

ZOOM Quality Management Suite

Call and Screen Recording User Guide

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Call and Screen Recording User Guide

Welcome to QM Suite Call Recording!

Call Recording is a multichannel recording solution for contact centers and unified communications environments. The application offers numerous features, including an intuitive web-based interface, advanced record organization, storage and archiving, sophisticated access control and record manipulation, comprehensive recording, and on-demand access to all recordings.

Users of Call and Screen Recording are managers, team leaders, and contact center agents. Managers can listen to entire groups or departments and team leaders can listen to their own team members. The aim of this guide is to address the needs and goals of managers, team leaders, and agents, enabling effective use of Call Recording, Screen Capture, and Live Monitoring features.

Topics

- Call Recording user settings
- Recorded Calls Screen
- Using Advanced Player
- Searching for Call Records in Call Recording
- Using Restored Call Recordings
- On Demand Prerecording
- Cisco Selective User Recording
- Using Live Monitoring
- Finesse User Guide- Recording Status Indication and Control
- ZOOM CRM Toolbar User Guide for Bucher and Suter Connects for Salesforce

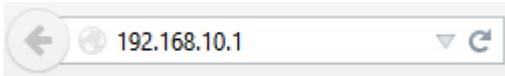
Call Recording user settings

This section describes how to open Call Recording, log in, and change the password, language, and time zone.

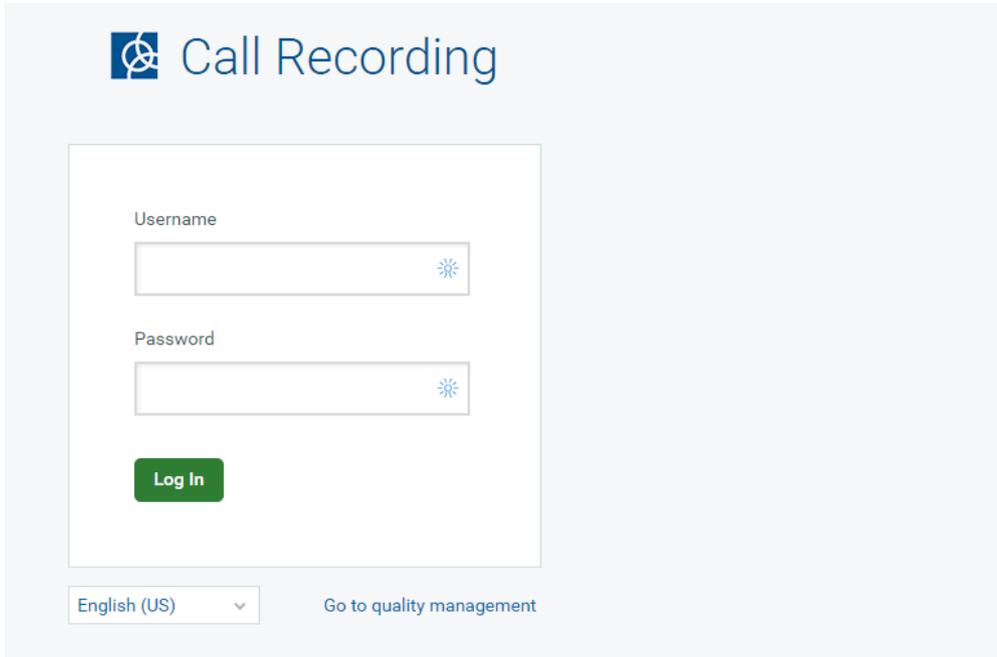
- Opening Call Recording
- Changing the login page language
- Logging in and out
- Changing the password
- Changing the Language That Call Recording Displays
- Changing Time Zone
- Changing Which Columns Display in the Recorded Calls Tab

Opening Call Recording

To open Call Recording simply type the Call Recording URL (Hostname, FQDN or the IP address for your QM Suite server) into the browser address bar.



The Login page opens.



The screenshot shows the Zoom Call Recording login interface. At the top left is the Zoom logo and the text "Call Recording". Below this is a white login box containing two input fields: "Username" and "Password", each with a small asterisk icon to its right. A green "Log In" button is positioned below the password field. At the bottom left of the page, there is a language selection dropdown menu currently set to "English (US)" and a blue link labeled "Go to quality management".

Please note, that by logging in, all eventually existing parallel sessions for the same user will be closed for security reason.

Changing the login page language

To change the login page language, select the required language from the drop-down menu before logging in. The language used in the login page changes to the selected language.

Call Recording

Username

Password

Log In

English (US) 

[Go to quality management](#)

- عربي
- Български
- Česky
- Deutsch
- English (GB)
- English (US)
- Español
- Français
- Latviešu
- Polski
- Português (Brasil)
- Română
- Русский
- Slovenčina
- Slovenščina
- Türkçe

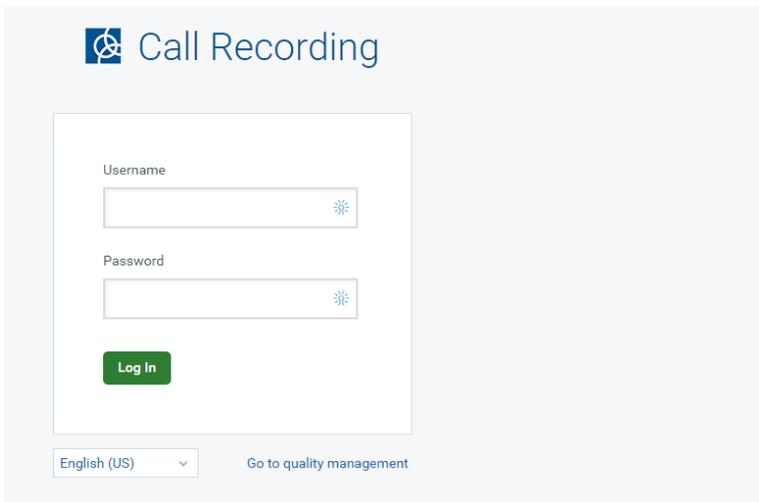
NOTE

Changing the language here affects only the current user for the duration of the active session. Other users are not affected.

Logging in and out

Once you have accessed the web interface of Call Recording the screen you will see is the Welcome page. Enter the credentials provided by your administrator.

Logging in



The screenshot shows the 'Call Recording' login interface. At the top left is the Zoom logo and the text 'Call Recording'. Below this is a white login box containing a 'Username' field, a 'Password' field, and a green 'Log In' button. At the bottom of the login box, there is a language dropdown menu set to 'English (US)' and a link that says 'Go to quality management'.

To log in to Call Recording:

1. Type your username in the **Username** field.
2. Type your password in the **Password** field.

NOTE

Usernames and passwords are case sensitive.
If you enter the wrong password three times the system will automatically block further login attempts for 30 minutes.

3. Click **Login** or press **Enter**. Call Recording opens on the **Recorded calls** tab.

Logging out

Certain changes in the configuration don't display until you log out and back in again.



To log out of Call Recording click **Logout**. You can also log out by closing the browser.

Changing the password

To change the password:

1. Log in to Call Recording. Go to the **Users** tab:



2. Select the appropriate group and then click **Edit** on the appropriate user.

Users						
<input type="checkbox"/>	Username	Surname	Name	Phone Number	LDAP	
<input type="checkbox"/>	admin					Edit
<input type="checkbox"/>	doe	Doe	John			Edit Delete

Delete Selected

3. The **Edit user** form displays:

Edit User

Username:
Password: ⓘ

Blocked:
Confirm Password:

Name:
Surname:

Email:
Phone Number:

LDAP User:

Choose Saved Search:

Group:

4. Type the new password in the **Password** and **Password confirmation** fields.

5. Click **Save**.

INFO

If the system is integrated with an LDAP, the user login names and passwords are authenticated against the user names and passwords stored in the LDAP.

Changing the Language That Call Recording Displays

To change the default Call Recording language for the main application log in to Call Recording.

Go to **Settings > Configuration > User Setup > Personal Setup**.

- Personal Setup
- Column Setup
- Plugins

Personal Setup

Language

Choose preferred language

English (US)

Time Zone

User Time Zone

Call Search Options

Allow search by call ID, segment ID

عربي
Български
Česky
Deutsch
English (GB)
English (US)
Español
Français
Latviešu
Polski
Português (Brasil)
Română
Русский
Slovenčina
Slovenščina
Türkçe

Save configuration

Reload configuration

1. Select the desired language from the **Choose preferred language** drop-down list.
2. Click **Save configuration**.

Click on another tab in Call Recording to refresh the web page or click **Refresh** in the web browser.

The labels in Call Recording display in the language selected. Some user interface elements may not change language because of naming restrictions and integration with other systems

Changing the language only affects the current user without affecting any other user.

Changing Time Zone

The **Time Zone** setting affects all dates and times that display in the Call Recording Web UI when logged in with a user profile. The only exceptions are dates and times used for **Recording rules** that are always set to the server time.

To change the default Call Recording Web UI time zone for a user profile:

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

- Personal Setup
- Column Setup
- Plugins

Personal Setup

Language

Choose preferred language

English (US)

Time Zone

User Time Zone

Call Search Options

Allow search by call ID, segment ID

عربي
Български
Česky
Deutsch
English (GB)
English (US)
Español
Français
Latviešu
Polski
Português (Brasil)
Română
Русский
Slovenčina
Slovenščina
Türkçe

Save configuration

Reload configuration

1. Select the desired time zone from the **User Time Zone** drop-down list.
2. Click **Save configuration**.

Click on another tab in Call Recording to refresh the web page or click **Refresh** in the web browser.

Changing the time zone only affects the current user without affecting any other user.

Changing Which Columns Display in the Recorded Calls Tab

The **Recorded calls** tab contains call information to help the user select calls to play. Add or subtract columns to control how much information displays. These selections only affect the user's own view of listed calls.

The number and type of columns available for selection depend on the system configuration and are set by the system administrator.

Navigate to **Settings > Configuration > User Setup > Columns setup.**

- Personal Setup
- **Columns Setup**
- Plugins

Columns Global Setup

Setup rights

Settings below will affect column view if this checkbox is checked

Basic columns

Column name	Visible	Description
Date	<input checked="" type="checkbox"/>	
Call start time	<input checked="" type="checkbox"/>	
Call end time	<input type="checkbox"/>	
Length of call	<input type="checkbox"/>	
Calling number	<input checked="" type="checkbox"/>	
Called number	<input checked="" type="checkbox"/>	
Calling Agent	<input checked="" type="checkbox"/>	
Called Agent	<input checked="" type="checkbox"/>	
Description	<input checked="" type="checkbox"/>	
Call id	<input checked="" type="checkbox"/>	
Segment id	<input checked="" type="checkbox"/>	

Live Monitoring columns

Column name	Visible	Description
Duration	<input checked="" type="checkbox"/>	
Calling number	<input checked="" type="checkbox"/>	
Called number	<input checked="" type="checkbox"/>	

Save configuration

Reload configuration

1. Select the columns to display in the **Recorded calls** tab.
2. Click **Save configuration**.

The columns display in the **Recorded calls** tab.

Recorded Calls Screen

The Recorded calls tab is the primary tab in the Call Recording Web UI that displays the captured media files.

The only people that should be Call Recording users are those who listen to phone calls, view calls, or administers the system. *Call center agents don't normally have user profiles on Call Recording.*

Typically, managers and team leaders must have user profiles on Call Recording because managers must be able to listen to entire groups and team leaders must be able to listen to their own teams.

CONTENT

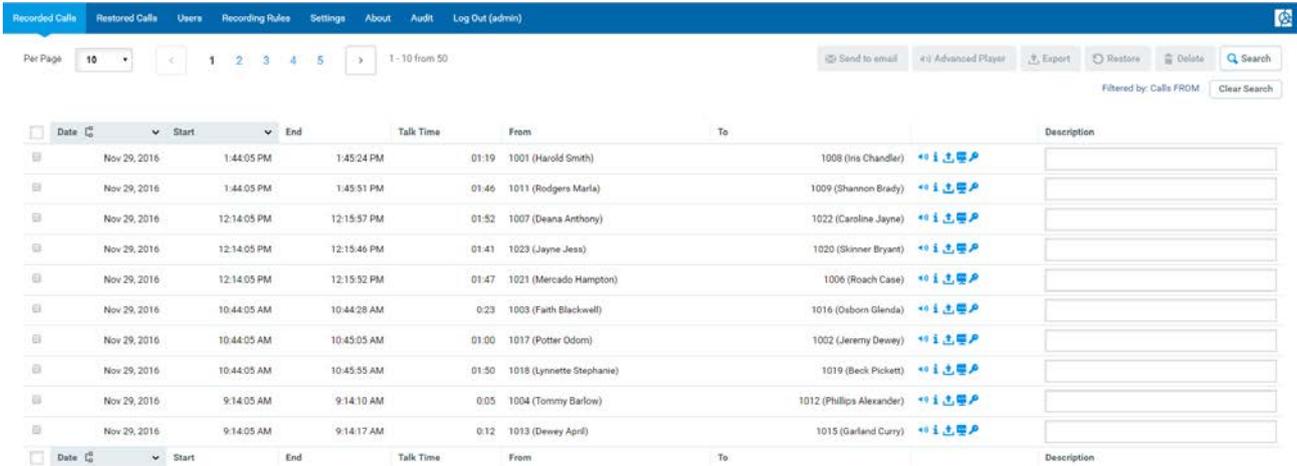
- Viewing Recorded Calls
 - Recorded Calls
 - Changing the Number of Visible Records
 - Listing the Pages
 - Sorting the Records
- Call Icons
- Call Details Window
- Playing Calls, Recorded Screens and Video Recordings
 - Playing Calls in the Integrated Media Player
 - Playing Recorded Screen
 - Playing Cisco Video Call Recordings
- Playing Transferred and Conference Calls
 - Consultative Transfers
 - Blind Transfers
 - Conference Calls
- Adding and Editing Call Descriptions
 - Descriptions in the Recorded Calls Tab
 - Descriptions in the Call Details Window
- Call Protection
 - Manually Protecting Calls from Deletion
 - Selecting Calls for Deletion
 - Protection by Quality Management
- Additional Functionality
 - Emailing Media Files
 - Advanced Player
 - Export
 - Restore
 - Deleting calls from the Recorded Calls tab

Viewing Recorded Calls

To view recorded calls or video recordings. Log into Call Recording. By default, the application opens to the **Recorded calls** tab.

Recorded Calls

The **Recorded calls** tab displays the calls and videos recorded by Call Recording.

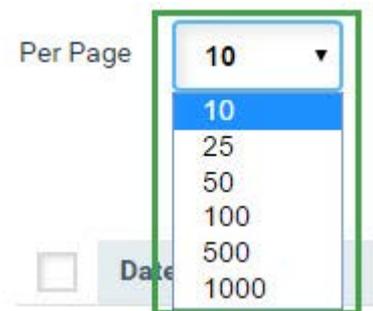


Date	Start	End	Talk Time	From	To	Description
Nov 29, 2016	1:44:05 PM	1:45:24 PM	01:19	1001 (Harold Smith)	1008 (Iris Chandler)	
Nov 29, 2016	1:44:05 PM	1:45:51 PM	01:46	1011 (Rodgers Marla)	1009 (Shannon Brady)	
Nov 29, 2016	12:14:05 PM	12:15:57 PM	01:52	1007 (Deana Anthony)	1022 (Caroline Jayne)	
Nov 29, 2016	12:14:05 PM	12:15:46 PM	01:41	1023 (Jayne Jess)	1020 (Skinner Bryant)	
Nov 29, 2016	12:14:05 PM	12:15:52 PM	01:47	1021 (Mercado Hampton)	1006 (Roach Case)	
Nov 29, 2016	10:44:05 AM	10:44:28 AM	0:23	1003 (Faith Blackwell)	1016 (Osborn Glenda)	
Nov 29, 2016	10:44:05 AM	10:45:05 AM	01:00	1017 (Potter Odom)	1002 (Jeremy Dewey)	
Nov 29, 2016	10:44:05 AM	10:45:55 AM	01:50	1018 (Lynnette Stephanie)	1019 (Beck Pickett)	
Nov 29, 2016	9:14:05 AM	9:14:10 AM	0:05	1004 (Tommy Barlow)	1012 (Phillips Alexander)	
Nov 29, 2016	9:14:05 AM	9:14:17 AM	0:12	1013 (Dewey April)	1015 (Garland Curry)	

Each row represents one call segment and shows basic call information.

