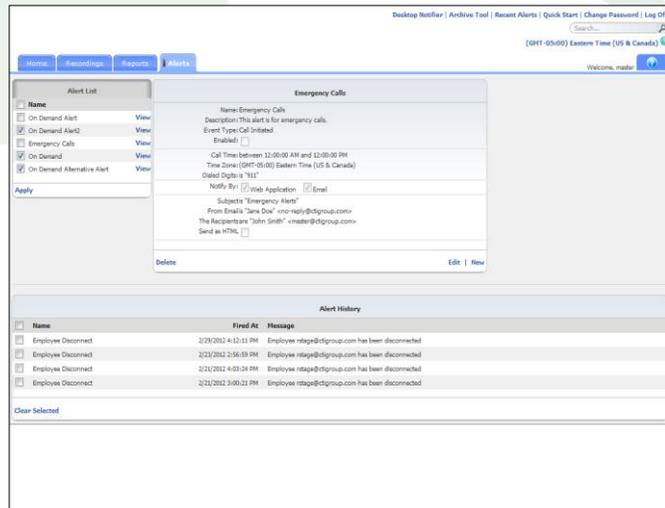
1. Click the **Alerts** tab.



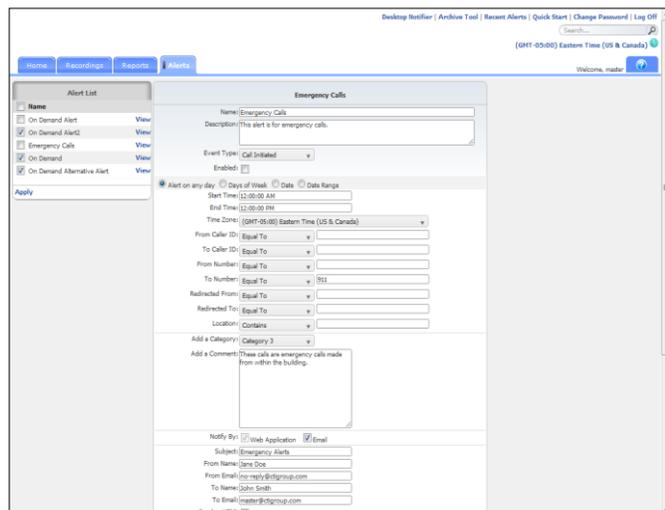
2. Click in the option box that corresponds to the Emergency Calls alert found under the **Alerts List**.



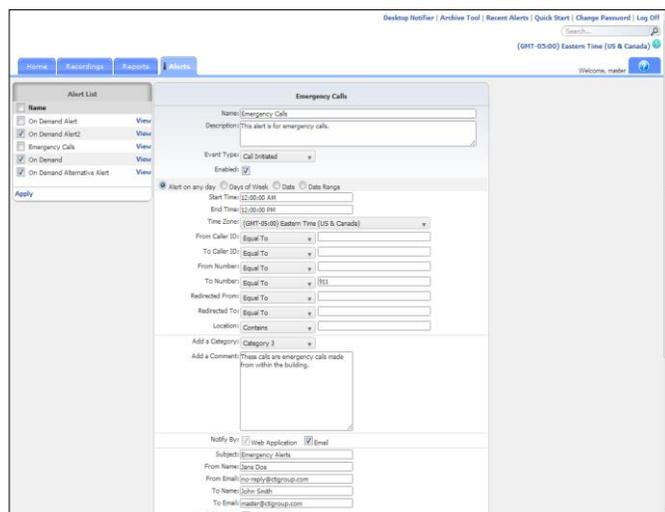
3. Select **Apply**.



4. Select **Edit**.



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



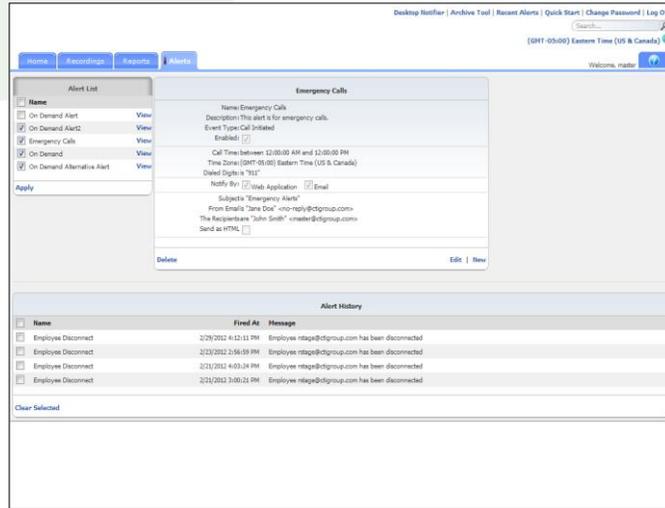
6. Select **Save**.

