

Lumen® Hosted VoIP

Call recording dashboard user guide

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Call recording licenses

Call recording is assigned to a specific User ID when implemented. The User ID is used to manage and store call recordings. Changing the User ID for a user when call recording is enabled is not supported and will impact the ability to retrieve calls that were previously recorded.

If you need to change a call recording User ID:

- Disable the call recording feature
- Change the User ID
- Re-enable the call recording feature

Calls recorded under the previous User ID will be accessible by the primary account administrator only in the administrator portal.

Call recording dashboard

This user guide describes feature/functionality for your call recording dashboard. For details on how to define call recording administrators and assign call recording users, refer to the call recording section of the [Hosted VoIP Administrator Portal Guide](#).

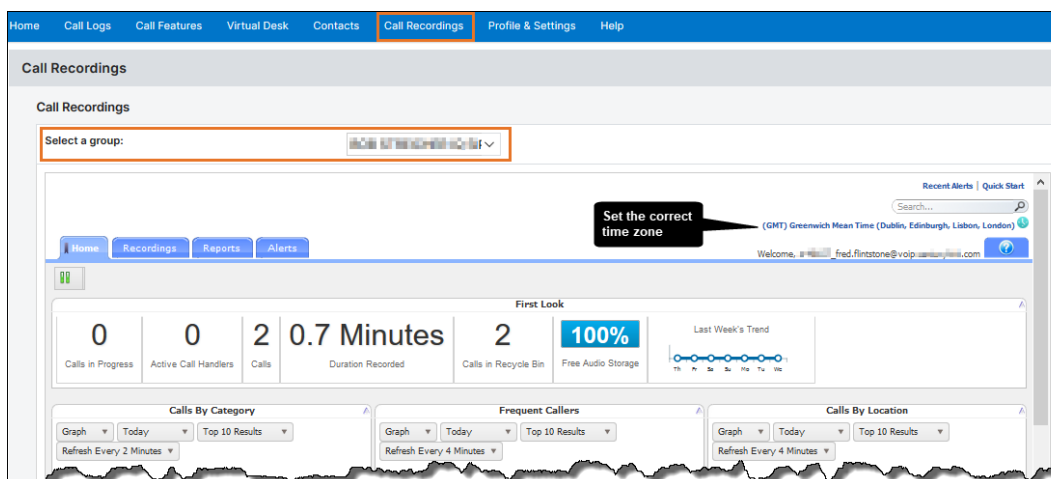
There are three levels of call recording licenses: basic, standard and premium. Each has a different retention policy for recorded calls:

- Basic 7 calendar days
- Standard 30 calendar days
- Premium 1 calendar year

Accessing the dashboard

You will access the call recording dashboard from the end user portal. Only recordings for individuals who have been assigned to you will be visible. (The administrator of the administrator portal can access all recordings within that portal.)

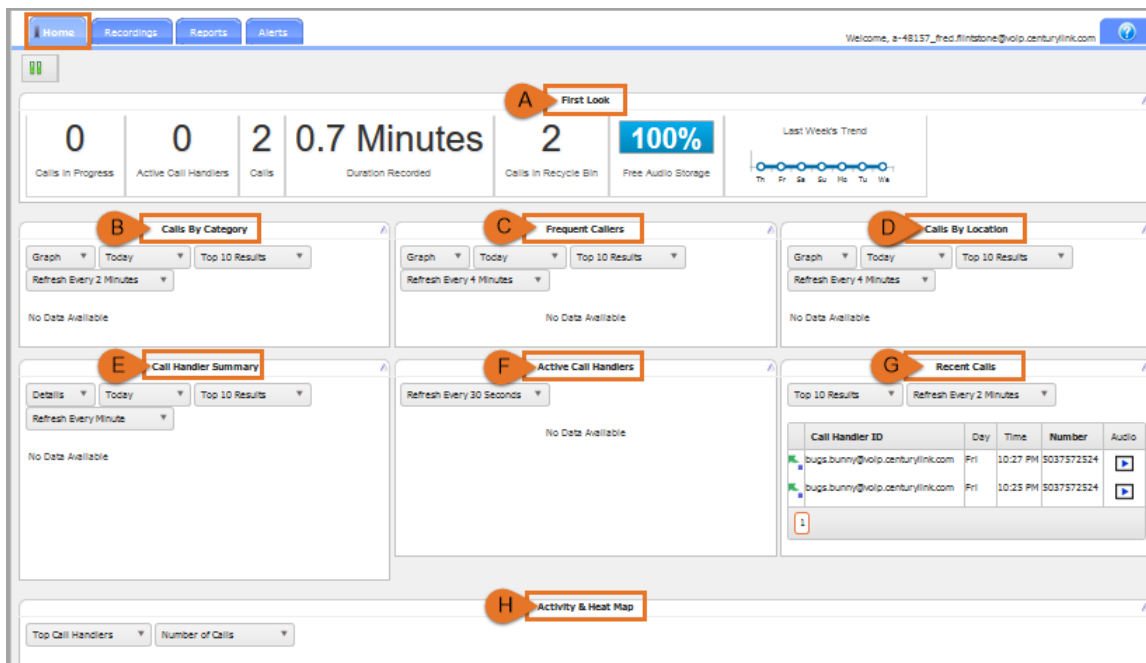
1. Click on **call recordings**.
2. Select the desired group from the **select a group** drop-down menu.
3. Click the **Greenwich Mean Time (GMT)** hyperlink to set your time zone.



Home tab

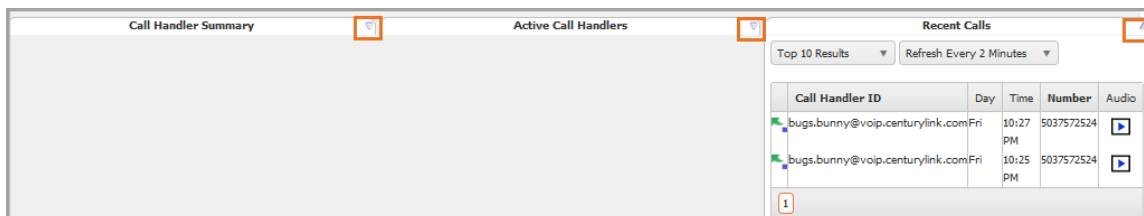
The home tab provides a real-time view of system data. It is divided into eight distinctive panes that provide a pictorial and data overview of your company's current call recordings.

- A. First look
- B. Calls by category
- C. Frequent callers
- D. Calls by location
- E. Call handler summary
- F. Active call handlers
- G. Recent calls
- H. Activity & heat map

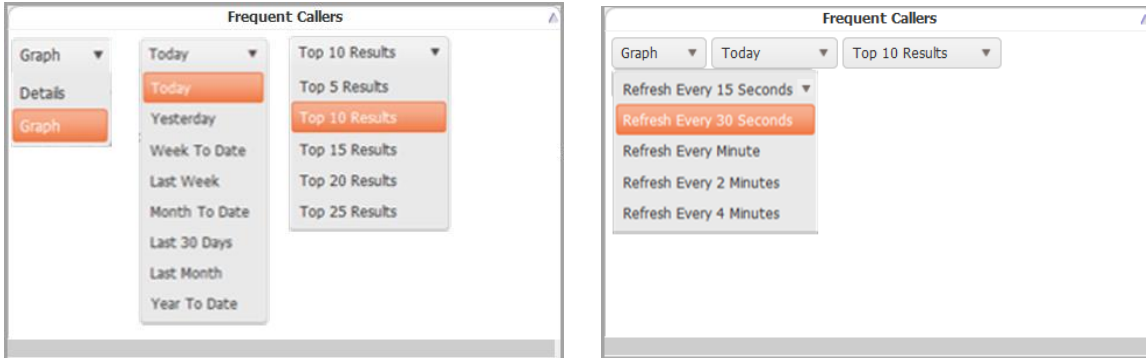


Where applicable, panes can be customized based on results you'd like to view:

