



# **XO Hosted PBX Call Recording**

## Dashboard Admin User Guide

Document Version – 1.0

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## **1 Summary of Changes**

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This section describes the changes to this document for each release and document version.

### **1.1 Changes for Release**

This is the initial release of Call Recording for XO Hosted PBX.

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## 2 About This Document

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This user guide provides step-by-step procedures and reference information for using XO Hosted PBX Call Recording client application.

### 2.1 Audience

This document is intended for Call Recording site administrators who use the XO Hosted PBX Call Recording Dashboard.

### 2.2 How This Guide is Organized

The following table identifies the sections to refer to for information about the functionality provided by Call Recording.

Section	Overview
<a href="#">Introduction to Call</a>	This section provides an overview of Call Recording and the functionality available in the Call Recording dashboard.
<b>Error! Reference source not found.</b>	This section describes how to sign in and out of Call Recording dashboard.
<b>Error! Reference source not found.</b>	This section provides an overview of the user interface.
<a href="#">Home Tab</a>	This section gives details about each section in the Home tab
<a href="#">Recordings Tab</a>	This section provides details of the Recordings Tab which is where you can view the list of recorded calls, playback, and save them to a local storage destination.

### 2.3 Additional Resources

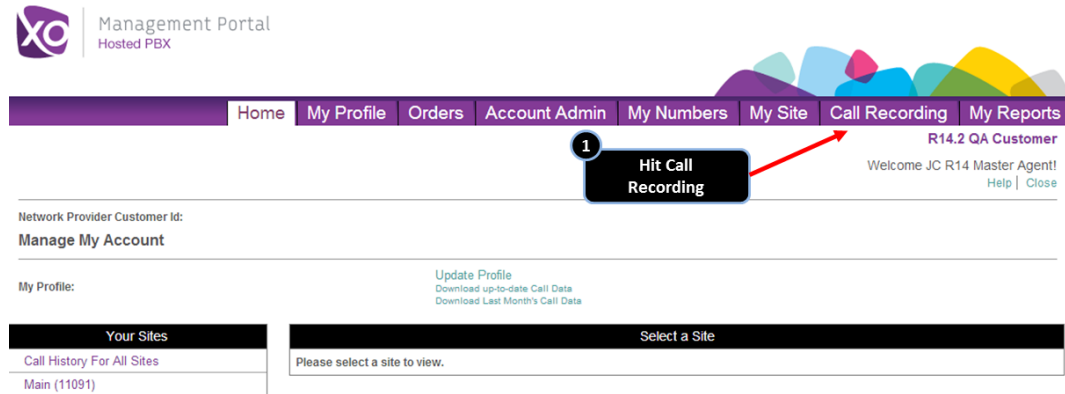
For more information on Call Recording ordering and configuring see the following XO Hosted PBX guides:

- *XO Hosted PBX Call Recording Quick Reference Guide*

### 3 Introduction to Call Recording

XO Hosted PBX Call Recording is a carrier-class fully integrated cloud-based product which enables the recording, playback and management of calls.