Changing the Number of Visible Records

You can change the call count displayed on a single page by changing the value in the **Count** drop-down menu:



Listing the Pages

Use the arrow buttons to move through the pages of recorded calls.



The maximal number of displayed records is 10 times 1 000 calls. In case you have to browse more than 10 000 records ad once please use filters in order to delimitate the records of your interest.

Sorting the Records

This section concerns how calls are displayed in the **Recorded calls** tab:

<input type="checkbox"/>	Date	Start	End	Talk Time	From
<input type="checkbox"/>	Nov 28, 2016	1:44:05 PM	1:46:01 PM	01:56	1004 (Tommy Barlow)
<input type="checkbox"/>	Nov 28, 2016	1:44:05 PM	1:46:02 PM	01:57	1012 (Phillips Alexander)
<input type="checkbox"/>	Nov 28, 2016	1:44:05 PM	1:45:44 PM	01:39	1014 (Selena Mike)

Calls automatically display in date and time order, beginning with the most recent call. You can change the order using the **up** and **down arrows** at the top of each column, such as **Date, Beginning, End, Talk Time, From, To,** and **Call ID.**

The calls displayed are dependent on the saved searches in the system. Click the Clean Searches button

Filtered by: Calls FROM

to display all available records.

By default, the visible columns are:

- The **Date** that the call occurred.
- The time that a call occurred. (**Beginning**)
- The call **End** time.
- The call **Talk Time**.
- The **From** column, which displays the extension from which the call was made.
- The extension **To** which the call was made.

You can change the columns you want to have in the **Recorded calls** tab by following the instructions here [Changing Which Columns Display in the Recorded Calls Tab.](#)

Call Icons

The recorded call icons enable various functions, such as playing calls, viewing call data, and exporting call and video files.

		Description
1005 (Socorro Russel)		<input type="text"/>
1013 (Dewey April)		<input type="text"/>
1015 (Garland Curry)		<input type="text"/>
1007 (Deana Anthony)		<input type="text"/>
1021 (Mercado Hampton)		<input type="text"/>
1023 (Jayne Jess)		<input type="text"/>

Call records can have the following icons (some of the call statuses use the same icons, hover your mouse over the icon to see the call status):

Icon	Name	Description
	Play audio	Launches the media player so that users can listen to the call.

	Call details	Opens the information window containing detailed call data. More detailed description of the information windows can be found here - Call details window
	Export	Enables users to open or save the call file. For more detailed information see here .
	Video	Mixes the video.
	Video mixed	Exports the call to user computers to play the call screen recording.
	Only one stream recorded	Warns users that only one side of the conversation is available for review.
	Incomplete stream saved	One of the streams is incomplete.
	Warning icon	Provides additional information when users place their pointer over the icon. A tooltip explains the reason for the warning (for example, "No stream recorded").
	Archived call	Indicates that the call is archived.
	Deleted call	Indicates that the call is deleted.
	Deleted call available for restoration	Restores deleted and archived calls for additional user actions.
	Restoring call	Shows that the call is in the process of being restored.
	Restored call	Shows that the call is restored and available for playback.
	Call unlocked	Indicates that the call can be deleted.
	Call protected	Indicates that the call is protected from deletion.
	Synchronized and used	Shows the status of synchronized calls in multi-server environments.
	Synchronized and not used	Shows that the call was processed by the Synchro tool but that no data were downloaded. This occurs when data from another recording cluster are present.
	Only external data were synchronized	Shows that the call was processed by the Synchro tool and only external data were synchronized. No media files downloaded.
	Synchronization failed	Shows that an error occurred during synchronization.
	Unmixed video	Shows that a Screen Capture video recording is available for the call but that the audio file for the call is unavailable.
	Video call recording available	Indicates that a video call recording is available for playback.

	Incomplete video call recording	Indicates that one of the video streams is incomplete.
	Selected for deletion	Indicates that a media file has been selected for deletion.

Export

By pressing the **Export** button a compressed file will be downloaded named **calldata.zip**. The audio file is in the same format as it is stored on the Call Recording Server. MP3 will be exported as mp3, Waveform Audio File as WAV(E). Recording RAW data will be exported as PCAPs. The file naming convention is as follows: **recording date_starting time_from Nr_to Nr.mp3**. In addition to the media files within the zip file, you'll find a text file named according to the date it was created (**yyyymmdd.txt**). This file contains information about all of the files that were exported.

Call Details Window

This section describes the functionality associated with the **Call Details icon** within Call Recording. The icon provides users with access to additional information (attached data) related to a particular call.

In order to see the Call Details icon go the **Recorded Calls** tab in Call Recording and search for calls.

Date	Start	End	Talk Time	From	To	Call details	Description
Nov 28, 2016	3:14:05 PM	3:15:41 PM	01:36	1022 (Caroline Jayne)	1023 (Jayne Jess)		
Nov 29, 2016	12:14:05 AM	12:14:34 AM	0:29	1007 (Deana Anthony)	1022 (Caroline Jayne)		
Nov 29, 2016	6:14:05 AM	6:14:47 AM	0:41	1007 (Deana Anthony)	1022 (Caroline Jayne)		
Nov 29, 2016	12:14:05 PM	12:15:57 PM	01:52	1007 (Deana Anthony)	1022 (Caroline Jayne)		
Nov 28, 2016	3:14:05 PM	3:14:50 PM	0:45	1020 (Skinner Bryant)	1021 (Mercado Hampton)		
Nov 29, 2016	12:14:05 AM	12:14:15 AM	0:10	1023 (Jayne Jess)	1020 (Skinner Bryant)		
Nov 29, 2016	6:14:05 AM	6:14:10 AM	0:05	1023 (Jayne Jess)	1020 (Skinner Bryant)		
Nov 29, 2016	12:14:05 PM	12:15:46 PM	01:41	1023 (Jayne Jess)	1020 (Skinner Bryant)		
Nov 28, 2016	6:14:05 PM	6:15:34 PM	01:29	1018 (Lynette Stephanie)	1019 (Beck Pickett)		
Nov 28, 2016	10:44:05 PM	10:45:35 PM	01:30	1018 (Lynette Stephanie)	1019 (Beck Pickett)		

To determine the particular use of an icon, hover your mouse over the icon. A popup will tell you what it does.

The section devoted to **Call icons** provides an overview of all available icons.

Select a record that is of interest (or which contains the desired external data) and click the **Call details icon**:

 The **Call details** window opens and displays the available data keys and values for the call.

The **Call details** window opens separately from the active window and remains open until you manually close it. If you return to the Call Recording window without closing the **Call details** window the next time you click on the **Call details icon** , the existing instance will refresh with the new data but will remain in the background. Switch windows to view the new data.

If you have **video call recording** enabled you will also be able to view recorded video conversations in the **Call details** window.

Call Segment Overview

From: 2037 **To:** 2036, **Start:** December 9, 2016 10:13 AM, **Talk Time:** 00:08, **Direction:** UNKNOWN

Associated Segments

Segment ID:	From:	To:	Start / Talk Time:
51	2037	2036	10:13 AM / 00:08

Segment Details

Call ID	51	Mixer Tool	✘
Segment ID	51	Protected From Deletion	✘
Call Status	No stream recorded.	Delete Tool	✘
Quality Management Use		Restore Tool	✘
Synchro Tool		Archive Tool	✘
Synchronization ID	16957684192.168.7.92:23830192.168.7.24:20082_1_1		

Media Information

Custom Data

Key	Value
CALLED_URL	192.168.7.24:20082(1104)
CALLING_URL	192.168.7.92:23830(1104)
COUPLE_END_REASON	NORMAL
COUPLE_START_REASON	NORMAL
GROUP_ID	16957684
JTAPI_CALLED_CALL_LEG	29893044
JTAPI_CALLED_TERMINAL_SEP	SEP0023043393EE
JTAPI_CALLING_CALL_LEG	29893043
JTAPI_CALLING_TERMINAL_SEP	SEP000B46D9C5A6
JTAPI_CISCO_CALLMANAGER_ID	1
JTAPI_CISCO_GLOBAL_CALL_ID	180468
JTAPI_CISCO_ID	16957684
JTAPI_RECORDING_TYPE	AUTOMATIC
SPANLESS_CALLED_REC_ID	nearend
SPANLESS_CALLING_REC_ID	farend
SPANLESS_REC_ID	SEP0023043393EE

Call Description

Save Description

The **Call details** window contains a variety of information related to the call, including:

- **Call segment Overview:** Which phone called who. Time and date of the Talk time and direction (inbound or outbound, for example).
- **Associated Segments:** Displays all related calls, including transfers which are part of the call.
- **Segment details:** Provides information related to segments, call records, as well as additional information related to the call.

- **Media Information:** Full path to the location where audio and video files are saved in the media storage. The lock icons indicate encryption status of the media files:  - the media files are not encrypted,  - the media files are encrypted.
- **Custom Data:** External data is information provided by the PBX or which comes from call centers such as extension number, agent ID, IP address and the like. External data can be used during the creation of recording rules. See [Using external data](#)
 - **JTAPI_RECORDING_TYPE** Starting with the ZQM 5.8 release you can find the recording method used:
 - **DISABLED** - For Cisco Enhanced Passive Recording.
 - **AUTOMATIC** - For Cisco Active Recording with JTAPI.
 - **SELECTIVE_USER** - For Cisco Selective User Recording.
 - **SELECTIVE** - For Cisco Selective User Recording.*
 - **SELECTIVE_SILENT** - For Cisco Basic Selective Silent Recording.
 - **JTAPI_START / STOP_TIMESTAMP_x** Starting with the ZQM 5.8 release you can find time stamps for all recording **start** and **stop actions** in Selective User Recording, and for the **call start** and **call end events** in the Basic Selective Recording and Cisco Active Recording with JTAPI.
- **Call Description:** Allows users to enter additional commentary, displayed alongside basic call data. The added commentary is later visible in the **Recorded calls** tab.

Date	Start	End	Talk Time	From	To	Description
Dec 9, 2016	10:13:43 AM	10:13:51 AM	0:08	2037	2036	
Nov 29, 2016	1:44:05 PM	1:45:24 PM	01:19	1001 (Harold Smith)	1008 (Iris Chandler)	
Nov 29, 2016	1:44:05 PM	1:45:51 PM	01:46	1011 (Rodgers Marla)	1009 (Shannon Brady)	good
Nov 29, 2016	12:14:05 PM	12:15:57 PM	01:52	1007 (Deana Anthony)	1022 (Caroline Jayne)	
Nov 29, 2016	12:14:05 PM	12:15:46 PM	01:41	1023 (Jayne Jess)	1020 (Skinner Bryant)	good crosssale
Nov 29, 2016	12:14:05 PM	12:15:52 PM	01:47	1021 (Marcado Hampton)	1006 (Roach Case)	
Nov 29, 2016	10:44:05 AM	10:44:28 AM	0:23	1003 (Faith Blackwell)	1016 (Osborn Glenda)	
Nov 29, 2016	10:44:05 AM	10:45:05 AM	01:00	1017 (Potter Odom)	1002 (Jeremy Dewey)	Welcome missing
Nov 29, 2016	10:44:05 AM	10:45:55 AM	01:50	1018 (Lynette Stephanie)	1019 (Beck Pickett)	
Nov 29, 2016	9:14:05 AM	9:14:10 AM	0:05	1004 (Tommy Barlow)	1012 (Phillips Alexander)	

*

The appearance of type **SELECTIVE** in the **JTAPI_RECORDING_TYPE** indicate a mis-configuration of the system. It appears in situation where the recording server finds a matching recording rule for an extension having selective recording profile configured. In such case the call is not recorded although and database record of it was created.

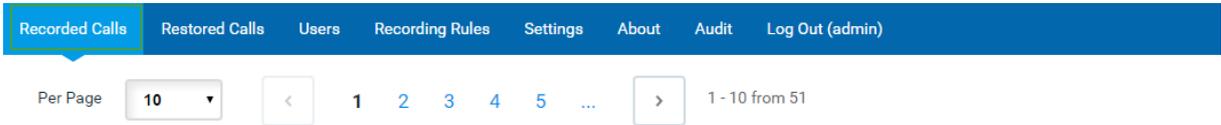
Please check the configuration of recording rules on the Call and Screen Recording Server and/or the configuration of Recording Profile on CUCM side.

Playing Calls, Recorded Screens and Video Recordings

This section describes how to playback a call and video in the Call Recording Web UI.

Playing Calls in the Integrated Media Player

1. Go to the **Recorded calls** tab:



2. Choose the call you wish to listen to and click the **audio icon**  to launch the browser's integrated player at the bottom of your screen and open the stereo recording:



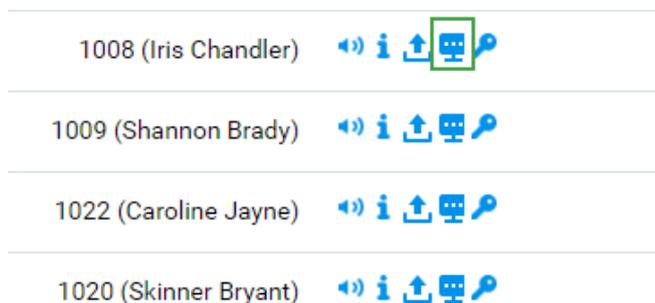
As shown the media player uses standard playback **control icons: play, pause, stop, fast forward, and volume.**



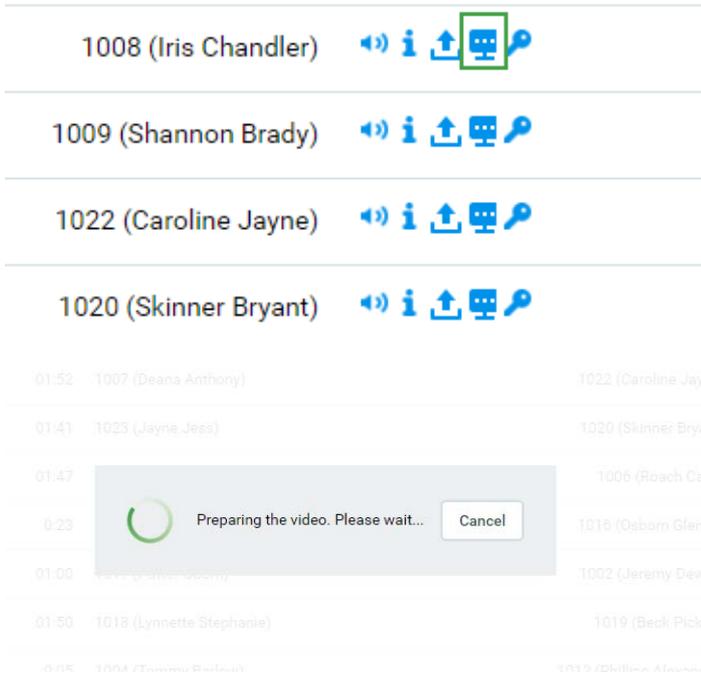
To play more than one call use the Advanced PLAYER.

Playing Recorded Screen

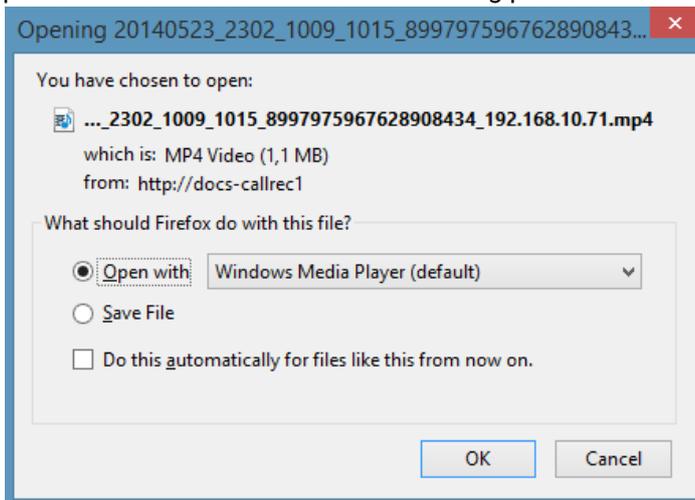
ZOOM Screen Capture enables users to watch video recordings of an agent's screens while concurrently listening to the call recording. Users can see and hear exactly what the agent saw and said.



Click the video icon  to mix the video with the audio file. Once the files are mixed the icon changes to  (this change appears after reloading the **Recorded calls** tab):



The mixing process can take a while depending on the size of the media files and the QM Suite server performance. As soon as the video mixing process finishes the following window appears:



Messages vary depending on your browser. You must have the H.264 video codec installed to launch videos. For more information contact your system administrator.

