About Genesys
Alcatel-Lucent's Genesys solutions feature leading software that manages customer interactions over phone, Web, and mobile devices. The Genesys software suite handles customer conversations across multiple channels and resources—self-service, assisted-service, and proactive outreach—fulfilling customer requests and optimizing customer care goals while efficiently using resources. Genesys software directs more than 100 million customer interactions every day for 4000 companies and government agencies in 80 countries. These companies and agencies leverage their entire organization, from the contact center to the back office, while dynamically engaging their customers. Go to www.genesyslab.com for more information.

Each product has its own documentation for online viewing at the Genesys Technical Support website or on the Documentation Library DVD, which is available from Genesys upon request. For more information, contact your sales representative.

Notice
Although reasonable effort is made to ensure that the information in this document is complete and accurate at the time of release, Genesys Telecommunications Laboratories, Inc., cannot assume responsibility for any existing errors. Changes and/or corrections to the information contained in this document may be incorporated in future versions.

Your Responsibility for Your System's Security
You are responsible for the security of your system. Product administration to prevent unauthorized use is your responsibility. Your system administrator should read all documents provided with this product to fully understand the features available that reduce your risk of incurring charges for unlicensed use of Genesys products.

Trademarks
Genesys, the Genesys logo, and T-Server are registered trademarks of Genesys Telecommunications Laboratories, Inc. All other trademarks and trade names referred to in this document are the property of other companies. The Crystal monospace font is used by permission of Software Renovation Corporation, www.SoftwareRenovation.com.

Technical Support from Genesys
If you have purchased support directly from Genesys, please contact Genesys Technical Support at the regional numbers provided on page 83. For complete contact information and procedures, refer to the Genesys Technical Support Guide.

Ordering and Licensing Information
Complete information on ordering and licensing Genesys products can be found in the Genesys Licensing Guide.

Released by
Genesys Telecommunications Laboratories, Inc. www.genesyslab.com

Document Version: 80gqm_us_cr_04-2011_8.0.480.00 v.1.00
# Table of Contents

## Chapter 1
**Introduction** ................................................................. 7  
Document Purpose .......................................................... 8  
Audience ................................................................................... 8  
Document Version ............................................................. 8  
Related Documents .......................................................... 9  
Conventions Used .............................................................. 9  
Expected Knowledge ......................................................... 9

## Chapter 2
**Genesys Call Recording – Overview** ........................................ 11

## Chapter 3
**Logging in to Call Recording** ........................................... 13  
Logging In ............................................................................. 14  
Logging Out of Call Recording .............................................. 15

## Chapter 4
**User Settings** .................................................................. 17  
Personal Setup (Language) .................................................. 18  
Columns Setup ..................................................................... 19

## Chapter 5
**Using Call Recording** ...................................................... 21  
Using Call Recording .......................................................... 22  
Recorded Call Icons ........................................................... 23  
Working with Recorded Calls ............................................... 24  
Selecting Multiple Calls ....................................................... 24  
Playing Recorded Calls ....................................................... 24  
Adding Notes to Call Data ................................................... 25  
Playing Screen Capture Video Recordings ......................... 26  
Playing Conference and Transferred Calls ......................... 26  
Locking Calls ...................................................................... 27  
Changing Display Order ..................................................... 27  
Sending Calls to Email ......................................................... 28  
Searching and Using Filters .................................................. 29  
Understanding Search Filters ................................................ 29  
Using Advanced Searches .................................................... 31  
Using Saved Filters ............................................................. 32
Chapter 1

Introduction

This chapter provides an overview of this document, identifies the primary audience, introduces document conventions, and lists related reference information:

- Document Purpose
- Audience
- Document Version
- Related Documents
- Conventions Used
- Expected Knowledge
Document Purpose

This document describes the Genesys Call Recording 8.0.480 user interface and contains guides for every task in it.

Audience

This guide is intended for users, supervisors, and administrators of Genesys Call Recording.

Document Version

The Genesys Quality Management products are provided by a partnership between Genesys and ZOOM International. The Genesys Quality Management products use a versioning format that represents a combination/joining of the versions used by these two separate entities. Although the Genesys Quality Management products and documentation use this combined versioning format, in much of the software and logs you will see the ZOOM versioning alone. You need to be aware of this, for example, when communicating with Technical Support.

The version for this document is based on the structure shown in the following diagram:
Related Documents

For other documents related to Genesys Call Recording please consult:

- Genesys Call Recording 8.0 Administration Guide
- Genesys Screen Capture 8.0 Administration Guide
- Genesys Quality Manager 8.0 Administration Guide
- Genesys Quality Manager 8.0 User Guide
- Genesys Quality Management 8.0 Planning Guide
- Genesys Quality Management 8.0 Installation Guide

Conventions Used

Names of functions and buttons are in bold. Example: **Upload**

File names, file paths, command parameters and scripts launched from the command line are in non-proportional font.

Code is placed on gray background and bordered

Expected Knowledge

Readers of this document are expected to have the following skills or knowledge

- Basic internet browser knowledge.
- Basic IPT terminology knowledge is recommended
Chapter 2

Genesys Call Recording – Overview

Genesys Call Recording is a software solution for call recording of Cisco IP telephony and IP contact centers. It has a rich set of standard features that include an intuitive web-based user interface, complete call lifecycle management, user access based on roles and privileges, total and on-demand recording and much more.

Call Recording is seamlessly integrated with Genesys Contact Center. This integration immediately adds information about agent ID, agent name, skill group and wrap-up information to each call and is fully searchable in the user interface.

Call Recording can be also deployed as a fully hosted solution for IP telephony service providers.
Call Recording—User Guide

Chapter 3

Logging in to Call Recording

The Call Recording user interface can be accessed through the following supported web browsers:
- Microsoft Internet Explorer 7+
- Mozilla Firefox 1.5+
- Apple Safari 3+

**Note:** Web browsers require a media player plug-in (Windows Media Player 9+, QuickTime) for audio and video media review.

A minimum screen resolution of 1024x768 is necessary to be able to comfortably use the Call Recording user interface application.

Your system administrator determines the Call Recording URL address.

Enter the Call Recording URL in your browser address box. The Log in screen opens.

![Opening Call Recording in your browser](image_url)

**Figure 1:** Opening Call Recording in your browser

The information in this chapter is divided into the following topics:

- [Logging In](#)
- [Logging Out of Call Recording](#)
Log in to Call Recording with the User Name and Password assigned to you by the system administrator or supervisor. When you log in, you can also choose the display language. Genesys Call Recording 8.0.480 supports English, Czech, Slovak, Dutch, Bulgarian, Russian, Arabic, Romanian, Polish, Turkish, Slovenian and German.

Figure 2: Login screen

1. Type your Name.
2. Type your Password.
3. Click Login.

Call Recording opens to the Recorded Calls tab, and you can begin listening to calls immediately.

Note: Names and passwords are case sensitive.

You can change your password after you have entered the system. If you have forgotten your user name or password, contact your system administrator.
Logging Out of Call Recording

You can log out of Call Recording by clicking Logout. Closing your browser also logs you out of Call Recording.

Figure 3: Logout of Call Recording
Chapter 4

User Settings

The Settings tab contains administration tools. System Administrators use the tools on the Settings tab for configuring and maintaining Call Recording and related systems.

Most users have access only to the Personal setup (Language) and Columns setup functions. To learn more about other Administrative tools, see the Genesys Call Recording Administration Guide.