#### 3.1 Log Into My Account Dashboard and Go To the Call Recording Tab



#### 3.2 Select the Site

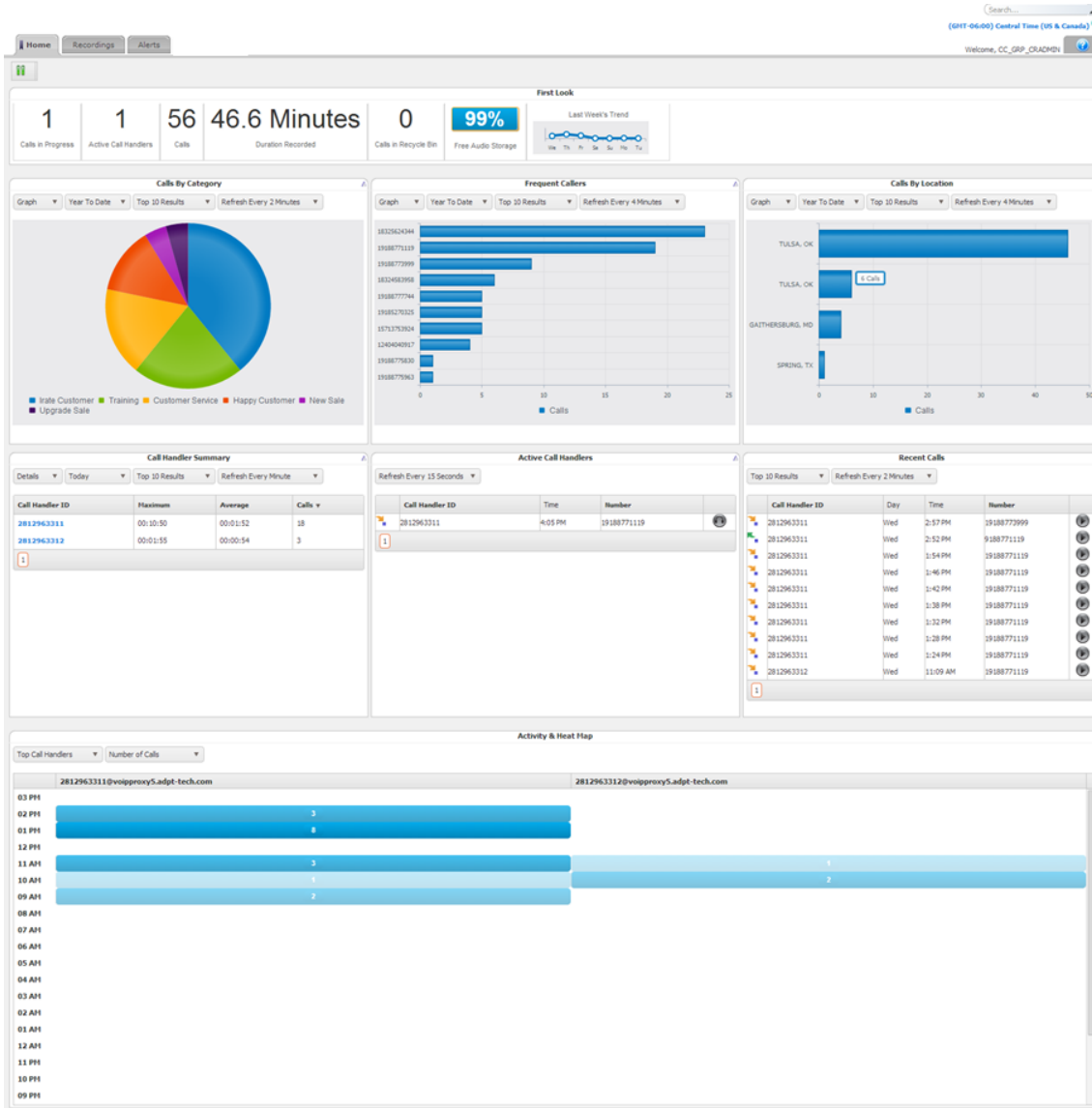


#### 3.3 Call Recording Home Tab

The Home Tab 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 screen storage, etc. for your site. The Home tab 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.

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. 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.



### 3.3.1 First Look



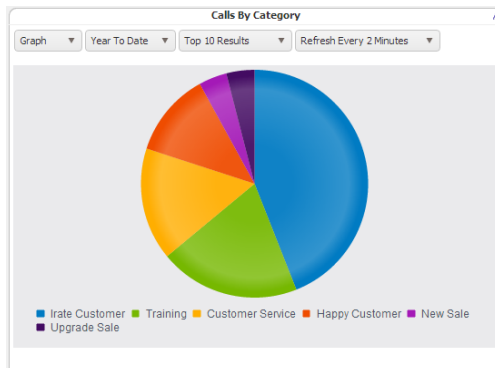
The First Look appears horizontally across the top of the Dashboard and displays a quick view of totals for the following information:

- 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.

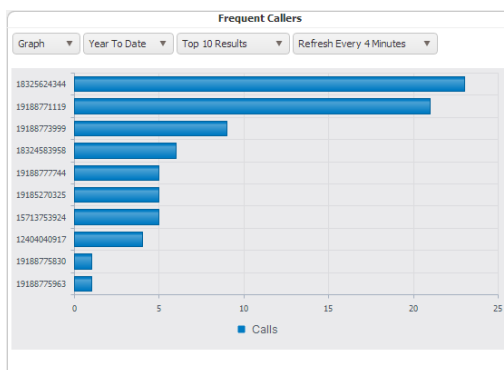
- Duration Recorded – identifies the sum of duration for recorded calls that have a recording associated with them, by Group and User. This value is accumulative over the lifetime of the Group.
- Calls in Recycle Bin – identifies the total number of calls that have a recording associated with them and 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 for the Site.
- Last Week’s Trend – provides a visual display of the call history for the previous week.

### 3.3.2 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.

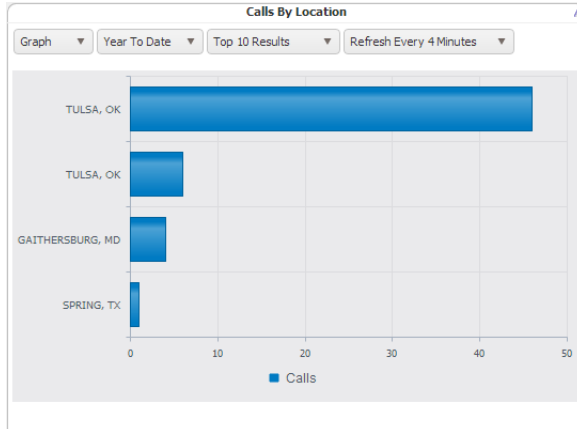
### 3.3.3 Frequent Callers



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.



### 3.3.4 Calls by Location



The Calls by Location pane displays total calls by each location as determined by the NPA/NXX (incoming calls from the NPA/NXX and outgoing calls to 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.

### 3.3.5 Call Handler Summary

Call Handler ID	Maximum	Average	Calls
<a href="#">2812963311</a>	00:10:50	00:02:01	19
<a href="#">2812963312</a>	00:01:55	00:00:54	3

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.

### 3.3.6 Active Call Handlers

Call Handler ID	Time	Number
<a href="#">2812963311</a>	4:20 PM	19188771119

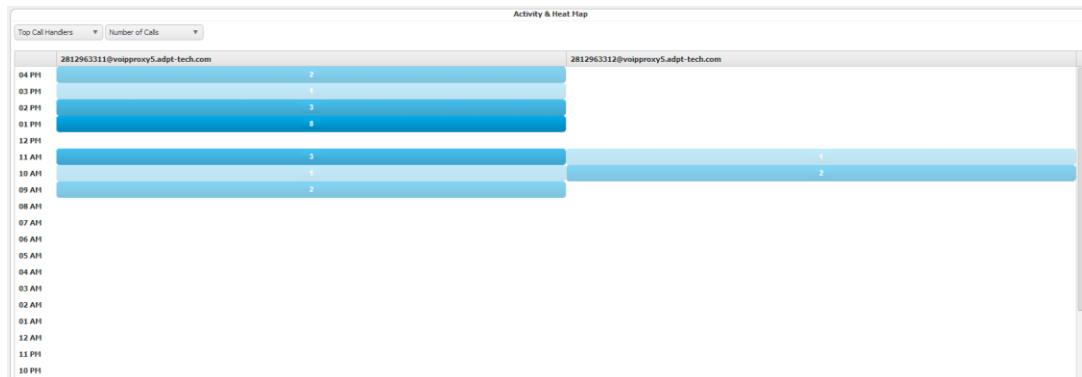
The Active Call Handlers pane displays the call handlers/numbers that are currently on calls and the number of the other party. Users that have access are able to monitor an active call handler's call in progress by clicking on the monitor button. Additionally, you are able to adjust the number of results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

### 3.3.7 Recent Calls

Call Handler ID	Day	Time	Number
2812963311	Wed	2:57 PM	19188773999
2812963311	Wed	2:52 PM	9188771119
2812963311	Wed	1:54 PM	19188771119
2812963311	Wed	1:46 PM	19188771119
2812963311	Wed	1:42 PM	19188771119
2812963311	Wed	1:38 PM	19188771119
2812963311	Wed	1:32 PM	19188771119
2812963311	Wed	1:28 PM	19188771119
2812963311	Wed	1:24 PM	19188771119
2812963312	Wed	11:09 AM	19188771119

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.

