Feature Overview

Businesses, call centers, and government agencies of all types and sizes are facing the need for call recording to remain compliant with regulatory issues and for legal protection. Additionally, organizations of all sizes and types are seeking to improve the quality of customer service, both through review of actual calls and improved training. The XO Hosted PBX Call Recording service provides a simple and scalable means to addressing these objectives.

The XO Hosted PBX Call Recording service provides fully hosted solution to record, store, organize, and access recordings of customer calls. The service can be used to cost effectively address regulatory compliance obligations, monitor quality control, training, or dispute resolution. Since this solution is hosted within the XO Hosted PBX network, that means you don't have to maintain servers with ever increasing hard drive requirements, complicated backup/restoration plans and maintenance schedules.

Feature Details

- All station types with a My Phone user may be assigned to Call Recording.

- Call Recording may be configured in My Site to record <u>all</u> user calls or only selected calls initiated on an <u>on demand</u> basis by the user via a feature access code on the phone.

- On demand recordings may be invoked at any time while on a call and the entire conversation will be recorded.

- The site administrator can optionally configure if a pre-alerting announcement message (default or custom) is played before the call is sent to the user and whether the message can be interrupted. The pre-alerting message can be set up to play for all callers at all times or only for select users and select time periods.

- Call recordings will be retained for 30 days.

- Access to call recordings are available through My Account. The account administrator is able to search, filter, add searchable comments, play, and download the recordings. More detailed information can be found in the *XO Hosted PBX Call Recording Dashboard User Guide*

- If both Calling and Called parties have Call Recording active, a separate recording is made for each user.

- Recording of calls begin when a call is answered, thus pre-alerting announcements are not recorded.

- Removing recording assignment from a user will cause all recordings for the user to be deleted.

Notes:

- Call Recording is subject to a number of Federal, State, and FCC regulations, primarily related to recording consent. It is critical that all customers utilizing the Call Recording service be familiar with, and in compliance of these regulations. It is the customer's responsibility to be aware of and implement measure to address all regulatory requirements in their area.

Feature Prerequisites

Before the Call Recording can be used the following conditions must be met:

- Call Recording is a site specific service ordered and assigned to appropriate users (DIDs).
- All DID's to be recorded must be assigned to a user station
- At least one Recorder must be purchased per site to use Call Recording
- Recording will only be active while the assignment on a user is active. Simply having the recorder in inventory will not record any calls.
- DTMF control of Pause and Resume require 2833-based DTMF support

Feature Setup

Prior to recording any calls, the Site administrator must assign the Recorders. Once logged into to My Account, simply follow the steps detailed below.