The screenshot displays the 'Alerts' configuration page in the SmartRecord application. The top navigation bar includes 'Home', 'Recordings', 'Reports', and 'Alerts'. The main content area is divided into three sections:

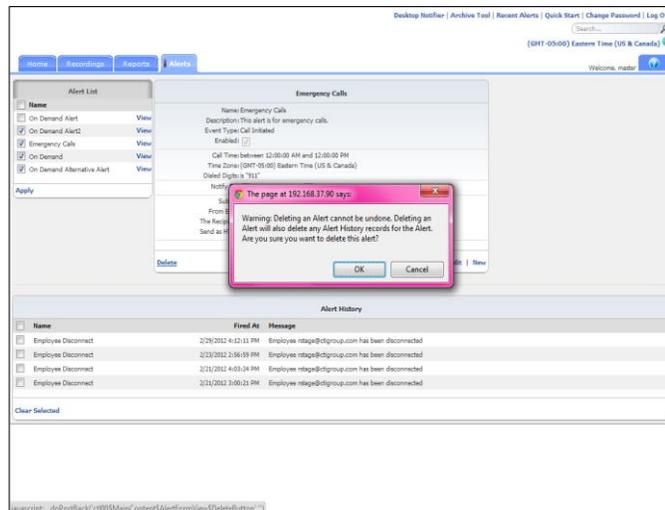
- Alert List:** A table with columns for Name, On Demand Alert, Emergency Calls, and On Demand Alternative Alert. Each row has a 'View' link.
- Emergency Calls (Detailed View):** A form showing configuration details for an 'Emergency Calls' alert, including Name, Description, Event Type, Enabled status, Call Time, Time Zone, Date, Notify By, Web Application, Email, Subject, From Email, To Email, and Send as HTML.
- Alert History:** A table with columns for Name, Fired At, and Message. It lists recent 'Employee Disconnect' events with timestamps and messages.

Example: Deleting an alert

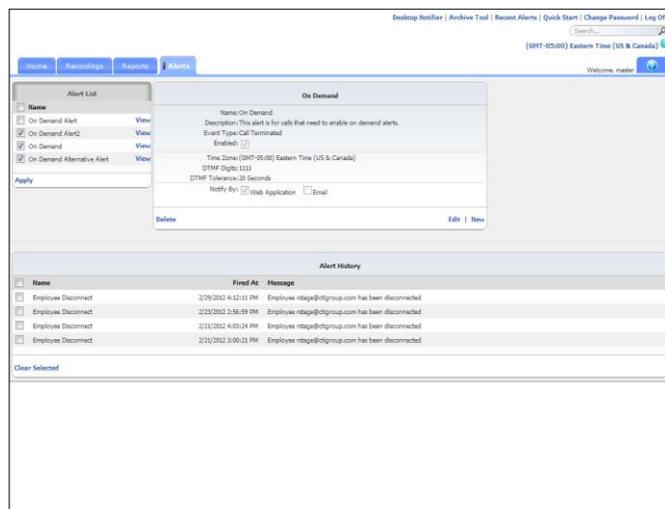
1. Click the **Alerts** tab.



2. Select **Delete**.



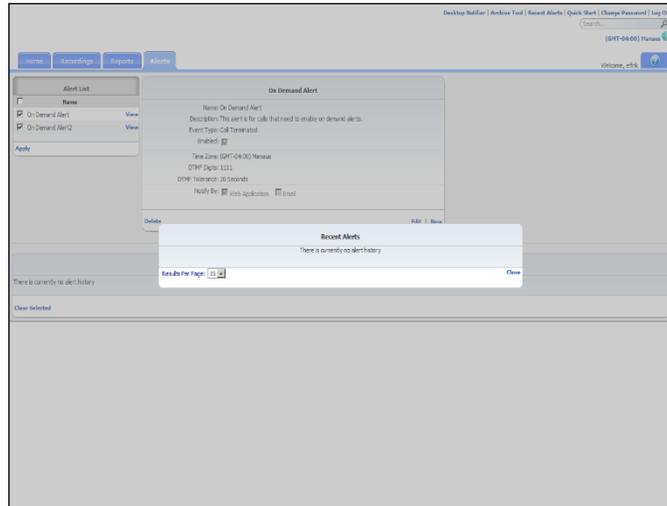
3. Select **OK**.