Segments that already contain the mixed video will display the mixed video icon: . Click on the **icon** to playback or download the video file.

Playing Cisco Video Call Recordings

ZOOM supports recording of point-to-point video calls routed via the Cisco Unified Border Element. (CUBE)

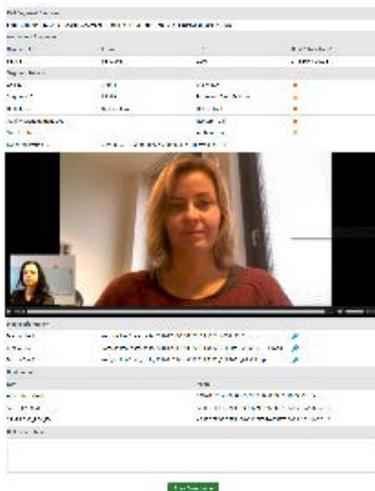
ZOOM video recording is a feature of ZOOM Quality Management Suite which utilizes the dial-peer forking feature of Cisco Unified Border Element (CUBE). QM Suite is able to record video calls forked by CUBE regardless what type of communication manager you use or whether or not the device is controlled by a Communication Manager.

To view recorded video conversations:

1. Go to the **Recorded calls** tab:
2. If your system has been properly **configured** and video recordings are saved within the system you will see a **web camera icon** on the **Recorded Calls** screen.



3. To replay the video conversation click on the Call Details icon. **i**
A new window will open.
4. The video can be played back from within the newly opened window.



- It is possible to switch views and see the recorded video of one party or the other, simply double-click video during playback to switch between screen views.
- Firefox is not supported for replay of video recordings.

Playing Transferred and Conference Calls

Call Recording records traffic data between pairs of connected telephones or endpoints. An endpoint is anything that can make or receive a call and includes:

- Softphones where the phone is answered using a computer.
- Hard phones.
- Answering machines.
- Interactive voice response (IVR) systems where the caller must select options by using the phone keypad.

Each conversation typically has two separate audio tracks, one for each direction (producing stereo sound). The two audio tracks are referred to as a call couple, or simply as a segment.

A transferred call or conference call is actually a series of these segments.

This section concerns transfer and conference calls:

Consultative Transfers

The following example involves three parties:

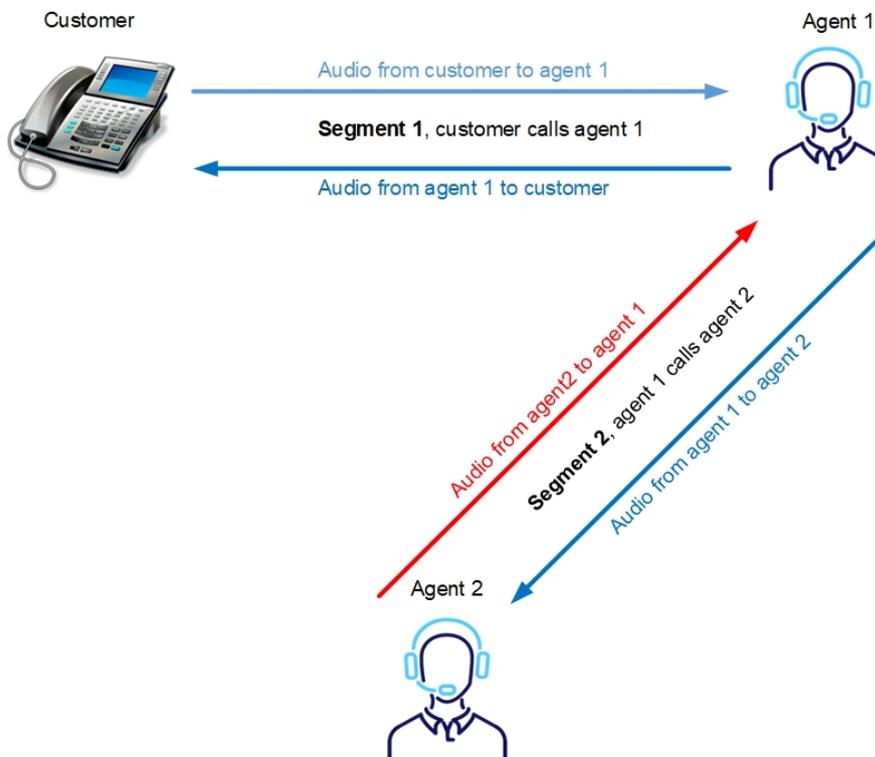
1. The customer calling from phone number 800800802
2. Agent 1 at extension 1009
3. Agent 2 at extension 1015

The consultative transfer call consists of three call segments:

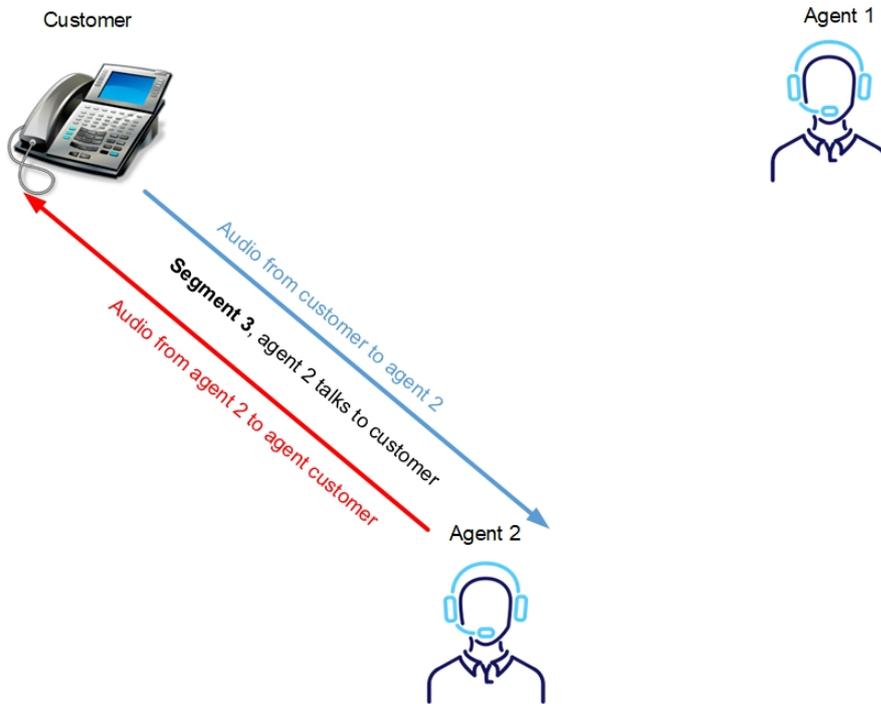
1. The customer calls Agent 1 to ask a question. Agent 1 answers the call and recording of **Segment 1 (800800802 > 1009)** starts.



2. Agent 1 doesn't know the answer but has a colleague that does. Agent 1 presses transfer and makes a consultative call to Agent 2. Recording of **Segment 1** finishes and recording of **Segment 2 (1009 > 1015)** starts.



3. Agent 1 complete the transfer by pressing the transfer button. Recording of **Segment 2** finishes and recording of **Segment 3 (800800802 > 1015)** starts.



4. Agent 2 speaks to the customer, solves the problem, and finishes the call. Recording of **Segment 3** finishes.

Consequently, we have three segments:

Call ID	Start Time	End Time	Duration	Caller	Called Party	Agent	Segment	Description	
2021 ((018)2021)	12:54:43 PM	12:55:19 PM	0:36	2662	2021 ((018)2021)	2662	32	49	5 consult conf
2021	12:54:10 PM	12:54:42 PM	0:32	2021	Conference16886339	2021 ((018)2021)	32	48	4 consult conf
2662	12:54:10 PM	12:54:42 PM	0:32	2662	Conference16886339	2021 ((018)2021)	32	47	3 consult conf
2633 (018.2633-kuku MS10.5)	12:54:08 PM	12:54:09 PM	0:01	2633 (018.2633-kuku MS10.5)	2021 ((018)2021)	2011	31	45	2 consult conf
2633 (018.2633-kuku MS10.5)	12:54:01 PM	12:54:06 PM	0:05	2633 (018.2633-kuku MS10.5)	2662 (kuku2015 2662)	2011	32	46	1 consult conf
2021 ((018)2021)	12:44:45 PM	12:45:02 PM	0:17	2021 ((018)2021)	2662	2021 ((018)2021)	28	42	3 consultative transfer -witho...
2633 (018.2633-kuku MS10.5)	12:44:36 PM	12:44:45 PM	0:09	2633 (018.2633-kuku MS10.5)	2021 ((018)2021)	2011	27	40	2 consultative transfer
2633 (018.2633-kuku MS10.5)	12:44:10 PM	12:44:35 PM	0:16	2633 (018.2633-kuku MS10.5)	2662 (kuku2015 2662)	2011	28	41	1 consultative transfer
2123	12:36:06 PM	12:36:21 PM	0:15	2123	2662	2021 ((018)2021)	25	37	2 direct transfer -without ucc...
2633 (018.2633-kuku MS10.5)	12:35:41 PM	12:36:04 PM	0:23	2633 (018.2633-kuku MS10.5)	2662 (kuku2015 2662)	2011	25	36	1 direct transfer
2633 (018.2633-kuku MS10.5)	12:33:24 PM	12:33:50 PM	0:26	2633 (018.2633-kuku MS10.5)	2662	2011	24	35	2 hold
2633 (018.2633-kuku MS10.5)	12:32:54 PM	12:33:12 PM	0:17	2633 (018.2633-kuku MS10.5)	2662 (kuku2015 2662)	2011	24	34	1 hold
2633 (018.2633-kuku MS10.5)	12:31:00 PM	12:31:21 PM	0:21	2633 (018.2633-kuku MS10.5)	2662 (kuku2015 2662)	2011	23	33	basic call
2633 (018.2633-kuku MS10.5)	12:30:41 PM	12:30:50 PM	0:09	2633 (018.2633-kuku MS10.5)	2021 ((018)2021)	2011	22	32	

To listen to the entire call, select the check boxes of all three segments comprising the call and click

Advanced Player

Advanced PLAYER

Blind Transfers

A blind transfer is similar to a consultative transfer except that no consultation occurs between the two agents because the customer is transferred directly.

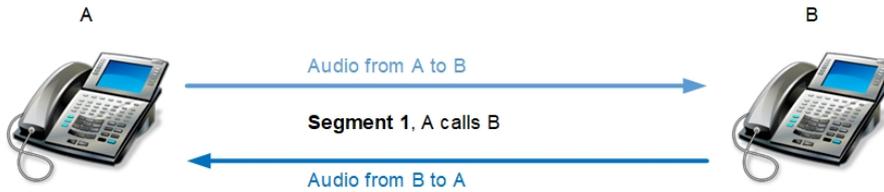
Conference Calls

The following example involves three parties:

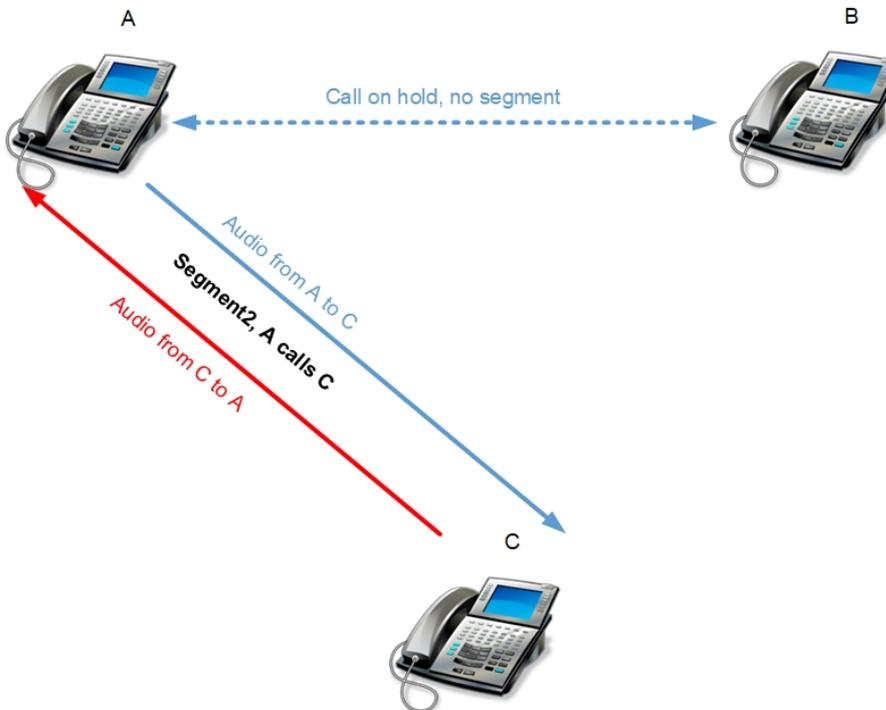
1. A at extension 1009
2. B at extension 1015
3. C at extension 1126

A, B, and C have a conference call to discuss a customer's technical query.

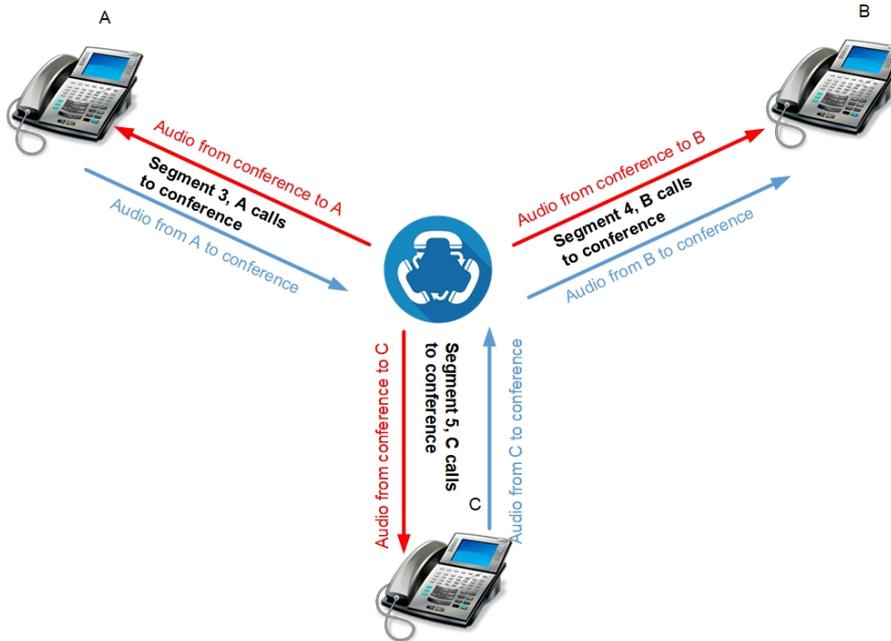
1. A calls B and B answers the call. Recording of **Segment 1(1009 > 1015)** starts.



2. A then presses the conference button and calls C. C answers the call while B is placed on hold. Recording of **Segment 1** finishes and recording of **Segment 2 (1009 > 1126)** starts.



3. A establishes the conference call by pressing the conference button. All three parties are now connected. Recording of **Segment 2** ends and recording of the conference call starts [**Segment 3 (1009 > ConferenceID)**].



4. A finishes the conference call by hanging up the phone. Recording of **Segment 3** finishes.

Consequently, we have three segments:

Date	Time	Duration	Call ID	Conference ID	Segment	Description	
Dec 1, 2016	12:54:43 PM	12:55:19 PM	0:36	2021 ((018)2021)	2662	5 consult conf	
Dec 1, 2016	12:54:10 PM	12:54:42 PM	0:32	2021	Conference16886339	4 consult conf	
Dec 1, 2016	12:54:10 PM	12:54:42 PM	0:32	2662	Conference16886339	3 consult conf	
Dec 1, 2016	12:54:08 PM	12:54:09 PM	0:01	2633 (018.2633-kuku MS10.5)	2021 ((018)2021)	2011	2 consult conf
Dec 1, 2016	12:54:01 PM	12:54:06 PM	0:05	2633 (018.2633-kuku MS10.5)	2662 (kuku2015 2662)	2011	1 consult conf
Dec 1, 2016	12:44:45 PM	12:45:02 PM	0:17	2021 ((018)2021)	2662	3 consultative transfer -witho...	
Dec 1, 2016	12:44:36 PM	12:44:45 PM	0:09	2633 (018.2633-kuku MS10.5)	2021 ((018)2021)	2011	2 consultative transfer
Dec 1, 2016	12:44:19 PM	12:44:35 PM	0:16	2633 (018.2633-kuku MS10.5)	2662 (kuku2015 2662)	2011	1 consultative transfer
Dec 1, 2016	12:36:06 PM	12:36:21 PM	0:15	2123	2662	2 direct transfer -without ucc...	
Dec 1, 2016	12:35:41 PM	12:36:04 PM	0:23	2633 (018.2633-kuku MS10.5)	2662 (kuku2015 2662)	2011	1 direct transfer
Dec 1, 2016	12:33:24 PM	12:33:50 PM	0:26	2633 (018.2633-kuku MS10.5)	2662	2011	2 hold
Dec 1, 2016	12:32:54 PM	12:33:12 PM	0:17	2633 (018.2633-kuku MS10.5)	2662 (kuku2015 2662)	2011	1 hold
Dec 1, 2016	12:31:00 PM	12:31:21 PM	0:21	2633 (018.2633-kuku MS10.5)	2662 (kuku2015 2662)	2011	basic call
Dec 1, 2016	12:30:41 PM	12:30:50 PM	0:09	2633 (018.2633-kuku MS10.5)	2021 ((018)2021)	2011	

Typically, the most pertinent segment of the call is the conference (**Segment 3**), whereas the first two segments are merely to set up the conference call.

