Phoneware Call Recording User Guide

Accessing web interface

Phoneware call recording has a web-interface, which can be accessed **via** the internet.

Inside web-browser address bar, **visit https://phoneware.mysiprec.com.**

**Once you have entered the correct address, you** should see the login page:

Your username is your ten-digit direct phone number with no formatting characters. Example: 6028675309. DO NOT use your main phone number to log in. If you are unsure of your direct phone number, and you have a desk phone, you should be able to lift the handset on your desk phone and see your ten-digit direct phone number on the telephone display.

Your password is the same password that you use to log into the user commportal and the MaX UC App. If you change your user commportal password, you will use the new password to log into the call recording server web portal.

Dashboard

Phoneware Call Recording's dashboard provides a thorough overview of calls-per-day, average call duration, current active calls, etc.
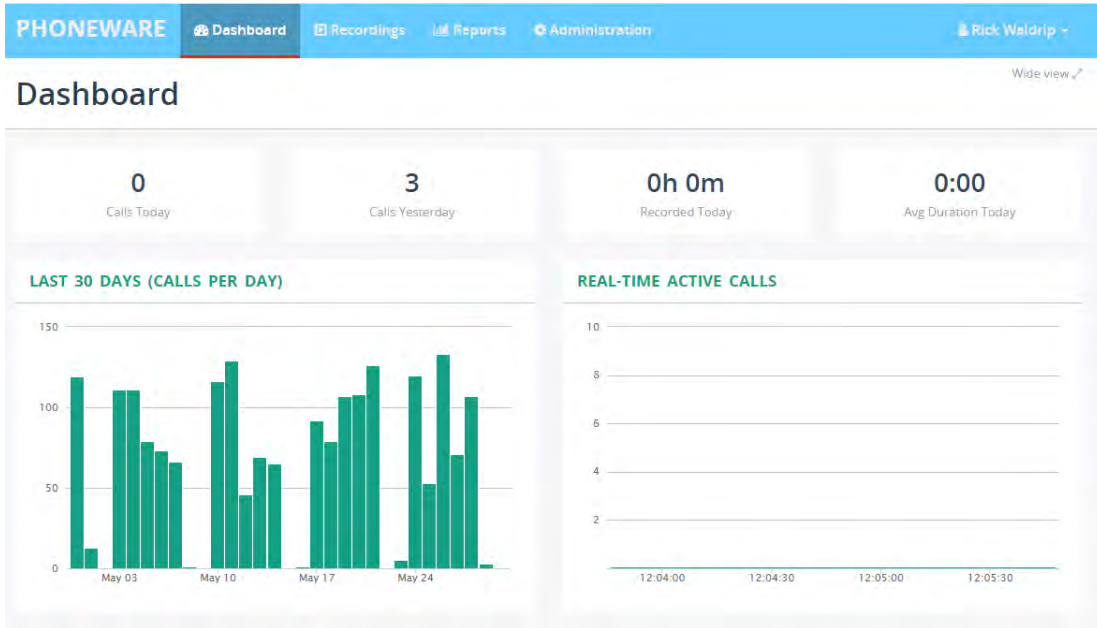
Call recordings views

Phoneware Call Recording supports the following call recording views as pictured:

View	Description
All calls	Displays all call recording (including active calls).
Active calls	Displays only active calls
My calls	Displays call recordings associated with the current logged in user
By user	Displays call recordings, which are grouped by user and user group
Not assigned to users	Displays call recordings, which were not assigned to any users; this view is visible to administrator accounts only.
By category	Displays calls recordings grouped by category
Advanced search	Displays advanced search form

Playback call recordings

Inline basic audio player

Click on the call list, and you will be able to see call details within a basic media player, which is right inside the call list.

Advanced audio player

Click on Open in new window and you will be able to to see detailed call information with an advanced audio player.

This visual audio presentation presents an easy way to detect periods of silence and talk-over within the conversation.

Searching calls

Phoneware Call Recording allows for an easy search of calls by utilizing different parameters, such as:

- Date range
- User or Group name
- Any text. The entered text is searched within caller/called phone number, name fields, and call notes.
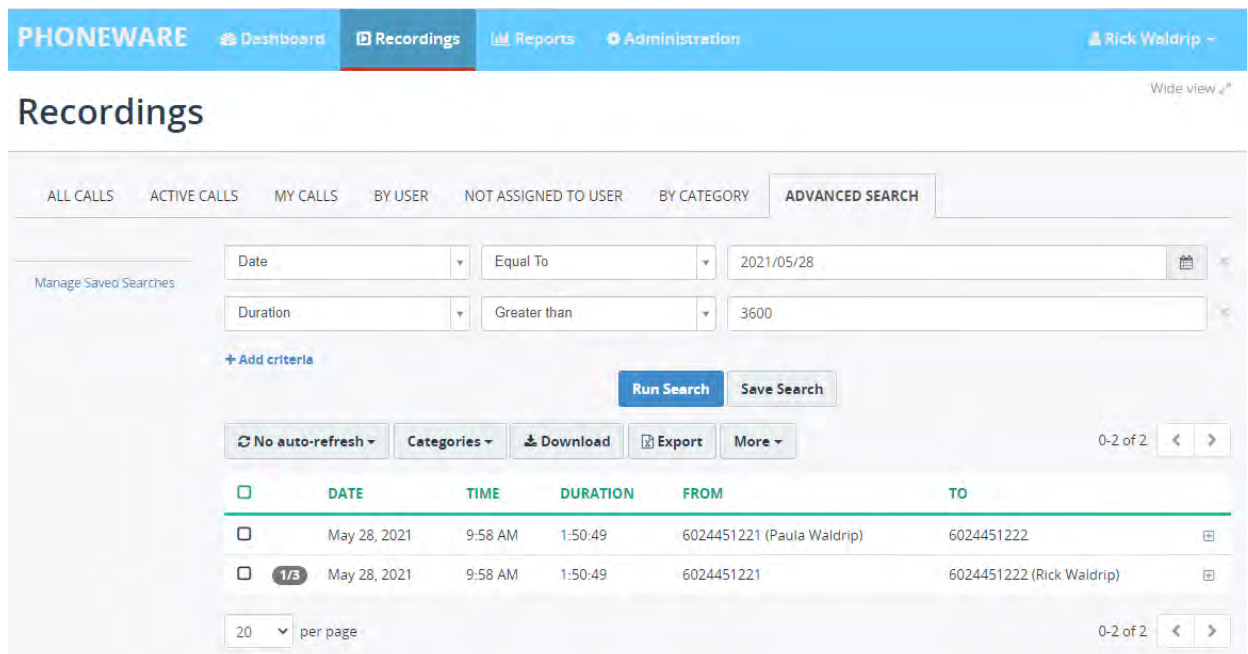
See also Advanced searching calls