### 3.3.8 Activity & Heat Map

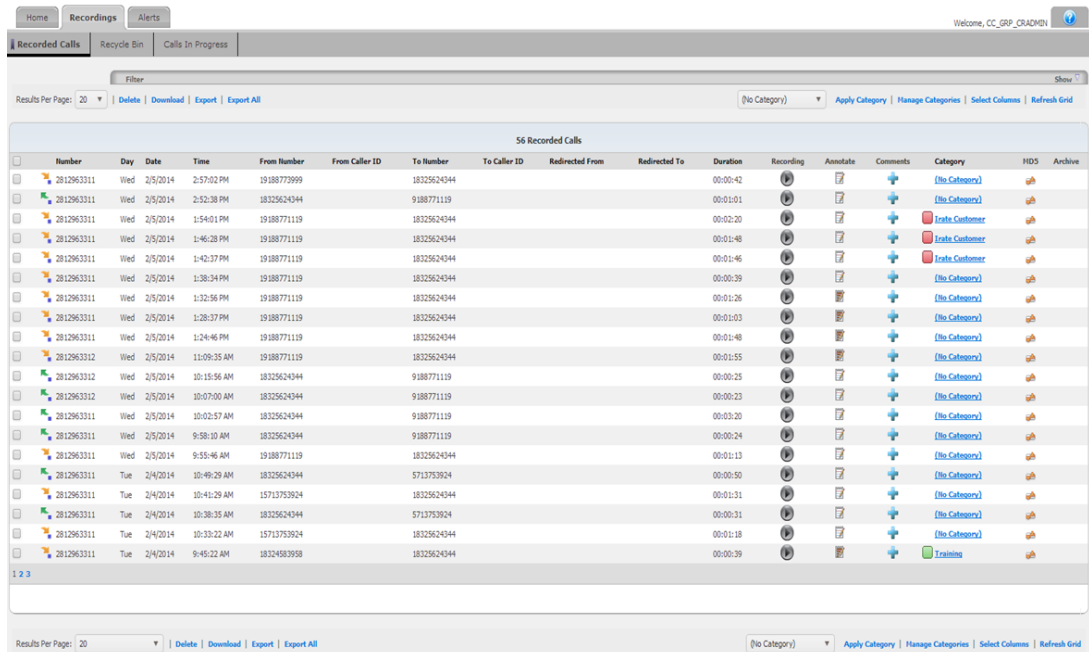


The Activity & Heat Map displays the call activity for the top 10 numbers by hourly intervals over a 24 hour period. The Activity & Heat Map can be filtered by Call Handlers, Calling Parties, or Called Parties. Additionally, the call activity can be displayed as Number of Calls or Call Duration (in minutes).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

## 3.4 Recordings Tab

### 3.4.1 Recorded Calls

The Recorded Calls screen displays all completed recorded calls for all Site users assigned to the Call Recording feature. 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. Columns may also be hidden/shown using the Select Columns link and selecting the desired columns to display.





Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirected From	Redirected To	Duration	Recording	Annotate	Comments	Category	MDS	Archive
2812963311	Wed	2/5/2014	2:57:02 PM	1918877999		18325624344				00:00:42				(No Category)		
2812963311	Wed	2/5/2014	2:52:38 PM	18325624344		9188771119				00:01:01				(No Category)		
2812963311	Wed	2/5/2014	1:54:01 PM	19188771119		18325624344				00:02:20			Invite Customer	(No Category)		
2812963311	Wed	2/5/2014	1:46:28 PM	19188771119		18325624344				00:01:48			Invite Customer	(No Category)		
2812963311	Wed	2/5/2014	1:42:37 PM	19188771119		18325624344				00:01:46			Invite Customer	(No Category)		
2812963311	Wed	2/5/2014	1:38:34 PM	19188771119		18325624344				00:00:39				(No Category)		
2812963311	Wed	2/5/2014	1:32:56 PM	19188771119		18325624344				00:01:26				(No Category)		
2812963311	Wed	2/5/2014	1:28:37 PM	19188771119		18325624344				00:01:03				(No Category)		
2812963311	Wed	2/5/2014	1:24:46 PM	19188771119		18325624344				00:01:48				(No Category)		
2812963312	Wed	2/5/2014	11:09:35 AM	19188771119		18325624344				00:01:55				(No Category)		
2812963312	Wed	2/5/2014	10:15:56 AM	18325624344		9188771119				00:00:25				(No Category)		
2812963312	Wed	2/5/2014	10:07:00 AM	18325624344		9188771119				00:00:23				(No Category)		
2812963311	Wed	2/5/2014	10:02:57 AM	18325624344		9188771119				00:01:20				(No Category)		
2812963311	Wed	2/5/2014	9:58:10 AM	18325624344		9188771119				00:00:24				(No Category)		
2812963311	Wed	2/5/2014	9:55:46 AM	19188771119		18325624344				00:01:13				(No Category)		
2812963311	Tue	2/4/2014	10:49:29 AM	18325624344		5713753924				00:00:50				(No Category)		
2812963311	Tue	2/4/2014	10:41:29 AM	15713753924		18325624344				00:01:31				(No Category)		
2812963311	Tue	2/4/2014	10:38:35 AM	18325624344		5713753924				00:00:31				(No Category)		
2812963311	Tue	2/4/2014	10:33:22 AM	15713753924		18325624344				00:01:18				(No Category)		
2812963311	Tue	2/4/2014	9:45:22 AM	18324583958		18325624344				00:00:39			Training	(No Category)		




The following information is available to be displayed on the Recorded Calls screen:

- **Number** – the phone number of the user with the recorded call. This is also referred to as the Call Handler number or description. Next to each number is an indicator showing if the recorded call was an inbound ( ) or outbound 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 phone number
- **From Caller ID** – displays the name or number of the person that originated the call (currently this column will not display any data)
- **To Number** – the terminating number. If the user is provisioned with a one-way number or is a two way number configured with a different Caller ID number, the provisioned Caller ID number will display in this field
- **To Caller ID** – displays the name or number of the To Number (currently this column will not display any data)
- **Redirected From** – displays the number of the person or group transferring the call (currently this column will not display any data)
- **Redirected To** – displays the number to which the call was transferred (currently this column will not display any data)
- **Duration** – the length of the call
- **Recording** – identifies whether or not there is a recording associated with the call. When a call is recorded, 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.