Adding and Editing Call Descriptions

This section describes how to add and edit call couple descriptions.

Descriptions in the Recorded Calls Tab

To add or edit a description in the **Recorded calls** tab, click in the **Description** field:

1. Add descriptive notes to the call.
2. These notes are visible to all users who have access to the call recording if the appropriate **Call List** user privilege has been granted. We recommend adding initials to the notes to identify who wrote them.
3. To delete or edit the note, click inside the **Description** field and edit or delete the text. Users must have the **Edit note** privilege assigned to perform this action.

Descriptions in the Call Details Window

Users can also add, delete, or modify call notes in the **Call details** window:

To	
2051	
2051	
2051	
2051	

Click the **Call details icon** . A new window appears displaying the call data, enabling the user to add notes in the **Call description** section at the bottom of the window:

Media Information		
Media File 1	/opt/callrec/data/calls/20161129/datagen-3173874761017267534.mp3	
Media File 2	/opt/callrec/data/calls/20161129/datagen-785661144219613474.recd	
Custom Data		
Key	Value	
Call Description		
<div style="border: 1px solid green; padding: 5px;"> Good product knowledge </div>		

1. Click in the **Call Description** box and type your notes. These notes display to all users who have access to the call recording if the appropriate **Call List** user privilege has been granted. We recommend adding initials to the notes to identify who wrote the notes.



We recommend using consistent terms, for example: “Poor product knowledge”, “Customer complaint”, or “Upsell opportunity”. Add initials to the notes to identify who wrote the notes, this will be useful when reviewing them later.

2. Click **Save description**. The information is added to the call data record and stored in the database.
3. To delete or modify a note:
 - Click the **Call details icon**  .
 - Click inside the **Call description** box. Delete or modify the notes.
 - Click **Save description**. The information is updated to the call data record and stored in the database.

Call Protection

Calls can be protected from deletion or selected for deletion. If selected for deletion then the call will be removed the next time the delete tool runs, the **Audit log** shows a record that the user has selected a call for deletion. If a call is marked as protected it can be deleted only after disabling the protection.

Protection and deletion can be enabled manually by a user or by Quality Management, this section covers both cases.

Manually Protecting Calls from Deletion

To manually protect a call from deletion:

Click the call unprotected icon  to lock a call.

Date	Start	End	Talk Time	From	To	Description
Nov 29, 2016	12:14:05 PM	12:15:46 PM	01:41	1023 (Jayne Jess)	1020 (Skinner Bryant)	good crosssale
Nov 29, 2016	12:14:05 PM	12:15:52 PM	01:47	1021 (Mercado Hampton)	1006 (Roach Case)	
Nov 29, 2016	10:44:05 AM	10:44:28 AM	0:23	1003 (Faith Blackwell)	1016 (Osborn Glenda)	
Nov 29, 2016	10:44:05 AM	10:45:05 AM	01:00	1017 (Potter Odum)	1002 (Jeremy Dewey)	Welcome missing

The call protected icon  appears:

Date	Start	End	Talk Time	From	To	Description
Nov 29, 2016	12:14:05 PM	12:15:46 PM	01:41	1023 (Jayne Jess)	1020 (Skinner Bryant)	good crosssale
Nov 29, 2016	12:14:05 PM	12:15:52 PM	01:47	1021 (Mercado Hampton)	1006 (Roach Case)	
Nov 29, 2016	10:44:05 AM	10:44:28 AM	0:23	1003 (Faith Blackwell)	1016 (Osborn Glenda)	
Nov 29, 2016	10:44:05 AM	10:45:05 AM	01:00	1017 (Potter Odum)	1002 (Jeremy Dewey)	Welcome missing

To remove protection from a call:

Click the call protected icon  to remove protection from a call. The call unprotected icon  appears.

Selecting Calls for Deletion

When a user selects a call for deletion it is selected 'to be deleted'. The **Selected for Deletion** icon  displays beside the call in the Web UI when the screen is refreshed. Media selected for deletion is deleted by a background process which runs on a regular basis.

There are several reasons that media selected for deletion will remain visible or which will prevent deletion:

- If media is marked with the protected flag it is not possible to mark it for deletion and it will remain visible in the Web UI.
- Compliance related requirements will prevent deletion until the retention period expires. Media will remain marked 'selected for deletion' until the compliance related retention period ends, the media will then be deleted.
- If a call is selected for deletion and then flagged as protected, it will not be deleted until the protection is removed.
- If a call is selected for deletion and then used in an evaluation, it will not be deleted until the protection is removed.

This action is recorded in the Audit log.

Protection by Quality Management

When Quality Management is deployed calls used in the application are flagged with a **Quality Management Usage** flag and are marked as **Protected**:

Segment Details			
Call ID	47	Mixer Tool	✗
Segment ID	47	Protected From Deletion	✓
Call Status	No Problem	Delete Tool	✗
Quality Management Use		Restore Tool	✗
Synchro Tool		Archive Tool	✗
Synchronization ID	bde6a467-cd63-7bb5-16d0-df047b4e8d0e		

The Quality Management Usage field can contain the following values:

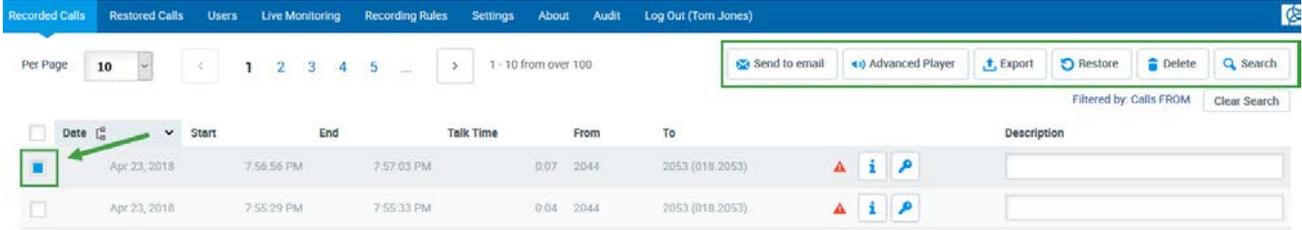
- **Evaluation** - indicates that this call is used for evaluation in Quality Management
- **Survey** - indicates that this call has an attached survey in Quality Management
- **Training** - indicates that this call is used for training in Quality Management
- **Unsuitable for Evaluation** - indicates that this call was replaced or deleted from an evaluation and will not appear in random searches in evaluations

Additional Functionality

This section describes additional functionality available from within the Recorded Calls Tab of Call Recording.

The icons are only clickable if a call or segment is selected on the users screen. The icons are greyed out until a selection has been made.



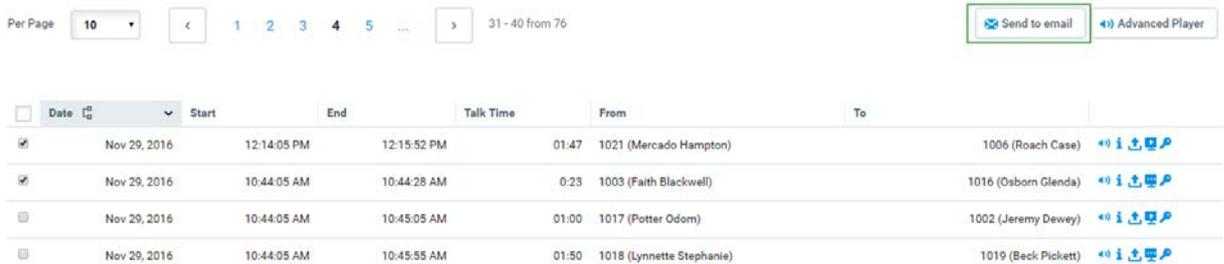


Emailing Media Files

It is possible to send recordings as an email attachment from within the Web UI.

To email recorded calls as .mp3 file attachments:

1. Select the check boxes of one or more recorded calls to the right of the recorded calls **Date**:



2. Click **Send to mail**. The **Send calls to email** dialog displays.

Send calls to email

The files listed below will be attached. Please ensure that the recipient's email does not have a size restriction that would prevent delivery.

Start	From	To	Media type (file name)	Size (kB)	Attach
11/29/16 12:14 PM (Europe/Prague)	1021	1006	AUDIO (datagen-8872890961453132198.mp3)	315	<input checked="" type="checkbox"/>
			RECD (datagen-4379072658581345336.recd)	10345	<input checked="" type="checkbox"/>
			VIDEO (datagen-4379072658581345336.mp4)	8572	<input checked="" type="checkbox"/>
11/29/16 10:44 AM (Europe/Prague)	1003	1016	AUDIO (datagen-9059276254245788529.mp3)	64	<input checked="" type="checkbox"/>
			RECD (datagen-7191539921112314768.recd)	2240	<input checked="" type="checkbox"/>

Attachment Size (kB):

Recipients:

Message:

You might need to remove the video files in order to reduce the size of the email. Do this by clearing the appropriate check box in the **Attach** column. The final attachment size will update.

3. Type the desired email addresses in the **Recipients** field, using commas to separate the addresses.
4. Type a message in the **Message body** field.
5. Click **Send**.

Call Recording checks if the total size of the files doesn't exceed 10MB and sends the attached calls to the email addresses entered.

If the size exceeds 10MB then you will see the message indicating this issue:

"Maximum file size exceeded! Please reduce the size of attachments."

Please note that attempting to attach more than 10MB of data can cause errors in the Web User Interface.

Limited access feature

User Groups can have the permission to send emails revoked by following the steps described under [Managing user groups](#).

Administrators should ensure that the email servers are configured to use secure channels and that *Users* are aware of the risks associated with sending data outside of the organization.

Administrators can configure email formatting by editing the file found at `/opt/callrec/etc/email.txt`.

Advanced Player

Please refer to [Using Advanced Player](#) for more detailed information.

Export

To export media to your local machine:

1. Select the check boxes of one or more recorded calls (on the left hand side of the screen):
2. Click **Export**.
3. A confirmation pops up asking "Do you want to export the selected calls?"

Restore

Visible to users with the appropriate permissions (Administrators may configure these settings by following the steps described under [Managing user groups](#).)

For more information please refer to the page: [Using Restored Call Recordings](#)

Deleting calls from the Recorded Calls tab

Visible to users with the appropriate permissions. If recordings are deleted all associated meta data is deleted as well.

To delete calls or couples:

1. Select the check boxes of one or more recorded calls (on the left hand side of the screen):
2. Click **Delete**.

3. A confirmation pops up asking "Do you want to delete the selected calls?"

Do you want to delete the selected calls?



- 4. Click **OK**
- 5. The selected rows will be selected for deletion by an icon  in the Web UI.

Files may be protected against deletion. See [Deletion Protection](#)

Using Advanced Player

This chapter describes how to use the Advanced Player, which allows users to listen to multiple calls, select specific call portions, arrange the call playback order, and isolate individual call streams:

- Advanced **PLAYER** controls
- Complex call examples

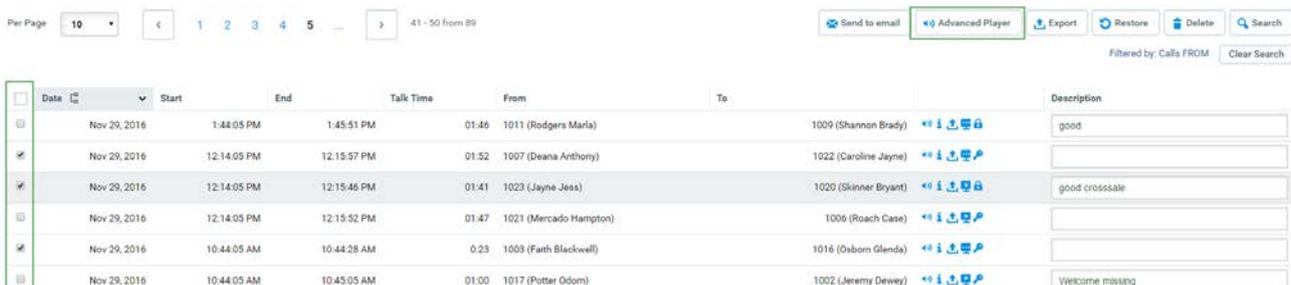
Advanced **PLAYER** controls

ZOOM Call Recording includes a media player that enables the user to take advantage of multiple features:

- Player display
- Playback controls
- Audio track
- Call isolation
- Call selection
- Call offsets

Player display

To open **Advanced Player** select one or more call check boxes from the **Call recording** tab and click **Advanced Player**:



The calls are represented on the timeline as blue bars that start on the left and finish on the right. The word **ready** appears on each blue bar when the call is downloaded and ready to be played.



The displayed call involves a consultative transfer.

Playback controls

The **Advanced Player** uses standard audio playback, rewind, and repeat buttons. The master volume button is controlled with a slider:



Audio track

You can enlarge, reduce, or reset the audio track display to full screen. This enables you to navigate between tracks and move their relative positions when replaying multiple call recordings.



Call isolation

To mute an individual call click the **speaker icon**. To adjust the volume, use the **volume slider**. Click **Isolate** to listen to only one specific segment of the call recording.



Call selection

Use the call **selection** controls to identify a section of the recordings. Use the red cursor line that appears in the player to select the start (|>) and end (>|) points of the recording. If you then click **selection**, only the selection between these two points plays. Click on **x** to clear the selection area.



Call offsets

Call offsets are gaps between call couples that can range from less than one second to several minutes. You can click on the each call segment and drag it across the timeline, lining up the segments from right to left, to remove the call offsets where no one is speaking.

To return the offsets to their original positions, click **recall offsets**.

To do this click on a blue bar and drag it to the left until the left edge of the call overlaps the right edge of the preceding call which always appears higher than later call segments in the display.



Complex call examples

The number of recorded call files created by Call Recording depends on the type of call as Conference Calls, Transferred Calls, Barged Calls, and cBarge Calls are all handled differently. As they are processed differently the system produces differing combinations of files and varying lengths of recorded call files.

Call Recording enables the user to play any individual call by clicking on it. The user can also select groups of related calls to be played back together. When the user plays back a group of related call recordings in **Advanced PLAYER** they see and hear all call streams in their proper sequence.

