

User Guide for PressONE Call Recording

Author	Date	Version	Notes
Shripal Daphtary	05/20/2016	1.0	Initial Draft

Table of Contents

[Table of Contents](#)

[Introduction](#)

[Accessing Call Recording Platform web interface](#)

[Dashboard](#)

[Call Recording Views](#)

[Playback call recordings](#)

[Inline basic audio player](#)

[Advanced audio player](#)

[Searching Calls](#)

[Advanced Searching of Calls](#)

[Add notes to calls](#)

[Call notes inline](#)

[Categorizing Calls](#)

[Live monitoring](#)

[Pause/resume recording via Web portal](#)

[Reports](#)

[Change own password](#)

[Audit Trail](#)

[Confidential Calls](#)

[Automatically mark calls as confidential](#)

[Manually mark calls as confidential](#)

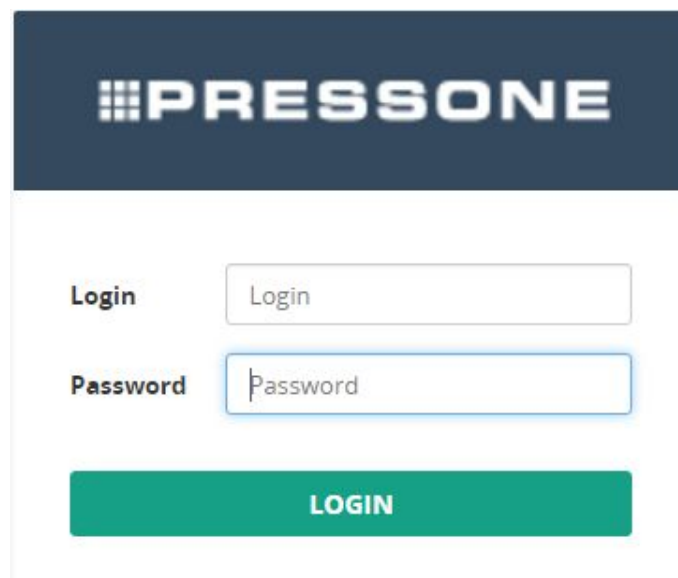
[Access confidential calls](#)

Introduction

This document outlines common uses of PressONE's Call Recording Platform. Please refer to this document. For advanced uses, please contact helpdesk@pressone.net.

Accessing Call Recording Platform web interface

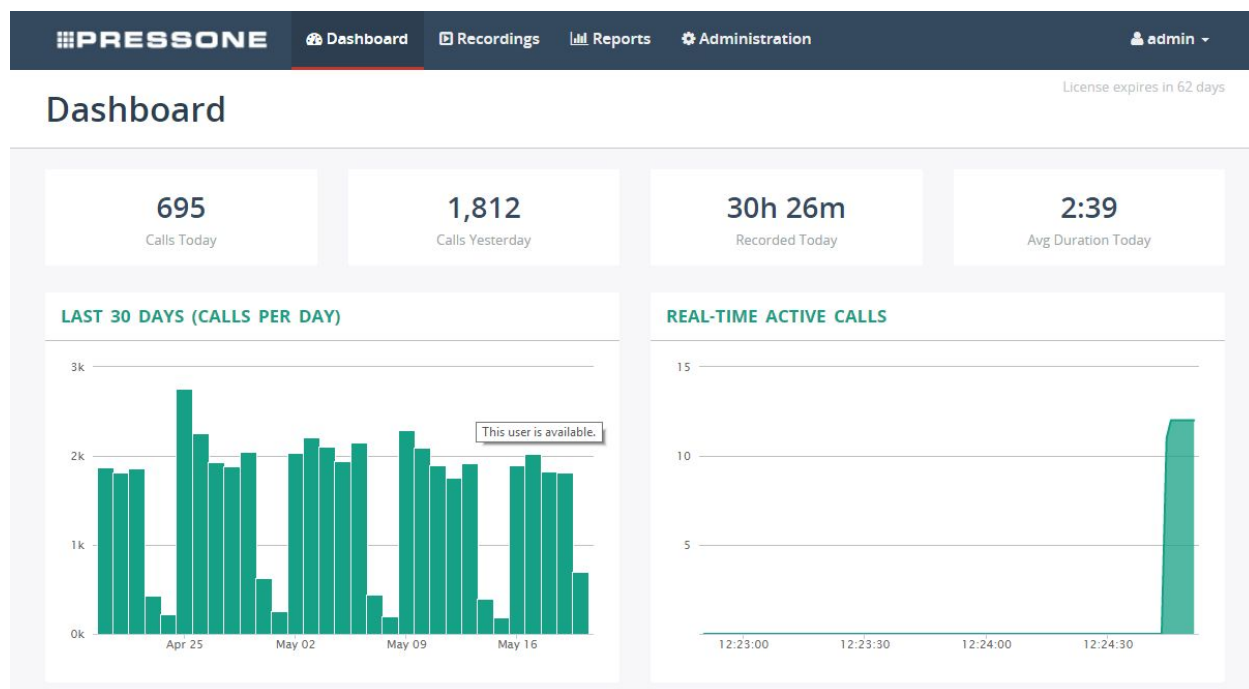
Open a web browser window (i.e. Google Chrome, Firefox, Safari, MS Internet Explorer or Edge, etc) and navigate to <https://callrecording.pressone.net/>