The information in this chapter is divided into the following topics:

- **Personal Setup (Language)**
- **Columns Setup**
Personal Setup (Language)

The Genesys Call Recording log in screen allows you to select a language. This language setting only controls the log in page, and does not affect the display of the rest of Call Recording.

To change the default Call Recording language:

1. Log in to Call Recording.

   **Note:** Changing the language affects only the logged in user. Users choose their own default language.

2. Navigate to **Settings > User Setup > Personal Setup**.

   ![Figure 4: Changing the default language](image)

   **Figure 4: Changing the default language**

3. Select your language from the **Language** drop down list.

4. Click **Save configuration**.

5. **Refresh** the web page.

You can refresh the web page by clicking on another tab in Call Recording, or by clicking Refresh in your web browser.

The labels in Call Recording display in the language you selected.

**Note:** Some user interface elements may not change language because of naming restrictions and integration with other systems.
Columns Setup

Note: This option is available only if the System Administrator allows users to change column set-up. See the Call Recording Administration Guide.

Call Recording’s Recorded Calls tab contains call information to help you select which calls to play. You can expand or reduce this view by adding or subtracting columns. Changing these selections affect only your own view of listed calls. The number and type of columns available for selection depends on your system configuration, and is set by the System Administrator.

1. Navigate to Settings > User Setup > Columns setup.

2. Select the columns to display in your Recorded Calls tab.

3. Click Save Configuration.

The columns you selected display in the Recorded Calls tab.
Chapter

5 Using Call Recording

The information in this chapter is divided into the following topics:

- Using Call Recording
- Working with Recorded Calls
- Searching and Using Filters
- Using Filters in Permanent Rules
Using Call Recording

When you log in to Call Recording, the **Recorded Calls** tab opens first.

The **Recorded Calls** tab displays calls recorded by Call Recording. Change the **Count** to increase or decrease the number of displayed calls.

- Click << or >> to move through your recorded calls.
- Click the speaker icon 🎧 to play a call.
- Click the play video icon 🎬 to watch any screen capture video associated with the call.
- Click the info icon ⚡ to add a comment to a call and see additional call information.

![Figure 6: List of recorded calls](image)

Standard call information includes:

- **Date**: Date of call.
- **Beginning**: Call start time.
- **End**: Call end time.
- **Length**: Call duration.
- **From**: CallerID (Number, Name, or IP Address.)
- **To**: CallerID (Number, Name, or IP Address.)
- **Description**: Text notes.
- **Additional fields**: Extra information fields set by the system administrator.
Recorded Call Icons

- **Play the call**: Launches the media player so you can listen to the call.
- **Insert a note**: Opens the information window so you can add text and see call details.
- **Export**: Allows you to open or save the call file.
- **Play the video recording**: Launches the media player and plays the call screen recording.
- **Warning icon**: The call has no audio stream and cannot be played.
- **Archived call**: The call is archived.
- **Deleted call**: The call is deleted.
- **Deleted call available for restore**: Restores deleted and archived calls so you can open them again.
- **Restoring call**: Shows that the call is in the process of being restored.
- **Restored call**: Shows the call is restored and available for playing.
- **Call unlocked** or **locked**: Protects a call from deletion (locked.)
- **Synchronized and used** or **but not used**: Shows synchronized calls in a multi-server environment.
- **Export video (no voice)**: Shows that a Screen Capture video recording is available for the call, but there is no audio data associated with the video.
Working with Recorded Calls

Selecting Multiple Calls

Call Recording allows you to work with many calls at once. Multiple calls can be sent via email, played together in Advanced Player, exported as a single .zip file archive, restored, or deleted.

To select multiple calls, click the check boxes on the left of the Recorded Calls screen.

Playing Recorded Calls

Clicking the speaker icon launches the integrated player and opens the call’s stereo recording. The media player uses standard playback controls. You can play, pause, stop, fast forward, and adjust the volume.

To listen to several calls together, select them by clicking the check boxes, and then click Advanced Player. The Advanced Player window opens, and you can drag and drop the calls to adjust the order and mix of call playback.
Adding Notes to Call Data

Clicking the information icon opens a new window that displays call data and allows you to add text notes.

<table>
<thead>
<tr>
<th>Key</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>CcserID</td>
<td>16777329</td>
</tr>
<tr>
<td>CcserGebalCallID</td>
<td>113</td>
</tr>
<tr>
<td>CcserCallManagerID</td>
<td>1</td>
</tr>
<tr>
<td>CalRecCalledURL</td>
<td>192.168.168.162:16384(1104)</td>
</tr>
<tr>
<td>CalRecCallingURL</td>
<td>192.168.160.78:24596(1104)</td>
</tr>
</tbody>
</table>

**Figure 9: Insert a note**

To add a note:

1. Click the call information icon.
2. Click inside the Call description box.
3. Type your notes.
4. Click Save description.

The information is added to the call data record and stored on the database.

**Note:** You can search saved call descriptions and find specific calls. Using consistent terms, like “sale”, “complaint”, and “training” is highly recommended.
Playing Screen Capture Video Recordings

Genesys Call recording allows you to watch a video recording of an agent’s desktop while listening to the call recording. You can see and hear what the agent saw and heard.

1. Click the video icon 
2. Click Open to launch the video, or click Save to store the file on your computer.

Note: You must have the H.263 video codec installed to launch videos. For more information, consult your system administrator or the Genesys Call recording 8.0 Administration Guide.

Playing Conference and Transferred Calls

Call Recording records data traffic between pairs of connected telephones. A conference call or transferred call is actually a series of these pairs.

- **Recording 1** – call between the caller and the operator.
- **Recording 2** – call between the operator and the called party.
- **Recording 3** – call between the caller and called party.

To listen to the entire call you must open all the pairs together in the advanced player. Select the calls’ check boxes, and then click Advanced Player.

Call Recording identifies conference calls with a ConferenceNumber identifier. The ConferenceNumber is the same for the entire collection of call pairs.

Transferred calls are kept as independent but related recordings (couples). To sort related calls so they’ll appear together in the recorded calls list, click the Order Calls icon at the top of the Date column.
Locking Calls

Locking a recorded call means that it cannot be deleted from the database.

- Click the Key icon to lock a call. The Locked icon appears.
- Click on the Lock icon to unlock a call. The Key icon appears.

When calls are archived, they are deleted from the active database. The lock function prevents this.

Changing Display Order

Calls are automatically displayed in date and time order, with the most recent calls first. You can change the order by using the up and down arrows at the top of each column.

Note: The calls displayed in Call Recording depend on the filters saved on your system. Clearing all filters from your Search screen displays all available records.
Sending Calls to Email

You can email Call Recording recorded calls as .mp3 file attachments.

1. Select one or more recorded calls by clicking their check boxes in the first column.
2. Click **Send to mail**. The Send calls to email window opens.

![Send calls to email window](image)

**Figure 13: Sending calls to email**

3. Type email addresses in the **Recipients** field (use commas to separate emails.)
4. Type the body of your email.
5. Click **Send**.

The attached calls are sent by Call Recording to all the email addresses you entered.
Searching and Using Filters

Genesys Call Recording uses search filters to identify call records. To find calls and video recordings, click Search.

![Image of the Search button](figure14.png)

**Figure 14: The Search button**

Understanding Search Filters

The Call Recording Search functionality depends on user generated search filters and recording rules. Recording rules set which calls get recorded, and search filters allow users to find those calls within the Call Recording database. In most installations, the system administrator provides basic recording and search filters during set-up. Each Group and User can be provided with default filters specific to their roles.