Advanced searching calls

Advanced search web-page provides the ability to search call recordings utilizing multiple criteria, such as:

- User
- Group
- Call ID
- Phone number (FROM and/or TO)
- Date range
- Call duration

Each of these criteria supports different comparison operators like `Equal To`, `Not equal to`, `Starts with`, `Ends with`, `Includes`, `Is empty`, `Not empty`, `Match simple pattern`, `Match regex pattern`, `Before`, `After`, `Between`, `Older than __ days`, `Newer than __ days`.

Saved Search

You can save the searched criteria, and use it later:
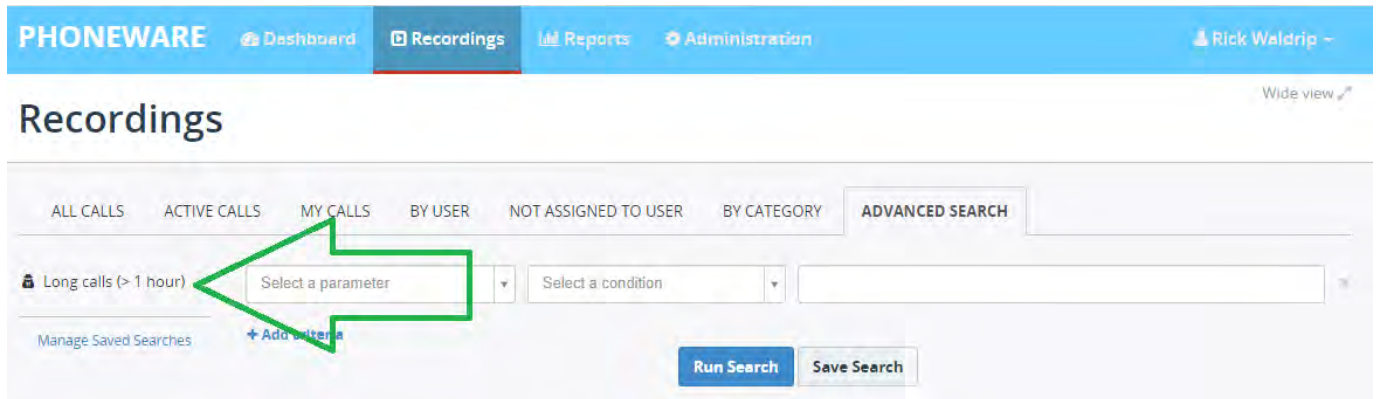
Add notes to calls

When the user has been given the appropriate permission, he or she will be able to view and add new notes to call recordings.

These call notes are displayed inline and in a new window

Notes are displayed from oldest to newest; additionally, it is possible to pin any notes on top (out of order).

Call notes inline

Call notes in new window

Categorizing calls

Phoneware Call Recording supports categories for call recordings. When the user has the appropriate permissions, he or she may assign categories to calls, create new categories, etc.

To utilize categories, check one or more call recordings in a list, and then click the "Categories" button, next, select one or more categories, which you would like to assign to the call.

View multi-part calls

Phoneware Call Recording automatically recognizes multiple call parts of longer interaction, for example, when a call has been transferred from one agent to another, or, when a call has been put on hold, the agent made a consultative call to his/her supervisor and then resumed the initial call.

When a call is a part of longer interaction, then a special icon is displayed in a calls list, and a link to the interaction web-page is provided.

Visualization of multi-part calls

Multi-part calls are stored internally as multiple calls, but they are displayed to the user as a single audio file. This allows users easily play back the whole interaction in one click.

Interaction

INTERACTION   CALL [1]   CALL [2]   CALL [3]

AUDIO

Switch to basic player

▶ Play

Call 200 -> 205

Begin Time: **10:21:11 PM**
End Time: **10:21:46 PM**
Duration: **35 seconds**
Call details

200 -> 205

200 -> 210

Silence between call segments has been removed

⬇ Save audio file

DATA/TIME

Begin Time: **Yesterday, 10:20:25 PM**
End Time: **Yesterday, 10:21:46 PM**
Total Duration: **1:21**

Supported call scenarios

Phoneware Call Recording merges multiple call parts into a single interaction in the following call scenarios:

1. An inbound call is transferred from one agent to another; in this case, both parts of the call will be added to the interaction.
2. An agent puts their first call on hold, makes an outbound consultative call, and then returns to their original call. In this case, all 3 calls will be added to the interaction.
3. An agent has an active call occurring, and he/she receives a second incoming call. The agent places the first call on hold and proceeds to answer the new call. The agent then returns to their original call. In this scenario, the incoming call that occurs between the hold/resume event is treated as an outside interaction. Only the 1st and the 3rd call parts will be added to the interaction.