- **Annotate** – comments and markers on calls to indicate where in the call a notable event occurred. 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 (site administrator) 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.

- **Comments** – enables a text description to be associated with a recording which allows searching of keywords to easily find specific recordings. 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.

**Category** – allows the user 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.

Categories must first be created before they are assigned to calls under the “Manage Categories” link. See section 3.5.9 below for details on setting up categories.

**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.

- **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. MD5 is a technique used to ensure that a file has not been altered in any way. When the call is recorded, an MD5 hash is created and outputs a string of random characters.

To determine if two recorded calls are the same, you can compare the MD5 hash of the calls. If they are the same, they are the same call. If a different string of characters that don't match the original is created, you know the call has been modified.

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.

**Note:** All columns on the Recorded Calls tab may not be displayed. Go to “Select Columns” in Section 3.5.3 below to change the viewed columns.

### 3.4.2 Filtering

Number, Redirection, Date/Time, Duration, Category, or Other (or a combination of all five) filters 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, Duration, 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.

The screenshot displays the 'Recorded Calls' section of the dashboard. A 'Filter' window is open, showing various filter tabs: By Number, By Employee, By Redirection, By Date/Time, By Duration, By Category, and Other. The 'By Number' tab is selected, with fields for 'From Number', 'To Number', 'From Caller ID', and 'To Caller ID'. A 'Call Handler Number Search' field is also present. Below the filter window, a table titled '84 Recorded Calls' is visible. The table has columns for Number, Day, Date, Time, From Number, From Caller ID, To Number, To Caller ID, Redirected From, Redirected To, Duration, Recording, Annotate, Comments, Category, HDS, and Archive. The first few rows of the table are as follows:

Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirected From	Redirected To	Duration	Recording	Annotate	Comments	Category	HDS	Archive
2812963312	Fri	2/7/2014	11:18:26 AM	19188773999		18325624344		18325624344		00:05:07				(No Category)		
2812963312	Fri	2/7/2014	11:13:54 AM	19188773999		18325624344		18325624344		00:03:51				(No Category)		
2812963312	Thu	2/6/2014	5:16:14 PM	19188771119		18325624344		18325624344		00:05:55				(No Category)		





#### 3.4.2.1 Applying a filter

1. Click on the **Filter** toolbar to expand it.
2. Select the desired filter tab: By Number, By Redirection, By Date/Time, By Duration, By Category, Other (note: By Employee is not functional at this time)
3. By Number Tab: Enter criteria to filter the calls list to find specific call records
  - a. From Number – enter a number that appears under the From Number column of the list of Recorded Calls.
  - b. To Number – enter a number that appears under the To Number column of the list of Recorded Calls.
  - c. From Caller ID – (at this time no Caller ID is available and cannot be filtered)
  - d. To Caller ID - (at this time no Caller ID is available and cannot be filtered)
  - e. Location – the location is determined by the NPA/NXX of the calling (incoming) or called (outgoing) number. The locations determined by the system can be seen in the Home page under Calls by Location. Enter one of these locations to see calls to/from this location.

- f. Comment Text – enter text that will be searched for in the Comments added to calls.
- g. Call Handler Number Search – Check this radio button to search for calls of one specific user. Enter a number or start typing the number of the user with the Call Recording feature. As you type a list of numbers will appear below, select one of the numbers.
- h. Select Call Handler Numbers – Check this radio button to search for calls of one or more users with the Call Recording feature. After you select this option, the list of users will be shown in a list. Select the user(s) by checking the box next to each user.

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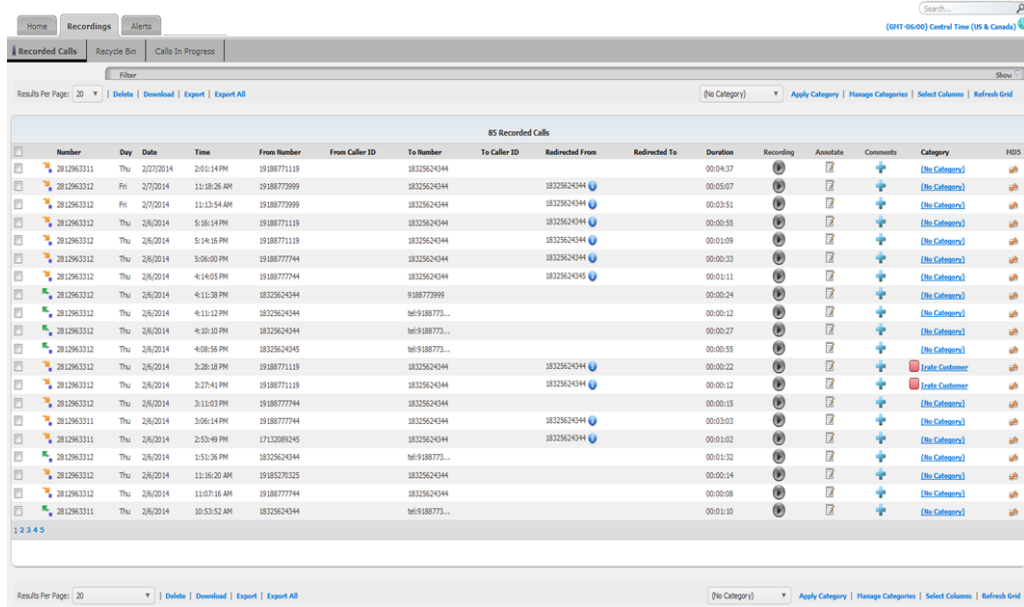
**The options below apply to all filter tabs**