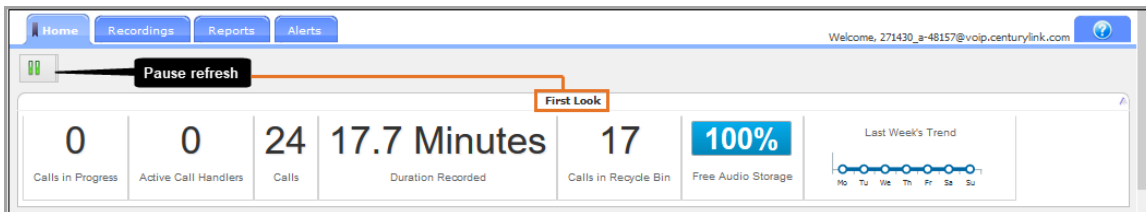
1. Collapse and expand panes by clicking the **up** arrow to collapse and the **down** arrow to expand.



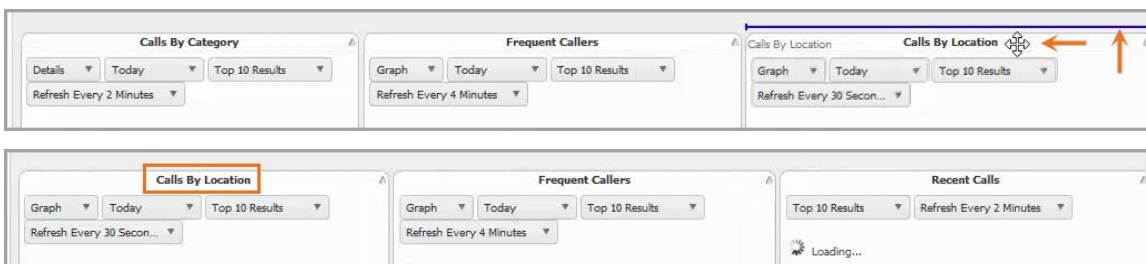
2. Each statistical pane provides dropdown arrows for filtering. Options can be set the same for each pane or can be unique based on your needs. Choose from options such as:
 - Graph/table
 - By day/month/year to date
 - Top 5-25 results
 - Refresh every 15 seconds to 4 minutes



3. Refresh can temporarily be stopped by clicking the **pause** button in the **first look** pane. As shown in the step above, in all other statistical panes, you can reset the refresh value for each pane individually.



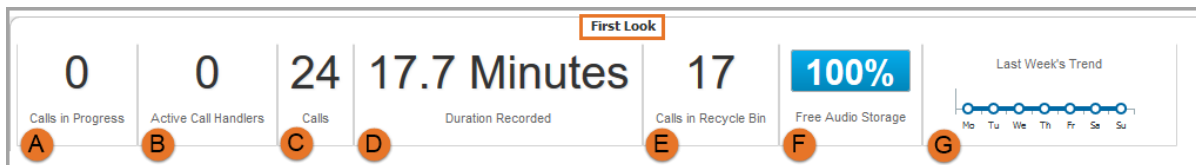
4. Panes can also be reorganized.
 - a. Click near the title of the panel; your cursor will show 4 arrows and a blue bar above the statistical pane.
 - b. Drag the pane to the preferred location and drop it.



First Look

The first look pane appears horizontally across the top of the dashboard and displays a quick view of totals for the following statistics:

- A. **Calls in progress** – identifies the total number of active calls in the system, by group or user.
- B. **Active call handlers** – displays total number of extensions with an active call. Active call handlers display information by group and then by user. Groups and users will only see information based on extensions to which they have access.
- C. **Calls** – identifies the total number of completed calls for the users that are logged in and 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 routinely swept from the application.
- D. **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.
- E. **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 routinely swept from the application.
- F. **Free audio storage** – identifies the total amount of free audio storage for the site.
- G. **Last week's trend** – provides a visual display of call history for the previous week.



Calls by category

The **calls by category** pane is presently not in use.

Frequent callers

The **frequent callers** pane displays total number of calls, by calling number, for the most frequently called numbers. This chart displays inbound calls only.

1. This pane can be displayed as text or graph by selecting **details** or **graph** from the dropdown list. Drill down into the specific recorded calls by clicking on a specific frequent caller.
2. The number of frequent callers displayed in the pane will be determined by the applied filter (for example: last 30 days, last month, etc.).
3. You can adjust the quantity of results displayed by selecting a number from the **top results** dropdown list.

Calls by location

The **calls by location** pane displays total calls by each location as determined by area code/prefix (incoming calls from the area code/prefix and outgoing calls to the area code/prefix).

1. This pane can be displayed as text or a pie chart by clicking on the **view graph** link. Drill down into specific recorded calls by clicking on a location under the **location** column.
2. Calls included in the totals are determined by the applied filter (for example: last 30 days, last month, etc.).
3. You can adjust the quantity of results displayed by selecting a number from the **top results** dropdown list.


Call handler summary

The **call handler summary** pane displays calls by duration.

1. This pane can be displayed as text or pie chart by clicking on the **view graph** link. Drill down into specific recorded calls by clicking on a call handler ID under the **call handler ID** column.
2. 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, etc.).
3. You can adjust the quantity of results to displayed by selecting a number from the **top results** dropdown list.

Active call handler

The **active call handlers** pane displays call handlers/numbers that are currently on calls, including the other party's number. You can adjust the quantity of results displayed by selecting a number from the **top results** dropdown list.

Note: At this time, the monitoring function launched from the  icon is not available.

Recent calls

The **recent calls** pane displays the most recent calls, incoming and outgoing, by call handler.

1. The recent calls pane can be displayed as text or graph by selecting **details** or **graph** from the dropdown list.
2. The number of recent calls displayed in the pane will be determined by the applied filter (for example: last 30 days, last month, etc.).
3. You can play a recorded call by clicking on the **recorded call** icon.
4. You can adjust the quantity of results displayed by selecting a number from the **top results** dropdown list.

Activity & heat maps

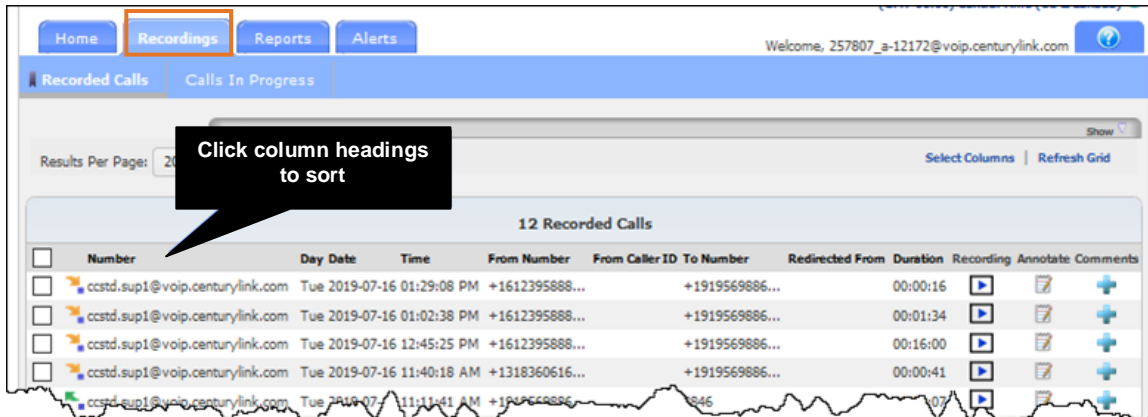
The **activity & heat map** displays call activity for the top 10 numbers by hourly intervals over a 24-hour period.