- Transferred Calls
- Barge Calls
- cBarge Calls
- Conference Calls

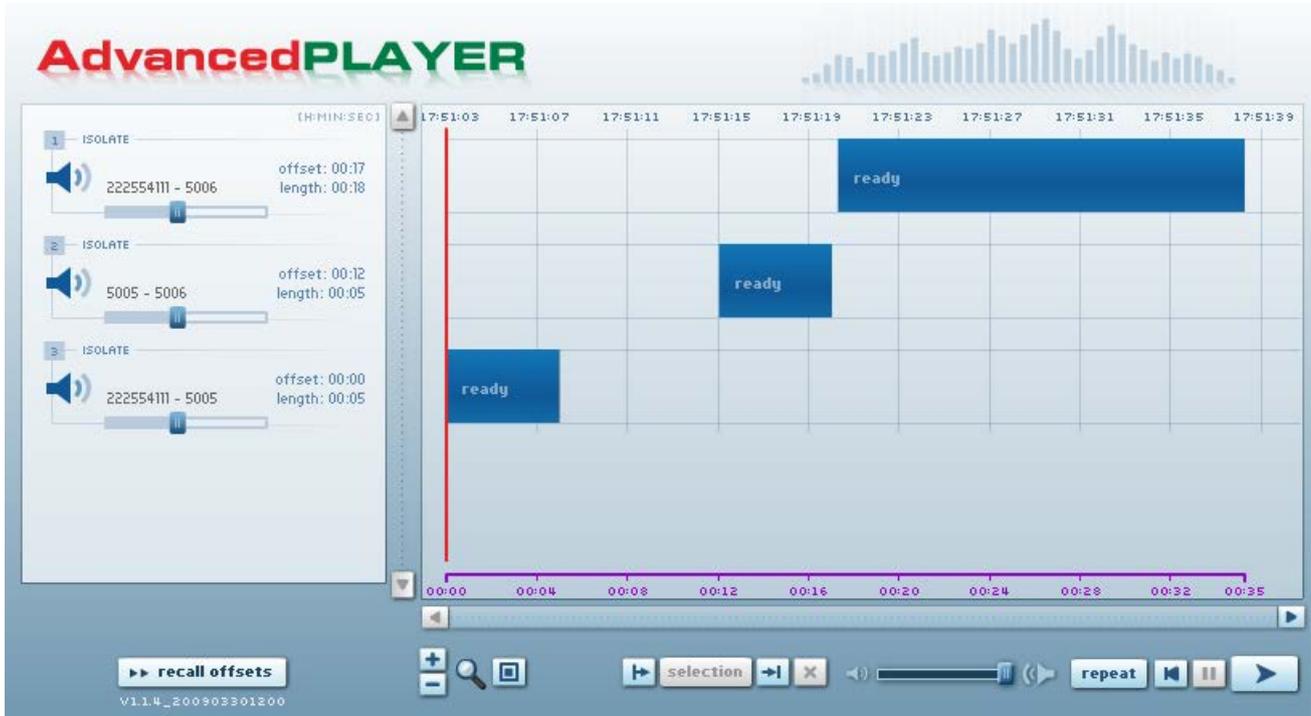
Transferred Calls

- Caller A connects with Caller B.
- Caller B connects with Caller C, requesting a transfer.
- Call is accepted by Caller C, and Caller B hangs up.
- Caller A connects with Caller C.
- Three different files are produced.

The following events lead to a file being created:

- Caller A connects with Caller B. File 1 is created.
- Caller B connects with Caller C. File 2 is created.
- Caller A connects with Caller C. File 3 is created.

When the user listens to a Transfer call in **Advanced PLAYER** they see and hear all three call recording files.



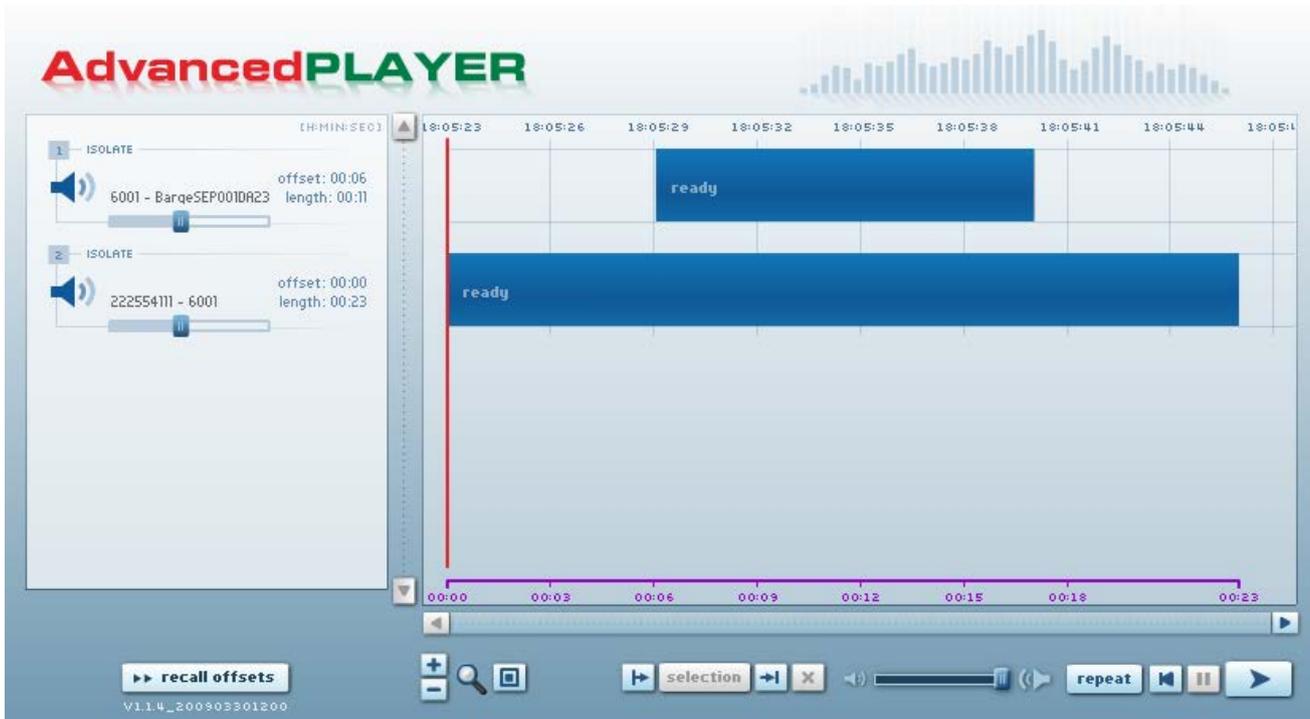
Barge Calls

- Caller A connects with Caller B.
- Caller C listens to the conversation between Caller A and Caller B.
- Two different files are produced.

The following events lead to a file being created:

- Caller A connects with Caller B. File 1 is created.
- Caller C listens to the conversation. File 2 is created, containing only the portion of the call that Caller C heard. (Compare the following with that for cBarge Calls.)

When the user listens to a barge call in **Advanced PLAYER** they see and hear both calls



cBarge Calls

In comparison with the Barge scenario a Conference Barge(or cBarge) uses a shared conference resource which allows more than one person to barge into the call. Therefore, when a third party listens the conversation using cBarge functionality, the original call which was made as a point-to-point call finishes and the call continues on the shared conference bridge. Due to this behavior Call Recording finishes the first part of the call and creates two more calls. As soon as the third party leaves the calls the call is reconnected as a point-to-point call and Call Recording creates the last part of the call between caller A and B as shown in our example below.

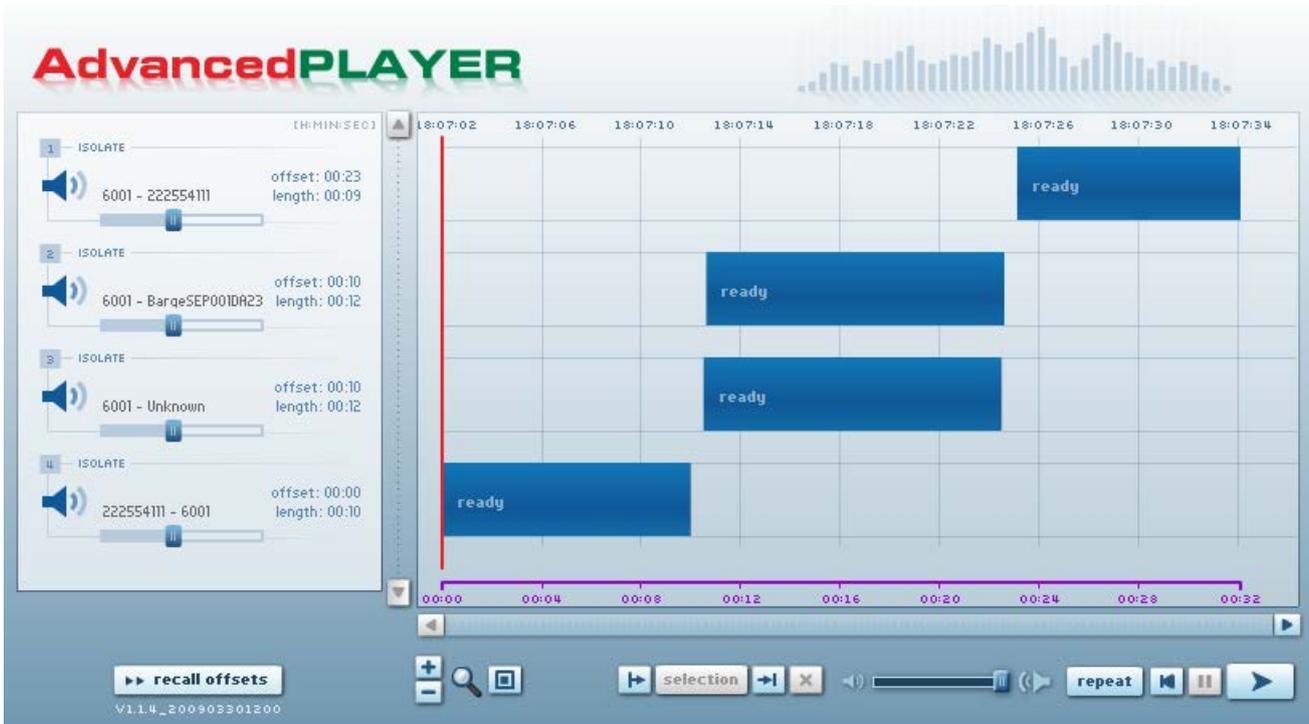
The cBarge model turns a two-sided call into a conference call when a third person listens in.

- Caller A connects with Caller B.
- Caller C listens in to the conversation between Caller A and Caller B.
- Four different files are produced.

The following events lead to a file being created:

- Caller A connects with Caller B. File 1 is created.
- Caller C listens to the conversation. Files 2, 3, and 4 are created.

When the user listens to a cBarge call in **Advanced PLAYER** they see and hear all four call recording files:



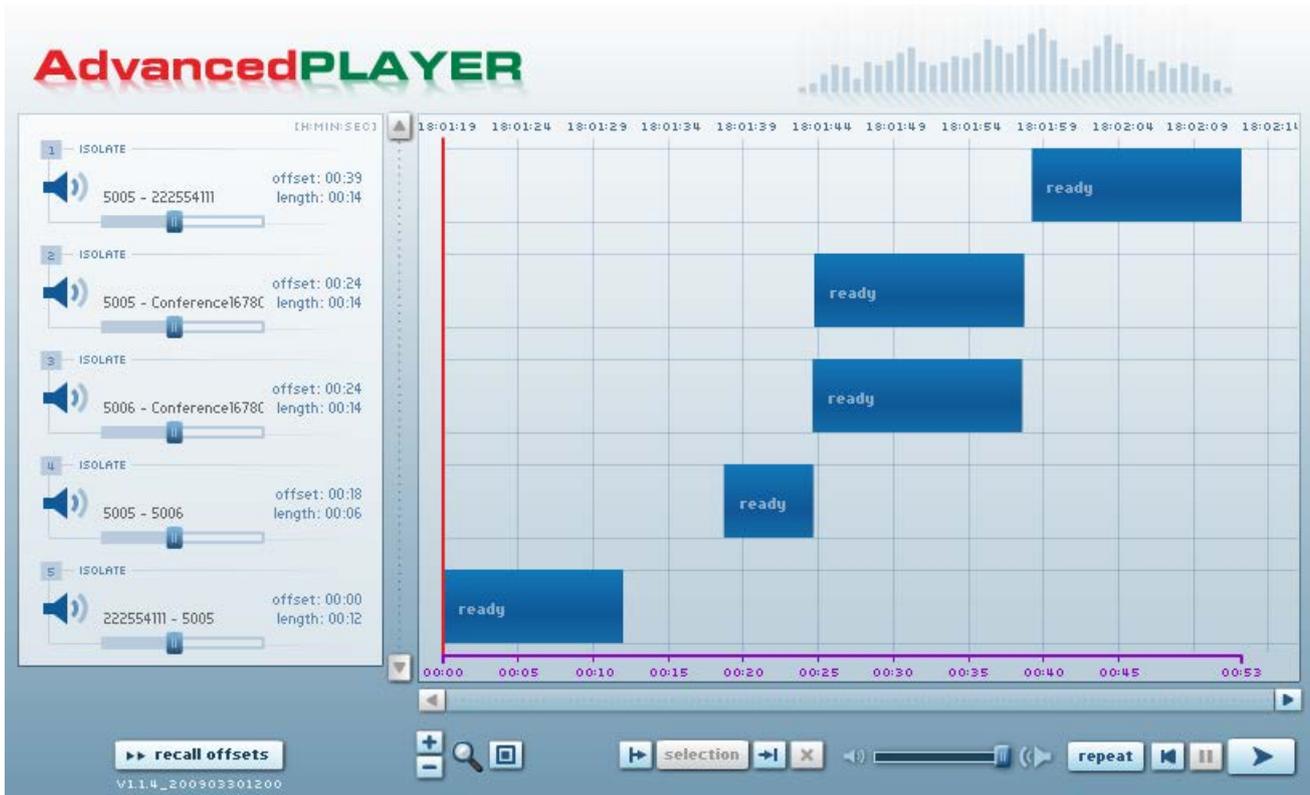
Conference Calls

- Caller A connects with Caller B.
- Caller C joins the conversation in the middle, and leaves it before Caller A and Caller B finish their conversation.
- Six different files are produced:

The following events lead to a file being created:

- Caller A calls Caller B. File 1 is created.
- Caller A calls Caller C and invites them into a conference call. This is stored as File 2.
- When Caller C joins the conference, Files 3, 4, and 5 are created.
- When Caller C leaves the conference before its end, the call reverts to a classic two-sided call and the remainder of the conversation is stored as File 6.

When the user listens to a Conference call in **Advanced PLAYER** they see and hear all of the call recording files:



Searching for Call Records in Call Recording

This chapter describes how to search for calls in Call Recording.

- Searching using basic information
- Using advanced search
- Using wildcard characters in search
- Searching and Using Filters in Call Recording

Searching using basic information

By default when a call is recorded Call Recording saves not only audio data but also basic information, such as calling and called numbers, start and stop times, and call lengths. The Call Recording web UI allows the use of this type of information to search for recorded calls.

Go to **Recorded calls > Search**. The **Search filter** opens:

Search

Close

Choose Saved Search

Choose Saved Search ▼

Load

Delete

Search Name

Save

All Users

Calling Numbers

Called Numbers

And Or

Calling Agent

Called Agent

And Or

Description

Type of Call

All ▼

Case Sensitive:

Segments count:

< = >

Random Selection

Talk Time

Min

Max

Calls with the same number from

???En_US_English (US).str_call_filter_multiple_from??? To

Or both

which occurred more than

From	To
<input type="text" value="No Filter"/>	<input type="text" value="No Filter"/>
<input type="text" value="11/8/16 12:00:00 AM"/>	<input type="text"/>
Daily hours from	Daily hours to
<input type="text"/>	<input type="text"/>

Problem Status

No Problem
Just one stream recorded.
No stream recorded.
Unknown codec.

Locked Only

The following search criteria are available:

- **Calling numbers** and **Called numbers** – Type the numbers of the calling or called parties or both. Use the wildcards ? and * for number ranges. For example, if your contact center agents have 4-digit numbers, find all calls made by all agents by typing **Calling number: ????** and clicking **Search**. To find all internal calls, define two criteria: **Calling numbers: ????** and **Called numbers: ????** To find all calls made to and by an agent with number 1234 type **Calling numbers: 1234 AND Called numbers: 1234**.
 - **AND** and **OR** – Select **AND** if you want the search to return only calls that are both to and from the specified **Calling number** and **Called number**. Select **OR** if you want the search to return all calls from the specified **Calling number** and all calls to the specified **Called number**.
- **Calling agent** and **Called agent** – Type the agent ID that is obtained through contact center integration modules (IMs), such as Cisco Unified Contact Center Enterprise (UCCE), UCC Express (UCCX), the Genesys integration module and the Genesys Active Driver. If you don't have an IM installed the agent ID field remains empty.
 - **AND** and **OR** – Select **AND** if you want the search to return only calls that are both to and from the specified **Calling agent** and **Called agent**. Select **OR** if you want the search to return all calls from the specified **Calling agent** and all calls to the specified **Called agent**.