Live monitoring

The live monitoring feature allows authorized users (supervisors) to listen to the active calls in real-time. This feature helps monitor customer service in real-time, train new employees, and alleviate problems as soon as possible.

A special application called Live Player needs to be installed on a supervisor's computer. This application is designed to provide a superior audio latency (less than 200ms).

If the user has the appropriate permissions, he/she will be able to see `live monitor this call` button when viewing active calls. Once this button is clicked, the Live Player application should start automatically. If it doesn't start, then verify if it has been installed previously on a supervisor's computer. **You can** <u>download the live monitoring application from https://azphoneware.com/downloads</u>.
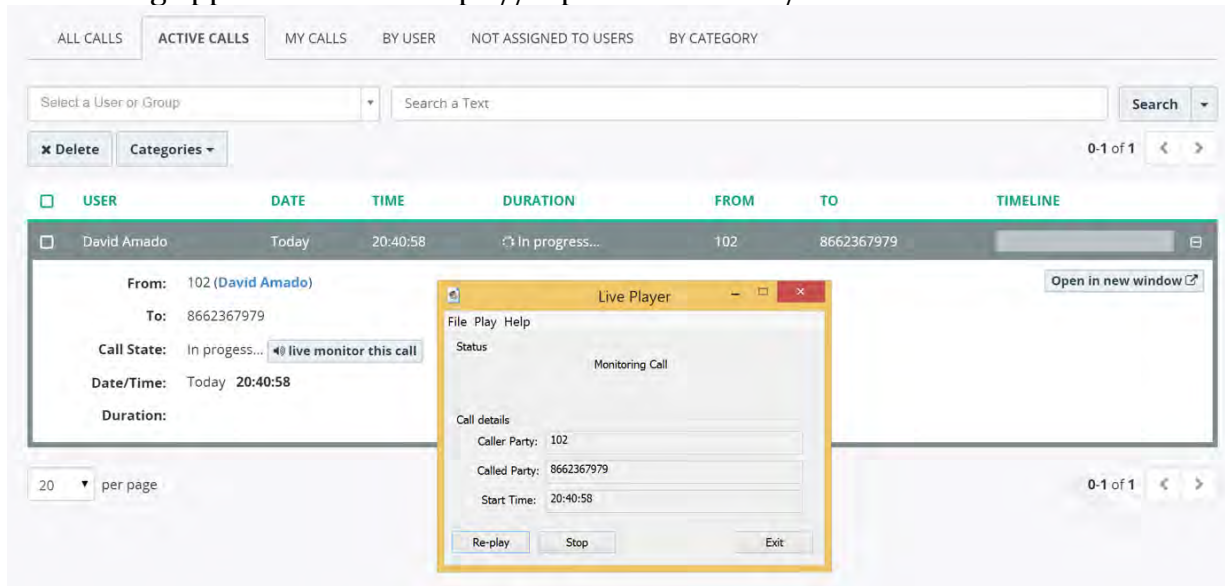
Live monitoring feature supports two modes, which are:

- Monitoring of a single call
- Monitoring of consecutive calls of particular agent

In the first case, a monitoring session automatically terminates when the call ends.

In the second case, a monitoring session is automatically restored when the monitored agent makes/receives a new call. The supervisor then initiates a live monitoring session and keeps automatically listening to the consecutive calls the particular agent is making

In order to start monitoring of the consecutive calls, the supervisor needs to select one of the agents'old calls, and then click on "Open in new window" button, then he/she will see `Live monitor phone ___` link.

How it works

Live monitoring feature is built-in to **Phoneware Call Recording** core. It doesn't depend on a phone system, and works with any recording method, whether it is passive or active.

System requirements

To live monitor calls, the following should be true:

1. The monitored calls should be assigned to agent. See Associating calls with users
2. "Monitoring seat license (as agent)" should be allocated to agent (menu Administration -> User Management -> Users)
3. In multi-tenant environment, the "Live monitoring" licenses should be allocated to a tenant account (menu Administration -> User Management -> Tenants)
4. Supervisor's role should have permission to live monitor other users's calls (menu Administration -> User Management -> Roles)
5. A firewall should not block access from supervisors' computers to **call recording** server on ports 6554 TCP and 7000-7999 UDP. See Firewall configuration
6. The Live Player application should be installed on supervisors' computers.

On-demand recording using Yealink phone

Phoneware Call Recording integrates with Yealink phones to provide on-demand recording control using softkey.

The photos below show example of Yealink T46S and T48S with **Phoneware Call Recording** XML application in action

Yealink T46S / **Record** softkey integration

Users can press `Record` / `No Record` softkey buttons during a call to selectively record some calls (on-demand recording).

