

Call Recording Quick Reference Guide



Logging Into the Portal

Before accessing the Call Recording service you will need a few fundamental pieces of information:

- The URL for the Call Recording Portal. <https://callrec-na.razorline.net>
- Your user name and password provided by your administrator.

Browse to the administrator provided URL. At the login screen enter your user name and password and click "Login". Depending on your level of access, you might only see your recordings as an agent/user or if enabled as a supervisor you will be able to see multiple agents/users and manage recordings. Functionality only to supervisor role will be explained below.



Call Recording Portal Login Page

Browse Recordings - Overview

Logging into the portal automatically opens the "Browse : Recordings "page. Search for recordings based-on multiple criteria and then play, tag, and if enabled as a supervisor can also forward, or download them.

Enter criteria such as a date range, tags, remote parties, and more.

This area shows call recording information such as date, time, duration, and a unique ID for each recording.

Shows the local party making or receiving recording.

Shows call information from the remote party.

Shows actions that can be assigned to a recording such as tags and forwarding via e-mail. Selecting the check box includes the record in a bulk action.

The screenshot shows the 'Call Recording Browse Page' interface. At the top, there are tabs for 'Recordings', 'Tags', and 'Audit Trail'. A search bar and filter options are on the left. The main area displays a table of recordings with columns for TYPE, ID, DATE, TIME, DURATION, LOCAL PARTY, DIRECTION, REMOTE PARTY, USER, and TAGS. A playback window is visible on the right side of the table.

TYPE	ID	DATE	TIME	DURATION	LOCAL PARTY	DIRECTION	REMOTE PARTY	USER	TAGS		
🔊	783	2019-04-10	12:53:36	478	johngrover@myco.com	👉	chihung@myco.com	John Grover	🔖	✉	☐
🔊	782	2019-04-10	12:19:08	33	johngrover@myco.com	👈	chihung@myco.com	John Grover	🔖	✉	☐
🔊	779	2019-04-10	12:07:14	183	johngrover@myco.com	👈	5559975443	John Grover	🔖	✉	☐
🔊	778	2019-04-10	11:46:44	478	johngrover@myco.com	👈	marysinclair@myco.com	John Grover	🔖	✉	☐
🔊	777	2019-04-10	11:27:11	33	johngrover@myco.com	👈	5559975443	John Grover	🔖	✉	☐
🔊	776	2019-04-10	10:42:19	280	johngrover@myco.com	👈	5552123456	John Grover	🔖	✉	☐
🔊	775	2019-04-10	10:23:55	478	johngrover@myco.com	👈	5556789012	John Grover	🔖	✉	☐
🔊	774	2019-04-10	10:11:32	70	johngrover@myco.com	👈	robertlavi@myco.com	John Grover	🔖	✉	☐
🔊	773	2019-04-10	09:37:21	300	johngrover@myco.com	👈	5559977432	John Grover	🔖	✉	☐
🔊	772	2019-04-10	09:03:04	183	johngrover@myco.com	👈	5552341236	John Grover	🔖	✉	☐

Call Recording Browse Page

Click the speaker icon to listen to the recording.

Clicking on either the recording ID or the date opens a details page for the selected recording.

The arrows indicate if the recorded call was inbound or outbound.

Search Call Recordings

Call Recording provides a powerful multi-criteria search feature. It allows you to search using one or multiple search criteria.

The screenshot shows a search interface for call recordings. It includes a 'Filter by' dropdown, a 'Monitored only' checkbox, and several search criteria: Tag name, Tag text, ID, Min duration (secs), Max duration (secs), Local party, Remote party, IP addresses, Start date, and End date. There are also radio buttons for 'Outgoing', 'Incoming', and 'Both'. At the bottom, there are buttons for 'Calculate disk space', 'Reset', and 'Search'. A 'Select tag' button is also present. A callout box shows a 'Select Tag Type' dialog with options like 'Compliment', 'Customer Issue', and 'New Tag Type'.

Filter search by individual or group.

Search based on specific tags. Click "Select tag" to choose the tags from a dialog box and click "Select Tag Type".

Search additional notes or tag text associated with the recording.

Search for recordings based on their minimum and maximum recording.

Quickly find a recording using its unique ID number.

Search based on local / remote party information (SIP ID, phone number, IP).

Search for recordings from a specific date or range of dates.

Filter the search results by type of call.

Input one or multiple search criteria and then click the "Search" button.

Playback Call Recordings

Easily playback recordings directly from the web browser.

Choose a recording and click the speaker icon to listen.

Playback controls for the recording.

Account Logout

Welcome Supervisor1

Recordings Tags Audit Trail

Filter by Search

Monitored only

Tag name Select tag

Tag text

ID

Min duration (secs)

Max duration (secs)

Local party

Remote party

IP addresses

Start date

End date

Outgoing Incoming Both

More metadata filters...