A screenshot of the PressONE login interface. At the top is a dark blue header with the "PRESSONE" logo in white. Below the header, on a white background, are the login fields. The "Login" label is to the left of a text input box containing the placeholder text "Login". The "Password" label is to the left of a text input box containing the placeholder text "Password". Below these fields is a large green button with the word "LOGIN" in white capital letters.

Enter the username and password provided to you by PressONE support or your office administrator.

Dashboard

The Call Recording dashboard provides an at-a-glance view of calls-per-day, average call duration, current active calls and other details.



Call Recording Views

PressONEs' Call Recording supports the following call recording views as shown in the screenshot below:

Click inside call list and you will be able to see call details with a basic media player right inside call list.

Click on [Open in new window](#) and you will be able to to see detailed call information with advanced audio player.

Advanced audio player is shown only in supported browsers (Chrome, Firefox, Safari). Visual presentation of audio allows to detect easily silence and talk-over periods in conversation.

The screenshot displays the PRESSONE interface for a specific call recording. The top navigation bar includes links for Dashboard, Recordings, Reports, and Administration, along with a user profile for 'admin'. The main header shows the call ID '2017051986 -> 719088792790' and buttons for 'Mark as confidential' and 'Delete Call'.

The 'AUDIO' section features a waveform visualization of the audio recording, with a timeline from 0 to 15 minutes. Below the waveform are buttons for 'Play' and 'Save audio file'. A link 'Switch to basic player' is also present.

The 'DATE/TIME' section provides details about the call:

- Date: Today
- Connect Time: 12:23:03 PM
- Disconnect Time: 12:23:23 PM
- Duration: 0:20
- Watermark: View

The 'FROM' section lists the caller's information:

- User: [redacted]
- Phone Number: [redacted]
- Phone Name: [redacted]
- Phone Id: [redacted]
- Ip-address: [redacted]
- Live monitor phone: [redacted]

The 'TO' section lists the recipient's information:

- User: [redacted]
- Phone Number: [redacted]
- Phone Name: [redacted]
- Phone Id: [redacted]
- Ip-address: [redacted]
- Live monitor phone: [redacted]

Searching Calls

MiaRec supports easy search of calls by different parameters:

- Date range
- User name or Group name
- Any text. The entered text is searched inside caller/called phone number/name fields as well as call notes.

The screenshot shows the 'Recordings' section of the PRESSONE interface. The top navigation bar is identical to the previous screenshot. The 'Recordings' header includes a sub-header 'License expires in 62 days'.

The 'ALL CALLS' tab is selected, showing a list of recordings. The search filters include:

- Select a Date Range
- Select a User or Group
- Search a Text
- Search button

Below the search filters are buttons for 'No auto-refresh', 'Categories', 'Download', 'Delete', and 'More'. The bottom right corner shows '0-20 of many' and navigation arrows.