The following photo demonstrates "Recording" state. User can press "No Record" to disable recording.
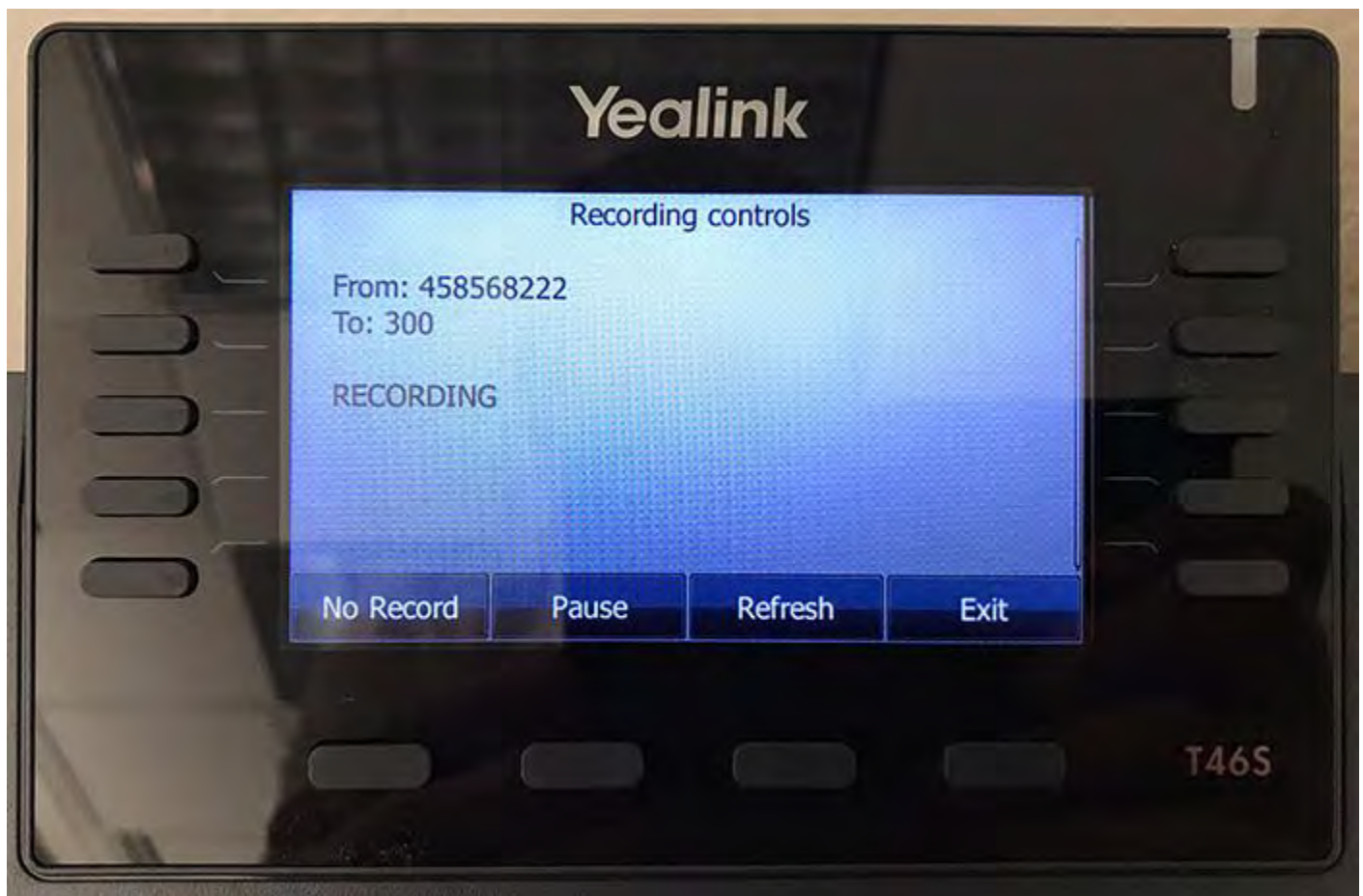
The following photo demonstrates "Not Recording" state. User can press "Record" to enable recording.

Yealink T48S / **Record** softkey integration
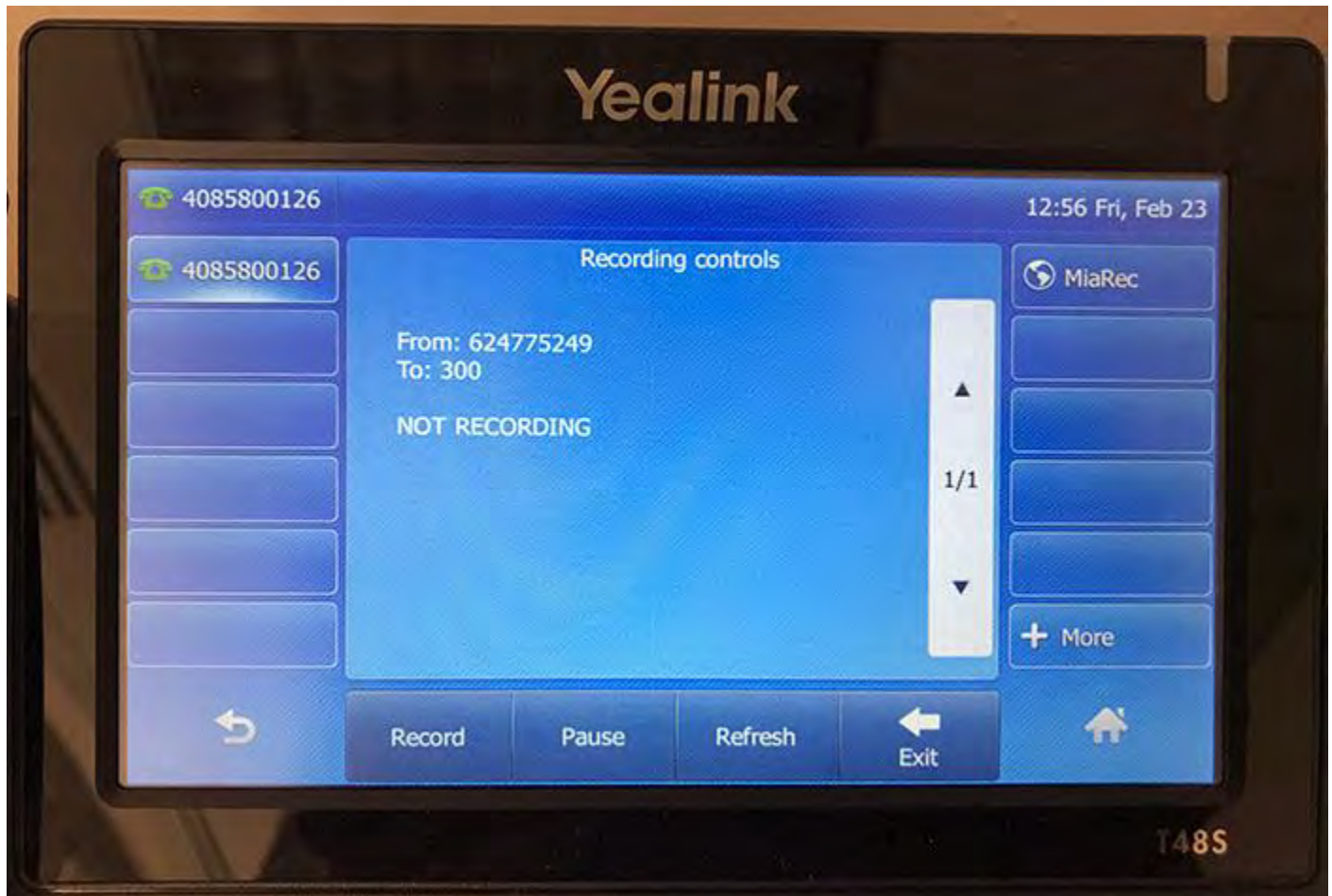
On-demand recording via Web portal