- i. Match Search Criteria As Entered – Check this box to search for exact matches and exact case (upper or lower) of letters of criteria entered in the From Number, To Number, and/or Location. If not checked, the search will be performed to search for partial numbers and will not be case sensitive on letters entered.
  - j. Apply Changes – After all search criteria is entered hit this button to filter the list of calls.
  - k. Reset All – Checking this button will clear all entered filter criteria.
  - l. Save () button – hit this button and enter a name to save the entered criteria. This saved filter can be applied to later search through the Apply Saved filter button (). This will save all criteria entered in all the filter tabs.
  - m. Apply Saved Filter () button – hit this button to apply or delete a previously saved filter. Hit the down arrow button to expand the list of saved filters and select one then hit *Apply* or *Delete*.
- 4. By Employee: this filter is not used at this time
  - 5. By Redirection: Enter a number that is in the Redirected From or Redirected To columns.
  - 6. By Date/Time Tab: Enter criteria to filter the calls list to find specific call records created on specific dates and or times.
    - a. Select the top dropdown box to select the dates to filter: Last 30 days (default), Today, Yesterday, Week to Date, Last Week, Month to Date, Last Month, Year to Date, or Custom Date Range.
    - b. When Custom Date Range is selected a Start Date and End Date boxes appear. Enter the date in MM/DD/YYYY format or select the calendar box () and pick the date. Dates for both boxes are required.
    - c. Start/End Time – enter a start time and end time to filter by if desired. Use HH:MM:SS format and enter “a” for A.M or “p” for P.M.
    - d. Hit “Apply Changes” button.
  - 7. By Duration Tab: Enables filtering of the call list to find specific call records with a specified duration.
    - a. Select the dropdown box to select the duration criteria to filter: Less Than, Less Than or Equal To, Equal To, Greater Than or Equal To, Greater Than or Between. You must also enter a duration time in HH:MM:SS format in the boxes next to the criteria drop down. If you select “Between”, you must enter a low end duration and high end duration.
    - b. Hit “Apply Changes” button.
  - 8. By Category Tab: Enables filtering of the call list to find specific call records that have been tagged with specific a specific category.

- a. Check the box for the categories you wish to filter for
  - b. Hit “Apply Changes” button
9. Other Tab: Enables filtering and showing a maximum number of call records, call records without recording, only incoming calls, only outgoing calls, and/or to show only a random percentage of calls.
  - a. Check the box or boxes of the options you wish to apply.
  - b. Hit “Apply Changes” button

### 3.4.3 Managing the Recorded Calls tab columns

The columns viewed in the Recorded Calls tab may be hidden or shown to meet the specific requirements of your business.

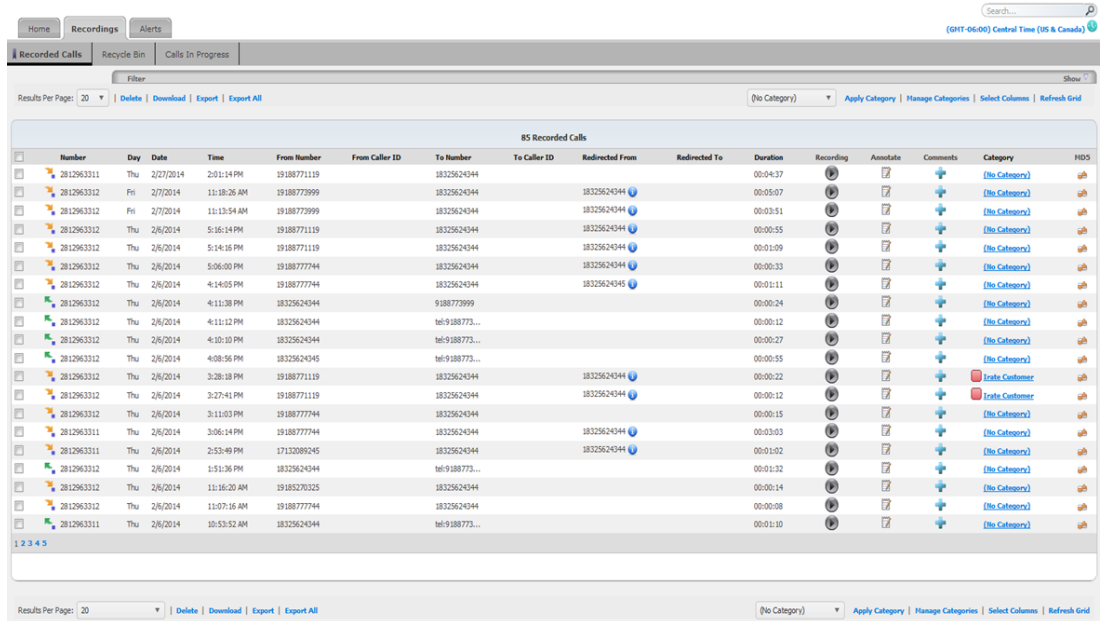


The screenshot shows the 'Recorded Calls' tab in a web application. At the top, there are navigation tabs for 'Home', 'Recordings', and 'Alerts'. Below this, there are sub-tabs for 'Recorded Calls', 'Recycle Bin', and 'Calls In Progress'. A search bar is located in the top right corner. The main content area displays a table titled '85 Recorded Calls'. The table has columns for 'Number', 'Day', 'Date', 'Time', 'From Number', 'From Caller ID', 'To Number', 'To Caller ID', 'Redirected From', 'Redirected To', 'Duration', 'Recording', 'Associate', 'Comments', 'Category', and 'MDS'. Below the table, there are pagination controls and a 'Select Columns' link. The table contains 20 rows of call records, each with a checkbox for selection and a trash icon for deletion.