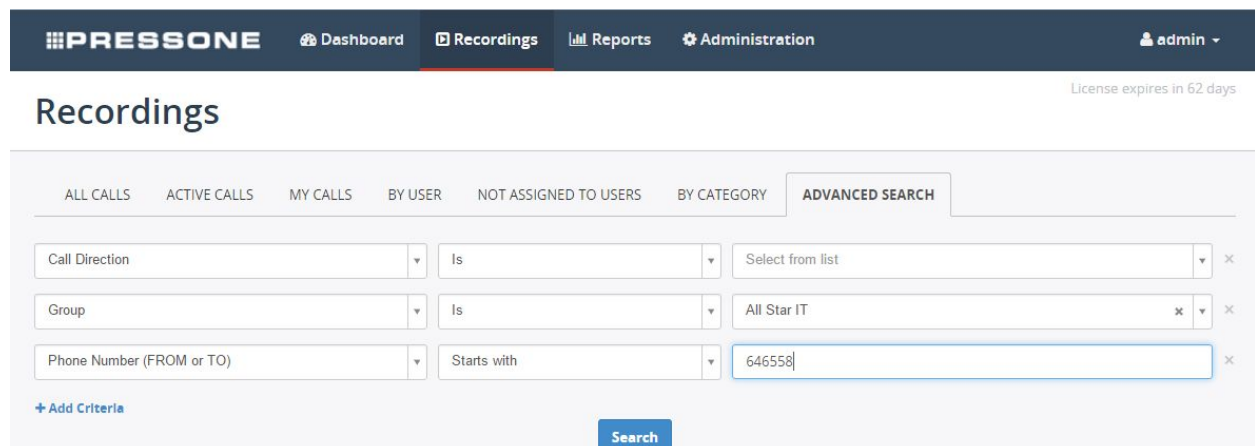
Advanced Searching of Calls

Advanced search web-page provides capability to search call recordings by multiple criteria like:

- 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.



The screenshot shows the PRESS ONE web interface. The top navigation bar includes the PRESS ONE logo, a Dashboard icon, and links for Recordings, Reports, and Administration. The user is logged in as 'admin'. Below the navigation bar, the 'Recordings' section is active. The 'ADVANCED SEARCH' tab is selected, showing a search form with three criteria: 'Call Direction' (operator 'Is'), 'Group' (operator 'Is'), and 'Phone Number (FROM or TO)' (operator 'Starts with'). The 'Phone Number' field contains the value '646558'. A '+ Add Criteria' link and a 'Search' button are at the bottom of the form. A license expiration notice 'License expires in 62 days' is visible in the top right corner.

Add notes to calls

When user has appropriate permissions, he/she will be able to view and optionally add new notes for call recordings.

Call notes are displayed inline and in new window.

Notes are displayed in the order in which they are created (oldest first). It is also possible to pin any notes on top.

Call notes inline

☐

Antonie Parker

Jun 10, 2015 9:17 PM 31:35 21311003000 (Antonie Parker) 6219310492

From: 21311003000 (Antonie Parker)

To: 6219310492

Date/Time: Jun 10, 2015 9:17:21 PM

Duration: 31:35

00:00 32:20

Save audio file

Notes:

admin Today, 9:06 PM

This is a sales lead. Follow up in 2 weeks

Unpin Delete

admin Today, 9:07 PM

Scheduled a demo.

Pin to the top Delete

Save Cancel

<input type="checkbox"/>	Alberta Selfried	Jun 10, 2015	9:12 PM	3:37	21311001009 (Alberta Selfried)	6309942916	
<input type="checkbox"/>	Tinisha Frost	Jun 10, 2015	9:10 PM	0:24	6510960318	21311002002 (Tinisha Frost)	

Dashboard
Recordings
Reports
Administration
admin

Call 21311003000 -> 6219310492
Delete Call

AUDIO
Switch to basic player

Play
Save audio file

DATE/TIME

Date: Jun 10, 2015
Connect Time: 9:17:21 PM
Disconnect Time: 9:48:56 PM
Duration: 31:35
Watermark: View

FROM

User: [redacted]
Phone Number: [redacted]
Phone Name: [redacted]
Ip-address:

TO

User: [redacted]
Phone Number: [redacted]
Phone Name: [redacted]
Ip-address:

Notes 2

admin Today, 9:06 PM
Unpin
Delete

This is a sales lead. Follow up in 2 weeks

admin Today, 9:07 PM
Pin to the top
Delete

Scheduled a demo.

Save
Cancel

Categorizing Calls

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

Check one or more call recordings in a list and click button “Categories”. Then select one or more categories, which you would like to assign to this call.