1. The activity & heat map can be filtered by call handlers, calling parties, or called parties.
2. Call activity can be displayed as number of calls or call duration (in minutes).
3. The darker colored blocks represent the higher volume call activity while the lighter colored blocks represent the lower volume call activity.
4. Each individual color block is clickable and takes you directly to the **recorded calls** tab, where are you able to view call activity, listen to the recording, add comments, etc.

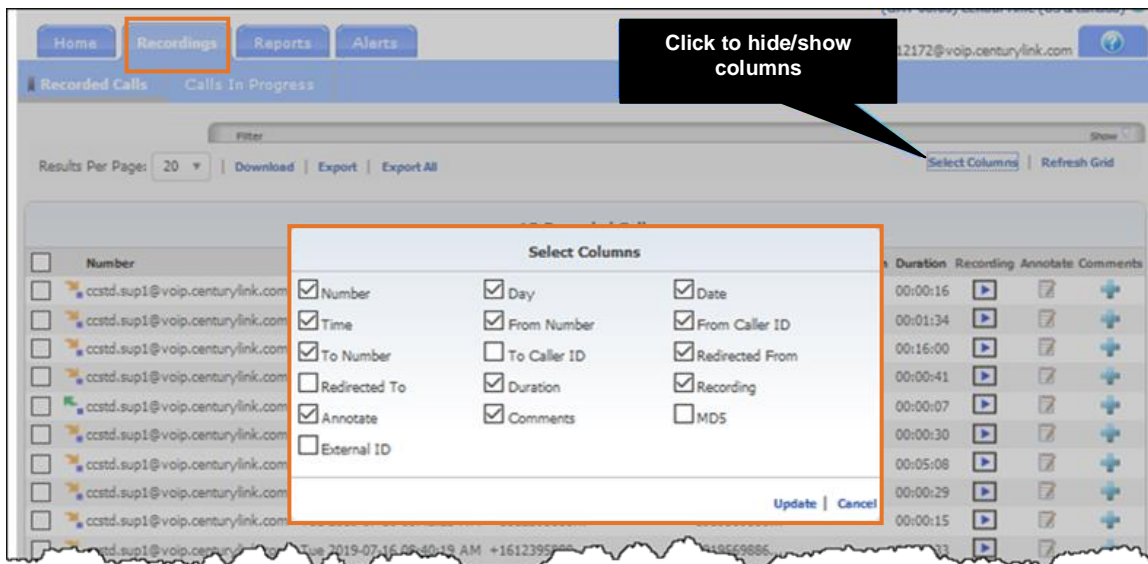
Recordings tab (recorded calls)

The recorded calls screen displays all completed recorded calls for all users assigned with the call recording feature.

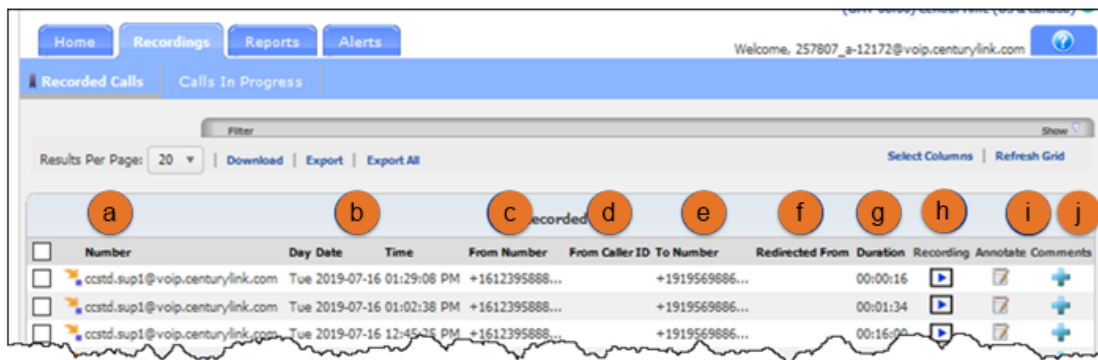
1. To better manage this screen, all column headers can be sorted by clicking on the applicable column header.
2. Click once to sort the column in **ascending** order, click again to sort the column in **descending** order.



3. Columns may also be hidden/shown using the **select columns** link to choose which columns to display.
4. Click **update** or **cancel** after selections are made.



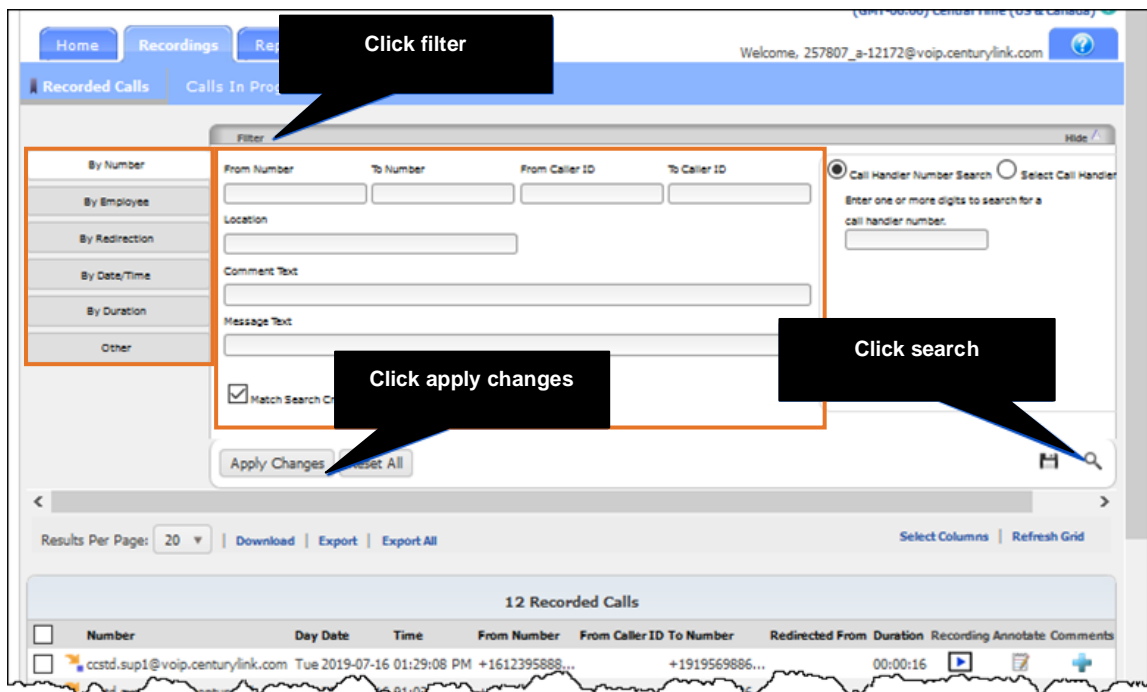
5. The following information is available for display on the recorded calls screen:
- Number** – phone number of the user with the recorded call. This is also referred to as the call handler number or description. Next to each number is an indicator showing if the recorded call was an inbound (📞) or outbound call (📞).
 - Day, date and time** – actual day of the week, date and time the call originated
 - From number** – 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** – 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 here.
 - Redirected from** – displays the number of the person or group transferring the call (currently this column will not display any data)
 - Duration** – the length of the call
 - Recording** – identifies whether there's a recording associated with the call. When a call is recorded, a **recordings** button (🔊) appears under the **recording** column indicating there's a recorded call file for that call. To listen to the recorded call file, click on the **recordings** button. Your default media player opens and begins 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. iTunes® loads the recorded call file in the library and you must click play to begin listening to the file.
 - Annotate** – allows you to add comments and markers to specific parts of calls to indicate where in the call a notable event 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. This **annotate** button (📝) indicates there are currently no annotations associated with the corresponding recorded call file. However, this **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 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. An **add comment** button (+) indicates there are currently no comments associated with the corresponding recorded call file. An **edit** button (✎) indicates there are 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. To change an existing note, click the **edit** button. Click **save**.