For example, a supervisor could have a filter that displays only calls handled by a group of agents. The supervisor then sees only those agents’ calls in the Call Recording user interface.

To search for a specific call or screen recording, the supervisor identifies call attributes, like an agent’s phone number, and a time range. Call Recording displays only the agent’s calls that were recorded during that time range.

If the supervisor uses the same searches repeatedly, they can save it as a filter, to be selected from the list and re-used. This search filter can also be made available to other users of the Call Recording system. Once a filter is in use, it cannot be deleted.

Filters identify calls based on call attributes. Call attributes include signaling information (e.g. which IPs and telephones were used in the calls), date/time information (e.g. when calls start and stop), duration, type of call, and call recording status (e.g. locked calls only).

Advanced searches allow you to set filters based on external information, including agent evaluation data fields added to the database by the system administrator.

**Default (Permanent) Search Filter**

After Call Recording installation, a permanent (un-removable) filter is added to limit the search range of calls to 31 days by default, to improve search performance. This filter prevents a gap of more than 31 days between the To and From search parameters; an error will be displayed if a larger search period is specified.

On a lightly used system (with thousands rather than millions of recorded calls per year), this value can be increased by an administrator to a higher value (maximum: 3000 - around a 7 year
search period) in the Call Recording Web GUI (**Settings > Configuration > Web UI > Web Interface > User Interface View Setting > Max search days**).

Conversely, it may be necessary to reduce this **Max search days** value on a system with millions of recorded calls per year.
Using Advanced Searches

The search capabilities can be extended by defining custom search criteria in **Advanced search**. Advanced search fields are derived from external data available in your call management system (e.g. UCCE). Advanced search criteria are defined by system administrators. When external data fields are added to the Advanced search, they appear under the calendar controls in the search window.

![Advanced search fields](image)

**Figure 15: Advanced search fields**
Using Saved Filters

Saved filters appear in the Choose filter drop down list. Selecting a pre-existing filter allows you to use recurring search criteria. Filters can be created by users, and shared, or they can be set-up by system administrators.

To use a saved filter:

1. Select a filter from the Choose filter drop down list.
2. Click Load. The filter settings appear in the Search window.
3. Click Search.

Only calls matching your filters display in Call Recording. To see all calls, clear the filters.

---

**Note:** When you apply a filter, only matching recordings display in the Recorded Calls list.
Clearing Filters

Call Recording displays the filter you are using at the top right of the screen.

![Filtered call by calling numbers, called number]

**Figure 17: Clearing filters**

- To return to displaying all records, click **Disable Filter**.
- To clear all filter selections in the Search window, click **Cancel**.

**Note:** A permanent Calls FROM filter improves search performance by limiting the search range (to a default of 31 days). This filter is visible and cannot be disabled, but the range value can be changed by an administrator – see Default (Permanent) Search Filter.

---

Saving Search Filters

To create a filter that displays only certain calls, you must choose search criteria in the Search window. Saving this search criteria creates a re-usable filter.

1. Select your search attributes.
2. Type a **Filter Name**.
3. Click **Save**.

Your filter is now added to the filter drop down list.

**Note:** Saved filters can be made available to all users of the system by selecting **All Users**. Otherwise, saved filters are available only to the user who created the filters.

---

Deleting Saved Filters

1. Select a filter from the Choose Filter drop down list.
2. Click **Delete**.

Your filter is no longer available in the filter drop down list.

**Note:** If the filter is being used by other users of the system, Call Recording does not allow you to delete the user who created the filter.
Using Filters in Permanent Rules

Filters can also be used as rules for restricting access to recorded calls. Supervisors and administrators can assign saved filters to Groups and Users. When filters are assigned to a group, then only those filtered recorded calls are available to the users within that group.

Permanent rule filters can be assigned to a group through the Users tab. Open a group, and click Edit Filters.

Multiple permanent rule filters can be assigned to a group by editing the group, and then choosing saved filters from the Choose filter drop down list. Use Boolean operators (And/Or) to combine filters. When you save the group, the permanent filters are applied to all members of that group.
Chapter 6

Finding Call Records

Genesys Call Recording provides you with a powerful search tool that allows you to combine several search parameters into a single filter. When you click Search, you are applying this filter to your displayed calls list. The more parameters you use, the narrower the search.

You can search for data stored in Call Recording, and if your system is properly configured, you can also search for external data. External data includes Agent Name and any notes or comments that have been added to a call record. Your system administrator can add additional fields to the Advanced search list, depending on your system's configuration.

The information in this chapter is divided into the following topics:

- Finding Call Records
- Finding Calls by External Data
Finding Call Records

Displaying Call Search Results Randomly

To display your search results in random order, instead of by date-time order, select the Random selection check box.

Finding Caller and Called Numbers

When you know the number of either calling or called phones, you can search for all calls using those numbers.

1. Type Calling numbers.

   Note: Use wildcards “*” and “?” for ranges of numbers.

2. Select the Boolean operator And or Or.
3. Type the Called numbers.

   Note: Use wildcards “*” and “?” for ranges of numbers.

4. Click Search.

Only recorded calls using the numbers you identified are displayed in the Recorded Calls list.

   • To return to seeing all recorded calls, click Disable Filter.

Finding Calls by Type

Call Recording is able to distinguish call patterns and determine that recordings belong to a type of call, such as a conference call between three different callers.

1. Select the Type of call from the drop down list.
2. Click Search.

Only recorded calls of the type you selected are displayed in the Recorded Calls list.

   • To return to seeing all recorded calls, click Disable Filter.
Finding Call Records

Finding Calls by Date-Time Range

All calls are identified by their date, time, and duration. Call Recording uses standard calendar controls to allow you to identify your own time ranges. You can also use pre-configured time ranges, or search during hourly ranges.

Pre-configured time ranges:

1. Select a pre-configured range from the **Calls FROM** drop down list or the **Calls TO** drop down list.
2. Click **Search**.

Only recorded calls from the time range you selected are displayed in the Recorded Calls list.

- To return to seeing all recorded calls, click **Disable Filter**.

Custom Time Ranges:

1. Select a starting date-time in the **Calls FROM** calendar control.
2. Select an ending date-time in the **Calls TO** calendar control.

Only recorded calls in the date-time range you selected are displayed in the Recorded Calls list.

- To return to seeing all recorded calls, click **Disable Filter**.

Daily Hours:

To see calls that were recorded during a standard daily time range, such as calls between 8 am and 10 am, use Daily Hours to find the recorded calls.

---

**Note:** Use the time format HH:MM:SS AM/PM.

---

1. Type the **Daily Hours From** starting time.
2. Type the **Daily Hours To** ending time.
3. Click **Search**.

Only recorded calls of the **Daily Hours** range you selected are displayed in the Recorded Calls list.

- To return to seeing all recorded calls, click **Disable Filter**.
Finding Calls by Saved Comments

Call Recording displays comments entered by agents in call records. You can search these comments.

**Note:** It is highly recommended to use standard terminology in call comments to make searching for calls more accurate.

1. Type your search terms in the **Description** box.
2. Select **Case Sensitive** if your search must match upper and lower case.
3. Click **Search**.

Only recorded calls containing comments matching your terms are displayed in the Recorded Calls list.

- To return to seeing all recorded calls, click **Disable Filter**.

Finding Calls by Couples Count

Each call has at least one couple. That is the connection between a pair of telephones. When you transfer a call, or have a conference call, each new connection is a new call couple. These related call couples can be found by describing the number of couples.

