CloudTalk Call Recording Quick Reference Guide

Logging Into the Portal

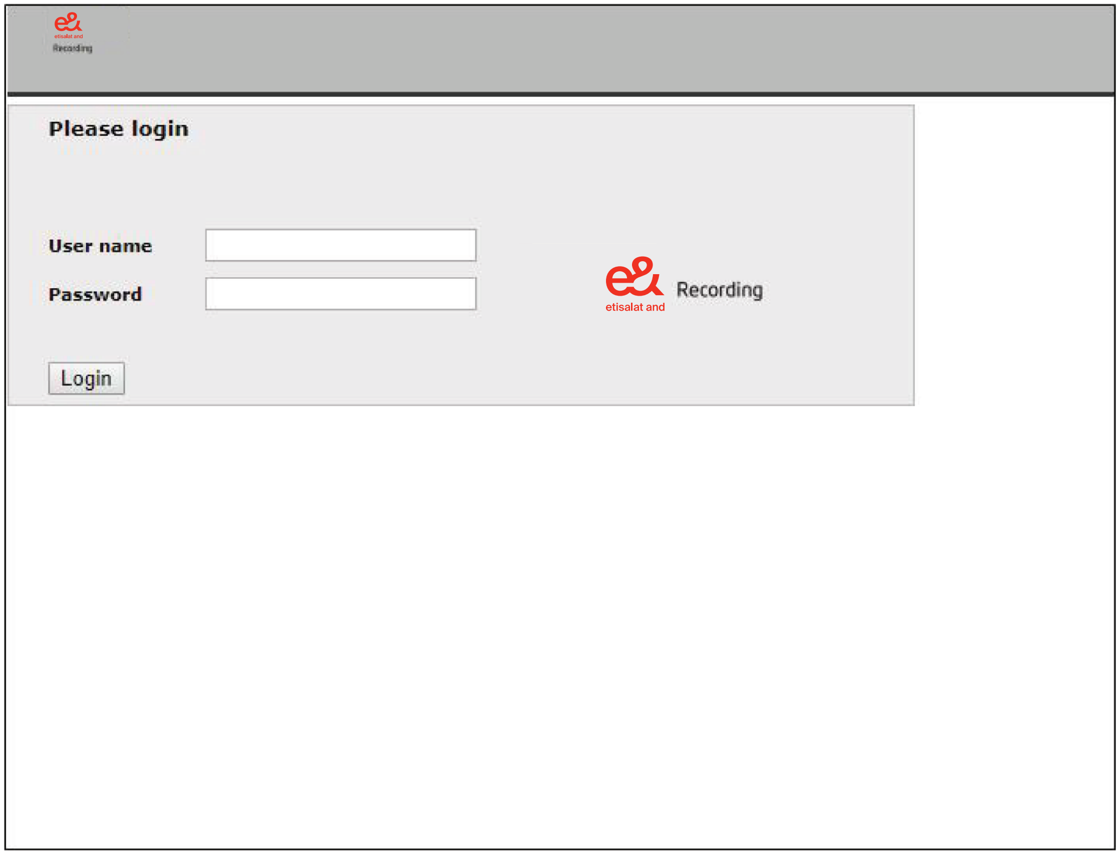
Before accessing the Call Recording service you will need a few fundamental pieces of information:

- The URL for the Call Recording Portal. This URL may be specific to your organization. Please consult your administrator for your specific URL.
- 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.

Enter Username & Password

Click Login



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.