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 just the information pertinent to your current needs.

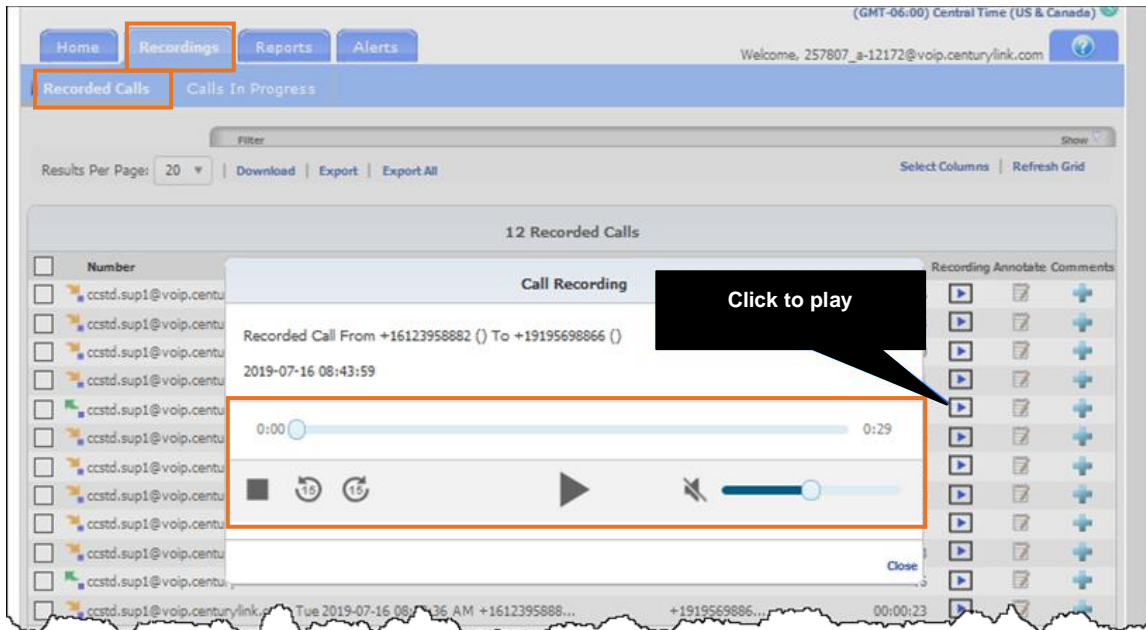
1. Click filter at the top of the recorded calls screen.
2. Click the tabs on the left to input categories you would like to sort by. Categories are:
 - **Number**
 - **Employee** (not used at this time)
 - **Redirection**
 - **Date/time**
 - **Duration**
 - **Other**
3. Each tab has different categories to filter from; all fields or options do not have to be selected, the more data you input, the more narrowed your search will be.
4. Click the **apply changes** button, then click the **search** icon in the lower right corner of the page (next to the **save** icon).
5. Recordings based on your search filter, appear at the bottom of the page.
6. Click on **filter** again, to collapse filter options.



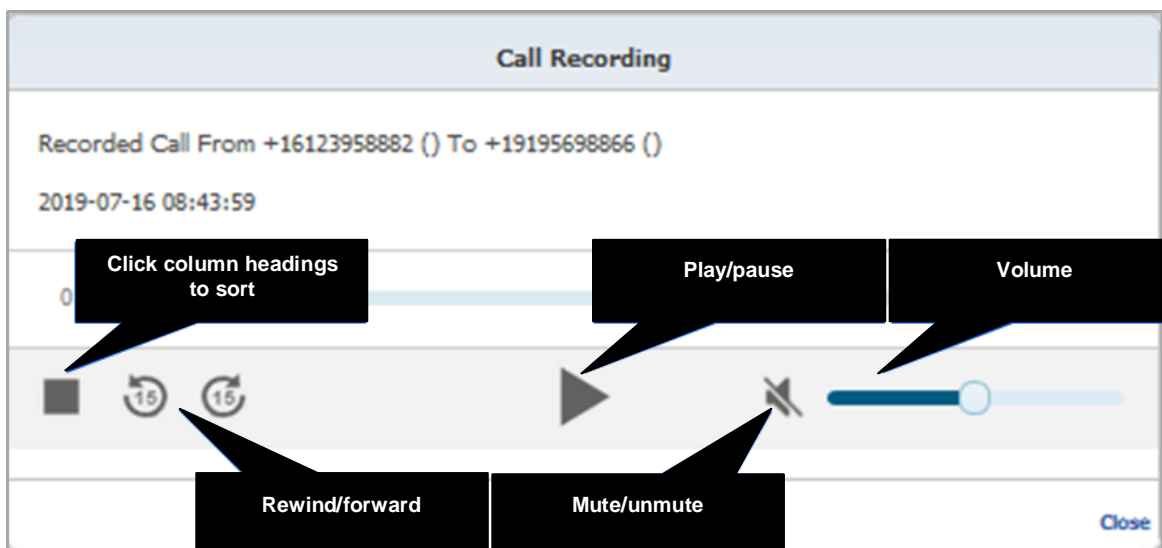
Play recorded call

Click the recordings tab and click the recorded calls sub tab to ensure that you're looking at the list of recorded calls.

1. Find a call and click the **recordings** button (🔊) corresponding to that call. Your default media player opens and begins playing the recorded call file (MP3 file).



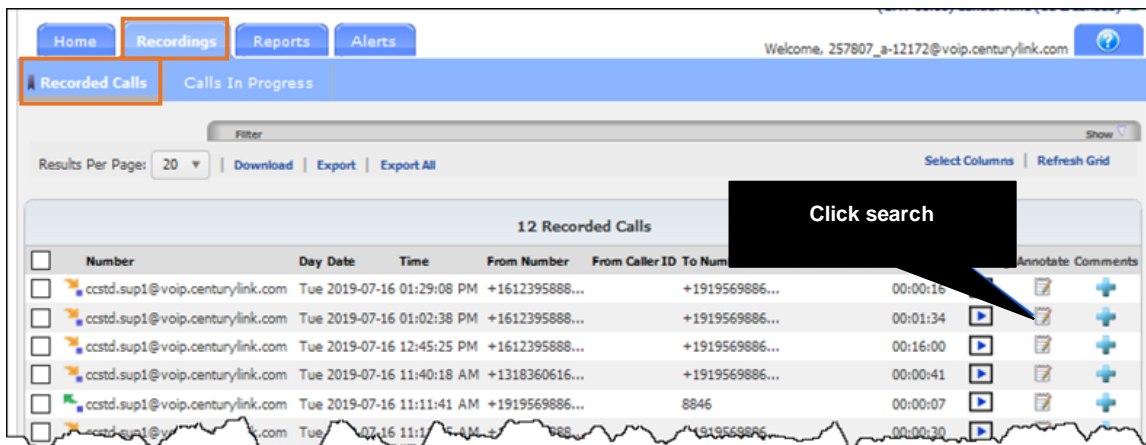
2. Use buttons at the bottom of the call recording window to **stop, rewind/forward, play/pause, mute** and **increase/decrease volume**.
3. Once you're done listening to the recording, click **close** at the bottom of the call recording window.