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. Check the box for each column you want to be visible and hit "Update". (It is recommended the From Caller ID and To Caller ID columns be hidden since there is no data that will be populated in these columns at the current time.)
4. Hit "Apply Changes"

### 3.4.4 Playing a recorded call






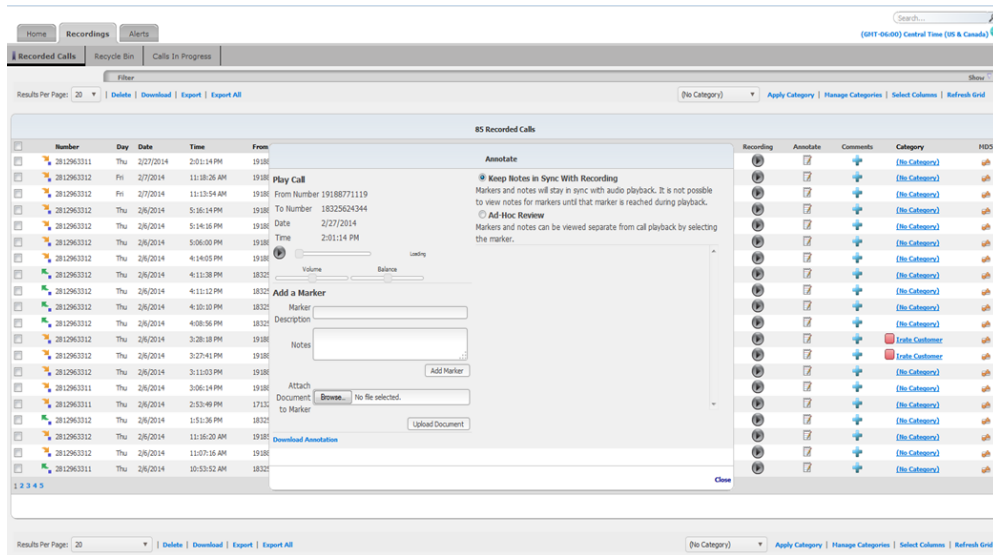
Number	Day	Date	Time	From Number	From Caller ID	To Number	To Caller ID	Redirected From	Redirected To	Duration	Recording	Annotate	Comments	Category	HD5
2812963311	Thu	2/27/2014	2:01:14 PM	1918877119		18325624344				00:04:37				(No Category)	
2812963312	Fri	2/7/2014	11:18:26 AM	1918877999		18325624344		18325624344		00:05:07				(No Category)	
2812963312	Fri	2/7/2014	11:13:54 AM	1918877999		18325624344		18325624344		00:03:51				(No Category)	
2812963312	Thu	2/6/2014	5:16:14 PM	1918877119		18325624344		18325624344		00:00:55				(No Category)	
2812963312	Thu	2/6/2014	5:14:16 PM	1918877119		18325624344		18325624344		00:01:09				(No Category)	
2812963312	Thu	2/6/2014	5:06:00 PM	1918877744		18325624344		18325624344		00:00:33				(No Category)	
2812963312	Thu	2/6/2014	4:14:05 PM	1918877744		18325624344		18325624344		00:01:11				(No Category)	
2812963312	Thu	2/6/2014	4:11:38 PM	18325624344		918877999				00:00:24				(No Category)	
2812963312	Thu	2/6/2014	4:10:12 PM	18325624344		tel:9188773...				00:00:12				(No Category)	
2812963312	Thu	2/6/2014	4:10:10 PM	18325624344		tel:9188773...				00:00:27				(No Category)	
2812963312	Thu	2/6/2014	4:08:56 PM	18325624345		tel:9188773...				00:00:55				(No Category)	
2812963312	Thu	2/6/2014	3:28:18 PM	1918877119		18325624344		18325624344		00:00:22				(No Category)	
2812963312	Thu	2/6/2014	3:27:43 PM	1918877119		18325624344		18325624344		00:00:12				(No Category)	
2812963312	Thu	2/6/2014	3:11:03 PM	1918877744		18325624344				00:00:15				(No Category)	
2812963311	Thu	2/6/2014	3:06:14 PM	1918877744		18325624344		18325624344		00:03:03				(No Category)	
2812963311	Thu	2/6/2014	2:53:49 PM	17132089245		18325624344		18325624344		00:01:02				(No Category)	
2812963312	Thu	2/6/2014	1:51:36 PM	18325624344		tel:9188773...				00:01:32				(No Category)	
2812963312	Thu	2/6/2014	11:16:20 AM	19185270325		18325624344				00:00:14				(No Category)	
2812963312	Thu	2/6/2014	11:07:16 AM	1918877744		18325624344				00:00:08				(No Category)	
2812963311	Thu	2/6/2014	10:53:52 AM	18325624344		tel:9188773...				00:01:10				(No Category)	


1. Click the **Recordings** tab and select **Recorded Calls** sub tab to ensure that you are looking at the list of recorded calls.
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.
3. Click the browser's **Back** button to return to the Recorded Calls screen.

### 3.4.5 Adding an annotation to a recorded call



An annotation enables notes to be added to call recordings at specific points in the playback of the call. These notes may be helpful in the training of employees or documenting specific points in calls for security or legal reasons.

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. A window will pop up which enables the adding of an annotation to the call.



3. You have two options with how annotations are tagged to the call. Select the desired option by hitting the radio button next to the description.
  - a. Keep Notes in Sync With Recording – Markers and notes will stay in sync with the playback. It is not possible to view notes for markers until that marker is reached during playback.
  - b. Ad-Hoc review – Markers and notes can be view separately from call playback by selecting the marker.
4. To add the annotation, select the **“Play”** button to begin playing the recorded call.
5. When the playback reaches the point of interest, hit the pause button.
6. Under “Add a Marker”, enter a description for the Note in Marker Description, add some notes in the Notes field and hit “Add Marker”.
7. If desired, you may also attach a document to the annotation. Hit the “Browse” button and select a document from your computer or network. Then hit the “Upload Document” button to add it to the call recording system.
8. If desired, you may enter additional markers in the call. Repeat steps 4-7. Saved markers will be shown in the pop-up window.
9. To delete a marker, click the delete marker  that corresponds to the annotation that is no longer needed. Click “OK” in the confirmation pop-up. This action will remove both the note and the attached document.