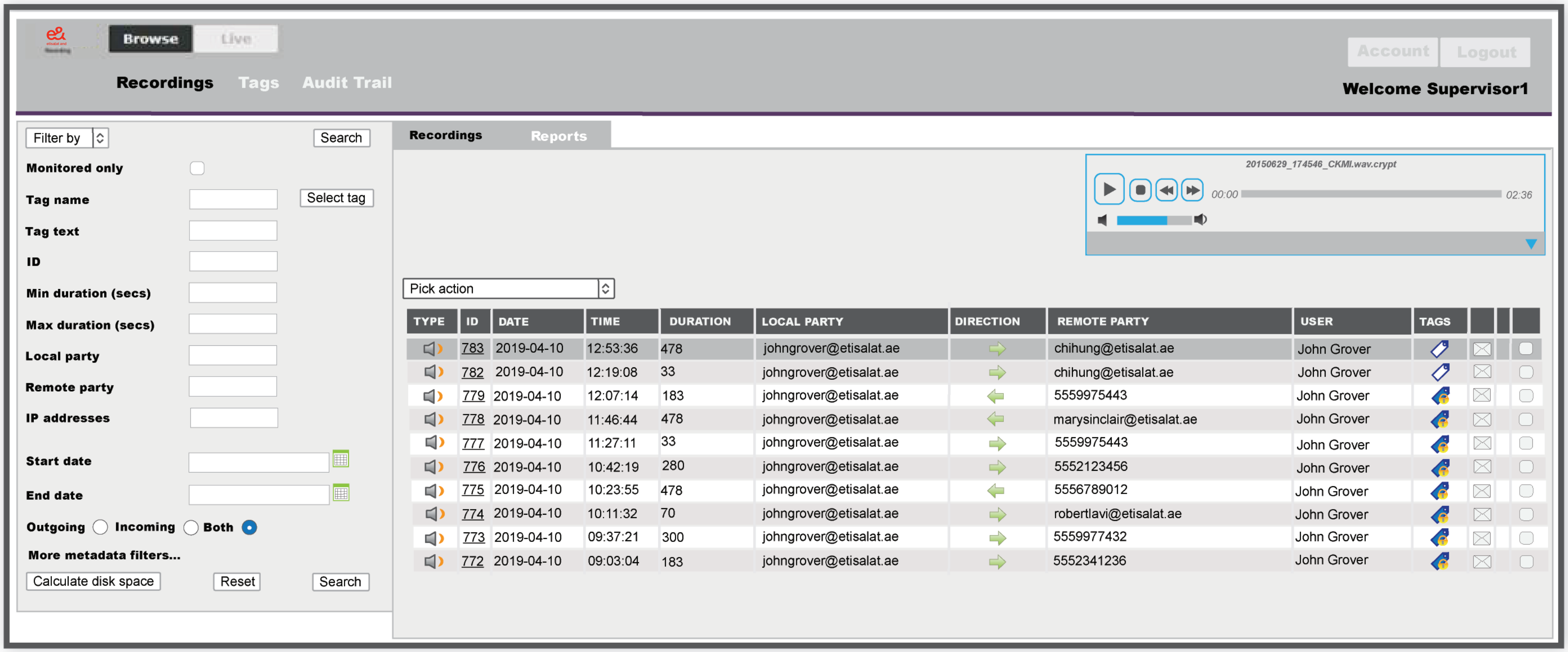
Enter criteria such as a date range, tags, remote parties, and more.

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 phone calls.

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.