Step 1. Go to My Site

Step 2. Select the appropriate Site to configure
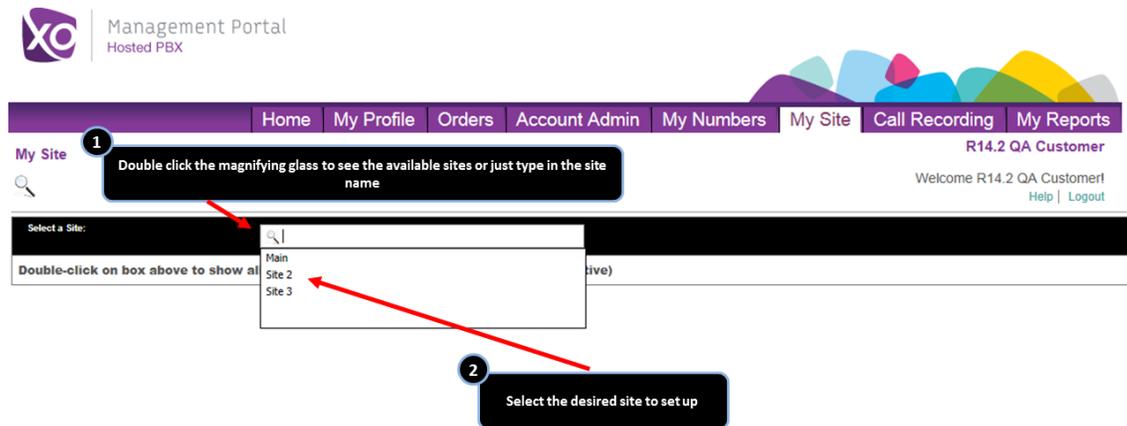
Step 3. Go to User Features
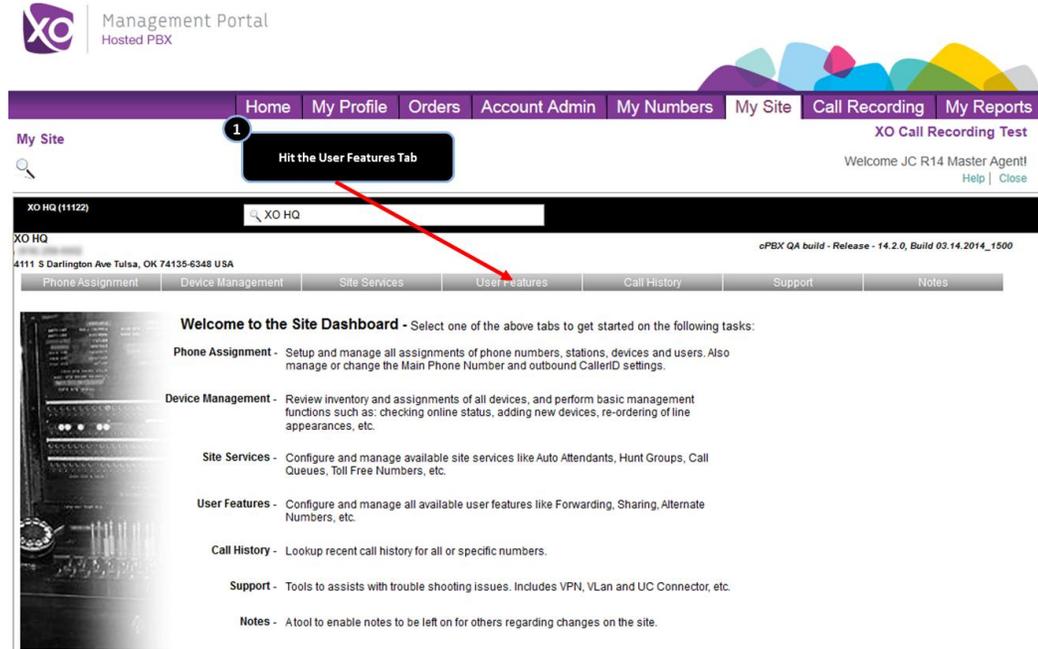
Step 4. Go to Recording Admin page and assign user licenses
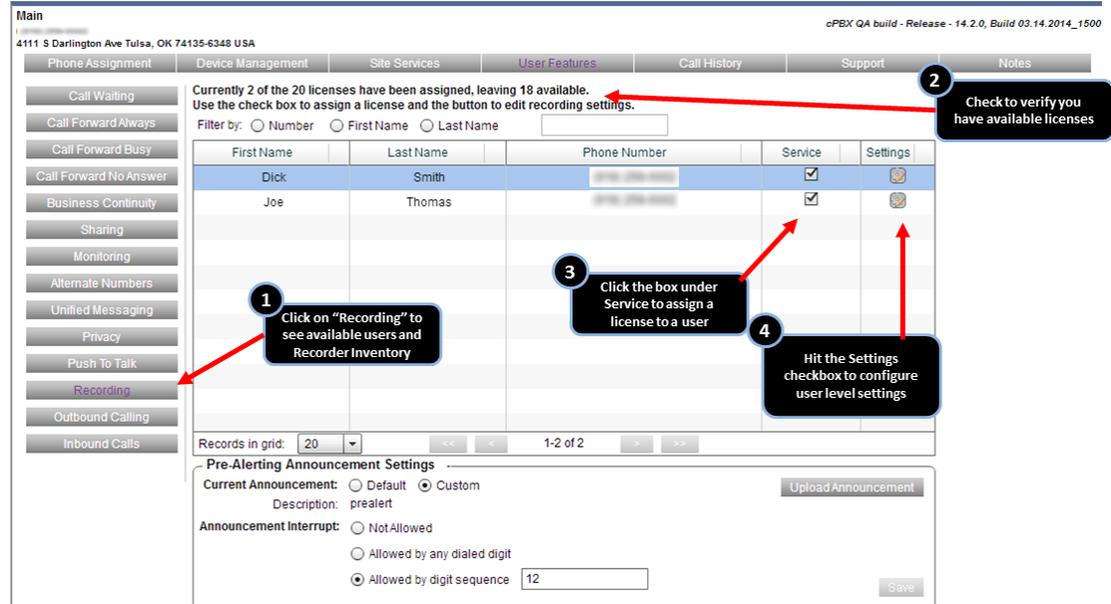
Step 5. Configure user settings