When an agent is configured for on-demand recording, then he/she or authorized user (his/her supervisor) may activate/deactivate recording in real-time during a call.

If the user decides during a call that he/she would like to keep recording, then a call recording will be stored in **the Phoneware Call Recording server** from the very beginning of a call.

Phoneware Call Recording supports look-back recording. The whole conversation will be stored in **the call recording server**, even if the user has made the decision to record a call at the very last second of a call.

In order to enable on-demand recording:

1. Change recording settings on agent's profile page from `always record` to `on-demand`.
2. Grant agent or his/her supervisor permissions to trigger on-demand recording (see Role settings)
3. During a call, an agent or his/her supervisor should select active call in **Phoneware Call Recording** web interface and click `Open in new window` button. Inside the opened web-page he/she will be able to see on-demand controls as shown in the screenshot below.

Pause/resume recording using Yealink phone

Phoneware Call Recording integrates with Yealink phones to provide pause/resume recording control using softkey for PCI compliance.

The photos below show example of Yealink T46S and T48S with **Record** XML application in action

Yealink T46S / **Record** softkey integration

Users can press `Pause` and `Resume` softkey buttons to temporary mute recording, for example, when customer speaks credit card number.
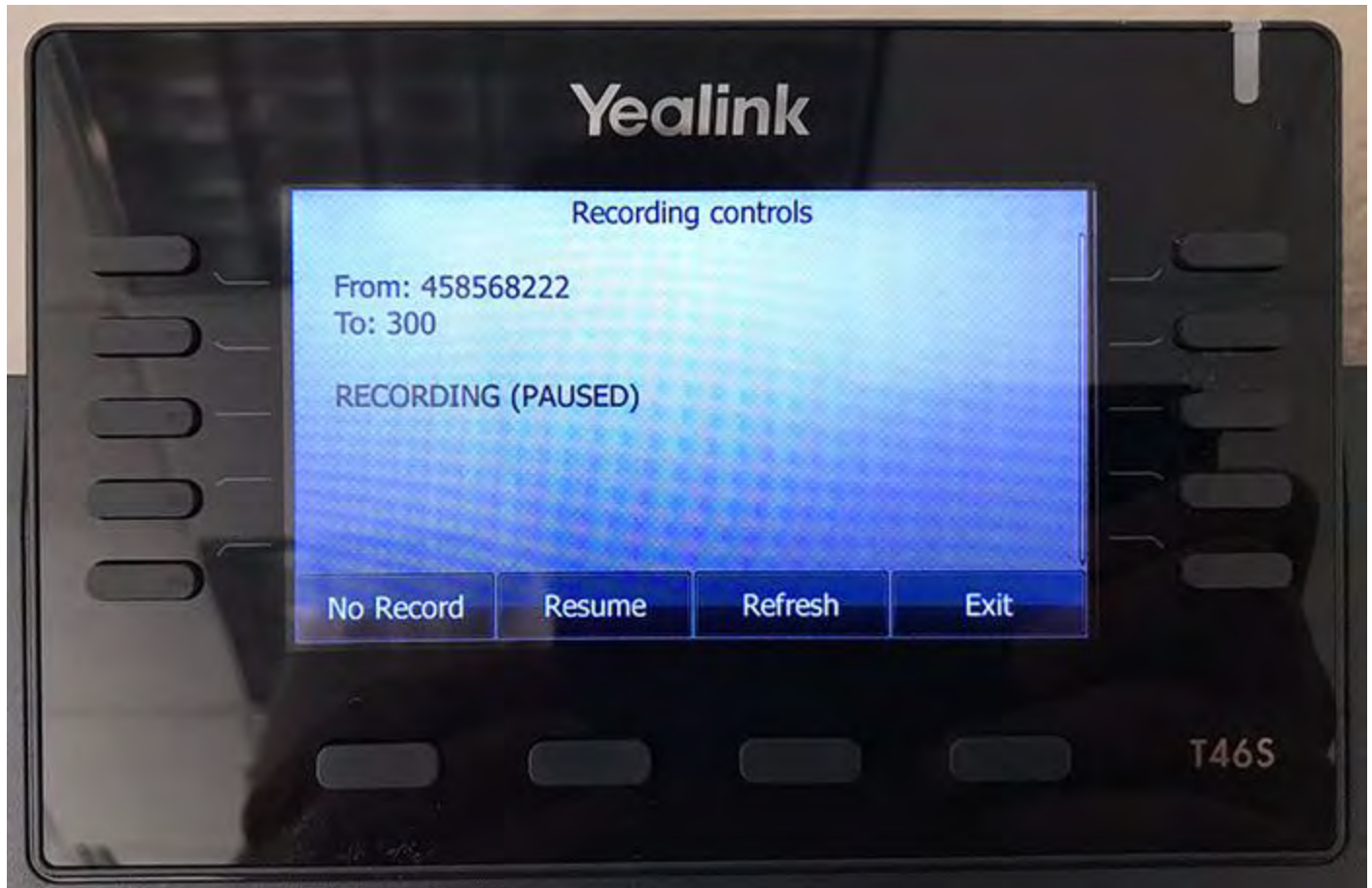
Yealink T48S / **Record** softkey integration
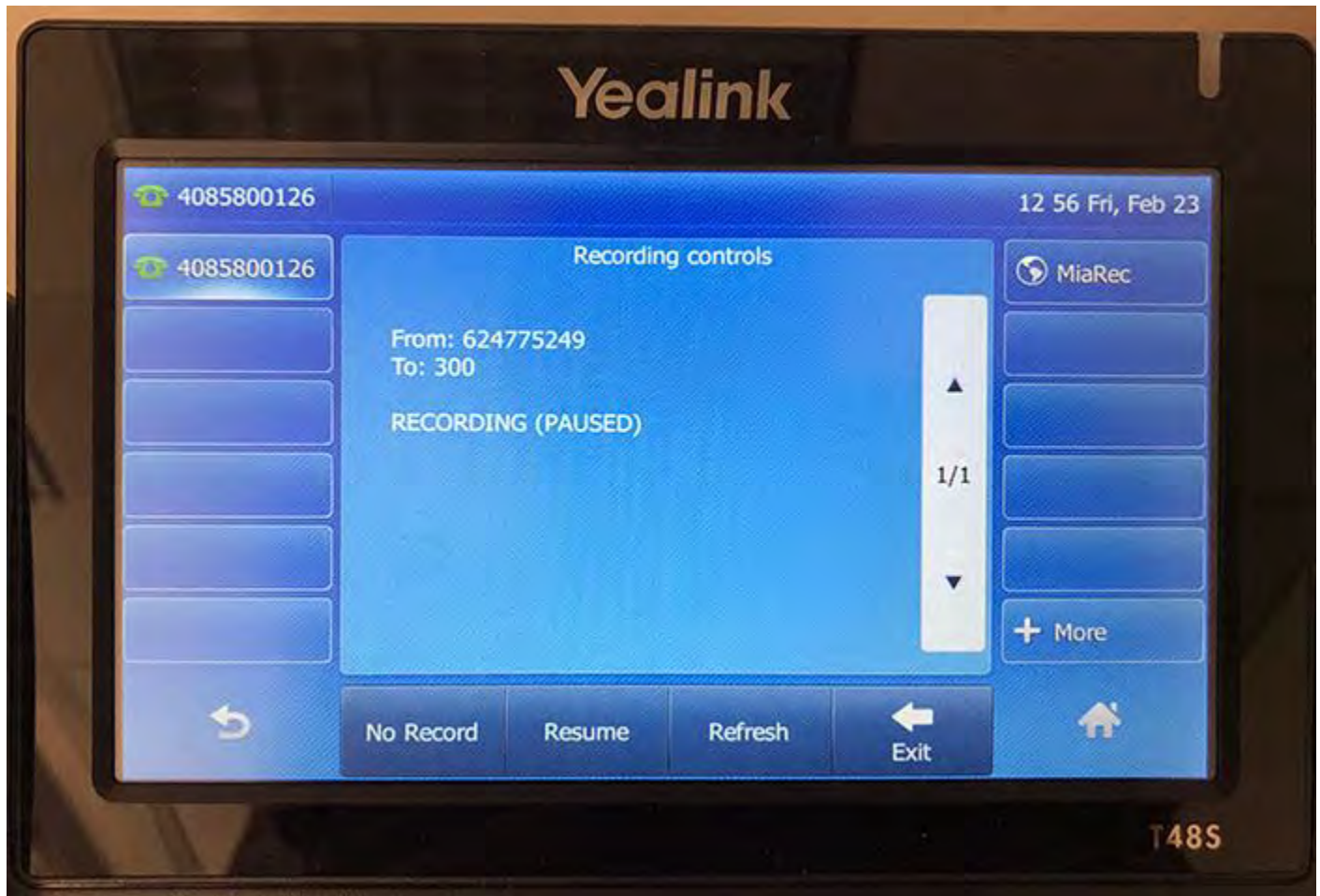
Pause/resume recording via Web portal

Agents may use **Phoneware Call Recording** web-portal to pause/resume recording to comply with PCI requirements.

PHONEWARE   🕸 Dashboard   ▶ Recordings

Call 1001 -> 1003

CALL STATUS

Call State:	**In progess...**
Duration:	**45:44**
On-demand recording:	✔ **Call is beeing recorded**
Recording State:	🎤 **Recording is paused** Re
Live Monitoring:	🔊 **Monitor this call**

Reports

Phoneware Call Recording provides extensive reporting.

Reports are available from top menu `Reports`.

Supports multiple reports, such as:

- Per day
- Per group
- Per user
- Per tenant (for multi-tenant version)
- Agent evaluation reports