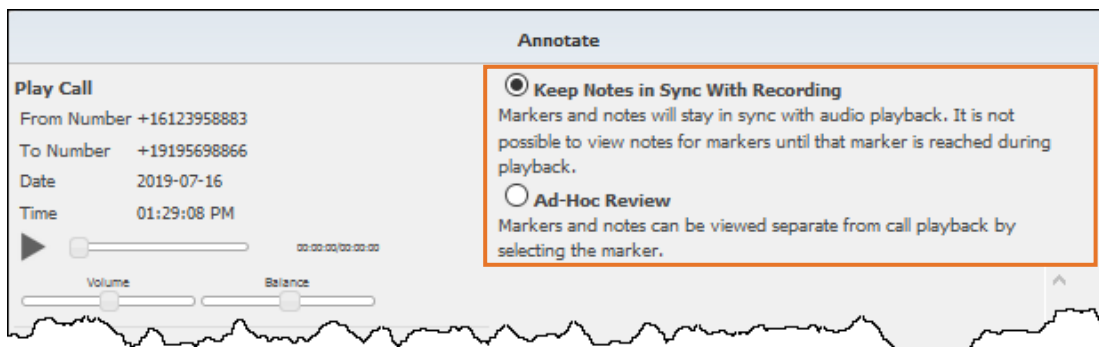
Annotation

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, legal or training reasons.

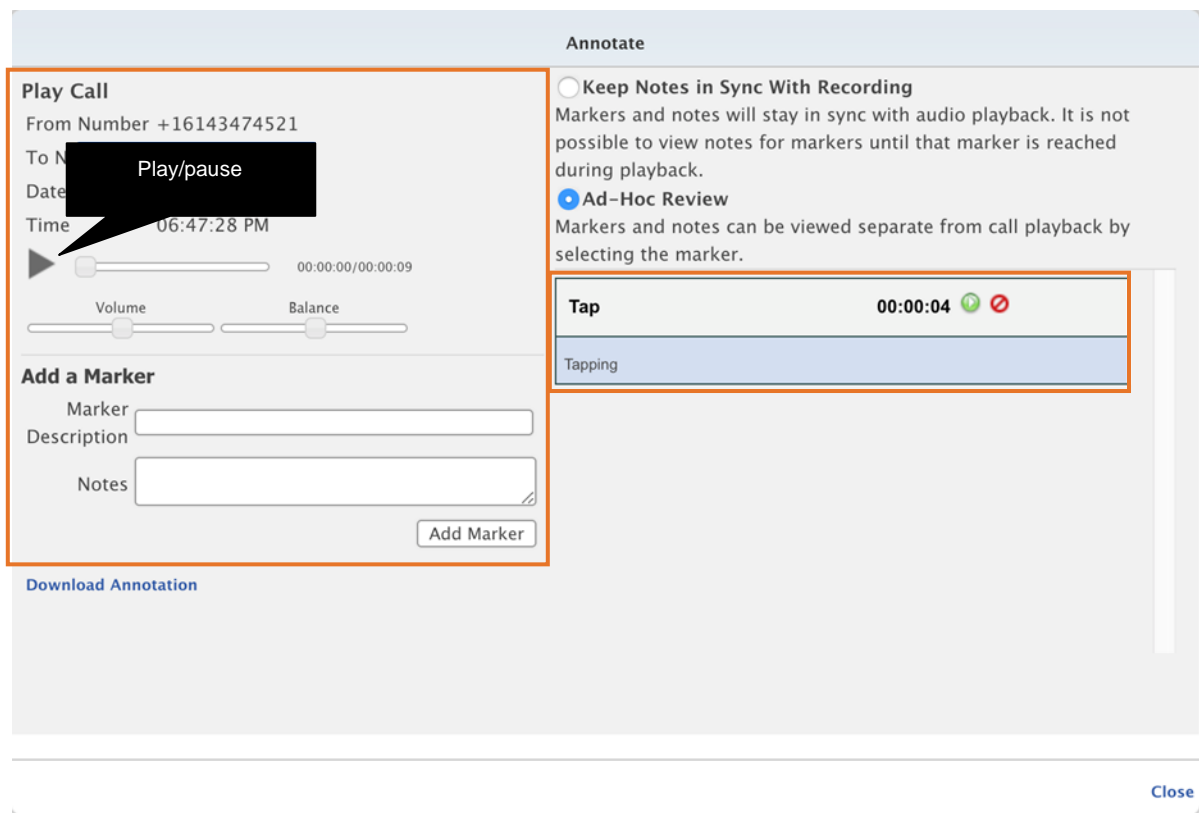
1. Click the recordings tab and select **recorded calls** to ensure that you're looking at the list of recorded calls.
2. Find a call and click on the **annotate** button (📝) that corresponds to that call. A window pops up which allows you to add an annotation to the recording.



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.
 - **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.
 - **Ad-hoc review** – markers and notes can be view separately from call playback by selecting the marker.



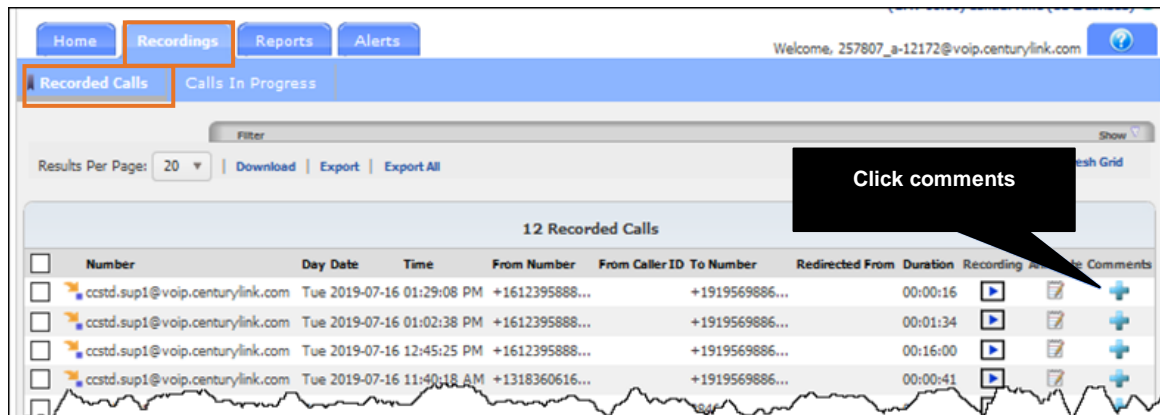
- To add an annotation, select the **play** button to start recording playback.
- When the playback reaches a point of interest, click the **pause** button.
- Under **add a marker**, enter a description for the note in **marker description**, add notes in the **notes** field and click **add marker**.
- If desired, additional markers can be added to the call, by repeating steps 4-6. Saved markers are shown in the **annotate** window.
- To delete a marker, click the **delete marker** button (🚫) that corresponds with the annotation no longer needed.
- Click **OK** in the confirmation window, which removes the note.
- Annotations can be downloaded by clicking **download annotation**.
- Select **open with** or **save file**.
- When annotation management is completed, click **close** at the bottom of the annotate window.