Controls whether the Pre-Alerting announcement is played or not and whether the announcement played is the Site default or a custom announcement.

Step 6. Create/Edit Rules

Defines by user whether the Pre-alerting announcement is played or not played for incoming calls from specific phone numbers
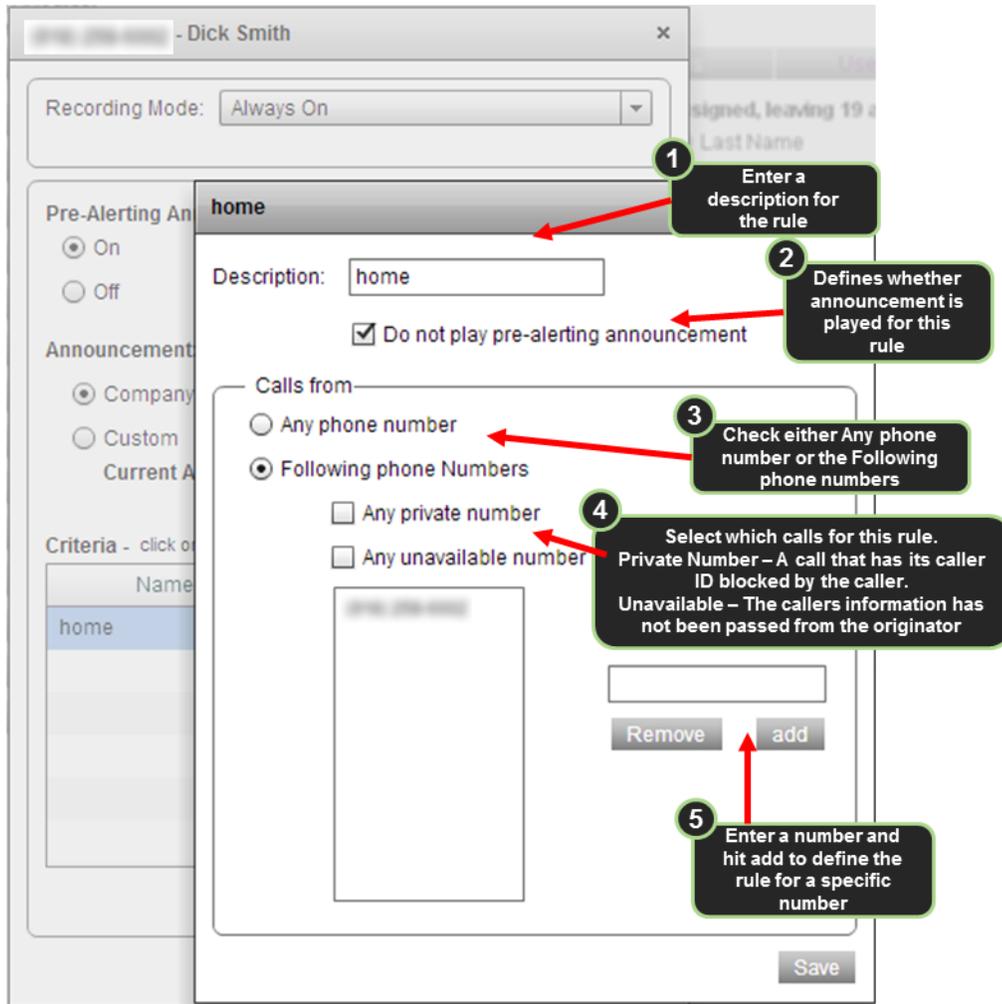
User Feature Operation

Always On - If Call Recording is set up by the site administrator to record all calls, then no action or control is required of the end user.