**Note:** Transferred calls are > (greater than) 1. Conference calls are > (greater than) 2.

1. Select < (less than) = (equal to) or > (greater than) from the drop down list.
2. Type the number of call couples.
3. Click **Search**.

Only recorded calls with the number of call couples you selected are displayed in the Recorded Calls list.

- To return to seeing all recorded calls, click **Disable Filter**.
Finding Calls by Call Length

Call Recording allows you to find calls based on their total length.

1. Type the minimum call length in the **Min**: box. (hh:mm:ss)
2. Type the maximum call length in the **Max**: box. (hh:mm:ss)

**Note:** You can combine Min: and Max: or only use one value.

3. Click **Search**.

Only recorded calls within the length you selected are displayed in the Recorded Calls list.

- To return to seeing all recorded calls, click **Disable Filter**.

Finding Calls by Same Numbers

Call Recording allows you to find phone numbers that are repeatedly connected to each other. So if you have a customer who calls repeatedly, or an agent who makes many calls to the same number, you can find these patterns.

1. Select **Calls from the same number**
   - **From**: The same number calls the call center repeatedly.
   - **To**: The same agent calls outside repeatedly.
   - **Both**: The same number calls the same agent repeatedly.

2. Type a number in the **which occurred more than** box.
3. Click **Search**.

Only recorded calls that meet your criteria are displayed in the Recorded Calls list.

- To return to seeing all recorded calls, click **Disable Filter**.

Using Wild Cards

Wild card characters can be used in find fields as follows:

- ![character represents an arbitrary character](image)
- ![character represents an arbitrary string](image)

Examples of the use of wild cards are as follows:

**Specifying a range:** 200? selects the numbers from 2000 to 2009; 20?? selects the numbers from 2000 to 2099

**Specifying all numbers:** 2* selects all phone numbers which start with the number 2; *2 selects all phone numbers which end with the number 2
Finding Calls by External Data

When Call Recording is integrated with other applications, such as a Cisco Call Manager or Genesys CIM, additional data can be passed from the external application to Call Recording. Call Recording can then use this data to find call records.

**Note:** The System Administrator must enable Advanced Search, and add external data fields to Call Recording before you can search for external data.

Finding Calls by Inbound or Outbound Call Type

To detect inbound and outbound calls from your integrated Genesys CIM, you can use one of the following methods – check with your System Administrator for more information:

- Search for the attached (external) data value `GSW_RECORD_HANDLE`; if this is present the call is outbound, if it is not it may be inbound (or not set up)
- Search for attached (external) data value `Call_Type`. This can have the value `'Inbound'`, `'Outbound'` or another value (for e.g. transfer calls)
- Use a custom field created by your System Administrator (see the *Call Recording Administration Guide*, section ‘Detecting Inbound and Outbound Calls’)

Finding Calls by Agent Names

In many call centers, agents are allowed to sit at any terminal. So each agent has a unique identifier in the Call Manager, usually a user name, which tracks their activity in the system.

1. In Advanced Search, select or type an **Agent Name**.
2. Click **Search**.

Only recorded calls involving the Agent you selected are displayed in the Recorded Calls list.

- To return to seeing all recorded calls, click **Disable Filter**.

Other External Data Searches

Your system administrator can add additional fields, depending on the external data stored in systems that are integrated with Call Recording. These fields are displayed in the Advanced Search area below standard searches.
Chapter

7 Administering Groups and Users

Call Recording uses Groups to grant system access privileges, as well as determining recording and filtering rules. Individual users are assigned to a group, and inherit the group’s access privileges and rules.

Figure 18: The Users tab

The information in this chapter is divided into the following topics:

- Groups in Call Recording
- Administering Users
Groups in Call Recording

The group with the most complete set of access rights is always called Admin. Users in the Admin group inherit all access rights, including setting recording rules and filters.

Any changes in a group’s rights is reflected for all sub-groups and users assigned to that group.

You can set up unlimited Groups and Users, each using its own recording rules and filters.

Practically speaking, this gives you very flexible control over which calls are recorded and who has access to those calls.

Figure 19: Tree view of Groups, Users, and access rights
Creating a New Group

To create a new group:

1. Click **Insert new group**. The Add new group window opens.

2. Type the group **Name**.
3. Type the group **Phone number**.

**Note:** The Phone number value is usually a mask indicating a range of numbers. Wild cards are valid.
To include all numbers beginning with 6, type “6*”.
To include all numbers in the system (i.e. to use the settings of the parent group with no filter applied), use the wildcard “***” or leave the field blank.
4. Select the **Parent group** from the drop down list.
5. Type a description of the group. (Optional)
6. Select **Group Rights**.

**Note:** These rights cannot be greater than the parent group.

7. Filtering is optional. You can select multiple pre-existing filters, combining the filters with Boolean operators to restrict call recordings displayed for the group.
8. Click **Insert new group** to save your new group.
The new group displays in the tree view of groups. You can now add users to this group.

### Assigning Access Rights

Access rights are inherited by all members of the group and any subgroups.

<table>
<thead>
<tr>
<th>Access Right</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recording rules</td>
<td>Add, and Edit recording rules.</td>
</tr>
<tr>
<td>Display incorrect calls</td>
<td>Display calls which are not recorded correctly. (E.g., calls which contain signalization data for the call but no audio recording.) Recommended only for system administrators.</td>
</tr>
<tr>
<td>Edit note</td>
<td>Add, Edit call notes—ability to add comments to call data records.</td>
</tr>
<tr>
<td>Display video calls</td>
<td>Allows viewing of Screen Capture recordings.</td>
</tr>
<tr>
<td>Changing of couple protection</td>
<td>Ability to unprotect protected (e.g. undeletable) couples.</td>
</tr>
<tr>
<td>Display not decoded calls</td>
<td>Displays calls which are not yet decoded and calls waiting to be decoded from the original format (PCAP) to the final format (MP3 or WAV).</td>
</tr>
<tr>
<td>Users and roles</td>
<td>Ability to administer groups, users and access rights.</td>
</tr>
<tr>
<td>Export</td>
<td>Ability to export recordings in selected audio format.</td>
</tr>
<tr>
<td>Live Monitor</td>
<td>Access to live call monitoring.</td>
</tr>
<tr>
<td>Restored calls</td>
<td>Access to restored recordings from backup and archive.</td>
</tr>
<tr>
<td>Audit</td>
<td>Access to audit information (logs etc.).</td>
</tr>
<tr>
<td>Other settings</td>
<td>Access to system and configuration settings. Recommended only for system administrators.</td>
</tr>
<tr>
<td>Send calls to email</td>
<td>Ability for the user to send call recordings to specified email addresses.</td>
</tr>
<tr>
<td>Call list</td>
<td>Ability to play recordings. Disabling this option also disables Edit note, Export and Call deletion.</td>
</tr>
<tr>
<td>Call deletion</td>
<td>Ability to delete recordings.</td>
</tr>
</tbody>
</table>
Limiting Group Access by Phone Numbers

Users inherit access rights from their group. You can further restrict access rights by specifying a phone number filter for the group. This can be a single phone number, or a range of numbers. Wild cards are valid.

Limiting Group Access by Boolean Filters

Boolean operators allow you to combine several pre-existing filters together and display only the results to the members of the group.

1. Select a Group.
2. Click Edit Group.
3. Choose a filter from the drop down list.
4. Select a Boolean operator.
5. Choose additional filters, connecting them with operators until you have defined the filter.
6. Click Save.