- **Description** – Search using the [call descriptions entered by users](#). We recommend using [wildcards](#). These ensure that the search query includes all possibilities for the string that you entered. For example, the string `*Sales*` includes descriptions, such as "Sales," (with the comma), "Sales " (with a space after the word), "Sales team", and "Sales." (with a period after the word). Select the **Case sensitive** check box located under the **Description** if the search must match both the upper and lower cases typed in the original comment.
- **Type of call** – Choose the desired call type from the drop-down menu. Call Recording can distinguish call patterns and determine which recordings belong to a specific type of call, such as conference calls containing three callers.
- **Segment count** – Find related [call couples](#) (in Playing transferred and conference calls) by the number of couples: Transferred calls have at least two couples and conference calls have at least three.
- **Random selection** – Select this check box to make your search results appear in random order. The purpose of this check box is to allow you to search, view, and randomly select call records for monitoring and reviewing purposes. The search results are randomized based on your other selected **Search filter** criteria. For example, if your search criterion is the date range of April 30, 2014 to August 21, 2014, only these calls appear in the **Recorded calls** tab. In this situation selecting **Random selection** ensures that the results of this date range appear in a random order. Depending on the number of calls that the search retrieves the results can sometimes appear to be sorted in some type of order. However, a complete review of all the search results will confirm that the calls are randomized. In addition, if you select one of the sort arrows appearing in the columns above the search results, the results are simply randomly reshuffled. They are not placed in order by the sort parameter of the arrow that you used.
- **Talk Time** – Type the minimum and/or maximum call length in the format **hh:mm:ss**. For example, to find calls longer than 1 minute, type **00:01:00**.
- **Calls with the same number from/to/ or both which occurred more than []**- Find phone numbers that are repeatedly connected to each other. For example, if you have a customer who calls repeatedly or an agent who makes multiple calls to the same number you can locate and track these patterns.
 - **From** – Use this parameter to identify when a person from the same number calls the call center repeatedly. This could be a dissatisfied customer that requires further attention.
 - **To** – Use this parameter to identify when the same agent calls the same number repeatedly. This could be an employee making personal calls using company resources.
 - **Both** – Use this parameter to identify when a person from the same number calls the same agent repeatedly. This could be an employee calling a relative using the company phone on company time and vice versa.
 - **Occurred more than []** – Use this parameter to specify how many calls must occur before you want them to show up in the search results.
- **Locked only** - Use this parameter to show only [locked calls](#) (see the section on Call Protection).
- **From** and **To** calendars – Define the time frame for the desired calls. You can also use preconfigured time ranges located in the drop-down menus.
- **Daily hours from/to** – specify the search time frame. For example, to show calls made during business hours, set **Daily hours from: 08:00:00** and **Daily hours to: 18:00:00**.
- **Problem status** – Search call recordings by problem status. This parameter provides information regarding whether the call was recorded with any problems or without. Further information regarding possible problem statuses can be found [here](#).

Search criteria can be combined. For example, you can search for calls made yesterday with a minimum length of 10 seconds and made to numbers 1000 – 1009.

To return your search results to displaying all recorded calls click **Clear Search** located at the top right corner of the screen.

Using advanced search

With basic data Call Recording also stores so called "external data" such as JTAPI_CISCO_ID, Genesys Connection ID or Avaya CM call ID. It can also collect additional call information from contact center applications. Those can be: Agent ID, Skill group or Contract Number.

The Call Recording web interface allows you to search based on any of this data in order to find calls.

The system administrator must **enable Advanced search** and add external data fields to Call Recording before a search can be made for external data.

Searching for Calls by Agent Names

Go to: **Recorded calls > Search.**

In many call centers agents can sit at any terminal. Each agent has a unique identifier in the Call Manager, name or ID number, that attributes call activity to the agent instead of the terminal.

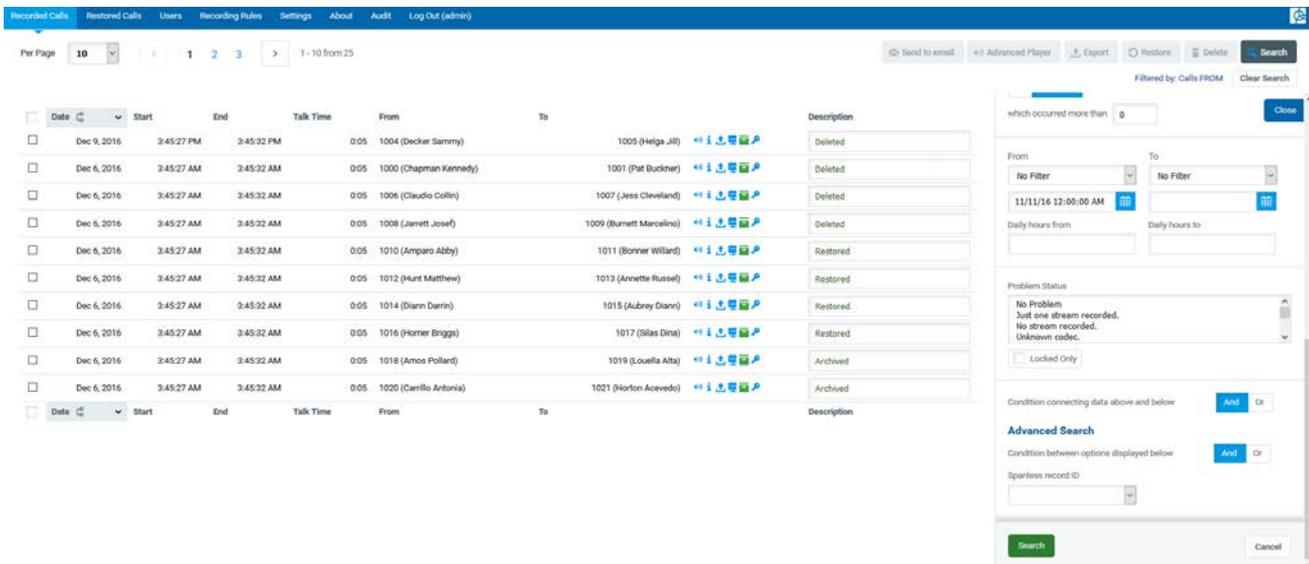
1. In **Advanced search**: select or type an **Agent Name**.
2. Click **Search**.

Only recorded calls involving the agent selected display in the **Recorded calls** list.

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

Searching with Other External Data

Navigate to: **Recorded calls > Search.**



The screenshot shows the Zoom Call Recording web interface. At the top, there are navigation tabs: Recorded Calls, Restored Calls, Users, Recording Rules, Settings, About, Audit, and Log Out (admin). Below the tabs, there's a header with 'Per Page' set to 10 and '1 - 10 from 25'. The main area displays a table of recorded calls with columns: Date, Start, End, Talk Time, From, To, and Description. The table lists 10 calls from Dec 6, 2016, with various agents and statuses (Deleted, Restored, Archived). On the right side, there is an 'Advanced Search' sidebar. It includes a search bar, a 'Filtered by: Calls FROM' dropdown, and a 'Close' button. Below that, there are sections for 'which occurred more than', 'From' and 'To' date pickers, 'Daily hours from' and 'Daily hours to' pickers, and a 'Problem Status' dropdown. At the bottom of the sidebar, there are sections for 'Condition connecting data above and below' and 'Condition between options displayed below', each with 'And' and 'Or' radio buttons and a 'Search' button.

These fields display in the **Advanced search**: area, below standard searches.

1. Select **and** or **or** in the **Condition connecting data above and below** section.
 Selecting **and** means that the search only returns calls that satisfy both the criteria in the top of the form and the **Advanced search**: criteria.
 Selecting **or** means that the search returns calls that satisfy either the criteria in the top of the form or the criteria in the **Advanced search**: section, or both.

2. Select **and** or **or** in **Condition between the options displayed below**.

Selecting **and** means that the search only returns calls that satisfy all the selected criteria in the **Advanced search**: criteria.

Selecting **or** means that the search returns calls that satisfy at least one of the **Advanced search**: criteria.

3. Depending on how each External data Key has been set up, type the criteria or select from the drop-down lists for each key to be searched for.

4. Click Search.

Please be aware, that the number of displayed records in the Recorded calls tab may differ before and after you reset parameters used in a Search. The reason is to spot in the system which is using different starting times for the time period to be displayed. These are 30 day time period ended at time of login and 30 day period from today's midnight after the Search reset.

Using wildcard characters in search

When searching for calls you can use wild card characters to define the search range. The Call Recording search engine supports the following characters:

- The **?** character represents an arbitrary character
- The ***** character represents an arbitrary string

For example:

- Specifying a range of: **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

Searching and Using Filters in Call Recording

Filters are saved searches which can be repeatedly used to save time. Taking the previous search which displayed several actions for calls to support this search can be saved to be used at a later date. This chapter describes how to search and use filters in Call Recording.

- [Opening the Search Filter Dialog](#)
- [Understanding Search Filters](#)
- [Default Search Filter](#)
- [Problem Statuses](#)
- [Using Advanced Searches](#)
- [Using Saved Searches](#)
- [Saving Searches](#)
- [Disabling Saved Searches](#)
- [Deleting Saved Filters](#)
- [Using Saved Searches in Permanent Rules](#)

Opening the Search Filter Dialog

ZOOM Call Recording uses search filters to identify call records.



Send to email Advanced Player Export Restore Delete **Search** Clear Search

Filtered by: Calls FROM

		Description
3005	   	
3005	  	
2002	   	
2002	   	
3004	   	
3003	  	
3002	  	
2002	   	
2002	   	
3005	   	
		Description

To search for calls and video recordings, click **Search**. The **Search filter** dialog box opens:

Search

Close

Choose Saved Search

Load

Delete

Search Name

Save

All Users

Calling Numbers

Called Numbers

And

Or

Calling Agent

Called Agent

And

Or

Description

Type of Call

Case Sensitive:

Segments count:

<

=

>

Random Selection

Talk Time

Min

Max

Calls with the same number from

 To

Or both

which occurred more than

From

No Filter ▼

11/8/16 12:00:00 AM 

Daily hours from

To

No Filter ▼



Daily hours to

Problem Status

No Problem
Just one stream recorded.
No stream recorded.
Unknown codec.

Locked Only

Understanding Search Filters

Search filters enable users to find calls within the Call Recording database and the same filters can be used to define user access rights within the Users tab.

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 can have a filter that only displays calls handled by a particular group of agents. In this case the supervisor only sees calls from those agents in the Recorded calls Tab.

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

If the supervisor uses the same searches repeatedly they can save the search as a filter to be used at a later time. This search filter can be made available to other users of the Call Recording system. A filter can not be deleted while in use.

Filters identify calls based on call attributes.

Call attributes include:

- Signaling information, for example IP addresses and telephones that were used in the calls
- Date or time information, for example, when calls start and stop
- Duration of call
- Type of call
- Call recording status, for example, locked calls only

Advanced searches enable the user to set filters based on external information, including customer name, skill type, wrap up code, and agent evaluation data fields added to the database by the system administrator.

Default Search Filter

A permanently set filter limits the search range of calls to 31 days by default in order to improve the performance of searches. This filter prevents a gap of more than 31 days between the **To:** and **From:** search parameters; an error displays if a longer search period is specified.

Problem Statuses

Every call in the Call Recording database has a so called "Problem Status" that shows whether a call was recorded without any problem or whether there is any issue with it.

Until a user defines a specific status to search for the search includes calls with all statuses.

The various problem statuses can be the following:

Problem Status	Description	Can This Call Be Repaired?
No Problem	Call was recorded without any problems	Irreparable
Just one stream recorded	Only one side of the stereo channel was recorded	The first channel will normally be available, the second one is irreparable
No stream recorded	A call was registered but no voice was recorded, neither of the two streams were recorded	Irreparable
Unknown codec	A recorded stream which has an unknown codec	Yes, the call can be exported from the server and can be manually decoded using a third party tool
Decoding error	A call was recorded but an error occurred during the decoding process	Yes, the call can be repaired using the repaircalls tool
Error communicating with recorder	A recorder didn't reply to a request	Irreparable
Cannot capture files	One of the recorded streams was not found	Depends on the cause

Decoder failure (IO error)	A specific IO operation failure occurred during the decoding process, for example because of an incorrect configuration of Key Manager	Yes, the call can be decoded after fixing the issue with the Decoder Service
Different codecs for each stream	Recorded streams have different payloads	Yes, the call can be repaired using the Fix Payloads tool
The file exceeds its maximum size	The final decoded file is greater than the maximum size allowed	Yes, the call can be exported from the server and can be manually decoded using a third party tool
Unavailable destination format of decoding	Decoder does not have any destination format for source files	Yes, the call can be decoded
No recording device available	Problem occurred with a recorded device (RS or SLR), which usually happens when Avaya virtual recording devices are not available	Irreparable
License problem	Call wasn't recorded because of a license issue (having exceeded license limitations)	Irreparable
Incomplete stream saved	One of the streams is incomplete	The incomplete part is irreparable
Only one incomplete stream recorded	Only one stream was recorded and it is incomplete	Irreparable

You can use **CTRL** or **SHIFT** to select more statuses at once

Using Advanced Searches

Navigate to: **Recorded calls > Search.**

Search

Close

Choose Saved Search

Load

Delete

Search Name

Save

All Users

Calling Numbers

Called Numbers

And

Or

Calling Agent

Called Agent

And

Or

Description

Type of Call

Case Sensitive:

Segments count:

<

=

>

Random Selection

Talk Time

Min

Max

Calls with the same number from

 To

Or both

which occurred more than

From	To
<input type="text" value="No Filter"/>	<input type="text" value="No Filter"/>
<input type="text" value="11/8/16 12:00:00 AM"/>	<input type="text"/>
Daily hours from	Daily hours to
<input type="text"/>	<input type="text"/>

Problem Status

No Problem
Just one stream recorded.
No stream recorded.
Unknown codec.

Locked Only

Defining custom search criteria in **Advanced search** extends the search capabilities to include external data available in the call management system. System administrators define **Advanced search** criteria. Added external data fields for **Advanced search** appear under the calendar controls in the search window.

Using Saved Searches

Navigate to: **Recorded calls > Search.**

Search

Close

Choose Saved Search

Choose Saved Search ▼

Search Name

Load

Delete

Save

All Users

Calling Numbers

Called Numbers

And Or

Calling Agent

Called Agent

And Or

Description

Type of Call

All ▼

Case Sensitive:

Segments count:

< = >

Random Selection

Talk Time

Min

Max

Calls with the same number from

???En_US_English (US).str_call_filter_multiple_from???

To

Or both

which occurred more than

From

No Filter ▼

11/8/16 12:00:00 AM 

Daily hours from

To

No Filter ▼



Daily hours to

Problem Status

No Problem
Just one stream recorded.
No stream recorded.
Unknown codec.

Locked Only

Search

Cancel

To use a saved Search:

Saved Searches appear in the **Choose Saved Search** drop-down list. Selecting a pre-existing filter enables the user to use recurring search criteria. Searches can be created by users and shared, or they can be set-up by system administrators.

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

Only calls matching the Saved Search display in the **Recorded calls** list in Call Recording. To see all calls disable the saved searches.

Saving Searches

To create a saved search that displays only certain calls the user must choose search criteria in the search window. Saving this search criteria creates a re-usable saved search.

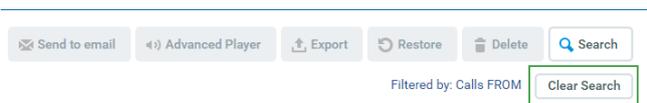
1. Select the search attributes. If the **From** date is chosen then the **To** date with a separation of no more than 31 days must also be chosen, otherwise the dates are not saved.
2. Type a **Saved Search name**.
3. Select **All users** to make saved filters available to all users of the system. Otherwise, saved filters are available only to the user who created the filters.
4. Click **Save**.

The filter is now added to the filter drop-down list.

Disabling Saved Searches

Navigate to: **Recorded calls**.

Call Recording displays the search criteria that are currently active at the top right of the screen next to the **Filtered by** indicator.



To return to displaying all records click **Disable saved searches**. 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.

Deleting Saved Filters

1. Select a saved search from the **Choose Saved search** drop-down list.
2. Click **Delete**.

The search is no longer available in the filter drop-down list.

If the filter is being used by other users of the system Call Recording does not enable the current user to delete the filter.

Using Saved Searches in Permanent Rules

Saved Searches 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. See the sections on limiting group access in the Administering Groups and Users chapter.

Permanent rule filters can be assigned to a group through the **Users** tab.

Open a group, and click **Edit Saved Searches**.

Multiple permanent rule filters can be assigned to a group by editing the group and choosing saved filters from the **Choose Saved Searches** drop-down list. Use Boolean operators, **and**, or **or**, to combine filters. When saving the group the permanent filters apply to all members of that group.