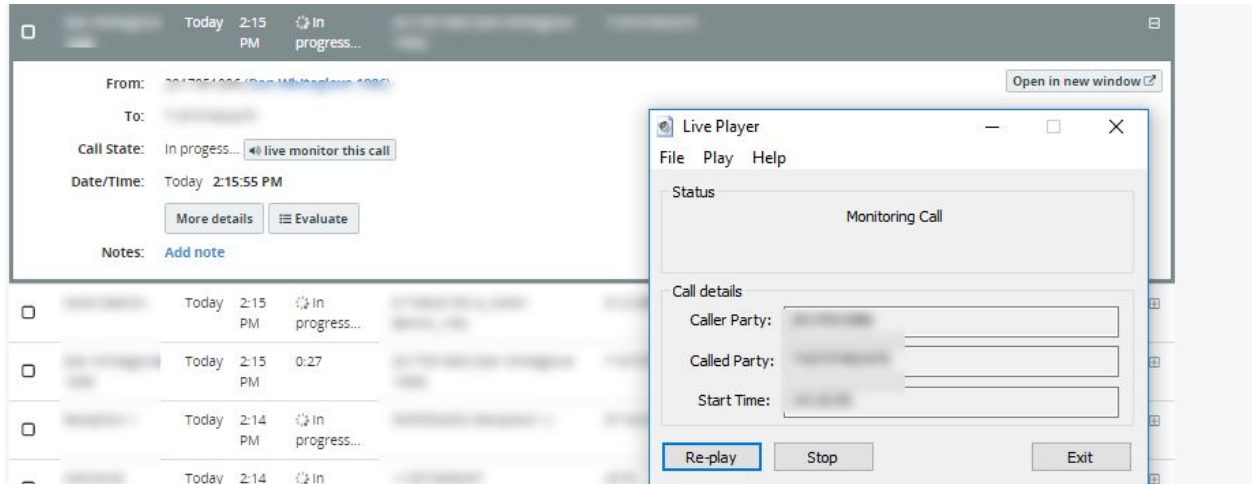
The screenshot shows the 'Recordings' page in the PRESS ONE application. The interface includes a top navigation bar with the following items: PRESSONE, Dashboard, Recordings (active), Reports, and Administration. A user profile 'admin' is visible in the top right corner. Below the navigation bar, the 'Recordings' section has tabs for 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY USER', 'NOT ASSIGNED TO USERS', 'BY CATEGORY', and 'ADVANCED SEARCH'. A search bar with 'Select a Date Range', 'Select a User or Group', and 'Search a Text' is present. Below the search bar are buttons for 'No auto-refresh', 'Categories', 'Download', 'Delete', and 'More'. A table with columns 'USER', 'TO', 'CATEGORIES', and 'BROADWORKS USER ID' is shown. A dropdown menu is open over the 'CATEGORIES' column, showing 'New Category' (circled in red) and 'Manage Categories'.

Live monitoring

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

An application called Live Player should be installed on a supervisor's computer. This application was designed to provide a superior audio latency (less than 200ms).

If user has appropriate permissions, he/she will be able to see live monitor this call button when viewing active calls. Upon clicking on this button, the Live Player application should be automatically started. If it doesn't start, then verify if it has been installed previously on a supervisor's computer (you can [download it from here](#)).



Live monitoring feature supports two modes:

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

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

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

PRESSONE Dashboard Recordings Reports Administration admin

Call +1415-464-6337 - 2089 [Mark as confidential](#) [Delete Call](#)

AUDIO [Switch to basic player](#)

0 30 60 1:30 2:00 2:30 3:00 3:30 4:00

[Play](#) [Save audio file](#)

DATE/TIME

Date: Today
Connect Time: 2:03:46 PM
Disconnect Time: 2:07:54 PM
Duration: 4:08
Watermark: [View](#)

FROM

User: [\[redacted\]](#)
Phone Number: [\[redacted\]](#)
Phone Name: [\[redacted\]](#)
Phone Id: [\[redacted\]](#)
Ip-address: [\[redacted\]](#)
[Live monitor phone + \[redacted\]](#)

TO

User: [\[redacted\]](#)
Phone Number: [\[redacted\]](#)
Phone Name: [\[redacted\]](#)
Phone Id: [\[redacted\]](#)
Ip-address: [\[redacted\]](#)
[Live monitor phone 2089](#)