The filter is applied to all members of the group and its subgroups.

Users may also apply filters to their individual view of recorded calls. The Group filters are applied first, and then the User filters. The result is that the viewer sees only a restricted set of recorded calls.

Note: If you apply a filter using SIP, you must define the mask for the whole SIP number. For example, 12345@*.
Editing Groups

![Image of Group Editing](image)

**Figure 22: Group editing**

1. Click **Edit Group**.
2. Make your changes.
3. Click **Save**.

The changes are saved and are inherited by all members of the group and any of its subgroups.
Deleting Groups

**Important!**
When you delete a group, you also delete all its members and recording rules.
Once a group has been deleted, it cannot be restored.

![IT support](image)
Phone number: 2111
Parent group: Admin

**Figure 23: Group deletion**

1. Select a **Group**.
2. Click **Delete Group**.
3. Click **OK** to confirm deletion of the group.

The group and all its members are deleted from the system.

**Note:** Deletion takes effect immediately. It cannot be undone. If a user has created a filter, and if the filter is used by another user, the user who created the filter cannot be deleted.

---

**Administering Users**

Users can only be created within Groups. Users inherit the rights and filters assigned to the Group. You can assign additional filters to the users, further restricting their access to recorded calls.

When Users are in the system they can be assigned to a different Group. You can also delete users from the system or edit their settings. Users can change their own password when they are logged in to the system. Administrators and Supervisors can also edit user passwords.
Adding Users to Groups

Open a group, and then create users to fill the group. Users inherit the rights of their group.

1. Click **Insert New User**. The Add new user window opens.

   ![Add new user window](image)

   Figure 24: Window for adding a new user

2. Type the User’s **Login**.
3. Type the User’s **Password**.
4. Confirm the User’s **Password**.
5. Type the User’s **First Name** and **Surname**.
6. (Optional) Type the User’s **Email**.
7. (Optional) Type the User’s **Phone Number**.

   **Note:** This can be a range of numbers. If it is blank, the User inherits the Group phone number.

8. (Optional) **Choose filters** assigned to this user. Add **Boolean** operators to connect multiple filters.
9. If the user is found in the LDAP and Call Recording is configured to access the LDAP, the **LDAP User** check box will be selected. Otherwise, leave this blank
10. Click **Insert New User** to add the User to the Group.

   The user is now a member of the group and inherits all its access rights, recording rules, and filters.

Limiting User Access by Phone Numbers

Users inherit access rights from their group. You can further restrict access rights by specifying a phone number filter for the user. This can be a single phone number, or a range of numbers. Wild cards are valid.
Limiting User Access by Boolean Filters

Users inherit group access rights and filters. You can add additional filters to a user, further limiting access. Call Recording allows you to set and save filters, and then apply the filters to individual users. By combining these pre-existing filters with Boolean operators, you can restrict user access to a very specific level.

1. Choose a filter from the drop down list.
2. Select a Boolean operator.
3. Choose additional filters, connecting them with operators until you have defined the filter.
4. Click Save.

The user has access only to the calls allowed by the filters.
The Group filters are applied first, and then the User filters. The result is that the user sees only a highly restricted set of recorded calls

**Note:** If you apply a filter using SIP numbers, you must define the mask for the whole SIP number. For example, 12345@*.

Editing Users

Administrators, supervisors, and users themselves can change user information, depending on access permissions.

1. Open the User’s Group.
2. Find the User in the list, and click **Edit**.

   ![Edit user](image)

   **Figure 25: Editing a user**

3. Make your changes.
4. Click **Save**.

Your changes are applied to the user immediately.
Moving Users between Groups

When you edit a user's data, you can also change the user's group.

1. Open the User's Group.
2. Find the User in the list, and click **Edit**.
3. Choose a **Group** from the drop down list.
4. Click **Save**.

The user is now a member of the group you selected and inherits all that group's rights, recording rules, and filters.

Adding Users from LDAP

**Note:** To add users to Call Recording from LDAP, your system administrator must configure both Call Recording and the LDAP so they communicate together.

Using LDAP to add users to Call Recording allows you to import information for several users simultaneously, and to maintain user information in the LDAP so it is updated in Call Recording automatically.

1. Open a Group.
2. Click **Insert New User**.
3. Click **Insert from LDAP**.
4. The Insert LDAP User window opens.

![Figure 26: Inserting Users from LDAP](image)

5. Select Users to import.
6. Click **Import**.
The LDAP information is imported into Call Recording, and the LDAP users are inserted into the group, inheriting the group’s rights, recording rules, and filters.

**Note:** If you change any information in Call Recording, such as the user’s password, this information is NOT changed in the LDAP. Information changed in LDAP is imported into Call Recording, so make any required changes to user information directly in the LDAP.

### Deleting Users

**Important!**
Deleting users cannot be undone.

**Note:** If a user has created a filter, and that filter is utilized by any other user of the system, the user who created the filter cannot be deleted.

![Users Table](image)

**Figure 27: Deleting a user**

1. Open the User’s Group.
2. Find the User in the list, and click Delete.

The user is deleted and no longer has any access to the Call Recording system.
Deleting Multiple Users

Important!
Deleting users cannot be undone.

Note: If a user has created a filter, and that filter is utilized by any other user of the system, the user who created the filter cannot be deleted.

1. Open the Users’ Group.
2. Find the Users in the list, and select their check boxes.
3. Click Delete Selected.

![Delete confirmation dialog box]

Figure 28: Deleting confirmation

4. Click OK to confirm the deletion.

All the users you selected are deleted and no longer have access to the Call Recording system.
8

Creating Recording Rules

Call Recording monitors incoming and outgoing calls within a telephone system. Call Recording actually records only those calls identified by the system administrator. The recording rules allow you to determine which calls are recorded by Call Recording. This allows you to manage the load on the Call Recording system and avoid wasting system resources on unwanted recordings.

**Note:** At least one recording rule must be defined, otherwise no calls will be recorded.

The simplest ‘always record’ rule mask is an asterisk * - see the following screenshot

![Screenshot of Call Recording interface]

**Figure 29:** “Record all calls” example – then click ‘Apply Changes’
Overview

- Recording rules are always associated with groups of users, and identify which calls to record for those users. The recording rules in each group are processed in sequence in the selected order by the method of first match. If there is no rule for the call or the condition is not met for the call, the processing is passed on to all subgroups. Processing takes place in all branches of the hierarchy in parallel.

- If the call satisfies several conditions (rules) at the end of the evaluation process for all groups and subgroups, the recording rule with the highest priority is applied in the following order: Record, Pre-record, Do not record.

- Sequential processing of each group can be prevented by applying a mask filter, which limits the telephone numbers (and therefore processing), assigned to a group that would normally be always included in sequential rule processing. Additionally, the special Ignore rule is used for immediate switching of processing to remaining subgroups.

- If a call doesn't match any rule in any of the groups or subgroups then it is not recorded.

- Recording rules can be set for a range of phone numbers as well as a single phone number. Wild cards are valid when creating recording rules, and are described below.