Using Restored Call Recordings

This chapter describes how to use the **Restored Calls** tab. A typical scenario for restoring a call is that it has been requested by a lawyer or other interested entity to settle a dispute. This tab contains only calls restored based on UI request. Calls restored from files are not displayed here but only in Recorded Calls tab.

The 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 the 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.

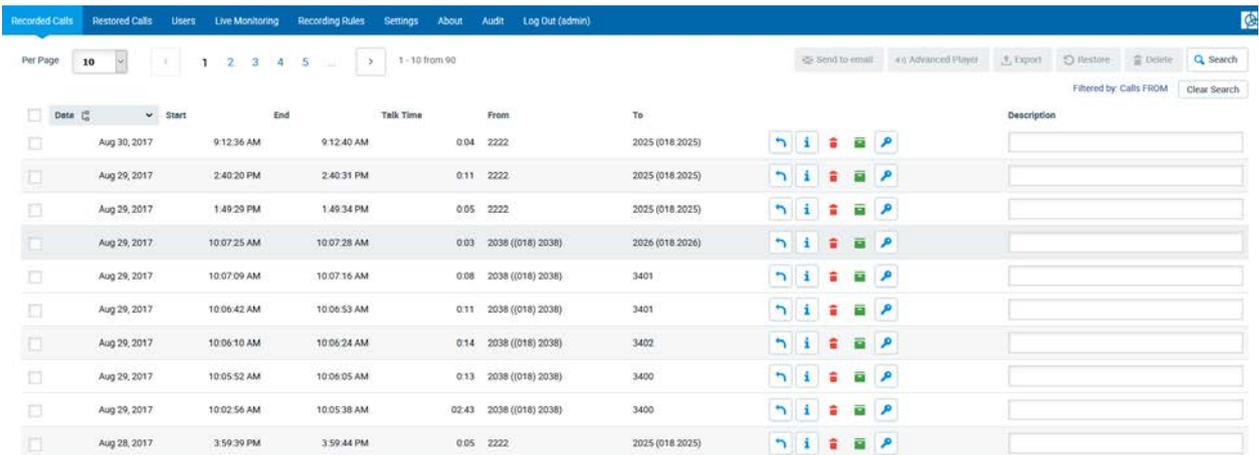
After a call has been both archived and deleted from the main database, the user must restore the call to be able to listen to it again. Restoring the call returns the deleted call recording to the database so the recording can be played in the system again.

Archived and deleted calls are identified with the deleted call available for restoration icon .

- Restoring an Archived and Deleted Call Recording
- Listening to Restored Calls
- Cancelling a Restoration

Restoring an Archived and Deleted Call Recording

1. Select archived and deleted calls in the **Recorded calls** tab.
2. Click **Restore**.



Date	Start	End	Talk Time	From	To	Description
Aug 30, 2017	9:12:36 AM	9:12:40 AM	0:04	2222	2025 (018.2025)	
Aug 29, 2017	2:40:20 PM	2:40:31 PM	0:11	2222	2025 (018.2025)	
Aug 29, 2017	1:49:29 PM	1:49:34 PM	0:05	2222	2025 (018.2025)	
Aug 29, 2017	10:07:25 AM	10:07:28 AM	0:03	2038 ((018) 2038)	2026 (018.2026)	
Aug 29, 2017	10:07:09 AM	10:07:16 AM	0:08	2038 ((018) 2038)	3401	
Aug 29, 2017	10:06:42 AM	10:06:53 AM	0:11	2038 ((018) 2038)	3401	
Aug 29, 2017	10:06:10 AM	10:06:24 AM	0:14	2038 ((018) 2038)	3402	
Aug 29, 2017	10:05:52 AM	10:06:05 AM	0:13	2038 ((018) 2038)	3400	
Aug 29, 2017	10:02:56 AM	10:05:38 AM	02:43	2038 ((018) 2038)	3400	
Aug 28, 2017	3:59:39 PM	3:59:44 PM	0:05	2222	2025 (018.2025)	

3. The restoring call icon appears .
4. When the call is restored, the restored call icon appears .

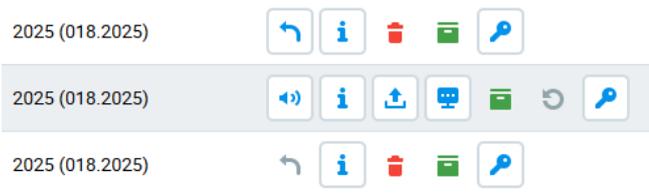
The user can listen to these restored calls normally. Restored calls appear under both the **Restored calls** tab, and the **Recorded calls** tab.

Depending on the 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 the user that the call has been restored.

If a recording was deleted (but not archived) it is not possible to restore it.

Listening to Restored Calls

To listen to restored calls, click on the call's speaker icon.

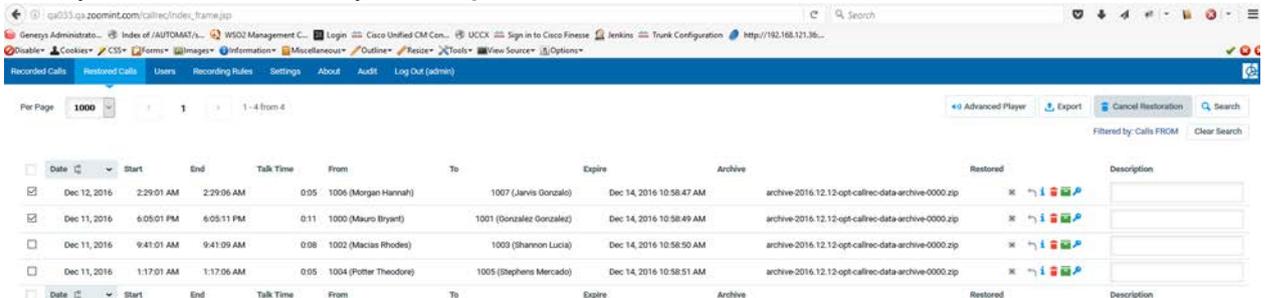


Alternatively, select multiple files and click **Advanced PLAYER**.

Cancelling a Restoration

The user can cancel a call restoration before it is complete.

1. Open the **Restored calls** tab.
2. Identify calls to be canceled by selecting their checkboxes.



3. Click **Cancel restoration**.
4. Click **OK** to confirm the cancellation.

The call restoration process for these calls is cancelled and the calls are not available for playback unless they are restored again. The status icons may require some time to reset, depending on the system configuration.

On Demand Prerecording

Although all calls are recorded, not all are saved. The prerecording feature enables users to save specific calls.

Prerecording differs from regular recording because it is on demand and activated from the Cisco IP phones that support XML services. The system administrator must configure prerecording in both Cisco Unified Communications Manager and Call Recording.

Prerecording Principles

Prerecording is the process of recording all calls and permanently saving only the recordings specified by the phone user. This means that while a call is in progress, or shortly after a call has ended, the phone user has the ability to save the call recording. If the user does not save the call within a specified period, the recording will be discarded. The system administrator can adjust the specified recording period. The default time is set to 2 minutes.

- Working with Calls in Progress
- Saving a Completed Call
- Tagging a Call with Call Information (External Data)

Working with Calls in Progress

The Cisco IP phone must be configured to provide prerecording services through Call Recording. Depending on the IP phone model and configuration certain steps may differ from those described here. Consult the IP phone documentation and system administrator.

When prerecording is configured for Cisco IP phones the user can choose to save any call in progress or a call that has recently been completed.

Saving a Call in Progress:

Press the **Services** button on the Cisco IP phone.



Select ZOOM Call Recording from the list of options.



Select **Save**.

The call recording will be saved to the database and when it is completed it will be 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 the Cisco IP phone.
2. Select ZOOMCall Recording from the list of options.
3. Select **Send by email**.

After the call has ended Call Recording will send an email with the call recording.

The recipient email address is set to include the prerecording when the Cisco IP phone is configured.

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

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

The call recording is saved to the database. When it is completed it will be available for playback on the Call Recording **Recorded calls** tab. In addition, the call recording is sent by email as an attachment.

Please note, that the combination of the sending recorded calls via email functionality together with the use of Speech Analytics is not recommended.

Since the Speech Analytics engine requires audio files in wave format, the data size which should be sent will most probably exceed the allowed attachment size set on your SMTP servers (MTAs). Please consult this with your mail server administrator, how large attachments are allowed in an email and ask them to change the limit, if necessary. Mail server administrator may set allowance for a bigger attachments from you ZQM servers.

Sending a Call Recording to a Different Email Address

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



4. Enter the desired email address. Use the # key to enter the @ symbol.
5. Select **Send**.

The call recording will be sent as an attachment to a designated email account.

If call encryption is enabled sending to email is not possible.

When the prerecording application returns following error message:

"Unable to retrieve device information. Cisco Real Time Information Server is unavailable.", it means, that the Recording server can't connect to the RIS Service of the Cisco UCM.

Please contact your system administrator to check the RIS service status.

Saving a Completed Call

Prerecording enables the user to save finished calls. The user has a limited period in which to save these calls.

The user must save the call within the period set by the system administrator (typically 2 to 10 minutes). Calls that are not saved within this time period cannot be recovered. In addition, depending on the system setup, PIN codes may be required.

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



4. Select the highlighted call from the list.
5. Select **Save**.

The call recording will be saved to the database and is available for playback on the Call Recording **Recorded calls** tab.

Tagging a Call with Call Information (External Data)

If configured by the system administrator, a user can add supplementary call information to a current or completed call using another IP phone service; this is known as ‘tagging’ a call. Call tagging is frequently used to categorise for enabling subsequent call filtration. Typical tag options are “Presales”, “Sales”, or “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.

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

To tag an in-progress or completed call, perform these steps:

1. Press the **Services** button on the Cisco IP phone.
2. Select the service, for example **Call Recording call-info** from the list of options.



3. Select the appropriate tag value and press **Select**.
4. Call Recording tags the call with this value and saves the call.

Cisco Selective User Recording

- General overview
- Working with Calls in Progress
- Working with recorded calls

General overview

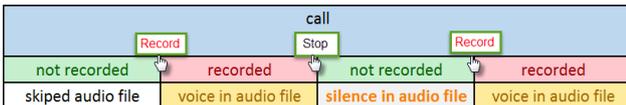
Starting with the release 5.8, ZOOM QM Suite also supports the Selective User Recording profile of the Cisco Unified Communication Manager. This recording feature allows users to record only calls which are of particular interest to them.

Typically it is used in environments where it is not necessary to record all interaction. Even then some of the interactions may be of particular interest or importance, and the user may wish to record a call for future use such as documentation or quality assurance.

In Selective User Recording, an agent or an IP Phone user may start and stop a recording session using a softkey or programmable line key. The call recording status is displayed on the Cisco IP phone.

The ZOOM Call and Screen Recording Server stores the the information about the entire call. Together with this data, the information about the actual recording durations are stored correctly as they are. The result of the recording is shown in the graphics below.

Selective User Recording only works if Recording Rules are NOT set or if These phones are excluded from the general recording rule.



Working with Calls in Progress

Without an active call the Selective User Recording indicator is not active.



After a call is answered by a user with Selective User Recording profile, the phone display shows the record option as active.



To start recording press the Record button. Now the button changes in the Stop Recording option.



To stop the recording press the Stop Recording button. The button changes again into the Record option.



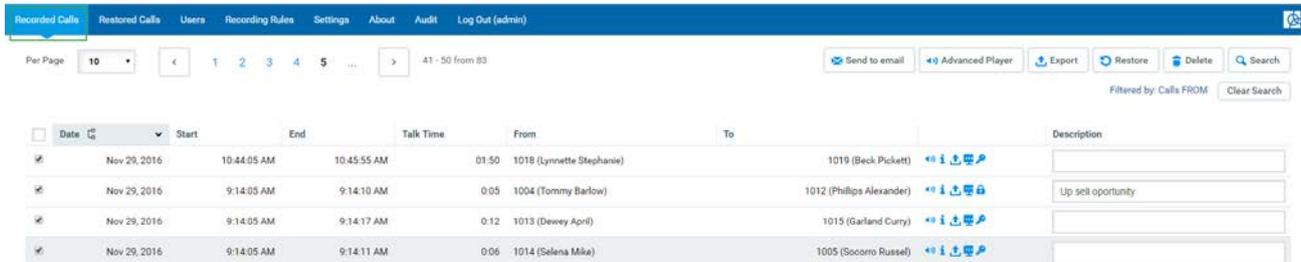
These actions can be chosen repeatedly during the call. Users therefore have the option to record only such calls and such parts of calls as are of interest to them.

Working with recorded calls

Calls recorded using the Cisco Selective User Recording method can be found in the same place as calls recorded using automatic recording.

Open your internet browser, enter the address of the ZOOM Call and Screen Recording server and enter your user credentials.

In the main page you will find the list of your recorded calls in the > **Recorded calls** tab.



Date	Start	End	Talk Time	From	To	Description
Nov 29, 2016	10:44:05 AM	10:45:55 AM	01:50	1018 (Lynnette Stephanie)	1019 (Beck Pickett)	
Nov 29, 2016	9:14:05 AM	9:14:10 AM	0:05	1004 (Tommy Barlow)	1012 (Phillips Alexander)	Up sell oportunity
Nov 29, 2016	9:14:05 AM	9:14:17 AM	0:12	1013 (Dewey April)	1015 (Garland Curry)	
Nov 29, 2016	9:14:05 AM	9:14:11 AM	0:06	1014 (Selena Mike)	1005 (Socorro Russel)	

On the very first look all recorded calls are similar regardless of the recording method used. To see the call and recording details open the call details section by clicking the **i** icon.



Date	Start	End	Talk Time	From	To	Description
Nov 29, 2016	10:44:05 AM	10:45:55 AM	01:50	1018 (Lynnette Stephanie)	1019 (Beck Pickett)	
Nov 29, 2016	9:14:05 AM	9:14:10 AM	0:05	1004 (Tommy Barlow)	1012 (Phillips Alexander)	Up sell oportunity
Nov 29, 2016	9:14:05 AM	9:14:17 AM	0:12	1013 (Dewey April)	1015 (Garland Curry)	
Nov 29, 2016	9:14:05 AM	9:14:11 AM	0:06	1014 (Selena Mike)	1005 (Socorro Russel)	

In the call details window you will find the information about the User Selective Recording method used as well as the time-temps of recording starting and stop times. In the JTAPI_RECORDING_TYPE field there will be stated **SELECTIVE** in place of **AUTOMATIC**.

Call Segment Overview

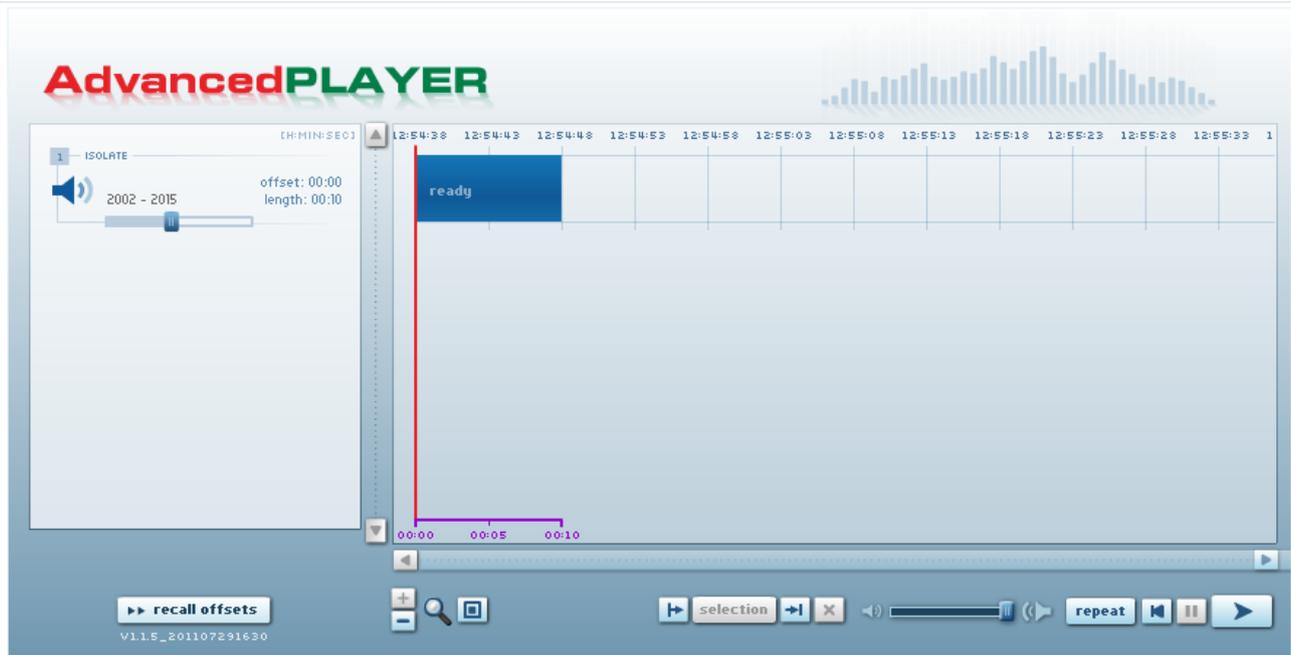
From: 2002 **To:** 2015, **Start:** December 9, 2016 12:54 PM, **Talk Time:** 00:10, **Direction:** UNKNOWN

Associated Segments

Segment ID:	From:	To:	Start / Talk Time:
84	2002	2015	12:54 PM / 00:10

Segment Details

Call ID	83	Mixer Tool	✗
Segment ID	84	Protected From Deletion	✗
Call Status	No Problem	Delete Tool	✗
Quality Management Use		Restore Tool	✗
Synchro Tool		Archive Tool	✗
Synchronization ID	16957786192.168.2.11:26830192.168.210.119:24578_2_1		



The image shows the 'AdvancedPLAYER' audio player interface. It features a waveform visualization at the top right, a central playback area with a 'ready' status, and a control panel at the bottom. The control panel includes buttons for 'recall offsets', 'selection', 'repeat', and other playback functions. The interface also displays a time scale from 12:54:38 to 12:55:33.