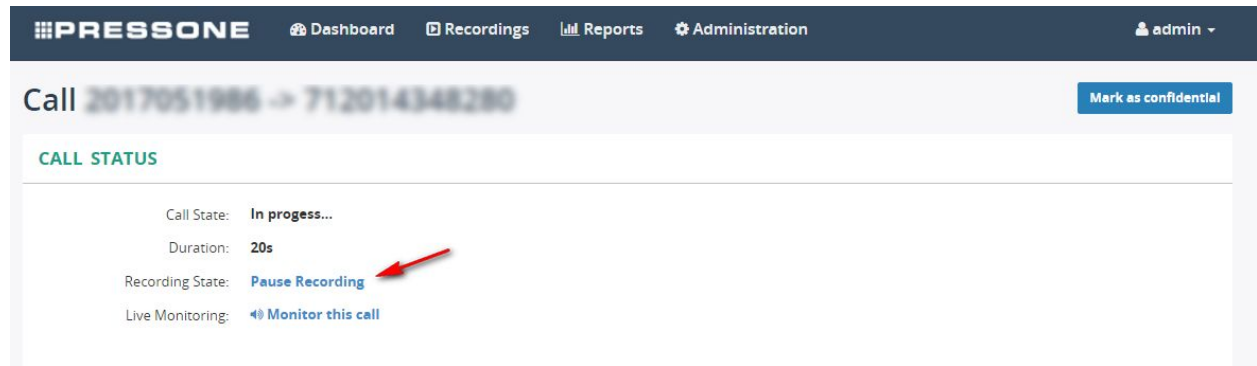
BROADWORKS USER INFO

Service Provider Id: [\[redacted\]](#)
Group Id: [\[redacted\]](#)
User Id: [\[redacted\]](#)

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

Pause/resume recording via Web portal

Agents may use MiaRec web-portal to pause/resume recording to comply with PCI requirements.



Reports

Reports are available from top menu Reports.

MiaRec supports multiple reports:

- Per day
- Per group
- Per user
- Per tenant (for multi-tenant version)

Reports

All Calls

Tenants

Group Calls

User Calls

Evaluation Reports

All recordings for period

Period 2016/05/14 - 2016/05/20

9,258

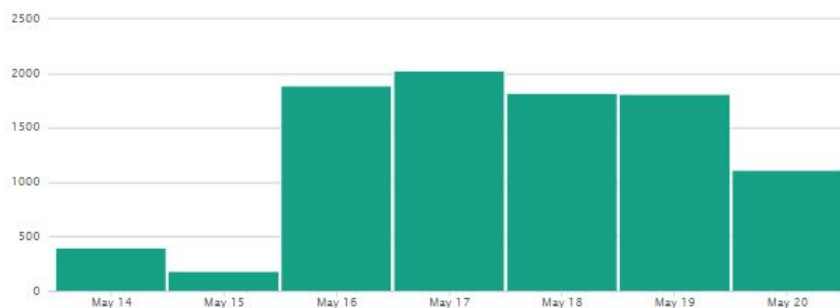
Calls

546

Hours

9,880

Disk space (MB)



DAY	RECORDED CALLS	DURATION (H:MM)
Sat, May 14, 2016	401	22:40
Sun, May 15, 2016	188	13:19
Mon, May 16, 2016	1,891	115:09
Tue, May 17, 2016	2,024	134:31
Wed, May 18, 2016	1,823	103:01
Thu, May 19, 2016	1,812	109:41
Fri, May 20, 2016	1,119	47:42

Reports

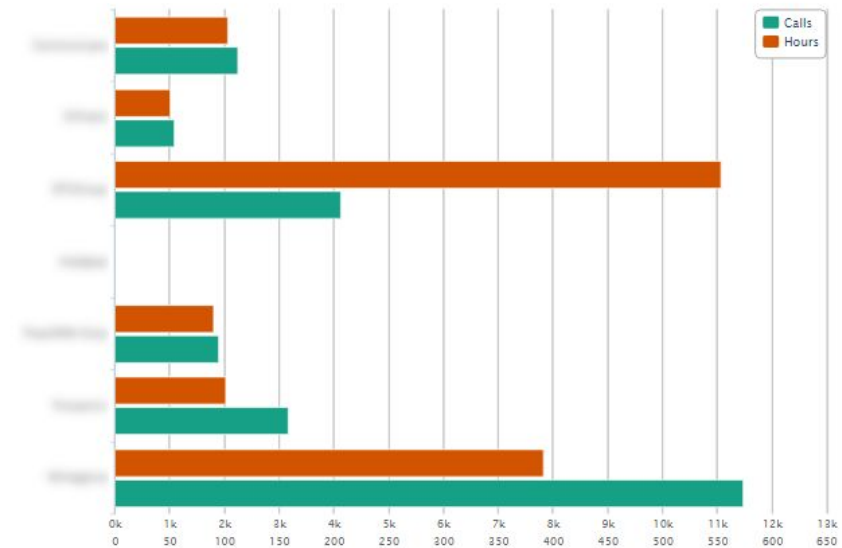
- All Calls
- Tenants
- Group Calls
- User Calls
- Evaluation Reports