### 3.4.6 Viewing an annotation on 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. A window will pop up which enables the adding of an annotation to the call.
3. In the list of annotations, click the  (Seek) button to jump to the annotated spot in the call.

### 3.4.7 Downloading an Annotation

1. Click the Download Annotation link, a pop-up will appear. Hit “Open”, “Save”, or “Save as”

### 3.4.8 Adding comments to a recorded call

Comments are useful in situations when a customer has called in several times. Comments can be added to each recorded call so that users can see the steps that have been taken along the way

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. A pop-up will appear with details about the call and a blank entry box.
3. In the Comment Text field, add desired notes about this call. Comment text cannot be greater than 1024 characters.
4. Hit "Save". Notice that the Add Comment button has changed to a  button indicating that there is a comment associated with this call.

### 3.4.9 Categorizing a recorded call

Categorization enables customers to add labels to similar type calls which help in viewing and reporting on call trends. Categories are not pre-defined and must be created before they are applied to calls.

#### 3.4.9.1 Managing/Adding Categories

1. Add a new category
  - a. Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.
  - b. Select the Manage Categories link. A pop-up will appear.
  - c. Enter a Category Name
  - d. In the drop down next to the Category Name, select a color to associate with the category. The color will be used in graphs on the Home tab.
  - e. Repeat steps c and d to add Category Names as required.
  - f. Hit "Add" to save the created Categories
  - g. Hit "Close" button to return to the call list
2. Update a category
  - a. Select the Manage Categories link. A pop-up will appear.
  - b. Select an existing category name
  - c. Change the name and/or color
  - d. Hit "Update" button
  - e. Hit "Close" button to return to the call list
3. Delete a category
  - a. Select the Manage Categories link. A pop-up will appear.
  - b. Select an existing category name
  - c. Hit "Delete" button
  - d. Hit "Close" button to return to the call list

#### 3.4.9.2 Assigning Categories to a Single Call

1. To apply categories to a single call, in the recorded calls list, select the **Category** link that corresponds to the call that you want to categorize. If no categories are assigned a “No Category” link is shown in the Category column. A pop-up will appear.
2. Hit the checkbox next the Categories to assign the call. When all appropriate categories are selected hit the “Save” button.

#### 3.4.9.3 Assigning Categories to Multiple Calls

1. In the recorded calls list, hit the check boxes (located on left side in the recorded calls list) of each desired call to assign categories.
2. Select the category you wish to apply from the drop down list found at the top or bottom of the Recorded Calls page. Multiple categories can be selected by hitting the control button while selecting the categories.
3. Select the **Apply Category** link (next to the Categories drop down box).

#### 3.4.10 Downloading a recorded call

Downloading enables a user to save selected recordings to a local storage location (users PC for example). Downloaded recordings are saved as a zip file folder in mp3 format.

4. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.
5. Select the recorded calls you wish to download by clicking in the corresponding option box to the left of the Number column. To select all
6. Hit the “Download” link at the top or bottom of the recorded calls list.

#### 3.4.11 Exporting the List of Recorded Calls

Export allows you to save the list of recorded calls to your PC in a .csv format. Information exported includes the following Call Direction, Number, Day, Date, time, From Number, From Caller ID, To Number, To Caller ID, Redirected From, Redirected To, Duration, Comments, MD5, and Category.


1. Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.
2. If desired, you can filter for the calls you want to export.
3. Select the recorded calls you wish to export by clicking in the corresponding option box to the left of the Number column. You may select calls from other pages by hitting the page numbers on the left of the page below the calls list.

Or you may select the “Export All” button which will export all calls from all pages. If a filter is applied only the filtered calls will be selected.

4. Select the Export link at the top or bottom of the Recorded Calls page.
5. A pop-up will appear. Hit the “Open”, “Save”, or “Cancel” button.
6. Opening the file will open the .csv file using your default csv associated program.

#### 3.4.12 Verifying a recording

Verifying is a feature used to compare two different files to ensure they are the exact same and have not been altered in any way. Verifying uses a technique call MD5 hashing. When a call is recorded, an MD5 hash is taken of it, outputting a string of random characters. If MD5 fingerprinting is applied to the same call at a later time, it will create the same string of characters. If a different string of characters that don't match the original is created, you know the call has been modified. Hovering your mouse over the MD5 icon for a specific call will reveal the hash string.