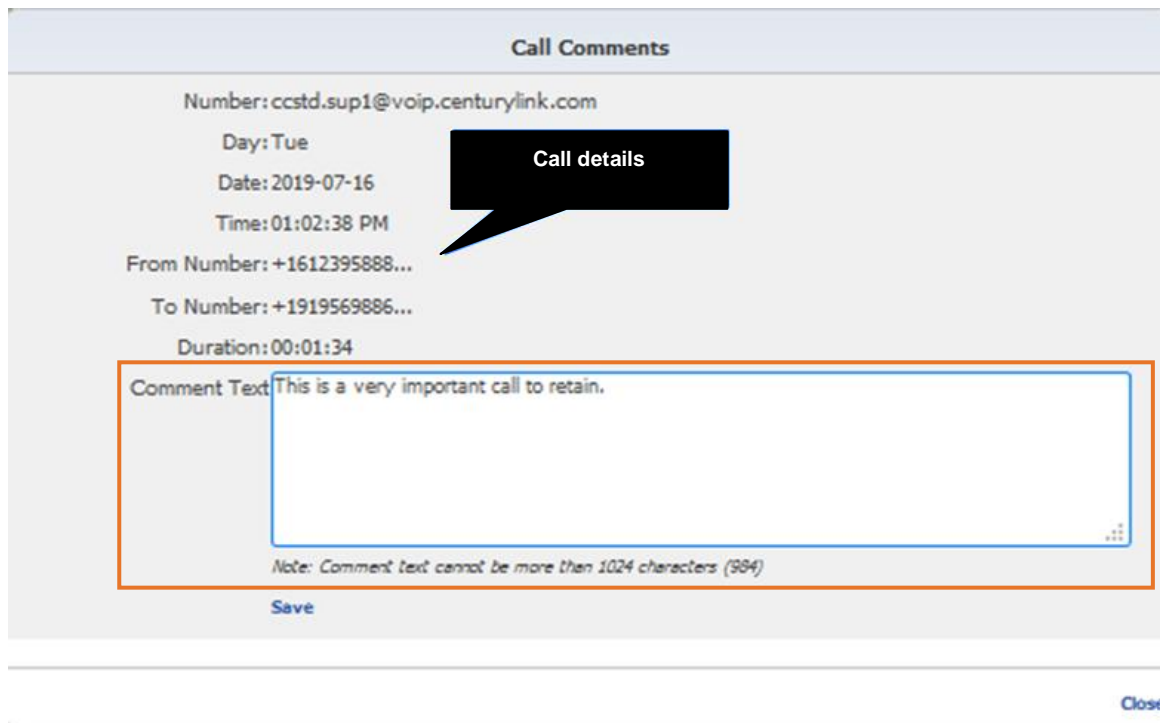
Comments

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.

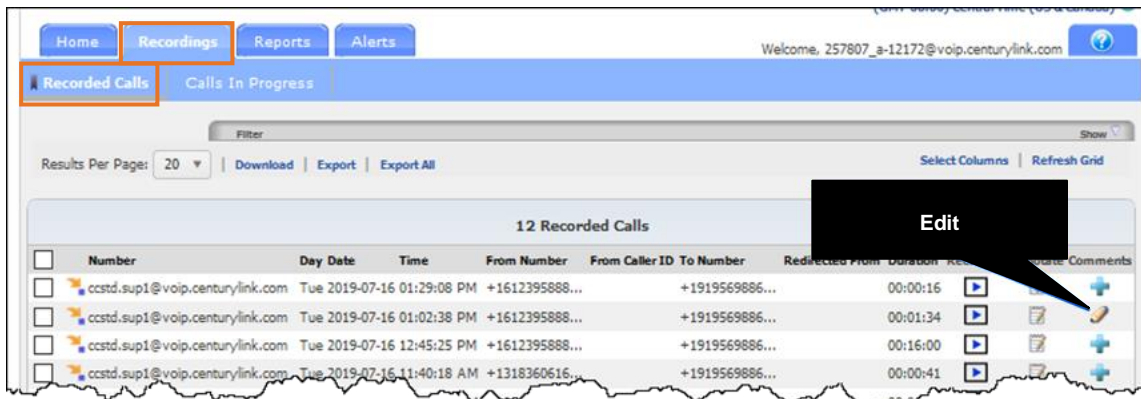
1. Click the recordings tab and click **recorded calls** to ensure that you're looking at the list of recorded calls.
2. Find a call and click on the **comments** button (+) that corresponds to that call.



3. A **call comments** window appears with details about the call and a blank entry box.
4. In the **comment text** field, add desired notes about the call. Comment text cannot be greater than 1024 characters.
5. Click **save** and **close** when notes are completed.



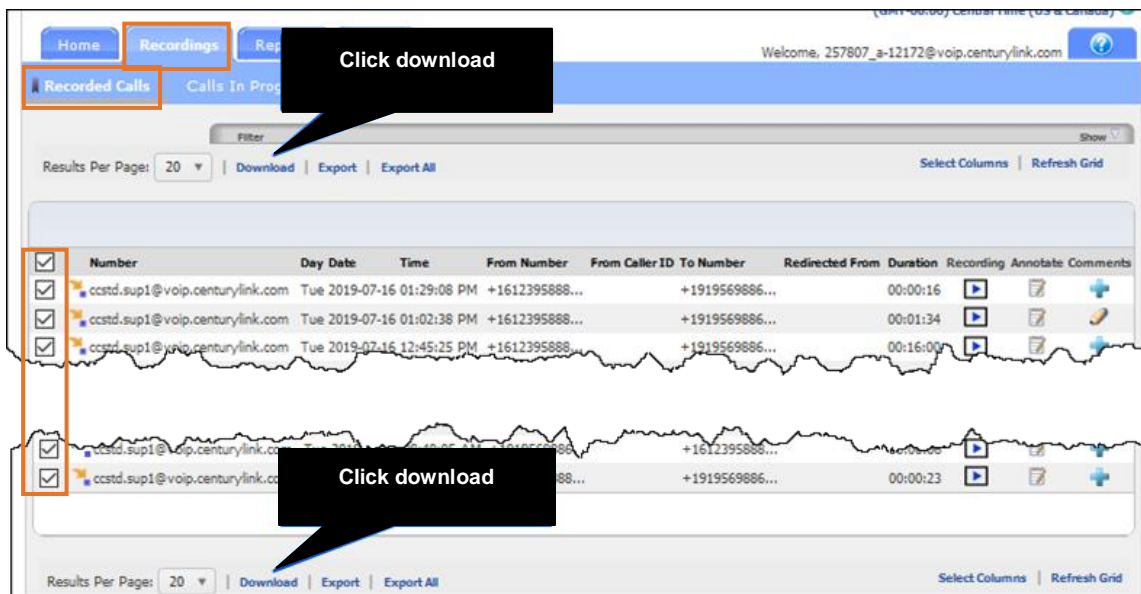
- The **comments** button changes to an **edit** button (✎) indicating there is a comment associated with this call.
- Click the **edit** button (✎) to view, edit or input additional comments.