Reports

	Users
👤 All Calls	
👤 Tenants	Sales Department
👤 Group Calls	
👤 **User Calls**	

Brandon Thornburg

Cedrick Irons

Damion Rein

Donette Olds

Manual Spoor

Micheal Harvell

Nettie Maharaj

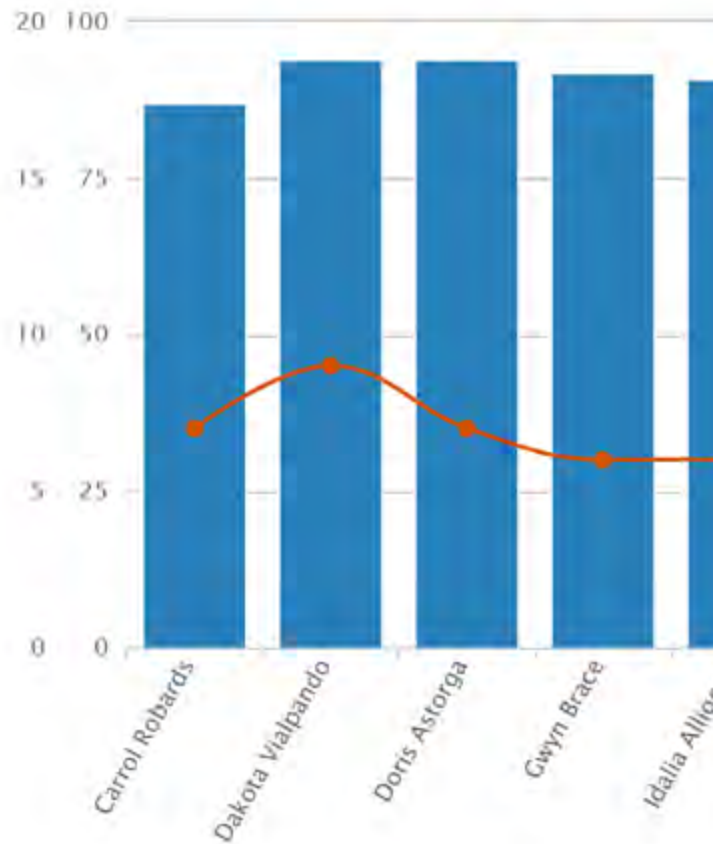Oren Bayne
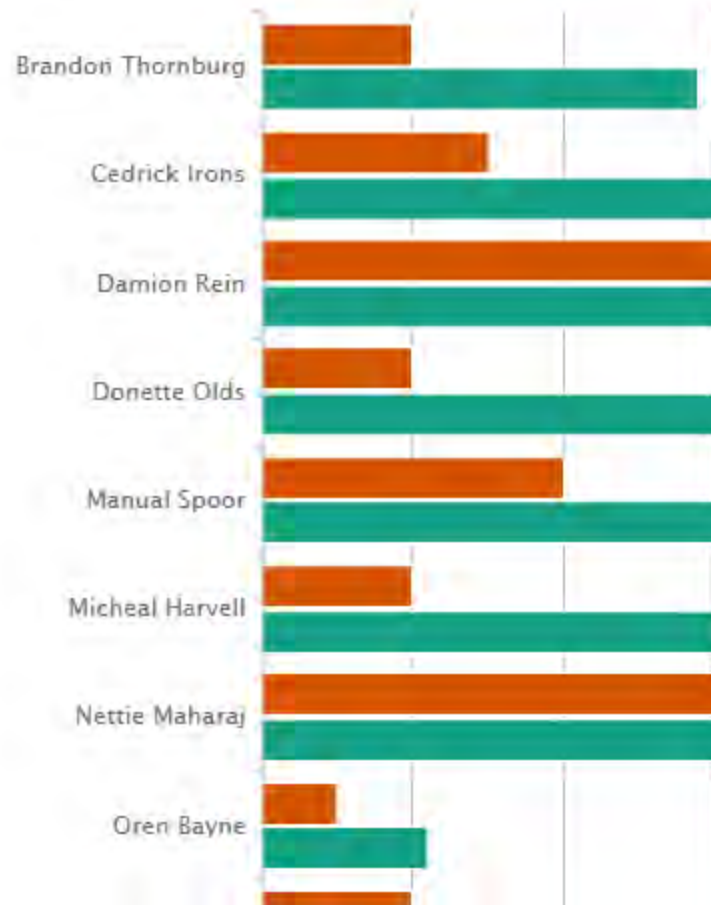
Reports

- 👤 All Calls
- 👤 Tenants
- 👤 Group Calls
- 👤 User Calls
- 👤 **Evaluation Reports** ⌄
  - All evaluation reports
  - **Agent performance summary**
  - Agent performance report

Agent Performance Sum

Sales Department

AGENT	TOTAL EV
Carrol Robards	
Dakota Vialpando	
Doris Astorga	

Agent evaluation

Agent Evaluation module provides contact center managers a tool to evaluate and monitor agent performance.

Prerequisites:

- Evaluator should have appropriate permissions to evaluate agents (see Roles page)
- Agent should be assigned an Agent Evaluation license on user's profile page