Groups

PressONE

Period

2016/04/21 - 2016/05/20



GROUP	RECORDED CALLS	DURATION (HOURS)
	2,251	103
	1,078	51
	4,129	553
	0	0
	1,899	90
	3,158	101
	11,471	391

Reports

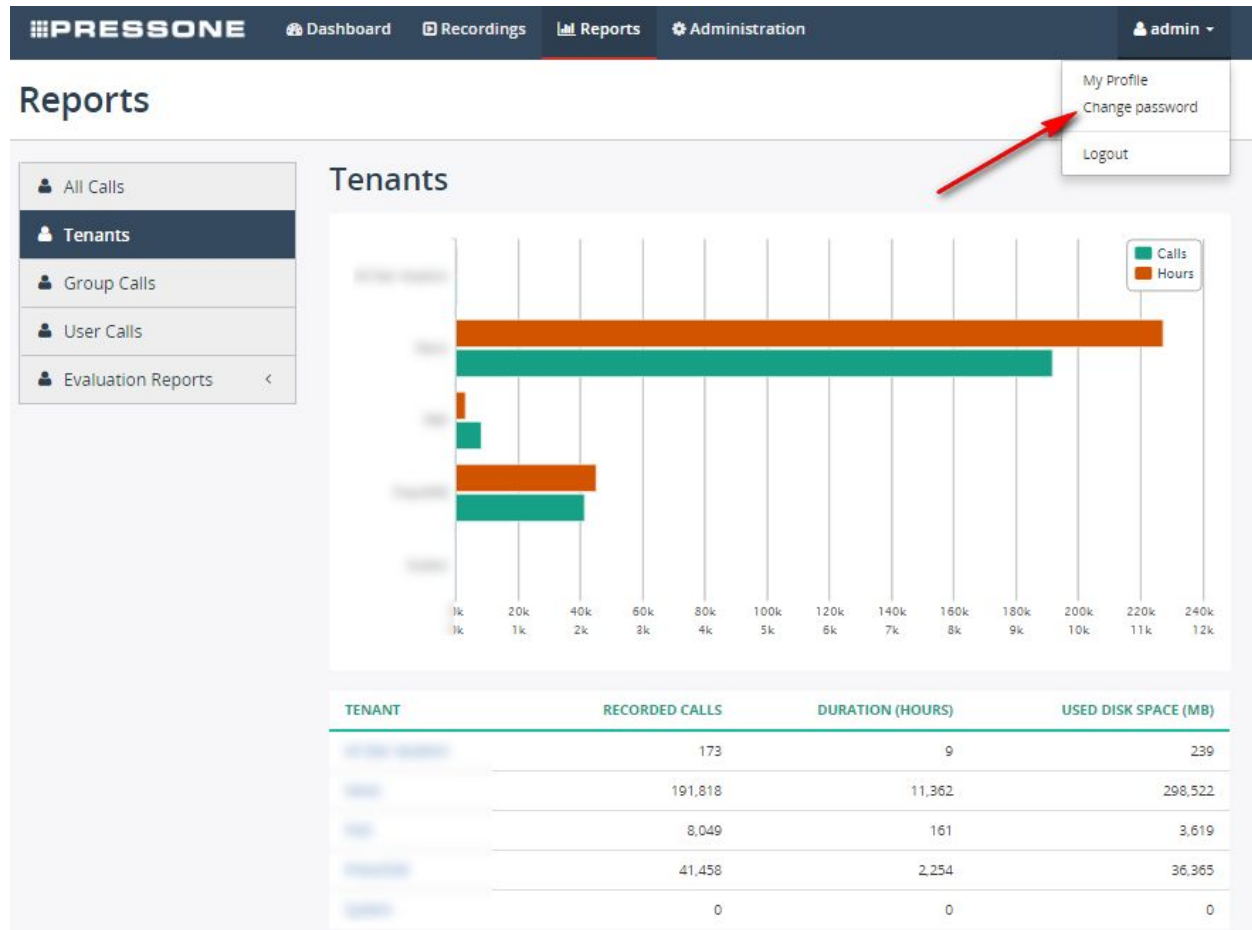
- All Calls
- Tenants
- Group Calls
- User Calls
- Evaluation Reports

Users



USER	RECORDED CALLS	DURATION (HOURS)
...	530	48
...	564	43
...	220	83
...	542	59
...	562	57
...	250	35
...	78	8
...	235	11

In order to change own password, click on your login name in the right top corner and select **Change my password** from drop-down menu.



Audit Trail

Navigate to menu **Administration -> Maintenance -> Audit Trail** to see the audit log. You can filter message by many parameters:

- Date of action
- Initiator (user that performed the logged action)
- Resource that is associated with the logged action, for example, "call", "user", "group", etc.
- Action such as "create", "update", "delete", "change password", etc.