Call Identification

Before you set recording rules, you must be aware of which type of protocol is used for identifying calls. 
SIP (Session Initiation Protocol) requires the use of the @ symbol when identifying telephone numbers to create recording rules. For example:

- 1224@*
- 123*@*
- ???@*
## Using Wild Cards

- **Setting the range:** 200? selects the numbers from 2000 to 2009; 20?? selects the numbers from 2000 to 2099, etc.
- **Setting all numbers:** Entering 2* selects all phone numbers which start with the number 2. Entering *2 selects all phone numbers which end with the number 2.
- **Incoming and outgoing:** The special character > sets the range for specifying incoming or outgoing phone calls. For example: 2005> select all calls made from the number 2005 and >2005 selects all calls which were made to the number 2005.
- **From-Till:** the special character = specifies calls made between two phone numbers. For example 2005=3000 selects calls made between 2005 and 3000.
- **Wild cards can be combined.** For example 20???> selects all outgoing calls from numbers 2000 to 2099.

### Note:
SIP requires the use of the "@" symbol when identifying telephone numbers to create recording rules. For example:
- 1224@
- 123*@
- ???@*

![Recording rules example](image_url)

**Figure 30: Recording rules example**
Types of Recording Rules:

- **Record**: The system records incoming and outgoing calls from the specified number, range of phone numbers, or IP addresses.
- **Pre-record**: The system records the calls, but does not save the recording unless the user sends a request.
- **Do not record**: The system does not record any calls from or to the specified number, range of phone numbers, or IP addresses.
- **Ignore**: A special rule that stops the process of rule evaluation in the current group and passes the processing to subgroups. See the examples below for a typical scenario.

---

**Note**: If no recording rules are set, no calls are recorded.

---

**Rule Order**

Recording rules are applied from top to bottom.

Order the recording rules so that the “No” rules (do not record) are positioned above the “Yes” rules (record). To move rules up or down, use the up and down arrow buttons ▲▼.

---

**Hierarchical Recording Rules**

Recording rules can be defined in every Call Recording group, and groups are arranged in a hierarchy. Higher group recording rules are processed prior to subordinate groups.

- **More restrictive rules should be at the top of your rule hierarchy**.

---

**Hierarchical Recording Rules Example**

In Call Recording groups are defined in a hierarchical order:

```
Admin
  Group1
    Group 2
    Group 3
  Group 4
    Group 5
  Group 6
```
The Admin group has highest priority and any rule defined for Admin always overrides any rule from subordinate groups (first match rule). If no recording rule is evaluated within a group then evaluation is passed on to all subordinate groups. The processing takes place in parallel. This sequential processing can be prevented by applying a subgroup (mask) filter. In this case the type of recording for this subgroup branch will remain undetermined. This is better illustrated in the following example:

**Example 1:** A rule in Group 4 is added to "not record calls from 42??" while Group 5 has a rule "record calls from 4???". Group 4 is evaluated first. Group 5 records only calls from 4000 – 4199 and 4300 – 4999.

**Example 2:** Rules in Group 2 are set to "record calls from 4???", in Group 3 to “pre-record calls from 4???” and in Group 5 to “do not record calls from 4???” Calls from 4??? will be recorded.

**Example 3:** In addition to Example 2 we set the phone number for Group 1 to “42??”, for Group 2 to “420?”. Calls from 4200-4209 will be recorded, calls from 4210-4299 will be pre-recorded and calls from 4000-4199 and 4300-4399 will not be recorded.

### Hierarchical Rule Administration Example

- **Admin**
  - Agent Group 1
  - Agent Group 2
  - Agent Group 3

The system administrator wants to delegate rule administration for each main group (groups 1,2,3 in the above diagram) to the respective agent group leader. This is accomplished as follows:

- Each group is given the appropriate range of extension numbers as its phone number; e.g. Group 1: 42?? covering extensions 4200-4299, Group 2: 43?? covering extensions 4300-4399, Group 3: 44?? covering extensions 4400-4499

- Three **Ignore** rules are created by the system administrator in the top-level Admin group;
  - Ignore 42??
  - Ignore 43??
  - Ignore 44??

- Each group leader creates additional rules for his/her group at the group level (i.e. Group 1 leader creates rules when Group 1 is selected on the Recording Rules screen)

- When a call is made to/from a Group extension, all top-level Admin rules are ignored and only rules within that Group are processed.
Creating a New Recording Rule

**Note:** Recording rules are always assigned to groups. You must select a group in the **Recording Rules** tab before adding or editing recording rules.

1. Open the **Recording Rules** tab.
2. Select a **Group**.

![Create new rule for the group](image)

4. Select a **Rule** from the drop down list (Record, Do Not Record, Prerecord, Ignore)
5. Select a **Rule type** from the drop down list (Phone number, IP address, External Data)
6. Type the **Mask** (Phone number or Range of numbers using wildcards)
7. Type the **Usage %** (for randomly recording only a percentage of all calls)
8. Select the **Days of the Week** to record.
9. Type the **From** and **Till** values to identify the daily time range to record calls. (Use the format HH:MM)
10. Select the **Screen Capture** check box to also record agent desktops.
11. Click **Insert New Rule**.
12. Click **Apply Changes**.

![Apply changes](image)

The new recording rule is now active in Call Recording.
Adding External Data to Recording Rules

Recording rules can be based on external data sources integrated with Call Recording. The following table contains an example of Cisco UCCE external data used for defining recording rules:

<table>
<thead>
<tr>
<th>External data</th>
<th>Sample value</th>
</tr>
</thead>
<tbody>
<tr>
<td>IPCC_AGENT_ID</td>
<td>6544</td>
</tr>
<tr>
<td>IPCC_AGENT_NAME</td>
<td>Doe John</td>
</tr>
<tr>
<td>IPCC_DIALED_NUMBER</td>
<td>8100</td>
</tr>
<tr>
<td>IPCC_CALLTYPE</td>
<td>2</td>
</tr>
<tr>
<td>IPCC_RCK_DAY</td>
<td>148968</td>
</tr>
<tr>
<td>IPCC_CALLQ_TIME</td>
<td>0</td>
</tr>
<tr>
<td>IPCC_SKILLG_NAME</td>
<td>SALES_SG</td>
</tr>
<tr>
<td>IPCC_SKILLG_NUM</td>
<td>1</td>
</tr>
<tr>
<td>IPCC_SKILLG_ID</td>
<td>5003</td>
</tr>
<tr>
<td>IPCC_ENTERED_DIGITS</td>
<td>8100</td>
</tr>
</tbody>
</table>

*Table 1: UCCE external data for Recording Rules*
Creating a Recording Rule with External Data

1. Select External Data in the Rule Type drop down list.
2. In the Mask field:
   - Type (or copy) the External Data ID (this must be the same as a key defined in the Settings > Configuration > Integration > User data configuration section.)
   - Type a blank space. (This separates the Data ID from the data value.)
   - Type the external data value. (Wild cards are valid.)
3. Click Insert New Rule.
4. Click Apply Changes.

The new recording rule using external data is now active in Call Recording.

Detecting an Inbound or Outbound Call

To detect inbound and outbound calls from your integrated Genesys CIM, check with your System Administrator for the preferred method; see the Call Recording Administration Guide, section ‘Detecting Inbound and Outbound Calls’ for more information, or the information on searching for inbound / outbound calls in this guide.
Editing Recording Rules

**Note:** You must have sufficient access rights to change Recording Rules. Do NOT change recording rules without considering the effect on the performance of the system.

![Figure 34: Recording rule editing](image)

On the Recording Rules tab, navigate to a Group that has a recording rule.

1. Click **Edit**.
2. Change the rule.
3. Click **Save**.
4. Click **Apply Changes**.

The changes to the recording rule are applied immediately.