On Demand – If Call Recording is set-up to be On Demand, the user must enter put the call on hold, hit an available line and enter the feature access code (*44) to record the call. The user will hear an announcement that the call is being recorded. The user may the resume the call that is on hold. In this mode, all calls are recorded but are only kept on the recording platform if the FAC is entered at any time before the call is ended.

Pause – When on a call being recorded, a user may enter the code *1234 to pause the recording.   Recorded calls that are paused will have silence during the portion of the call that is paused when played back.

Resume Recording – If a call being recorded is paused, the user may enter *4321 to resume the recording of a call.

Administrator Recording Management

Recording retrieval is limited to the Account administrator, or appointed user with defined administrative access. To pull recording, login to My Account and follow the steps below.

For more detailed information, see the *XO Hosted PBX Call Recording Dashboard User Guide*.

1. Go to My Account and hit the Call Recording tab at the top
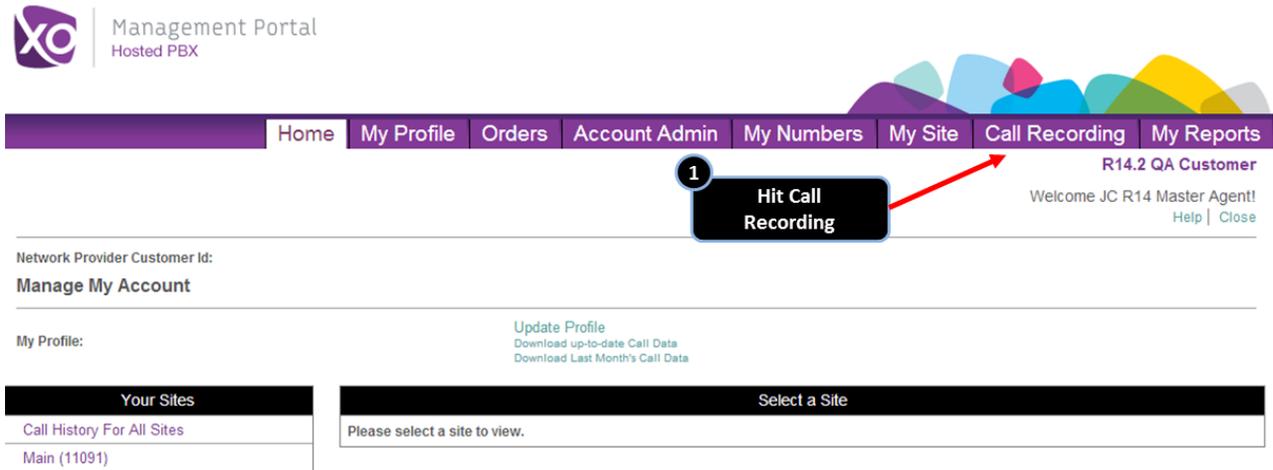
2. Choose the site