Additionally, you can search inside DATA field of audit log message.

User Management <

Storage <

System <

Customization <

Maintenance >

» System Logs

» License

» Audit Trail

» Recording Servers

» UNDO List

» Troubleshooting

Administration > Maintenance

Audit Trail

Select a Date Range

Select a User or Group

Search in DATA

Resources: (set all | clear all)

☐ Audio files
☐ Calls
☐ Categories
☐ Category assignments
☐ Encrypt private keys
☐ Encrypt public keys
☐ Encrypt system tenant keys
☐ Evaluation form options
☐ Evaluation form questions
☐ Evaluation form sections
☐ Evaluation forms
☐ Evaluation report sections
☐ Evaluation reports
☒ Groups
☐ Incoming replication tokens
☐ Jobs
☐ Managed groups
☐ Notes
☐ Recorders
☐ Role permissions
☒ Roles
☐ Saved searches
☐ Settings
☐ Settings for recorder
☐ Tenant licenses
☐ Tenants
☐ User extensions
☐ User licenses
☒ Users

Actions: (set all | clear all)

☐ Abort job
☐ Assign call to user
☐ Assign many calls to user
☐ Change password
☐ Clear category
☐ Clear managed group
☒ Create
☒ Delete
☐ Download
☐ Error
☐ Export
☐ Grant encrypt key access
☐ Import
☐ Job failure
☐ Job finished
☐ Job started
☐ Live monitor call
☐ Live monitor phone
☐ Login
☐ Login failure
☐ Logout
☐ Mark Delete
☐ On-demand discard
☐ On-demand keep
☐ Pause recording
☐ Playback
☐ Replicate receive
☐ Replicate send
☐ Resume recording
☐ Revoke encrypt key access
☐ Set category
☐ Set managed group
☐ Start job
☐ Undo Delete
☒ Update

+ Filter by Resource

+ Filter by Action

Apply Filter

Reset Filter

0-20 of 33 < >

DATE	INITIATOR	RESOURCE	ACTION / DETAILS
May 6, 2016, 12:37 PM	admin (admin)	Users	<div>Update</div> <div>User account "Arianne Riner" (login: arianne.riner) has been modified. Updated fields: authenticate_type, must_change_password, confidential</div> <div>View</div>
May 6, 2016, 11:47 AM	admin (admin)	Users	<div>Update</div> <div>User account "David Amado" (login: david.amado) has been modified. Updated fields: authenticate_type, must_change_password, confidential</div> <div>View</div>
May 6, 2016, 11:47 AM	admin (admin)	Users	<div>Delete</div> <div>User account "New user for Maxiserve 2" (login:) has been deleted</div> <div>View</div>
May 6, 2016, 11:18 AM	admin (admin)	Users	<div>Update</div> <div>User account "John Smith" (login: john.smith) has been modified. Updated fields: record</div> <div>View</div>

To view details of audit trail message, click "View" button and you will see the associated data. For example, you will see which fields have been modified in "Update" action:

Action «Update»

Time: **Apr 21, 2016, 2:52:27 PM**

Initiator: **admin**

Client Ip-address: **127.0.0.1**

Application: **web**

Resource: **Users**

Action: **Update**

Related To: **User(name=Antonie Parker, id=ffe17f5c-9200-11e5-90ed-e03f497dbdff) ([view](#))**

Details: **User account "Antonie Parker" (login: antonie.parker) has been modified. Updated fields: authenticate_type, must_change_password, confidential**

DATA

[Modified fields](#)
[All fields](#)

FIELD	OLD VALUE	NEW VALUE
authenticate_type		0
broadworks_group_id		No change
broadworks_sp_id		No change
broadworks_user_id		No change
can_login	True	No change
confidential		False
created_time	2015-11-23 08:41:09.528-08	No change
email		No change
encrypt_fingerprint	02f8e0e39bd95394a4c91a20c2add77a	No change
encrypt_public_key	MIIBIJANBgqhkiG9w0BAQEFAAOCAQ8AMIIBC...	No change
group_id	ffe06da6-9200-11e5-ad74-e03f497dbdff	No change

Additionally, when you view call details, user profile, or any other resource, you will be able to see all audit log messages associated with that particular object:

INFO

Date: **Apr 7, 2016**

Connect Time: **3:22:57 PM**

Disconnect Time: **3:25:37 PM**

Duration: **2:40**

Watermark: [View](#)

FROM

User:

Phone Number: **252503727**

Phone Name:

Phone Id: **252503727**

Ip-address: **127.0.0.1 (3001)**

[Live monitor phone 252503727](#)