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

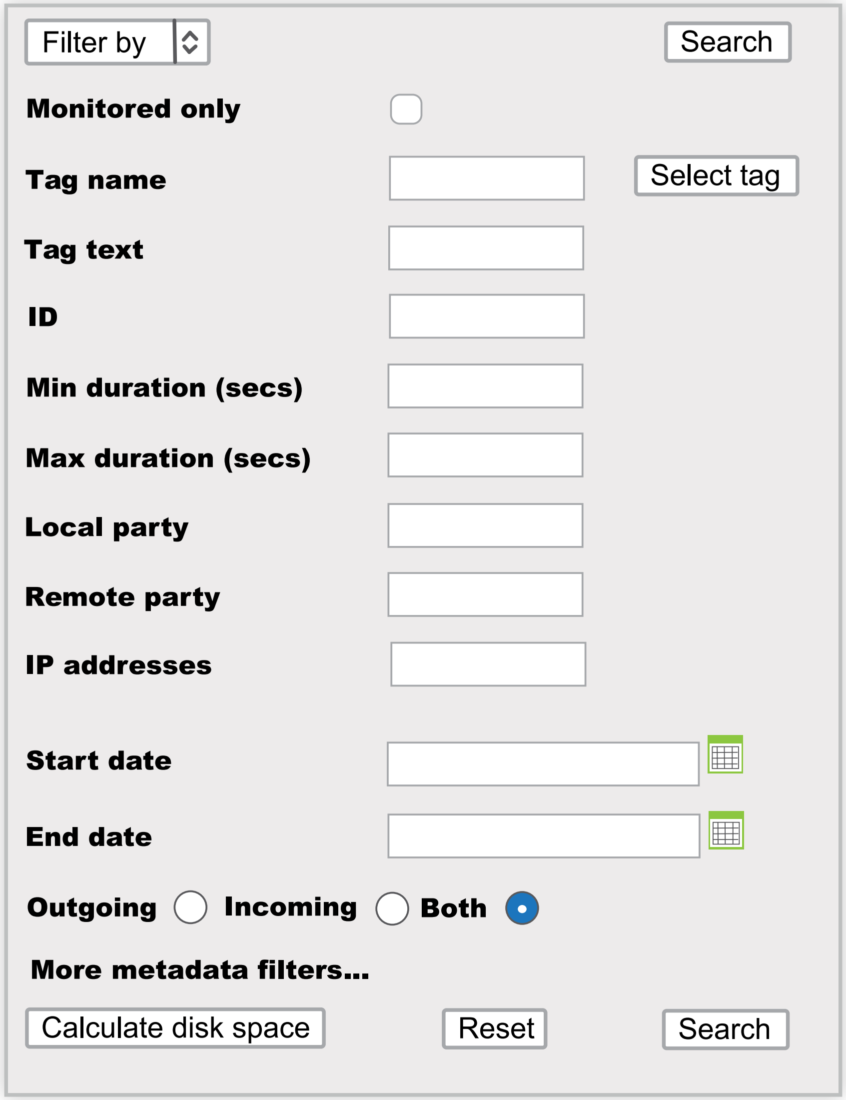
Call Recording provides a powerful multi-criteria search feature. It allows you to search using one or multiple search criteria.

Filter search by individual or group.

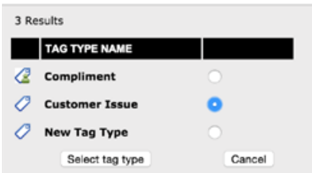
Search additional notes or tag text associated with the recording.

Search for recordings based on their minimum and maximum recording.

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



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



Quickly find a recording using its unique ID number.

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

Filter the search results by type of call.