Downloading call recordings

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

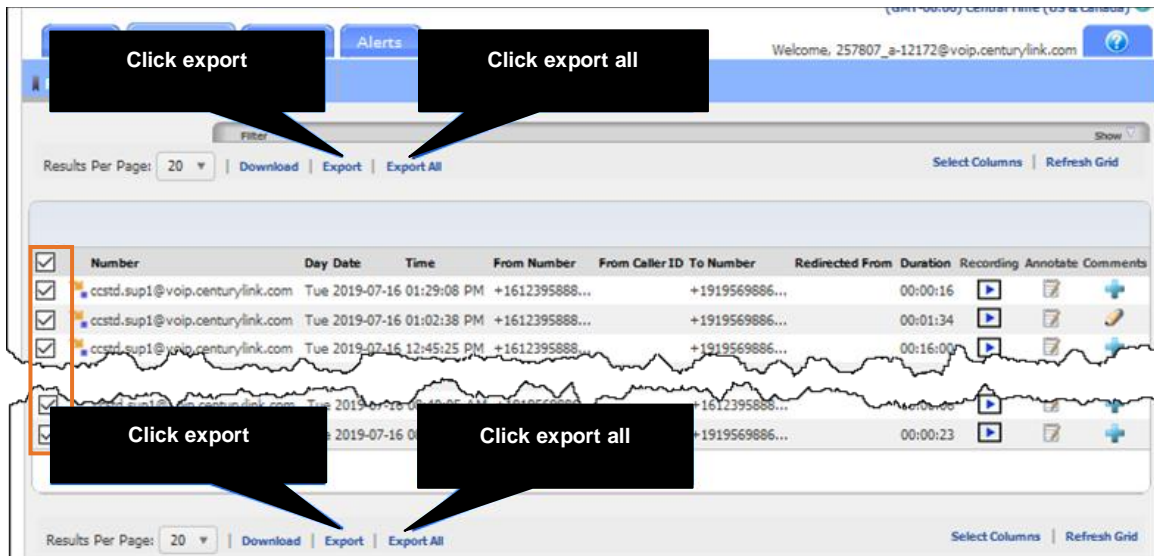
- Click the recordings tab and select **recorded calls** to ensure that you're looking at the list of recorded calls.
- Select the recorded call(s) you wish to download by clicking in the corresponding option box to the left of the **number** column. To select all calls, select the checkbox at the top of the column.
- Click the **download** link at the top or bottom of the recorded calls list.
- Click **open with** or **save file** to place your call in your preferred directory location.



Export/export all

Export/export all allows you to save the list of recorded calls to your PC in .csv format.

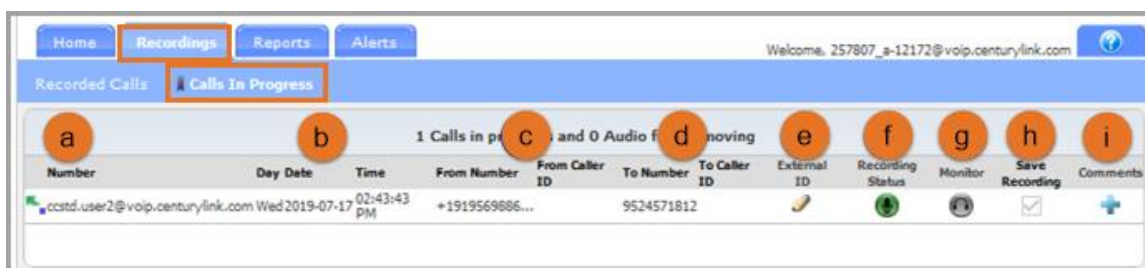
1. Click the recordings tab and click **recorded calls** to ensure that you're looking at the list of recorded calls.
2. Select the recorded call(s) you wish to export by clicking in the corresponding option box to the left of the number column. You may select calls from other pages by hitting the page numbers on the left of the page below the calls list; or you may select the **export all** button which exports all calls from all pages. If a filter is applied only the filtered calls will be selected.
3. Select the **export** link at the top or bottom of the **recorded calls** page.
4. Click **open with** or **save file**.
5. Opening the file opens the **.csv file** using your default .csv associated program.



Calls in progress

Calls in progress provides you with a real-time view of system data including information about the total number of calls in progress, active call handlers, calls, and durations recorded.

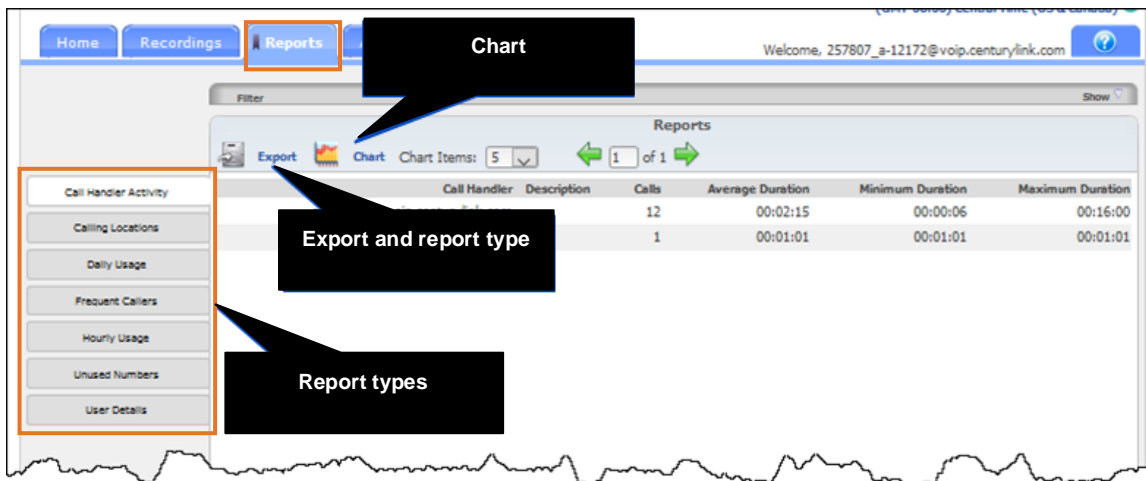
1. Click the recordings tab and click **calls in progress** to ensure you're looking at the list of active calls.
2. Observe or access the following for any active recorded call:
 - a. Number
 - b. Day, date and time
 - c. From number/caller ID
 - d. To number/ caller ID
 - e. External ID
 - f. Recording status
 - g. Monitor
 - h. Save recording
 - i. Comments



Reports tab

There are seven reports included in the application, to assist with user administration activities. Reports identify information that can also be found within the dashboard or **home tab** but provides more detail. Reports can be viewed as text or in graphical format. You can export reports to a local drive or removable storage device. Report content can be filtered by number, date and time.

1. Click the reports tab.
2. Click **export** to open or save your report in Excel format.
3. Click **chart** to view the report data in graphical format.
4. Click the report topic you'd like to review statistic for, in this example, the **call handler activity** report.



Call handler activities

The **call handler activity** report displays the last 30 days of activity for each call handler in the application. The call handler activity report can be displayed as text or pie chart by clicking the **chart** button found on the report toolbar. The report displays the number, description, total number of calls, average call duration, minimum duration, and maximum duration by call handler.

Call locations report

The **calling locations report** displays total calls by each location as determined by the area code/prefix, for the last 30 days. The calling locations report can be displayed as text or pie chart by clicking the **chart** button found on the report toolbar. The report displays the number, location, and total number of calls made to that location.

Daily usage report

The **daily usage report** displays the activity totals for the day in the application. The daily usage report can be displayed as text or column chart by clicking the **chart** button found on the report toolbar. The report displays the date, total number of calls, average call duration, minimum duration, and maximum duration for the day.

Frequent callers report

The **frequent callers report** displays the callers (by number) that have called the most frequently. The frequent callers report can be displayed as text or bar chart by clicking the **chart** button found on the report toolbar. The report displays the number, the name associated with the number (caller ID), the total number of calls, average call duration, minimum duration, and maximum duration. The report is sorted in order of the most frequently called or dialed number.

Hourly usage report

The **hourly usage report** displays a distribution of call activity across the hours of the day. The report can be displayed as text or column chart by clicking the **chart** button found on the report toolbar. The report displays the hour, total number of calls, average call duration, minimum duration, and maximum duration for each hour.

Unused numbers report

The **unused numbers report** identifies numbers that have had no usage. The unused numbers report is text format only. However, you're able to click on the **view and edit details** link in the report to go directly to the numbers page. The report displays the number and description.