TO

User: [Kim Skinner](#)

Group: [MiaRec Users](#)

Phone Number: **300**

Phone Name:

Phone Id: **300**

Ip-address: **127.0.0.1 (5080)**

[Live monitor phone 300](#)

Audit Trail

DATE	INITIATOR	RESOURCE	ACTION / DETAILS
Today, 9:06 AM	admin (admin)	Calls	Playback User starts playback of call recording: 252503727 -> 300 , call time: Apr 7, 2016, 3:22:57 PM View
Apr 29, 2016, 11:00 AM	admin (admin)	Calls	Download User downloaded call recording: 252503727 -> 300 , call time: Apr 7, 2016, 3:22:57 PM View
Apr 29, 2016, 10:56 AM	admin (admin)	Calls	Playback User starts playback of call recording: 252503727 -> 300 , call time: Apr 7, 2016, 3:22:57 PM View
Apr 28, 2016, 4:45 PM	admin (admin)	Category assignments	Clear category Category "Order" is removed from call with id e03f497d-bdff-1019-123a-cacf86657b83 View
Apr 28, 2016, 4:44 PM	admin (admin)	Category assignments	Set category Category "Refund" is assigned to call with id e03f497d-bdff-1019-123a-cacf86657b83 View

Confidential Calls

Some call recordings may be marked as confidential. This feature allows to achieve the following use case:

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

Normally, such conversation between agent and executive will be visible to supervisor. But when a call is marked as a confidential, then such call recording will be hidden from 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-demand only ☐ Never ☐ Default

Record Direction ☒ Inbound ☒ Outbound

Extension * ✕ ▼ ✕

[Add Extension](#)

Confidential calls * ☒ Automatically mark all calls of this user as confidential

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".

MiaRec [Dashboard](#) [Recordings](#) [Reports](#) [Administration](#) admin ▾

Recordings

ALL CALLS **ACTIVE CALLS** **MY CALLS** **BY USER** **NOT ASSIGNED TO USERS** **BY CATEGORY** **ADVANCED SEARCH**

Select a Date Range Select a User or Group Search a Text Search ▾

☒ No auto-refresh ☒ Categories ☒ Download ☒ Delete ☒ More ▾ 0-20 of many < >

<input type="checkbox"/>	USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES	
<input type="checkbox"/>	🔒	Jul 19, 2015	8:17 PM	0:02	264460096	313287900	Back Office	⊕
<input type="checkbox"/>	🔒	Jul 19, 2015	8:17 PM	0:03	693706169	267270394	Back Office	⊕
<input type="checkbox"/>		Jul 19, 2015	8:17 PM	0:02	644718934	981705030	Back Office	⊕
<input type="checkbox"/>		Jul 19, 2015	8:17 PM	0:03	152294129	248822481	Back Office	⊕

Mark as confidential
Clear confidential flag

Access confidential calls

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

Such permissions are configured on user role page:

Configure Roles		Not allowed for this access scope	
Configure Groups	<input type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Delete	all none	
Configure Users	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete	all none	
Access Own Calls	<input type="checkbox"/> View <input type="checkbox"/> Playback <input type="checkbox"/> Trigger on-demand <input type="checkbox"/> Categorize <input type="checkbox"/> Add notes <input checked="" type="checkbox"/> Set confidential flag <input checked="" type="checkbox"/> Clear confidential flag <input type="checkbox"/> Edit <input type="checkbox"/> Delete	all none	
Access Other Calls	<input type="checkbox"/> View <input type="checkbox"/> Playback <input type="checkbox"/> Trigger on-demand <input type="checkbox"/> Live monitor <input type="checkbox"/> Categorize <input type="checkbox"/> Add notes <input checked="" type="checkbox"/> Set confidential flag <input checked="" type="checkbox"/> Clear confidential flag <input type="checkbox"/> Edit <input type="checkbox"/> Delete	all none	
Access Confidential Calls	<input checked="" type="checkbox"/> View	all none	
Access Public Categories	<input type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Delete	all none	

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

MiaRec
Dashboard
Recordings
Reports
Administration
admin

Call 264460096 -> 313287900

Confidential

Back Office

Clear confidential flag

Delete Call

AUDIO
Switch to basic player

0

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

User: Unknown User (assign)
Phone Number: 264460096
Phone Name:
Ip-address: 192.168.2.84 (3000)

TO

User: Unknown User (assign)
Phone Number: 313287900
Phone Name:
Ip-address: 192.168.2.5 (5070)