**Note:** You can turn a recording rule on and off with the **Active** check box.
Deleting Recording Rules

**Note:** You must have sufficient access rights to delete Recording Rules. Do NOT delete recording rules without considering the effect on the performance of the system.

![Deleting Recording Rules](image)

**Figure 35: Deleting Recording Rules**

On the Recording Rules tab, navigate to a Group that has a recording rule.

1. Click **Delete**.
2. Click **Apply Changes**.

The recording rule is deleted and calls within the deleted recording rule are no longer recorded unless a new recording rule is created.

**Note:** You can turn a recording rule on and off with the **Active** check box.
Chapter 9

Using On Demand “Prerecording”

Prerecording allows you to save only the calls you identify. All other calls are recorded, but not saved.

Prerecording differs from regular recording because it is “On Demand”. You only use it when you need it. Your system administrator must configure prerecording on the system before you can use it.

Prerecording is activated from the Cisco IP Phone user interface.

Note: Prerecording is only available for Cisco IP phones that support XML services. The system administrator must configure prerecording in both the Cisco Call Manager and Call Recording.

The information in this chapter is divided into the following topics:

- “Prerecording” Principles
- Working with Calls in Progress
- Saving a Completed Call
- Tagging a Call with Call Information
“Prerecording” Principles

Prerecording is the process of recording all calls, while only permanently saving the recordings identified by the phone user. This means that while a call is in progress, or shortly after a call has been completed, the phone user has the ability to save the call recording. If the user does not save the call within this time, the call recording is discarded.

The amount of time the user has to save the call can be adjusted by the system administrator. The default is 2 minutes.

Working with Calls in Progress

Note: Your Cisco IP Phone must be configured to provide prerecording services through Call Recording. Depending on your IP Phone model and configuration, some steps may be slightly different than described here. Consult your IP Phone documentation and system administrator.

When prerecording is configured for your Cisco IP Phone, you can choose to save any call in progress. You can also choose a call that has been recently completed.

Saving a Call in Progress:

1. Press the “Services” button on your Cisco IP phone.

Figure 36: Selecting Call Recording Services on the Cisco IP Phone

2. Select Genesys Call Recording from the list of options.
3. Select **Save**.

The call recording is saved to the database, and when it is completed it is available for playback on the Recorded Calls tab of Call Recording.

### Sending a Call in Progress as an Email Attachment

1. Press the **Services** button on your Cisco IP phone.
2. Select **Genesys Call Recording** from the list of options.
3. Select **Send by email**.

After the call is completed, Call Recording sends an email with the call recording.

**Note:** The email address is set when you configure your Cisco IP Phone to include prerecording.

### Saving a Call in Progress and Sending it as an Email Attachment

1. Press the **Services** button on your Cisco IP phone.
2. Select **Genesys Call Recording** from the list of options.
3. Select **Save and send by email**.

The call recording is saved to the database, and when it is completed is available for playback on the Recorded Calls tab of Call Recording. In addition, the call recording is sent to email as an attachment.
Sending a Call Recording to a Different Email Address

1. Press the “Services” button on your Cisco IP phone.
2. Select Genesys Call Recording from the list of options.
3. Select Send by email to...

![Image: Inserting a new e-mail address]

4. Enter the email address.

   **Note:** Use the # key to enter the @ symbol.

5. Select Send.

   The call recording is sent as an attachment to the email address you have entered.
Saving a Completed Call

Prerecording allows you to save calls that have already been completed. You'll have a limited amount of time to save completed calls, typically 2-10 minutes.

**Note:** You must save the call within the period set by the system administrator. Calls that are not saved within this time period cannot be recovered. PIN codes may be required, depending on your system setup.

1. Press the "Services" button on your Cisco IP phone.
2. Select Genesys Call Recording from the list of options.
3. Select Prerecorded calls.

![Figure 39: Saving Completed Calls](image)

4. Select the call you want to save from the list.
5. Select Save.

The call recording is saved to the database, and is available for playback on the Recorded Calls tab of Call Recording.
Tagging a Call with Call Information (External Data)

If configured by your system administrator, you can add supplementary call information to a current (in progress) or completed call through another IP phone service; this action is known as ‘tagging’ a call. Call tagging is often used to categorize a call for later filtering (typical tag options can be e.g. “Presales”, “Sales” and “Support”).

Call tagging automatically marks the call for recording and saves the tag data together with the call. Tag information is visible when browsing through recorded calls in the Call Recording user interface.

**Note:** Call tagging is not enabled by default for prerecording, so must be configured by your system administrator. The call must be tagged within the period set by your administrator.

To tag an in-progress or completed call:

Your system administrator will provide the name of the call information IP phone service.

Press the “Services” button on your Cisco IP phone.

Select the service (e.g. "Call Recording call-info") from the list of options.

Select the appropriate tag value and press Select.

Call Recording tags the call with this value and marks the call for saving.

![Figure 40: Tagging a prerecorded call](image-url)
Chapter

10 Restoring Call Recordings

Your Call Recording System Administrator determines how long Call Recording stores recorded calls in the main database. Call Recording archives older call recordings, storing them offline, and then deleting the call recordings from main database. Only the call data remains available, and is still displayed in Call Recording. When a call has been archived but not deleted, it behaves as a normal call recording.

After a call has been both archived and deleted from the main database, you must restore the call to be able to listen to it again. Restoring the call returns the deleted call recording to the database so the recording can be played in the system again.

- Archived and deleted calls are identified with the grey arrow icon.

The information in this chapter is divided into the following topics:

- Restoring an Archived and Deleted Call Recordings
- Canceling Restoration
Restoring an Archived and Deleted Call Recording

1. Select archived and deleted calls in the Recorded calls tab.
2. Click Restore.
3. The yellow arrow icon appears.

**Note:** Depending on your system configuration and storage policy, the restored call recordings usually appear in the Restored calls tab within 24 hours. Call Recording sends an email notifying you that the call has been restored.

When the call is restored, the blue arrow icon appears. You can listen to these restored calls normally. Restored calls appear under both the Restored calls tab, and the Recorded calls tab.

The (x) icon in the table in the Restored Calls “Available” column indicates the calls in the process of being restored. The recording is not available yet. The icon changes when the call is available for playback.

Immediately after the selected calls are restored from the archive, the user receives an e-mail notification and can access the recordings.

Information about the restored call includes:

- **Expire:** Date when the system automatically deletes the restored recordings.
- **Archive:** Name of the exported archive containing the requested calls.
Chapter 10: Restoring Call Recordings

Restoring an Archived and Deleted Call Recording

Figure 42: Restored call info

**Note:** The restored calls are accessible in both the Recorded Calls tab and the Restored Calls tab. Restored calls are marked with the blue double-arrows icon -  

After a pre-set amount of time (typically 48 hours), older restored calls are removed from the list and are no longer available – unless you lock the call or request restoration again. You can cancel a restoration by selecting calls, and clicking **Cancel Restoration**.

**Note:** The restore function does not work with manually deleted calls. Only automatically archived calls can be restored.

Listening to Restored Calls

To listen to restored calls, click on the call’s Speaker icon, or select multiple files and click **Advanced Player**.

Figure 43: Restored calls and archived calls in the section “Recorded calls”
Canceling Restoration

You can cancel a call restoration before it is complete.

1. Open the Restored Calls tab.
2. Identify calls to be cancelled by selecting their check boxes.

3. Click Cancel Restoration.
4. Click OK to confirm the cancellation.

The call restoration process for these calls is cancelled and the calls will not be available for playback unless they are restored again.