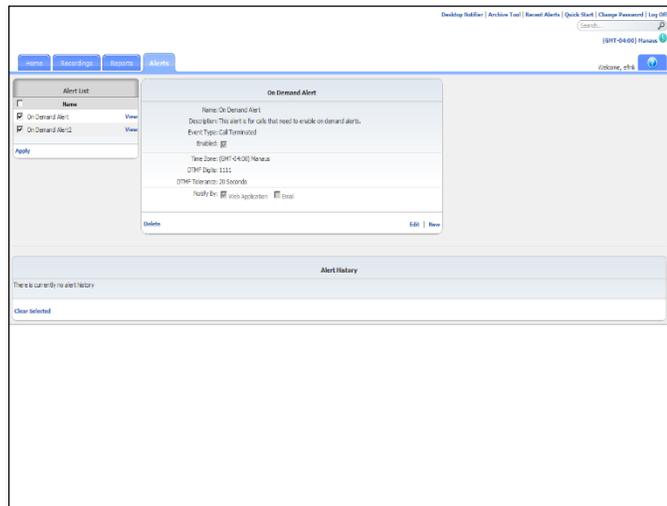
Example: Recent alerts

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.



2. Select **Close**.



Archive Tool

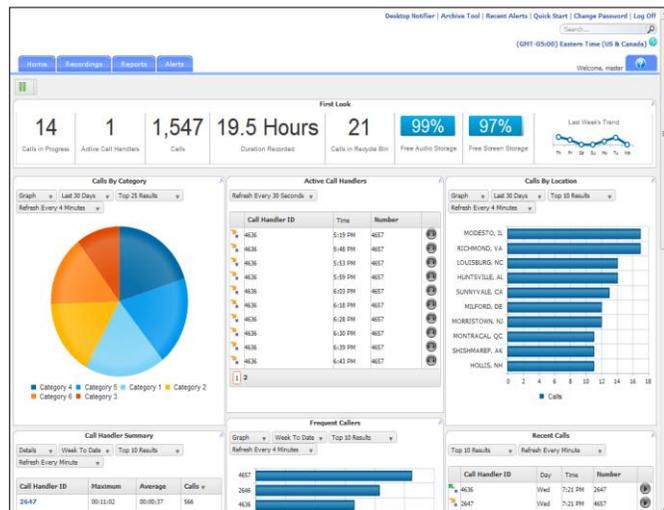
The Archive Tool allows users to archive call recordings to ISO images. These image files can be burned to CD/DVD at the convenience of the user.

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.

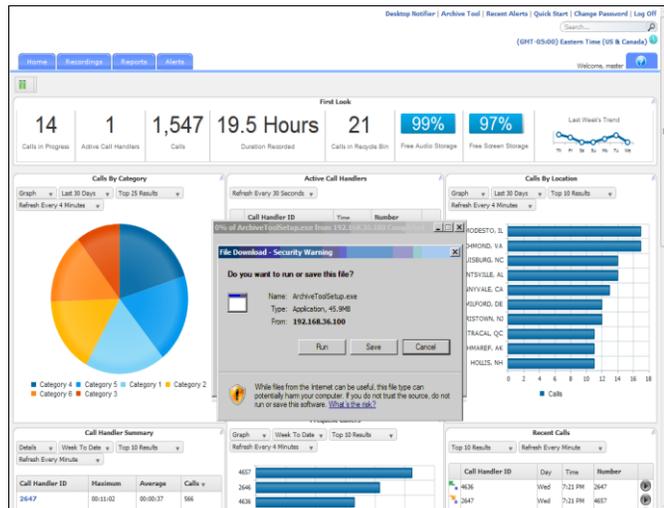
For more information on how to configure the Archive Tool, open the Archive ISO Image tool and click the [Documentation](#) tab.