Calculate disk space Reset Search

Recordings Reports

Pick action

TYPE	ID	DATE	TIME	DURATION	LOCAL PARTY	DIRECTION	REMOTE PARTY	USER	TAGS			
	783	2019-04-10	12:53:36	478	johngrover@myco.com		chihung@myco.com	John Grover				
	782	2019-04-10	12:19:08	33	johngrover@myco.com		chihung@myco.com	John Grover				
	779	2019-04-10	12:07:14	183	johngrover@myco.com		5559975443	John Grover				
	778	2019-04-10	11:46:44	478	johngrover@myco.com		marysinclair@myco.com	John Grover				
	777	2019-04-10	11:27:11	33	johngrover@myco.com		5559975443	John Grover				
	776	2019-04-10	10:42:19	280	johngrover@myco.com		5552123456	John Grover				
	775	2019-04-10	10:23:55	478	johngrover@myco.com		5556789012	John Grover				
	774	2019-04-10	10:11:32	70	johngrover@myco.com		robertlavi@myco.com	John Grover				
	773	2019-04-10	09:37:21	300	johngrover@myco.com		5559977432	John Grover				
	772	2019-04-10	09:03:04	183	johngrover@myco.com		5552341236	John Grover				

20190629_174546_CKMI.wav.crypt

00:00 02:36

Download Recordings

Supervisors and administrators have two different methods for downloading recordings. Individual agent/users cannot download recordings.

Download All the Media Files Associated with a Search Query.

1. Perform a search.
2. From the “Pick action” drop down menu choose “Export query results media files”.
3. Choose a location and click “Save” This will download all of the media files from that search.

Manually Select Files for Download

1. Perform a search.
2. Choose the files to be downloaded.
3. From the “Pick Action” drop down menu choose “Export selected media files”.
4. Choose a location and click “Save”.

Check the box of one or more recordings you wish to download

Welcome Supervisor1

Recordings Tags Audit Trail

Filter by [dropdown] Search

Monitored only

Tag name Select tag

Tag text

ID

Min duration (secs)

Max duration (secs)

Local party

Remote party

IP addresses

Start date

End date

Outgoing Incoming Both

More metadata filters...

Calculate disk space Reset Search

TYPE	ID	DATE	TIME	DURATION	LOCAL PARTY	DIRECTION	REMOTE PARTY	USER	TAGS			
	783	2019-04-10	12:53:36	478	johngrover@myco.com	←	chihung@myco.com	John Grover				<input checked="" type="checkbox"/>
	782	2019-04-10	12:19:08	33	johngrover@myco.com	→	chihung@myco.com	John Grover				<input checked="" type="checkbox"/>
	779	2019-04-10	12:07:14	183	johngrover@myco.com	←	5559975443	John Grover				<input checked="" type="checkbox"/>
	778	2019-04-10	11:46:44	478	johngrover@myco.com	←	marysinclair@myco.com	John Grover				<input type="checkbox"/>
	777	2019-04-10	11:27:11	33	johngrover@myco.com	→	5559975443	John Grover				<input type="checkbox"/>
	776	2019-04-10	10:42:19	280	johngrover@myco.com	→	5552123456	John Grover				<input type="checkbox"/>
	775	2019-04-10	10:23:55	478	johngrover@myco.com	←	5556789012	John Grover				<input type="checkbox"/>
	774	2019-04-10	10:11:32	70	johngrover@myco.com	→	robertlavi@myco.com	John Grover				<input type="checkbox"/>
	773	2019-04-10	09:37:21	300	johngrover@myco.com	→	5559977432	John Grover				<input type="checkbox"/>
	772	2019-04-10	09:03:04	183	johngrover@myco.com	→	5552341236	John Grover				<input type="checkbox"/>

20150629_174546_CKMI.mpv.crypt
00:00 02:36

Call Recording Browse Page

After selecting one or more recordings for download, the system can calculate the expected file size. Click “Calculate Disk Space” to start the calculation.

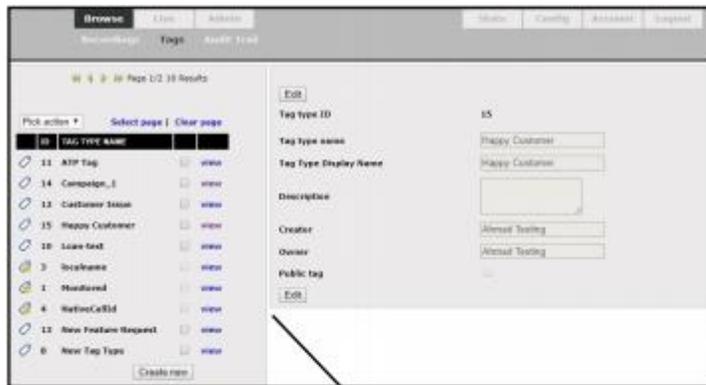
Choose “Export selected media files” or “Export query results media files from the drop down menu.

Creating New Tags and Tagging Recordings

Tags can be created and added to recordings to reflect common actions, experiences or potential search criteria. Tags can be added during a live call or after the call is complete. Tags can even be applied based on a specific point in the recording. Multiple tags can be added to the same recording to improve the granularity of future search results.