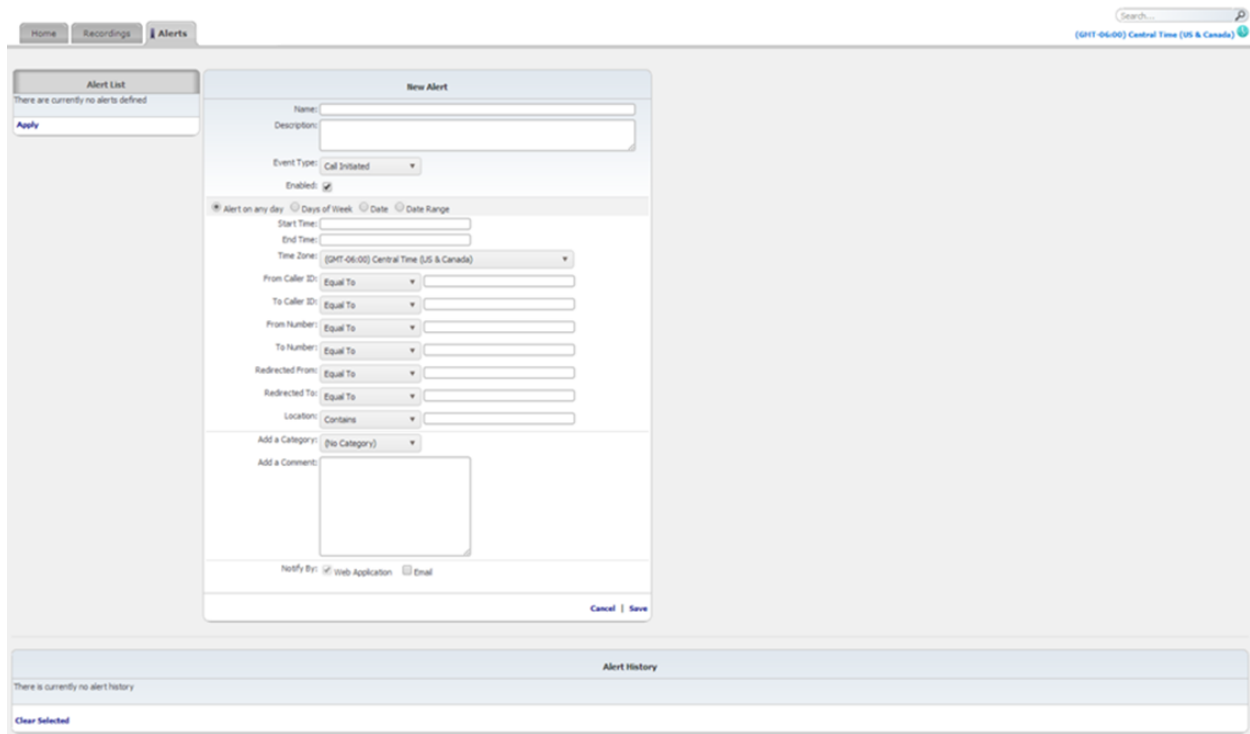
1. Click the Recordings tab and select Recorded Calls to ensure that you are looking at the list of recorded calls.
2. Select the recorded call you wish to verify a recording for and click on the corresponding  button.
3. A Verify Recording pop-up will appear with details about the call saved on the Call Recording platform.
4. Hit the "Browse" button to find a file saved on your local computer or network to compare against the file on the Call Recording platform.
5. Once the file is selected hit the link "Verify Against Original Recording". You will receive a message notifying you whether or not the uploaded recording is identical to the original recording.

### 3.5 Alerts Tab

Alerts are used to notify you of calls that meet specific conditions as defined by you. The system will look at all terminating calls and when it finds calls that meet your criteria, it will notify you with the information regarding those calls so that you can address any issues or make any necessary changes to current policies or procedures. A history of the alerts that have executed is available from the Alerts tab.

#### 3.5.1 Creating an Alert Event

Hit the Alter tab. If this is your initial alert, a New Alert window will be open. Fill in the fields as desired for your alert.



The screenshot shows the 'Alerts' tab in the XO Communications dashboard. On the left, there is an 'Alert List' section with the text 'There are currently no alerts defined' and an 'Apply' button. The main area is titled 'New Alert' and contains the following fields:

- Name: [Text input field]
- Description: [Text input field]
- Event Type: [Dropdown menu, currently set to 'Call Initiated']
- Enabled:
- Alert on any day:  Days of Week  Date  Date Range
- Start Time: [Text input field]
- End Time: [Text input field]
- Time Zone: [Dropdown menu, currently set to '(GMT-06:00) Central Time (US & Canada)']
- From Caller ID: [Dropdown menu, currently set to 'Equal To']
- To Caller ID: [Dropdown menu, currently set to 'Equal To']
- From Number: [Dropdown menu, currently set to 'Equal To']
- To Number: [Dropdown menu, currently set to 'Equal To']
- Redirected From: [Dropdown menu, currently set to 'Equal To']
- Redirected To: [Dropdown menu, currently set to 'Equal To']
- Location: [Dropdown menu, currently set to 'Contains']
- Add a Category: [Dropdown menu, currently set to '(No Category)']
- Add a Comment: [Text area]
- Notify By:  Web Application  Email

At the bottom right of the form are 'Cancel' and 'Save' buttons. Below the form is an 'Alert History' section with the text 'There is currently no alert history' and a 'Clear Selected' button.

These first five criteria are required to save the Alert

- 3.5.1.1 Name – Enter a name for this alert (a maximum of 50 characters).
- 3.5.1.2 Description – Enter a description for the alert.
- 3.5.1.3 Event Type – Select an event type in the dropdown box.
  - Call Initiated – Creates an alert when a call is started that meets the entered criteria.
  - Call Terminated – Creates an alert when a call is ended that meets the entered criteria
- 3.5.1.4 Enabled – Check the enabled box to make this alert active. If not checked, the alert will not be active.
- 3.5.1.5 Alert Day – Select a day, days or date range for which this alert will be active. You can select multiple criteria such as Days of the Week and a Date Range.
  - 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.

At least one of the criteria below must be entered to save the Alert

- 3.5.1.6 Start Time - if applicable, select the start time the Alert should begin running on the selected day(s).
- 3.5.1.7 End Time - if applicable, select the end time that the Alert should stop running on the selected day(s).
- 3.5.1.8 Time Zone - select a time zone that you wish to apply to the alert.
- 3.5.1.9 Call Duration - (only appears when Call Terminated event type is selected) Select an option from the drop down box (less than, less than or equal to, equal to, greater than or equal to, greater than, or between) and the duration in HH:MM:SS format.
- 3.5.1.10 From Caller ID - defines the originating caller ID or partial originating caller ID on which to alert.
- 3.5.1.11 To Caller ID - defines the terminating caller ID or partial terminating caller ID on which to alert.
- 3.5.1.12 From Number - defines the originating number or partial originating number on which to alert.
- 3.5.1.13 To Number - defines the dialed number or partial dialed number on which to alert.
- 3.5.1.14 Redirected From – defines the number of the person or group transferring the call.
- 3.5.1.15 Redirected To – defines the number to which the call was transferred.
- 3.5.1.16 Location - defines the location or partial location on which to report.
- 3.5.1.17 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.

3.5.1.18 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.

3.5.1.19 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.

3.5.1.20 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.

3.5.1.21 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. By default Web Application is always check and Alerts will appear in this Alert tab. If you selected to be notified by email, you must enter the To and From email addresses and optionally the Subject, From Name, and To Name.

If desired you may select Send As HTML, which will send the email in HTML format. If unchecked the email will be sent as text.

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.