Example: Downloading the Archive Tool

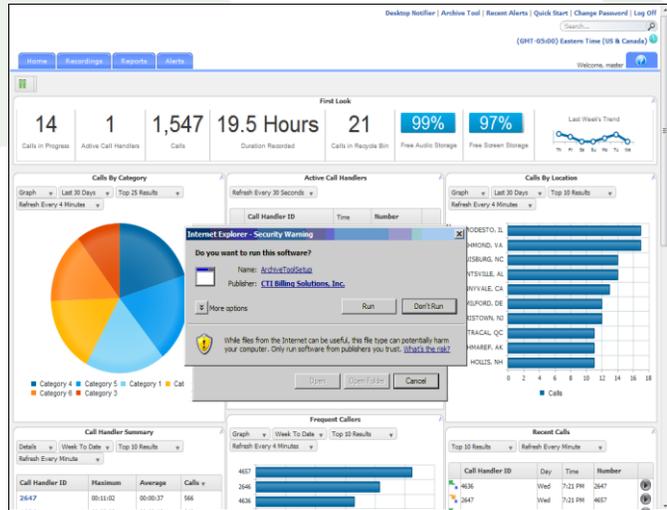
1. Click the [Archive Tool](#) link.



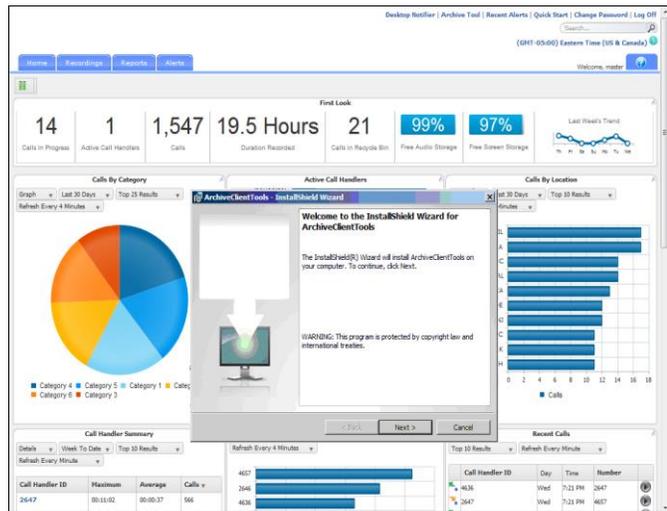
2. Click [Run](#).



3. Click **Run**.



4. Select the defaults for each screen in the wizard.



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:

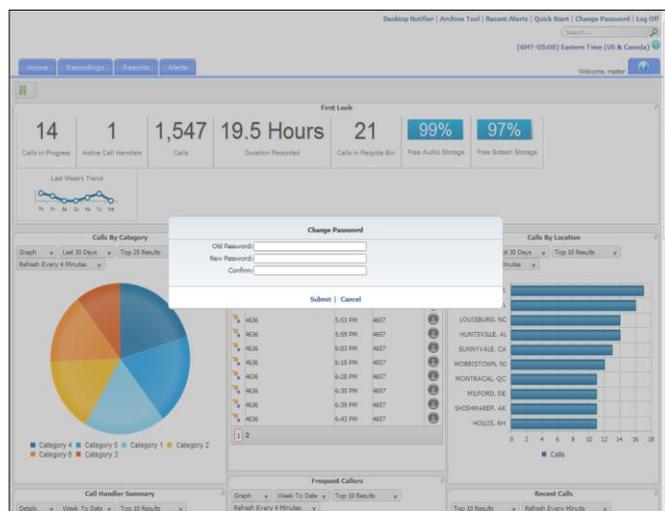
- Weak password - no password at all; contains your user name, real name, or company name; or contains a complete dictionary word
- Strong password - at least seven characters long; does not contain dictionary words, letter or number sequences, usernames, relative or pet names, romantic links, or biographical 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

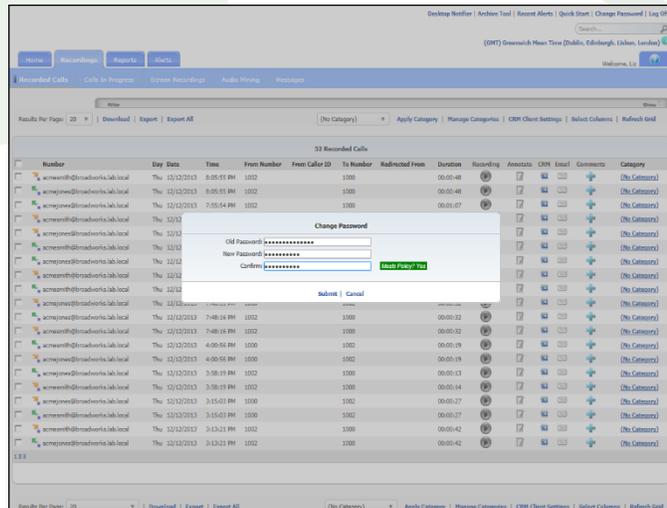
1. Click the [Change Password](#) link.