3. View the Dashboard

   Home tab – provides an updated view of real time information on recorded calls in process as well as Calls by Category, Frequent Callers, Calls by Location, Active Calls, and Recent Calls and Calls to each user. These data points are shown in widgets that can be configured to display graphs or charts in user defined time periods. These widgets can also be resized or minimized if you do not wish to view them.
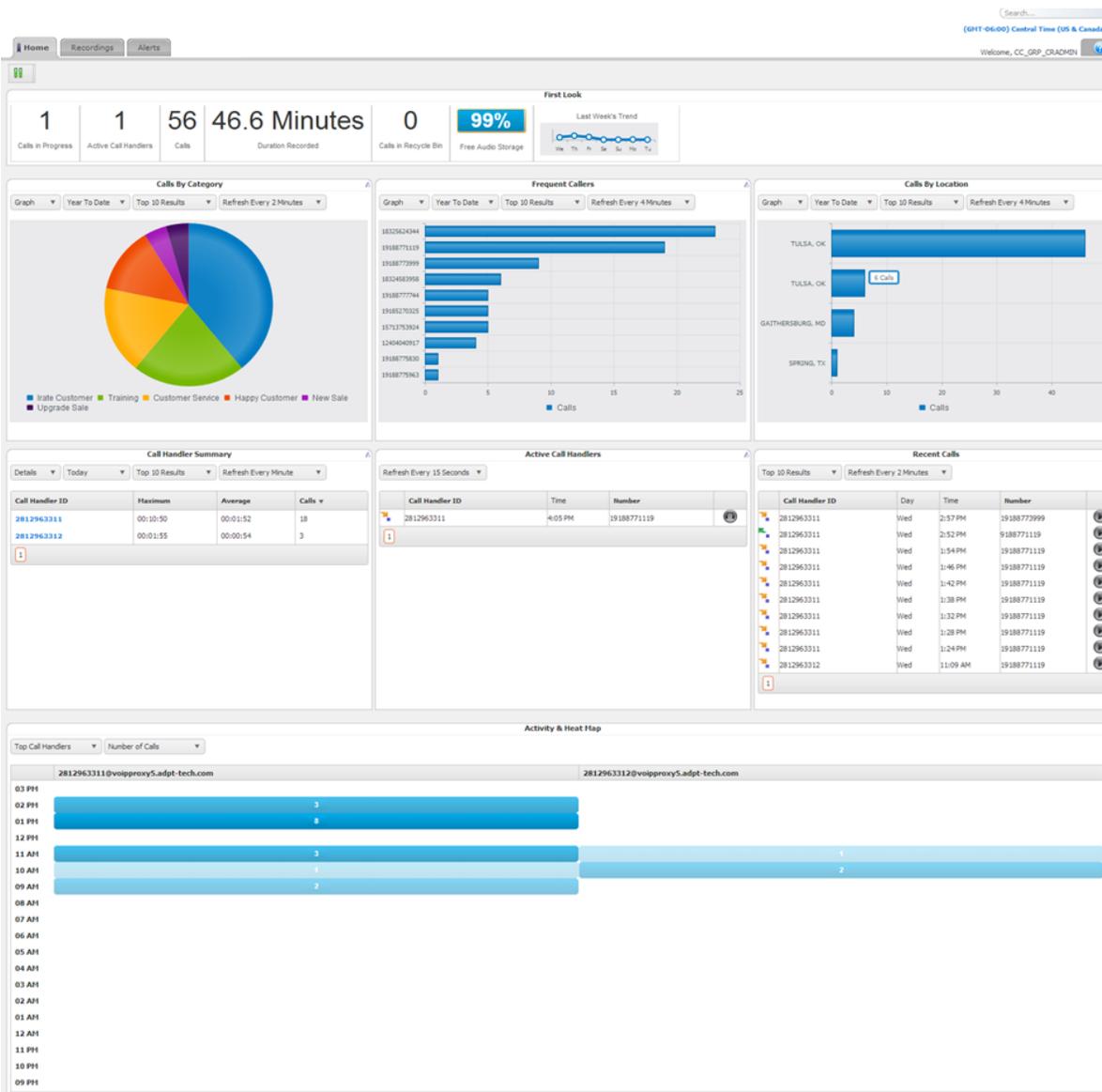
Recordings Tab – Provides the list of recorded calls and enables playback, downloading, commenting, annotating, categorization, comparing, deleting and exporting the list. An enhanced search, filtering and sorting capability exist to find specific calls.

The Recycle Bin shows calls that are nearing 30 days in age and will be deleted from the system soon.

Calls in Progress displays all calls in progress to users with Call Recording licenses. Calls to users with On Demand recording are shown in the list but will not be kept unless the user has prompted the system to record the call.

Alerts Tab – Enables the setup of criteria that will provide an alert via email that a call is in progress or has ended that meets the defined criteria.