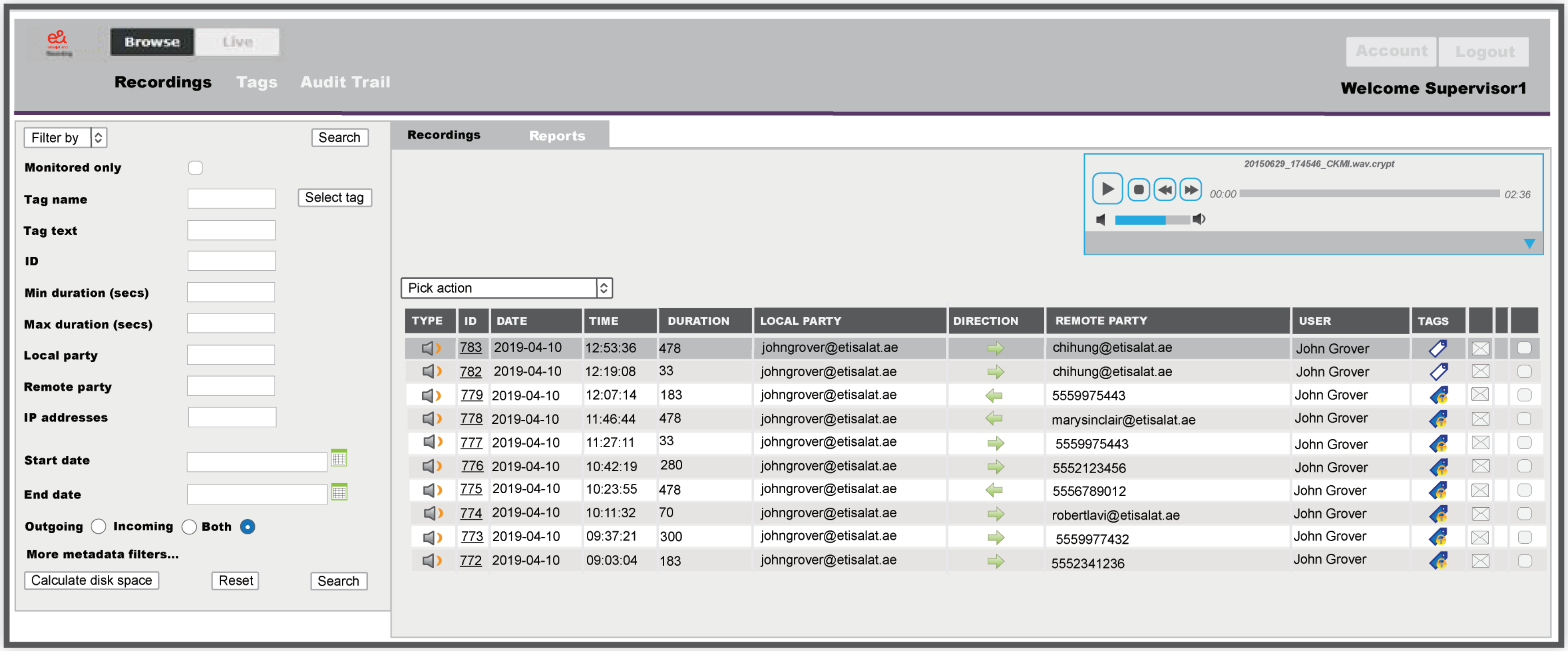
Input one or multiple search criteria and then click the "Search" button.

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.



Download Recordings

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

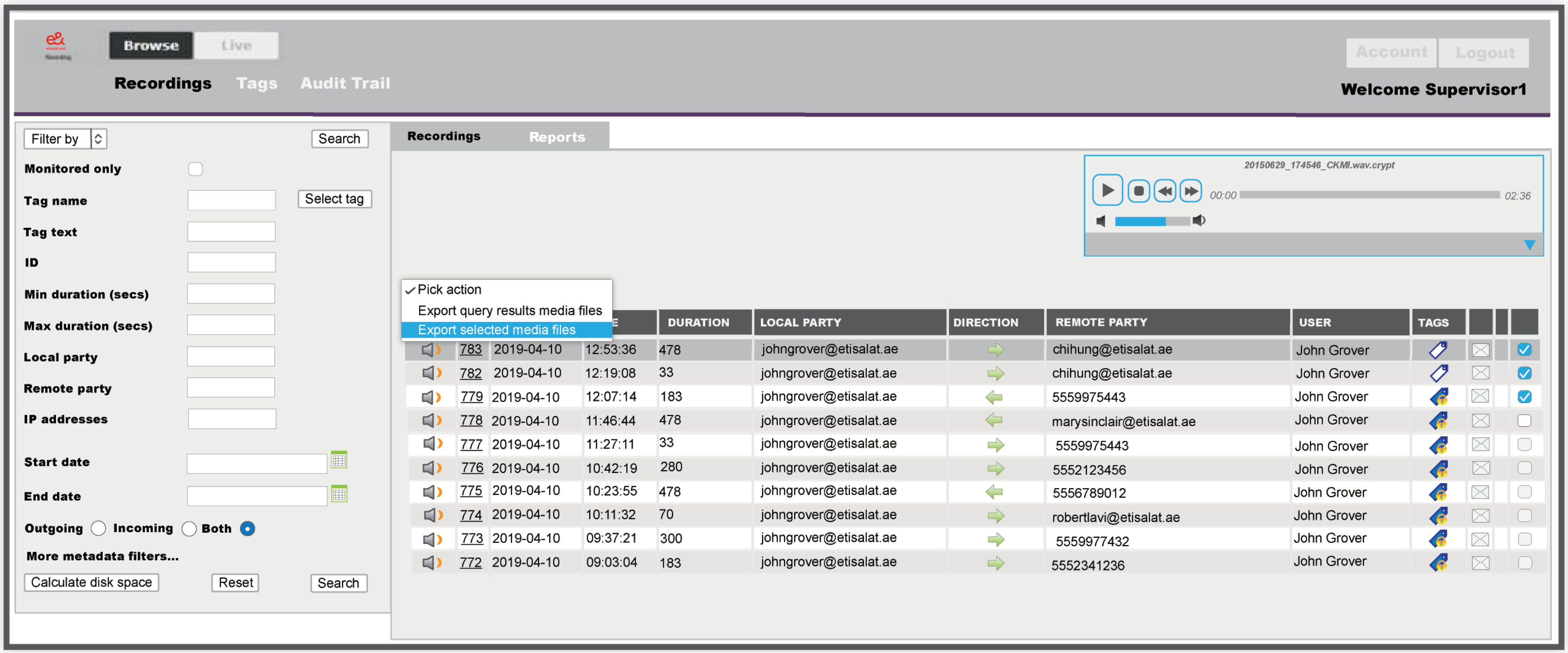
Download All the Media Files Associated with a Search Query.