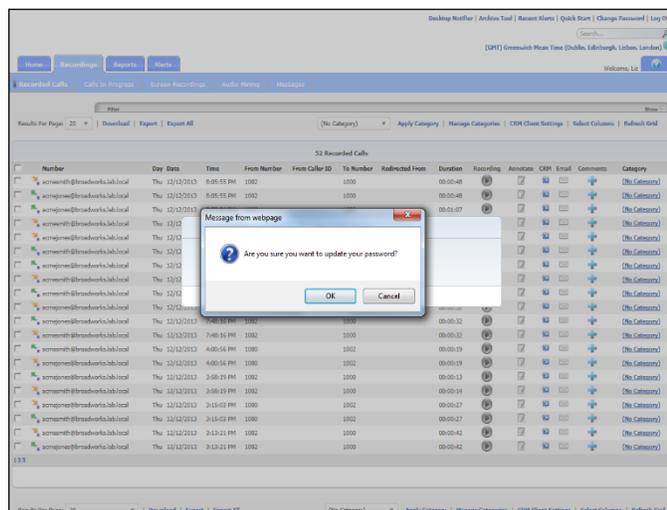
2. Enter or select the following information:

- Old Password – **current password**
- New Password – **select a new password that meets the password security requirements**
- Confirm – **enter your new password again**

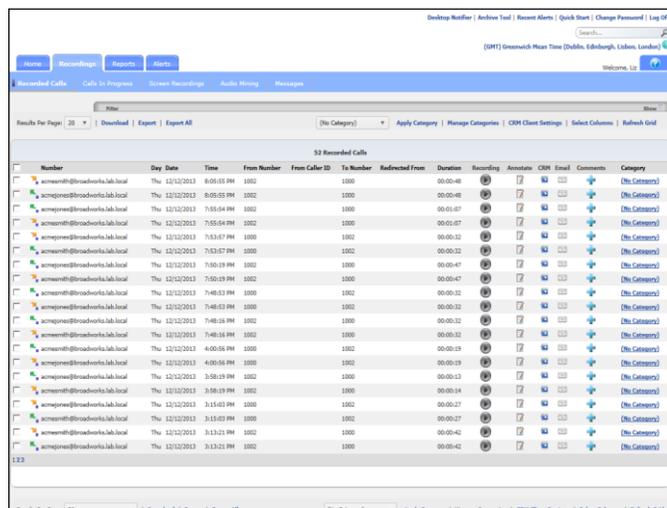
Note: Password security requirements are defined during the installation and configuration process. Once you begin typing your new password, the security requirements will be displayed under the New Password field.



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



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



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.

- 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.

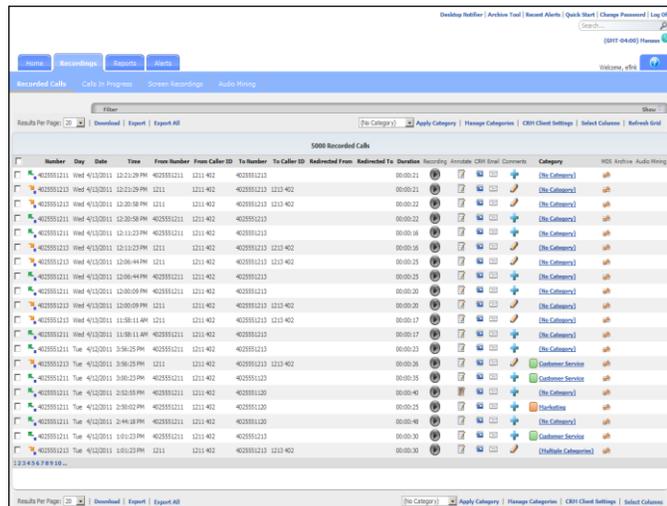
- Click **Submit**.