Note: The status icons may require some time to reset, depending on your system configuration.
Chapter 11 Using Live Monitor

Live Monitor is a powerful assessment tool that can monitor an agent’s calls in real time. Live Monitor allows the management team to silently listen to a call with the option of recording the call on demand, and then saving or emailing the data.

While the rest of Call Recording is devoted to monitoring saved calls, Live Monitor is specifically designed to allow you to monitor live calls as they occur.

Depending on your system settings, it may take a few moments before Live Monitor launches.

Notes:

• Live Monitor runs as a standalone JAVA application outside your internet browser.

  When you click on the Live Monitor button in Call Recording, you are prompted to download and open the application. You may have to give your system permission to allow Live Monitor to operate within your firewall. Contact your system administrator.

• Since VoIP technologies work in real-time, high network latency can be an issue for Live Monitor.

  For example, if Call Recording is deployed on a WAN that uses only T1 lines (@1.5Mbps), the network can have a latency of around 300ms, which makes usage of Live Monitor impractical. **In this scenario, Live Monitor cannot be supported by Genesys.**
Understanding Live Monitor

Live Monitor displays only calls in progress. Once a call is completed, it is no longer displayed. Calls are displayed according to when they started, with earlier calls appearing at the bottom of the list. You can change the display order of Live Monitor by right-clicking in any column heading.

Listening to Live Calls

When you launch Live Monitor, all active calls in the system that have an associated recording rule are displayed in the list.

1. Select a call from the list.
2. Click the Play button.

Live Monitor plays the conversation on your system. You can click Pause to stop playing the call. Adjust the call Balance and Volume to suit your needs.
Adding Data to Live Calls

When you select a call, you can add data to the call record. This information stays with the call and can be used to evaluate agents or add notes about the conversation.

Custom data fields can be added to Live Monitor by your system administrator. The availability of fields depends on how your system is configured.

1. Select a call from the list.
2. Click the Notes button.
3. Add your comments or other data.

The data is saved when you exit the call, or when the call is completed. This data can be used in other areas of Call Recording.

Saving Live Call Recordings

You can use Live Monitor to save prerecorded calls for later playback.

1. Right-click on a call in the list. The Change Record Status context menu appears.
2. Select Record After.

When the call is completed, it appears in the Call Recording Recorded Calls tab.

Emailing Live Call Recordings

1. Right-click on a call in the list. The Change Record Status context menu appears.
2. Select Send to Email.
3. Type your Email Address.
4. Click OK.

When the call is completed, the call recording is sent as an attachment to the email address you entered.
Sorting Live Calls

You can change the display of Live Monitor by right-clicking in a column heading. This allows you to enter a filter, (wild cards are valid), such as a phone number or agent name, and display only matching calls in your list.

**Note:** To clear column display settings, and return to viewing all available calls, right-click in a column heading and then press Enter on your keyboard.

---

Setting duration thresholds:

The Duration column displays calls by how long they have remained connected. To screen out longer or shorter calls, you can change the Duration threshold.

1. Right-click on the Duration column heading.
2. Select Less than (<) or Greater than (>) and enter the number of minutes.
3. Click ... to apply the Duration threshold.

Only calls under or over your threshold are displayed in the Live Monitor call list.

Displaying calls by Record Status:

By default, Live Monitor displays all calls in the Call Recording system. You can change the display to only show calls with a specific recording status.

Options:

- **Prerecord** – Display calls which are being prerecorded on Call Recording.
- **Record After** – Display calls which have been selected for recording after completion.
- **Record** – Displays all calls which are being recorded by Call Recording.
- **Email** – Displays all calls which have been selected for attachment to an email.
- **Norecord** – Displays all calls which have been associated with a “No Record” rule.
- **Queued** – Displays all calls currently queued in the system.
Chapter

12 Using the Advanced Player

Genesys Call Recording includes an Advanced Player that allows you to listen to multiple calls, select sections of calls, arrange the order of call playback, and isolate individual call streams.

The information in this chapter is divided into the following topics:

- Using Advanced Player Controls
- Playing Multiple Calls
- Adjusting Call Offsets
- Isolating Calls
To open the Advanced Player:

1. Select one or more calls’ check boxes.
2. Click the Advanced Player button.

Figure 46: Opening the Advanced Player

Figure 47: The Advanced PLAYER window
Using Advanced Player Controls

The Advanced Player uses standard audio playback, rewind, and repeat control buttons. Master volume is controlled with a slider control.

![Advanced Player playback controls](image)

Figure 48: Advanced Player playback controls

You can ZOOM into the audio tracks’ display, ZOOM out of the display, or reset the ZOOM to its original position. This allows you to navigate between tracks and move their relative positions when you are replaying multiple call recordings.

![Audio track ZOOM and reset](image)

Figure 49: Audio track ZOOM and reset

To mute an individual call, click the call’s speaker icon. To adjust the volume up or down, use the call’s volume slider. Click Isolate to hear only that call recording.

![Call’s related controls](image)

Figure 50: Call’s related controls

Use the Call Selection controls to identify a section of recordings. Use the red cursor line to select the Start (\(\langle\)) and End (\(\rangle\)) points. Only the selection between these points plays when you click the Selection button. Clicking X clears the selection area.

![Calls Selection Controls](image)

Figure 51: Calls Selection Controls
Playing Multiple Calls

In the Recorded Calls tab, select multiple calls by clicking their check boxes.

Figure 52: Recorded calls with some calls selected

Click Advanced Player. The Advanced Player window opens with those calls ready to play in sequential order.

Figure 53: Playing call recordings in the Advanced PLAYER

Use the Red cursor line to move within the recordings. Click the Play button to hear the calls.
Adjusting Call Offsets

Call Offsets are gaps between calls. These can be small, less than one second, or large. To close the gaps, use your mouse to drag the call tracks closer together.

To return all the offsets to their original positions, click Recall Offsets.

![Recall Offsets button](image)

**Figure 54: Recall Offsets button**

Isolating Calls

To hear only one of the selected calls, and mute all other calls, click **Isolate** next to the Call identification information.

![Isolating a Call](image)

**Figure 55: Isolating a Call**

- Clicking **Isolate** again turns all calls back on.
- Clicking the **Speaker** icon mutes the call.
Chapter 13 Requesting Technical Support

Technical Support from VARs
If you have purchased support from a value-added reseller (VAR), contact the VAR for technical support.

Technical Support from Genesys
If you have purchased support directly from Genesys, contact Genesys Technical Support at the following regional numbers:

<table>
<thead>
<tr>
<th>Region</th>
<th>Telephone</th>
<th>E-Mail</th>
</tr>
</thead>
</table>
| North America and Latin America | +888-369-5555 (toll-free)  
                              | +506-674-6767                  | support@genesyslab.com     |
| Europe, Middle East, and Africa | +44-(0)-1276-45-7002     | support@genesyslab.co.uk   |
| Asia Pacific                | +61-7-3368-6868                  | support@genesyslab.com.au  |
| Malaysia                    | 1-800-814-472 (toll-free)   
                              | +61-7-3368-6868                | support@genesyslab.com.au  |
| India                       | 000-800-100-7136 (toll-free)  
                              | +91-(022)-3918-0537           | support@genesyslab.com.au  |
| Japan                       | +81-3-6361-8950                 | support@genesyslab.co.jp    |

Before contacting Genesys technical support, refer to the Genesys Technical Support Guide for complete contact information and procedures.