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



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.

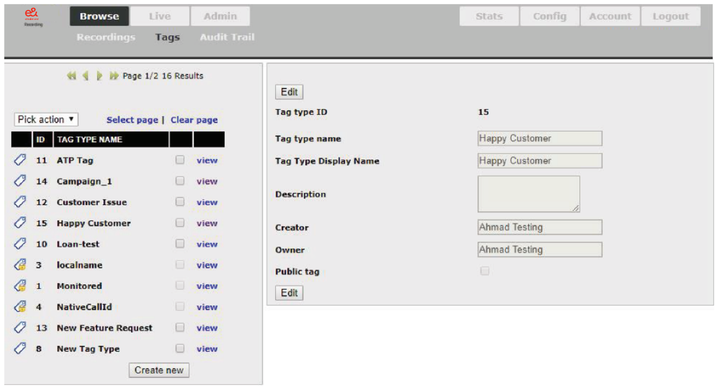
Choose "Export selected media files" or "Export query results media files from the drop down menu.

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.

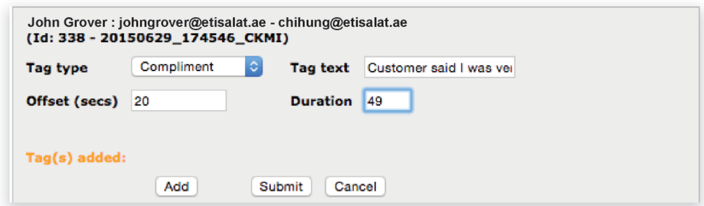
To create a new tag:

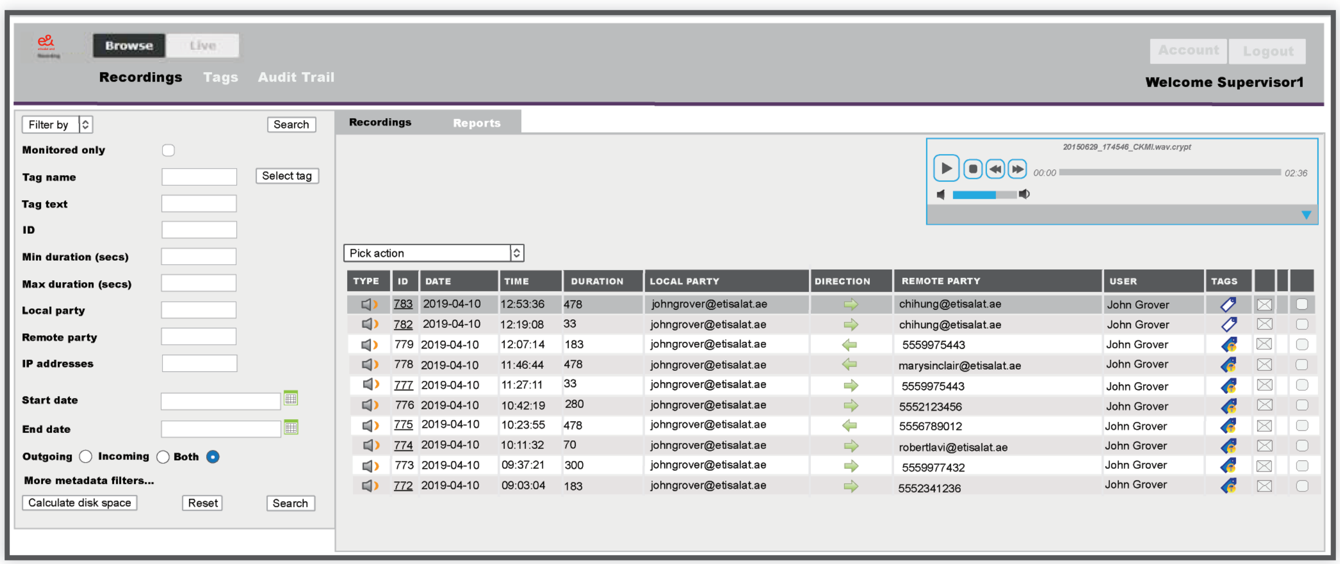
1. Click on “Tags” to open the Tags page.
2. Click “Create new”. This will reveal the Tags edit screen.
3. Click “Edit” to start creating a new tag.
4. Enter the name and description (optional) of the new tag and click Submit.



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”.





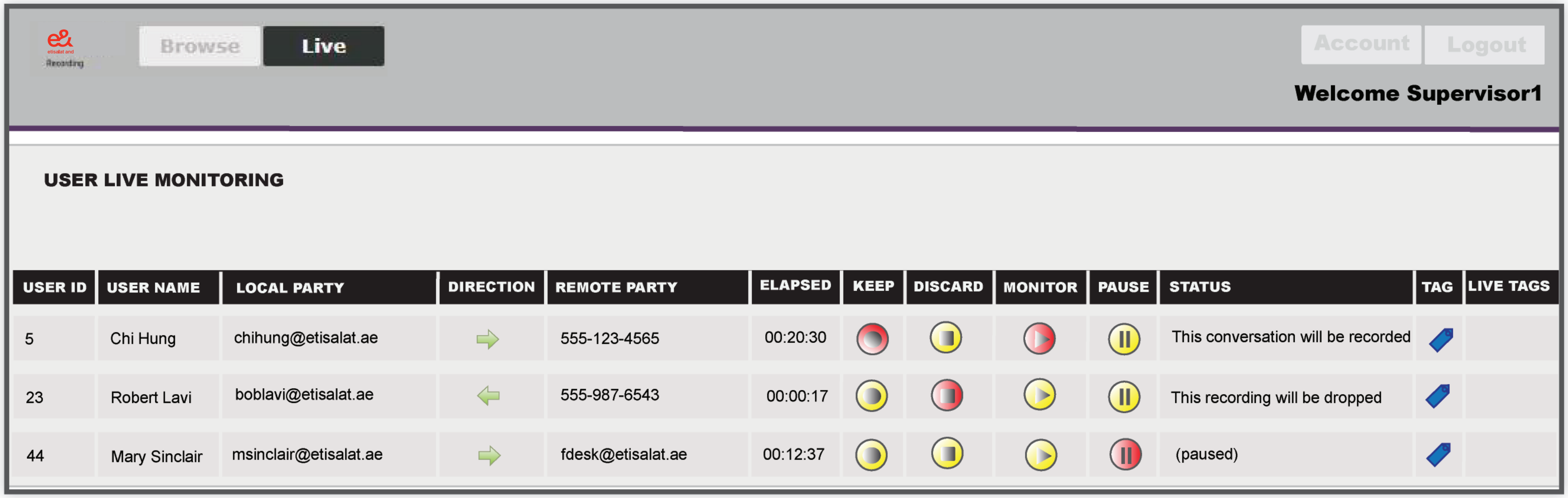
Live Call Monitoring

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 is complete.

Listen to calls in real-time.



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.