Search

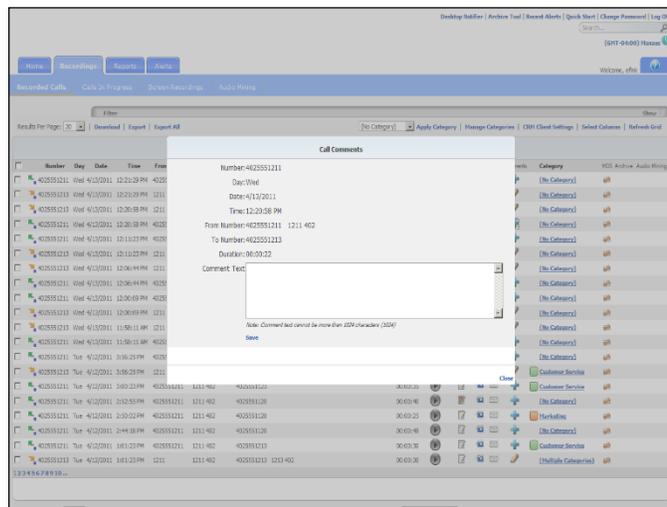
The Search feature allows you to search any part of the call record (Number, Duration, Time, Comments, etc.) on the Recorded Calls screen in order to find a specific call record. For example: if there are 10 pages of recorded call files on the Recorded Calls screen and you need to find a specific call 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.



2. Select a recorded call file and click on the .



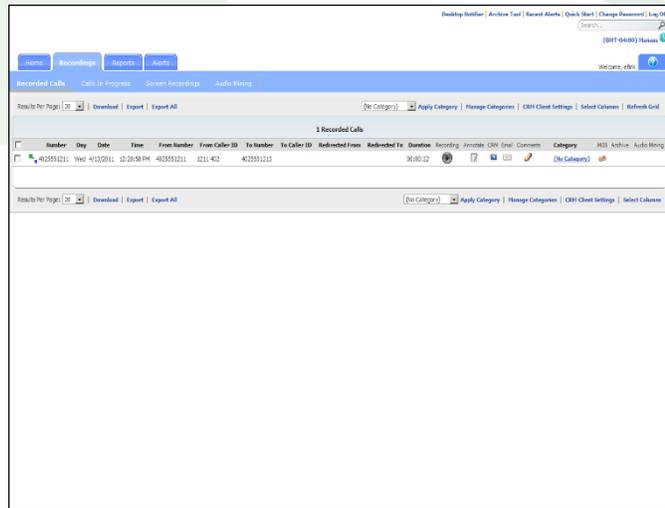
3. Enter the following information:

- Comment – **This call is to be used for training.**

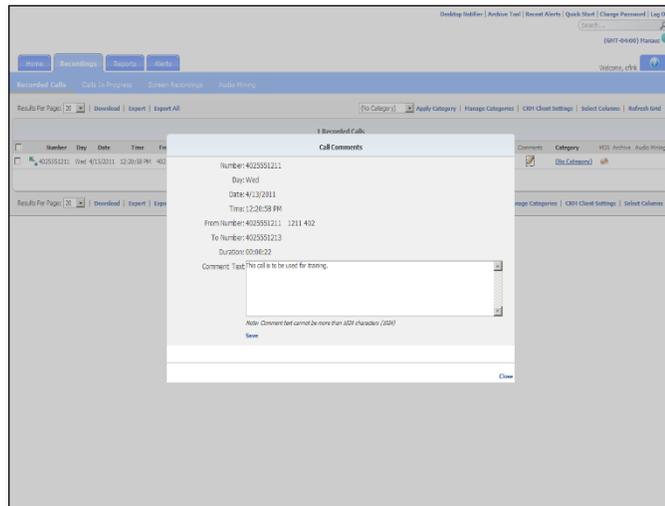
4. Click **Save**.

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

6. Click **View search results.**



7. Click on the button.



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.

The screenshot shows the 'Recorded Calls' interface. At the top, there are navigation tabs: Home, Recordings, Reports, and Alerts. Below the tabs, there are filters for 'Recorded Calls', 'Calls In Progress', 'Screen Recordings', and 'Audio Wiring'. A search bar and a 'Filter' button are visible. The main area displays a table of 5000 recorded calls. The table has columns for: Number, Day, Date, Time, From Number, From Caller ID, To Number, To Caller ID, Redirection From, Redirection To, Duration, Recording, Announcements, OMR, Email, Comments, Category, and MOC Archive Audio Wiring. The first few rows of the table show call records for Wednesday, April 13, 2011, with various times and numbers.

2. Click on the time zone link and select the following from the drop down menu:

- Time Zone – **(GMT -03:30) Newfoundland**

This screenshot is identical to the one above, showing the 'Recorded Calls' interface with the same table of 5000 recorded calls. The difference is that the time zone link in the first row of the table is highlighted, indicating that the user has selected the time zone from the drop-down menu.