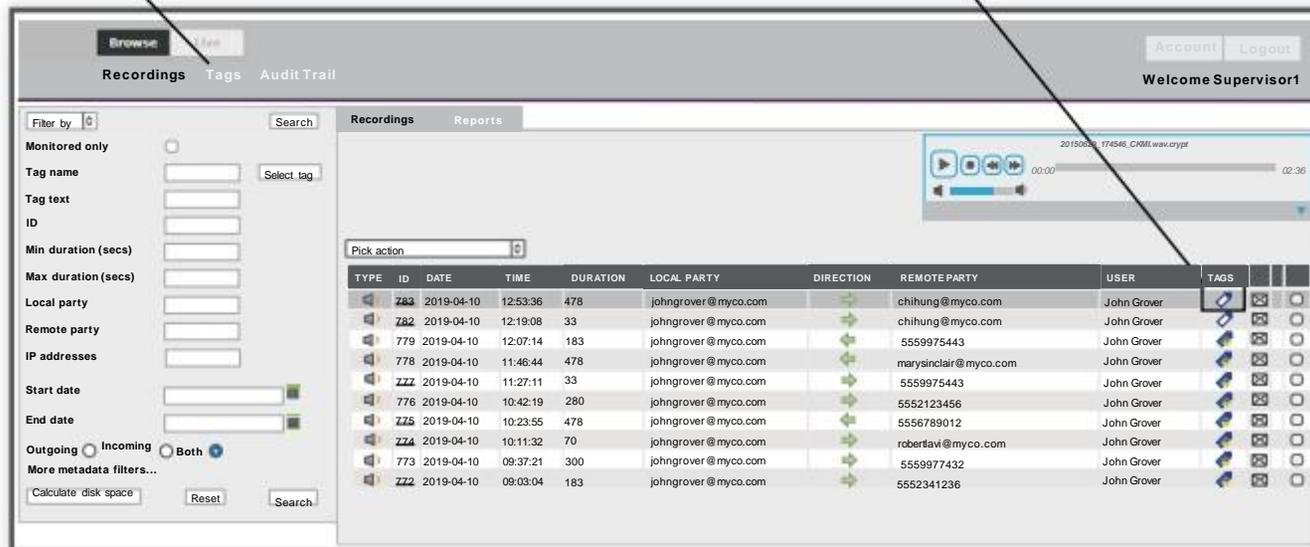
To create a new tag:

1. Click on "Tags" to open the Tags page.
2. Click "Create new". This will reveal the Tags edit screen.
3. Click "Edit" to start creating a new tag.
4. Enter the name and description (optional) of the new tag and click Submit.



To tag a recording:

1. Click on the tag icon of the recording to be tagged. This will open the tag dialog box.
2. Click on the "Tag type" drop down menu and choose the tag.
3. Enter the tag text to help describe the event being tagged.
4. Click "Add". Multiple tags can be added to a recording.
6. Click "Submit".



Live Call Monitoring

Supervisors and administrators can monitor calls in real-time while they are being recorded. By default any user set-up for call recordings has their calls recorded automatically. Supervisors and administrators have the access to override the automatic recording settings and either keep, discard, or pause a recording. Recordings can also be paused during calls by any user to avoid capturing sensitive information such as credit card information.

Click the "Live" button to monitor live call recordings.

Click the keep button to keep the call recording of the call that is complete.

Listen to calls in real-time.

The screenshot shows a web interface for call monitoring. At the top, there are 'Browse' and 'Live' buttons. On the right, there are 'Account' and 'Logout' buttons. Below is a table with columns: USER ID, USER NAME, LOCAL PARTY, DIRECTION, REMOTE PARTY, ELAPSED, KEEP, DISCARD, MONITOR, PAUSE, STATUS, TAG, and LIVE TAGS. Three call records are shown. Call 5 (Chi Hung) is active and will be recorded. Call 23 (Robert Lavi) is completed and will be dropped. Call 44 (Mary Sinclair) is completed and paused. Below the table, there are three call actions: 'Click the discard button to delete the call recording after the call is complete.', 'Click the pause button to pause recordings.', and 'Tag call recordings in real-time to increase search ability.'

USER ID	USER NAME	LOCAL PARTY	DIRECTION	REMOTE PARTY	ELAPSED	KEEP	DISCARD	MONITOR	PAUSE	STATUS	TAG	LIVE TAGS
5	Chi Hung	chihung@myco.com	→	555-123-4565	00:20:30					This conversation will be recorded		
23	Robert Lavi	boblavi@myco.com	←	555-987-6543	00:00:17					This recording will be dropped		
44	Mary Sinclair	msinclair@myco.com	→	fdesk@myco.com	00:12:37					(paused)		

Click the discard button to delete the call recording after the call is complete.

Click the pause button to pause recordings.

Tag call recordings in real-time to increase search ability.

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