User details report

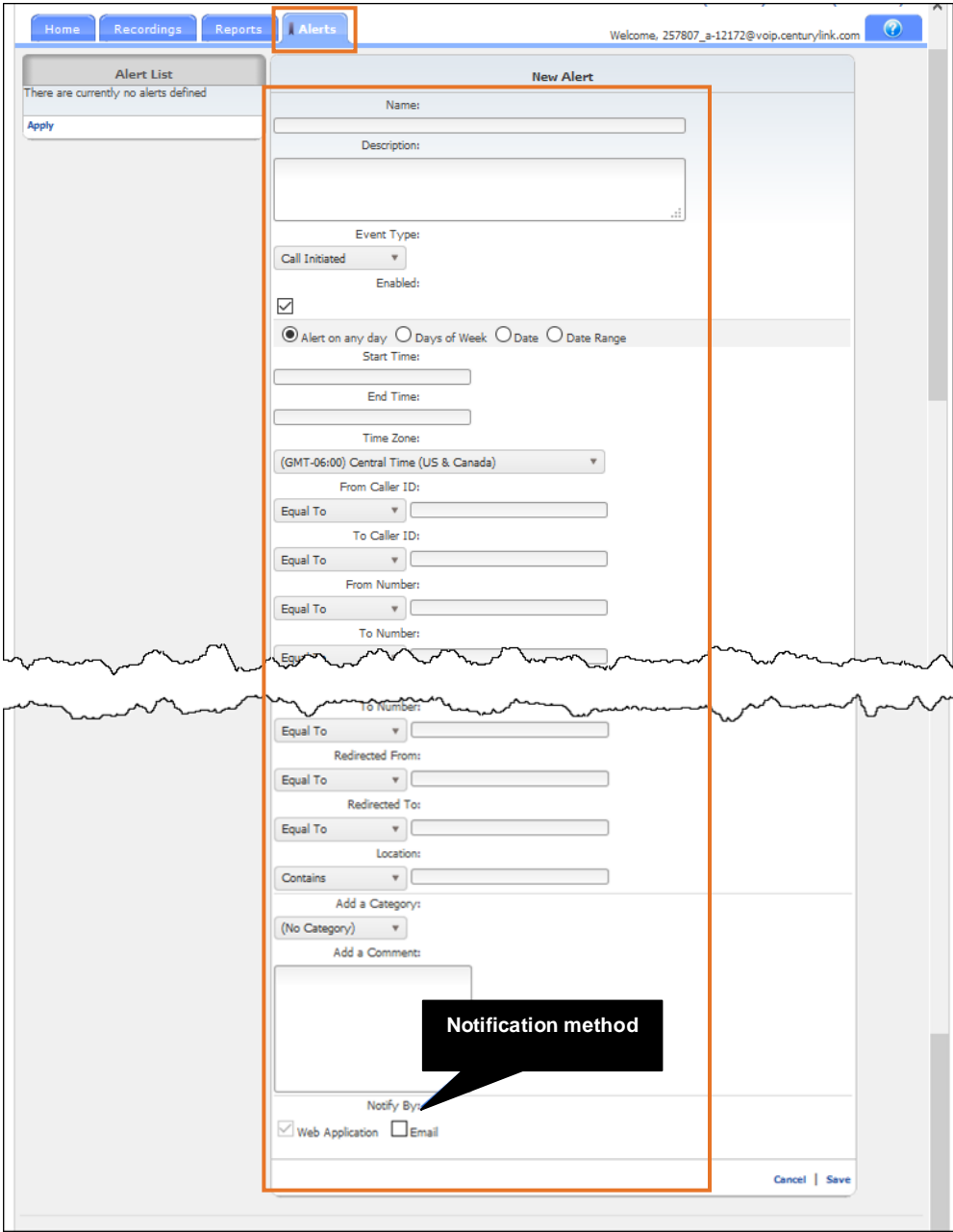
The **user details report** identifies information about each user of the application. The user details report is text format only. The report displays the username, email address, the date the user was created, the date the user last logged on to the application, the date the user's password was last changed, the total amount of numbers assigned to the user, total number of annotations and categories created by the user, and whether the user has permission to archive calls to a CRM application.

Alerts tab

Alerts are used to notify you of calls that meet specific conditions as defined by you. The system looks at all terminating calls, and if calls are found meeting your criteria, you're notified with information regarding those calls so you can address issues or make any necessary changes to current policies or procedures. A history of executed alerts are available from the alerts tab.

Creating an alert event

- 1. Click the alerts tab.
- 2. If this is your first alert, a new alert window opens.
- 3. Fill in the fields, click radio buttons and select options from dropdown lists to set your desired alert.

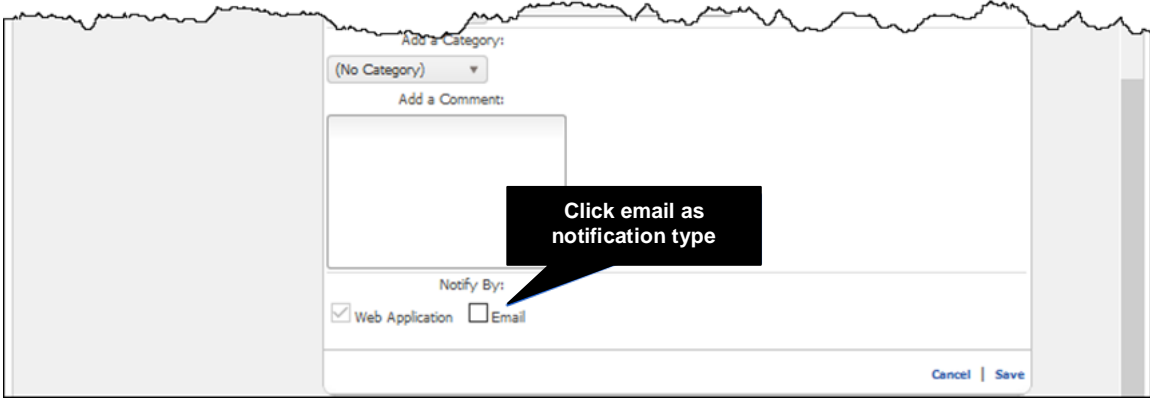


- a. **Name** – enter a name for the alert (a maximum of 50 characters).
- b. **Description** – enter a description for the alert.
- c. **Event type** – select an event type in the dropdown box.
 - **Call initiated** – creates an alert when a call is started that meets the entered criteria.
 - **Call terminated** – creates an alert when a call is ended that meets the entered criteria
- d. **Enabled** – check the enabled box to make this alert active. If not checked, the alert will not be active.
- e. **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** – each day of the week will appear. Select the specific days the alert should run. The alert runs on the selected day(s) while 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:

- f. **Start time** – if applicable, select the start time the Alert should begin running on the selected day(s).
- g. **End time** – if applicable, select the end time that the Alert should stop running on the selected day(s).
- h. **Time zone** – select a time zone that you wish to apply to the alert.
- i. **From caller ID** – defines the originating caller ID or partial originating caller ID on which to alert.
- j. **To caller ID** – defines the terminating caller ID or partial terminating caller ID on which to alert.
- k. **From number** – defines the originating number or partial originating number on which to alert.
- l. **To number** – defines the dialed number or partial dialed number on which to alert.
- m. **Redirected from** – defines the number of the person or group transferring the call.
- n. **Redirected to** – defines the number to which the call was transferred.
- o. **Location** – defines the location or partial location on which to report.
- p. **Add a category** – not in used at this time.
- q. **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.

- 4. Select if you want to be notified by email when an alert occurs by clicking the **email** option box.
- 5. By default, web application is always checked and **alerts** appear in this alerts tab.



- 6. If you select notification by email, you must enter the **to** and **from email addresses**.
- 7. Optionally enter the **subject**, **from name**, and **to name**.
- 8. Click **save** or **cancel**.