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

Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirection From	Redirection To	Duration	Recording	Announce	CDR	Email	Comments	Category	HCS	Archive	Audio	Ring
402551211	Wed	4/12/2011	1:51:29 PM	402551211	1211 402	402551213	1211 402			00:00:21						(No Category)				
402551213	Wed	4/12/2011	1:51:29 PM	1211	1211 402	402551213	1211 402			00:00:21						(No Category)				

- Click on the time zone link and select the following from the drop down menu:

- Time Zone – **(GMT +10:00) Brisbane**

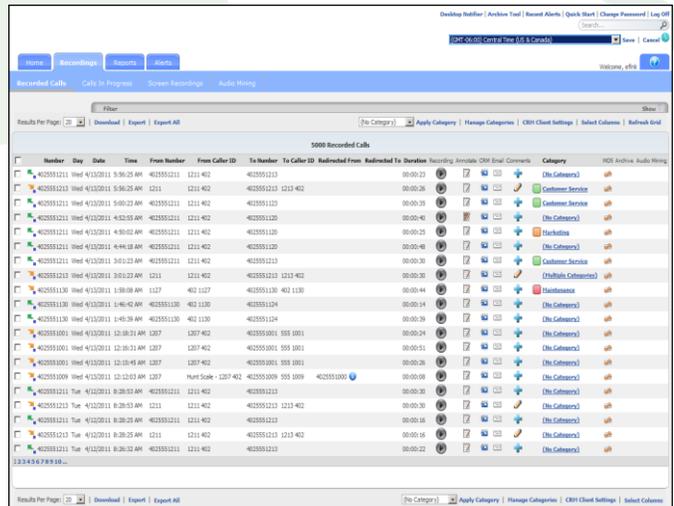
Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirection From	Redirection To	Duration	Recording	Announce	CDR	Email	Comments	Category	HCS	Archive	Audio	Ring
402551211	Wed	4/12/2011	1:51:29 PM	402551211	1211 402	402551213	1211 402			00:00:21						(No Category)				
402551213	Wed	4/12/2011	1:51:29 PM	1211	1211 402	402551213	1211 402			00:00:21						(No Category)				

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

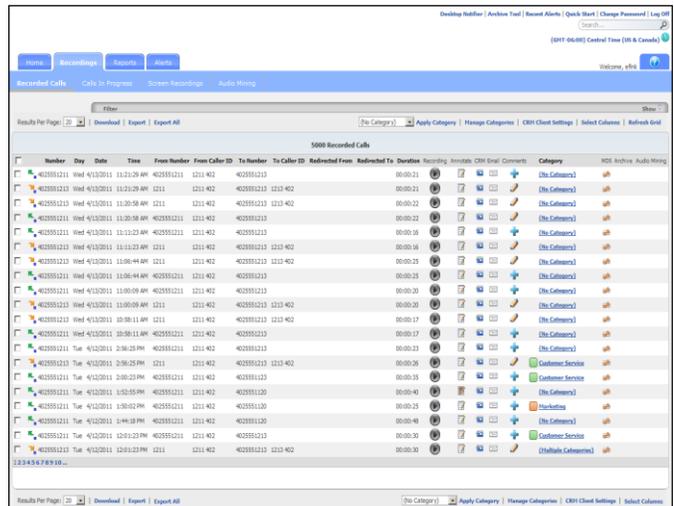
Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirection From	Redirection To	Duration	Recording	Announce	CDR	Email	Comments	Category	HCS	Archive	Audio	Ring
402551211	Wed	4/12/2011	1:51:29 AM	402551211	1211 402	402551213	1211 402			00:00:21						(No Category)				
402551213	Wed	4/12/2011	1:51:29 AM	1211	1211 402	402551213	1211 402			00:00:21						(No Category)				

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)**



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



FTP

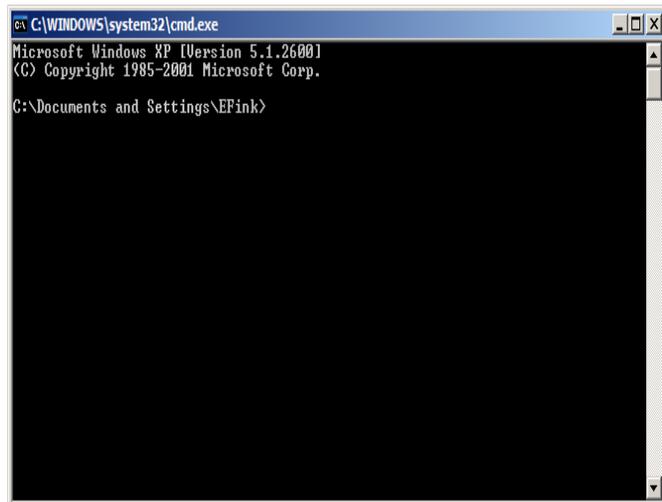
In some cases, it is possible that Users may have access to their recording file (audio and video) via FTP. Access depends on whether or not the Group that created the user was granted FTP access when they were created in the Administrative Interface. FTP access allows you to access any recordings made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