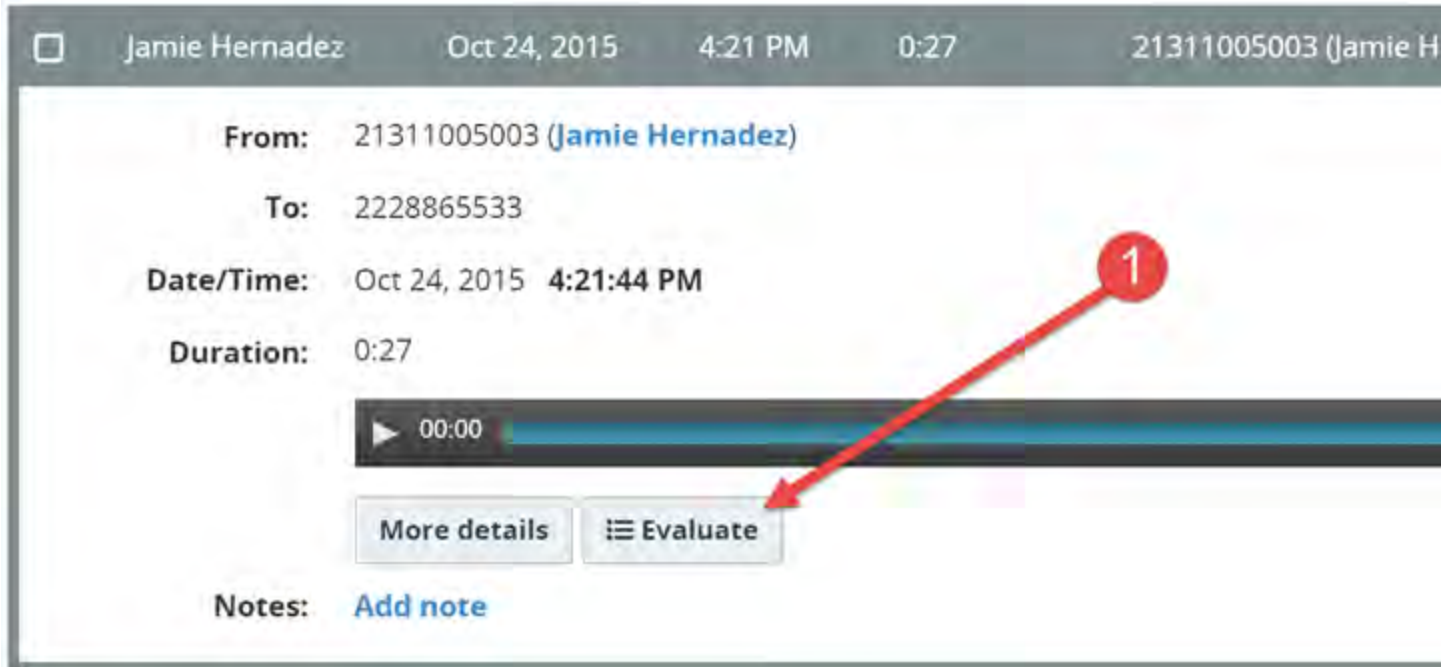To evaluate an agent, select a call recording and click "Evaluate" button in call details:

Select which evaluation form to use for this call:
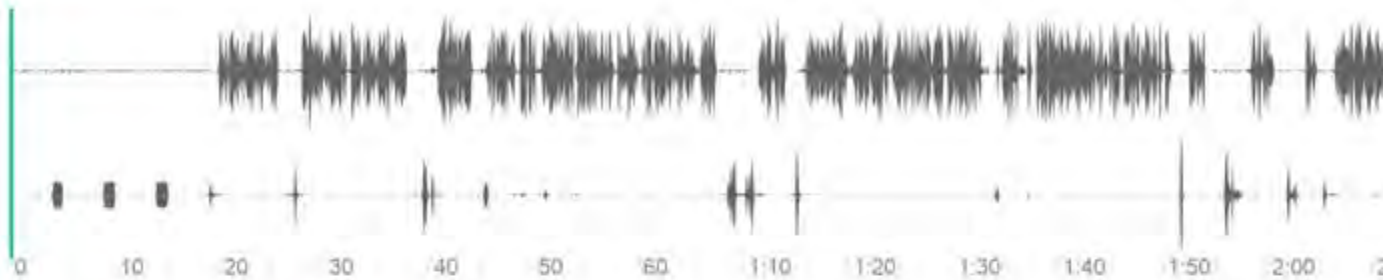
Listen to call recording and answer questions in this evaluation form. Once all questions have been answered, this call will be scored from 0 to 100 points.

Add Evaluation Report

AUDIO

▶ **Play**   ⬇ **Save audio file**

EVALUATION REPORT

Agent:	**Carrol Robards**
Evaluator:	**admin**
Evaluation Form:	**Inbound Tech Support**

CALL DETAILS

Call Date/Time:	**Mar 1, 2010, 9:05:58 AM**
Call Duration:	**3:55**
From:	**827 CTI_HAR_27 (Carrol Robards)**
To:	**0041796930211**
	View call details

GREETING

Did the agent say "Thank you for ca

Did the agent mention his/her name

Did the agent mention the company

If the call was transferred did the a
greeting accordingly?

Did the agent say "This call may be
(outbound only)?

Comments

VERIFICATION

Confidential calls

Some call recordings may be marked as confidential. This feature is utilized in the following scenario:e:

- The supervisor is a manager of a group of agents. He/she has access to all call recordings of these agents.
- Company's executive makes a call to one of the agents.

Typically, such conversation between an agent and executive would be visible to the supervisor. However, when a call is marked as confidential, then this call recording would be hidden from the supervisor. A call recording may be marked as "confidential" either manually or automatically.

Automatically mark calls as confidential

On Executive's user profile page, an administrator may check setting "Mark all calls of this user as confidential."

RECORDING SETTINGS

Record *   ⦿ Yes   ○ On-dem

Record Direction   ☑ Inbound   ☑ Ou

Extension *   +2002

Add Extension

Confidential calls *   ☑ Automatically mark

Manually mark calls as confidential

Authorized users may mark calls as confidential manually. Note, the user's role should have enabled permission to "Set confidential flag."

Access confidential calls

An administrator may grant permission to view confidential calls to authorized users, for example, executives.

Configure Roles	Not allowed for this access s
Configure Groups	☐ View ☐ Edit
Configure Users	☑ View ☑ Edit ☑
Access Own Calls	☐ View ☐ Playback ☐ Add notes ☑ Set ☐ ☐ Edit ☐ Delete
Access Other Calls	☐ View ☐ Playback ☐ Categorize ☐ Add ☑ Clear confidential flag
Access Confidential Calls	☑ View
Access Public Categories	☐ View ☐ Edit ☐

After that, authorized users will be able to see confidential calls:

Call 264460096 -> 313287900

🔒 Confidential   Back Office

AUDIO

▶ Play   ⬇ Save audio file

DATE/TIME

Date:	**Jul 19, 2015**
Connect Time:	**8:17:27 PM**
Disconnect Time:	**8:17:29 PM**
Duration:	**0:02**
Watermark:	**View**

FROM

Us...	
Phone Numb...	
Phone Nam...	
Ip-addre...	