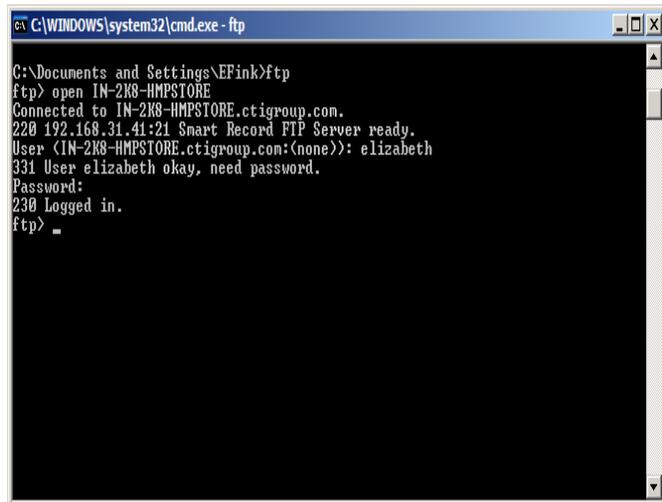


```

C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

C:\Documents and Settings\EFink>
    
```

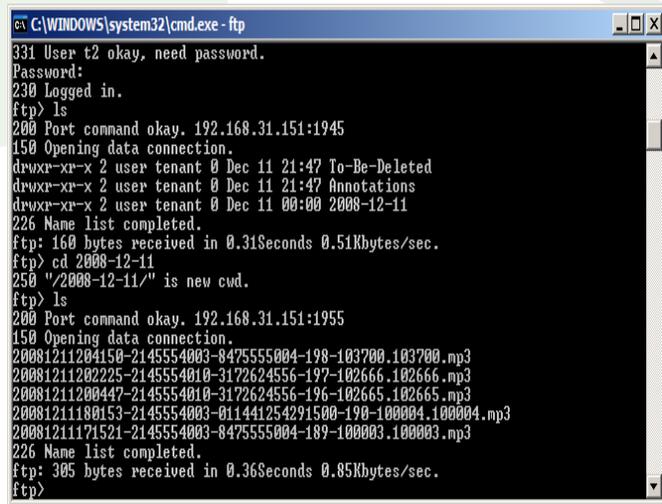
2. Log onto the server that houses the call recording application or where your recordings are stored.



```

C:\WINDOWS\system32\cmd.exe - ftp
C:\Documents and Settings\EFink>ftp
ftp> open IN-2K8-HMPSTORE
Connected to IN-2K8-HMPSTORE.ctigroup.com.
220 192.168.31.41:21 Smart Record FTP Server ready.
User (IN-2K8-HMPSTORE.ctigroup.com:(none)): elizabeth
331 User elizabeth okay, need password.
Password:
230 Logged in.
ftp> _
    
```

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



```
ca C:\WINDOWS\system32\cmd.exe - ftp
331 User t2 okay, need password.
Password:
230 Logged in.
ftp> ls
200 Port command okay. 192.168.31.151:1945
150 Opening data connection.
drwxr-xr-x 2 user tenant 0 Dec 11 21:47 To-Be-Deleted
drwxr-xr-x 2 user tenant 0 Dec 11 21:47 Annotations
drwxr-xr-x 2 user tenant 0 Dec 11 00:00 2008-12-11
226 Name list completed.
ftp: 160 bytes received in 0.31Seconds 0.51Kbytes/sec.
ftp> cd 2008-12-11
250 "2008-12-11/" is new cwd.
ftp> ls
200 Port command okay. 192.168.31.151:1955
150 Opening data connection.
20081211204150-2145554003-8475555004-198-103700.103700.mp3
20081211202225-2145554010-3172624556-197-102666.102666.mp3
20081211200447-2145554010-3172624556-196-102665.102665.mp3
20081211180153-2145554003-011441254291500-190-100004.100004.mp3
20081211171521-2145554003-8475555004-189-100003.100003.mp3
226 Name list completed.
ftp: 305 bytes received in 0.36Seconds 0.85Kbytes/sec.
ftp>
```