Media Information

Media File 1 /opt/callrec/data/calls/20161209/1481284478236_2002_2015_84.mp3

Custom Data

Key	Value
CALLED_URL	192.168.210.119:24578(1104)
CALLING_URL	192.168.2.11:26830(1104)
COUPLE_END_REASON	NORMAL
COUPLE_START_REASON	NORMAL
GROUP_ID	16957786
JTAPI_CALLING_CALL_LEG	29893349
JTAPI_CALLING_TERMINAL_SEP	agent2
JTAPI_CISCO_CALLMANAGER_ID	1
JTAPI_CISCO_GLOBAL_CALL_ID	180570
JTAPI_CISCO_ID	16957786
JTAPI_RECORDING_TYPE	AUTOMATIC
JTAPI_START_TIMESTAMP_1	0.47
JTAPI_STOP_TIMESTAMP_1	10.05
SPANLESS_CALLED_REC_ID	farend

Executing Live Monitoring

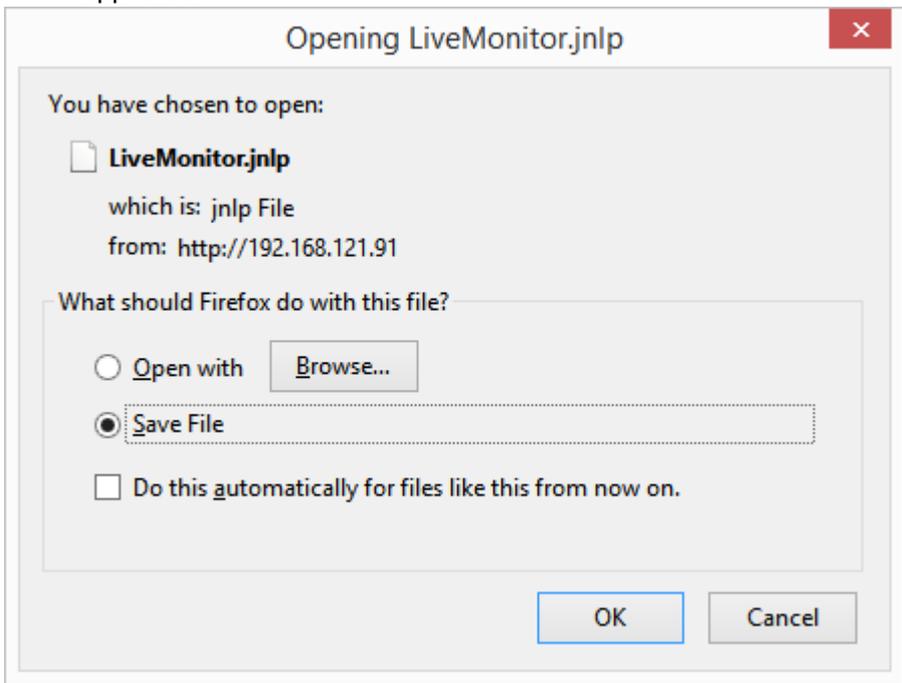
Live Monitoring runs as a standalone JAVA application separately from the internet browser. The user must have JAVA Runtime Environment installed for it to work. Download it for free from this URL <http://www.java.com/en/download/>

Live Monitoring user can monitor and listen to the same range of calls as is displayed on the **Recorded calls** page.

Executing the Live Monitoring in MS Windows

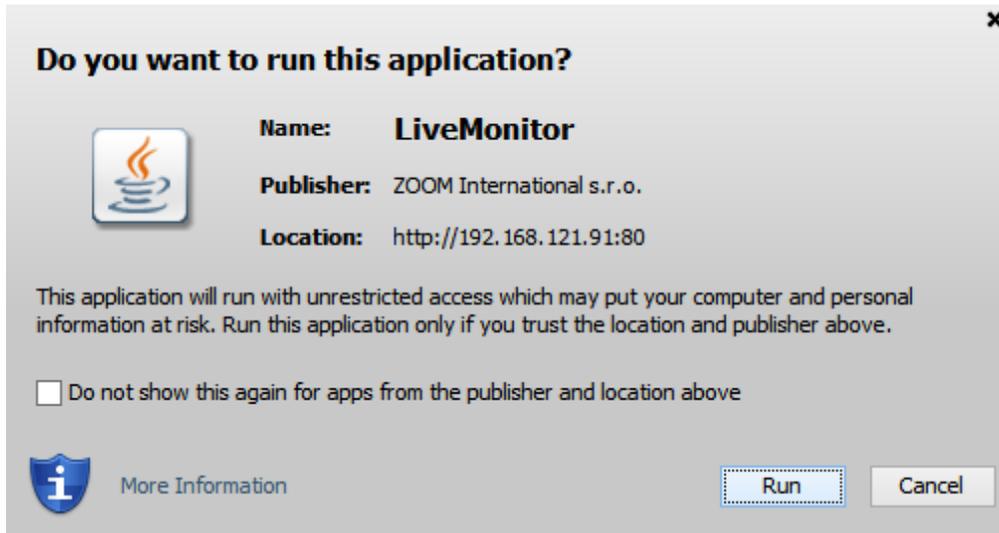
To run **Live Monitoring**:

1. Click on the **Live Monitoring** tab in Call Recording.
 - If using Live Monitoring on a replay server that has more than one recording server a list of the available servers appears. Select the required server for Live Monitoring to monitor. A prompt appears to download and open the application.
 - If using Live Monitoring on a recording server a prompt appears to download and open the application.



2. Click OK. A security warning displays.

If the user does not have sufficient permission they may have to contact the system administrator.



3. Click Run.

The Live Monitoring User interface opens.

Depending on system settings it may take a few moments before Live Monitoring launches.

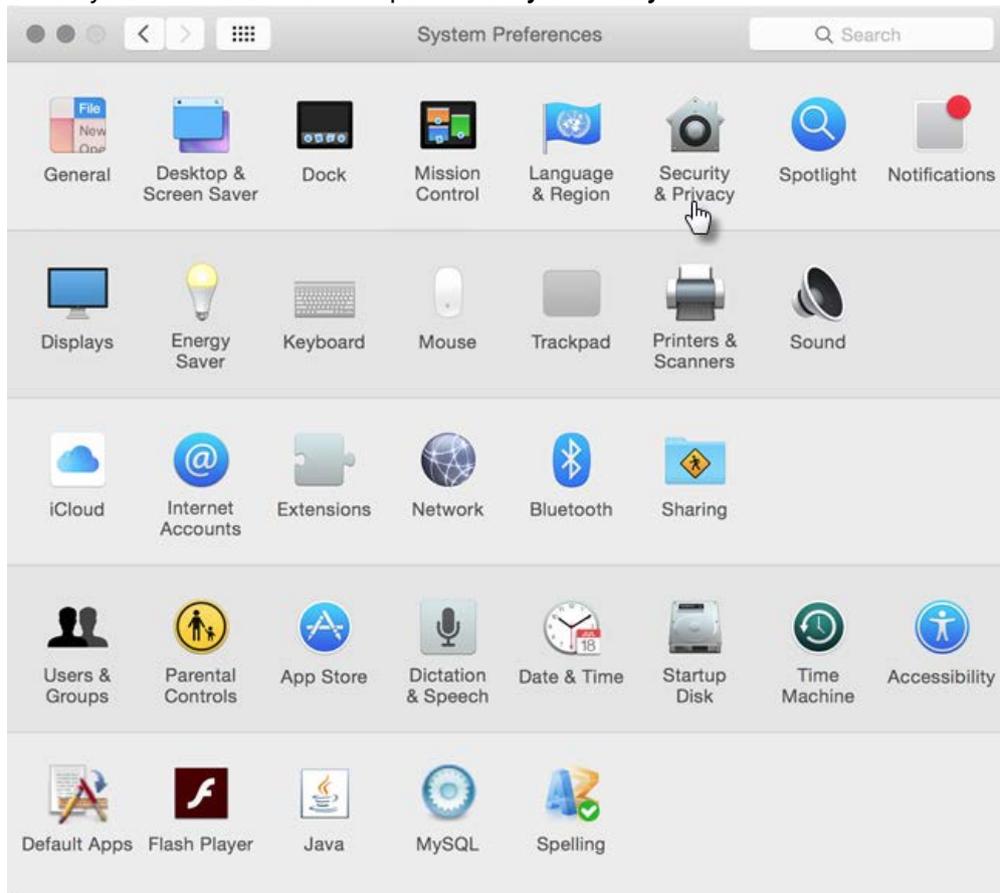
Executing Live Monitoring under Mac OS

The execution of the Live Monitoring application may be forbidden by the OS if the security settings on your system allow the execution of trusted apps only. If this is the case a warning message will appear:

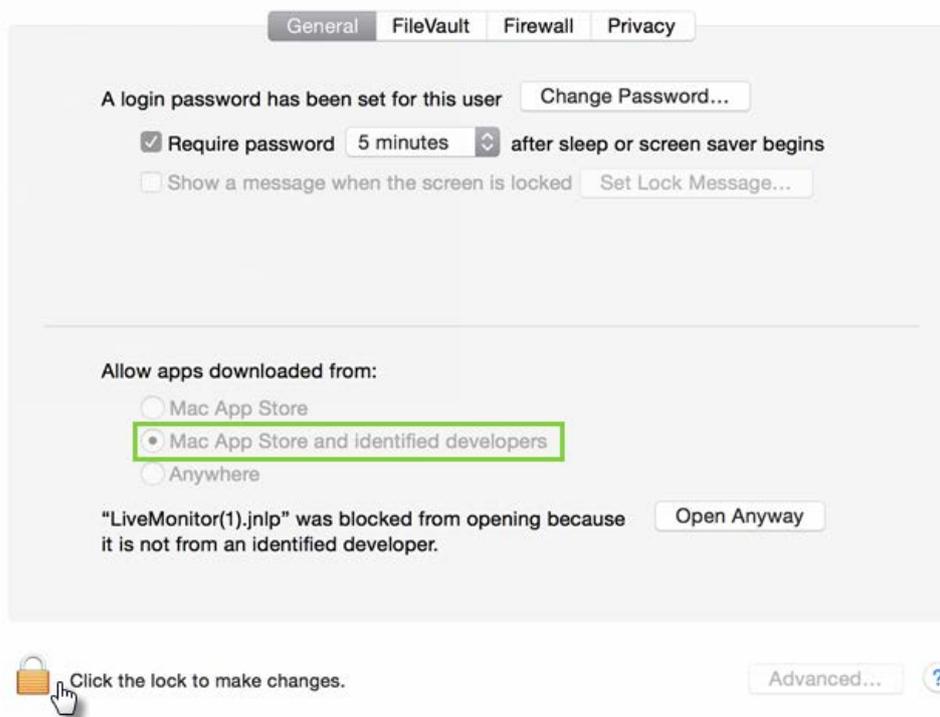


The following steps must be taken to allow the Live monitoring app to run on a Mac device:

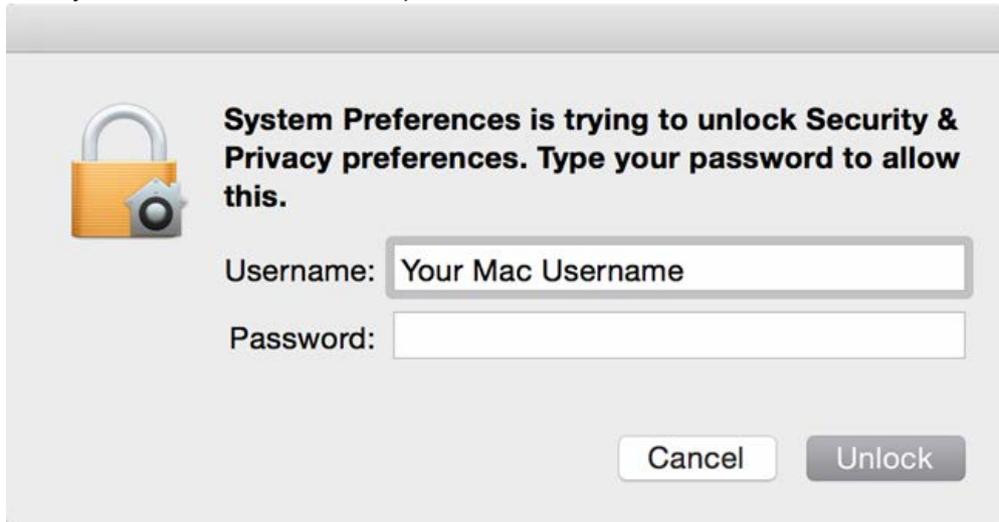
1. Go to system **Preferences** and open **Security & Privacy**.



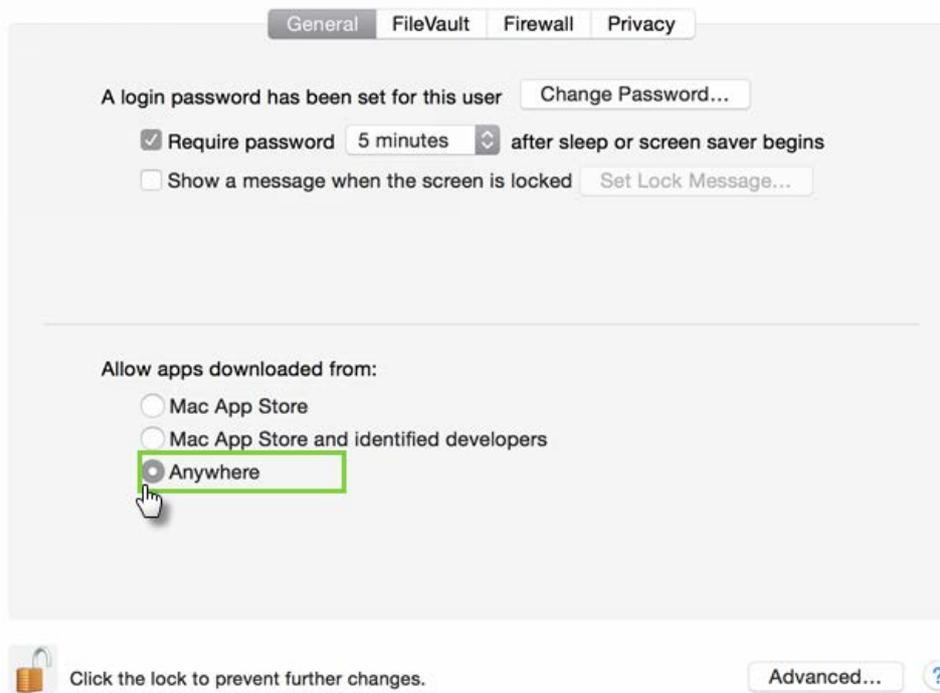
2. Click the **lock** to make changes.



3. Enter your Mac OS *username* and *password*.



4. Click on Allow from **Anywhere**.



5. After making the required changes the following message will appear:



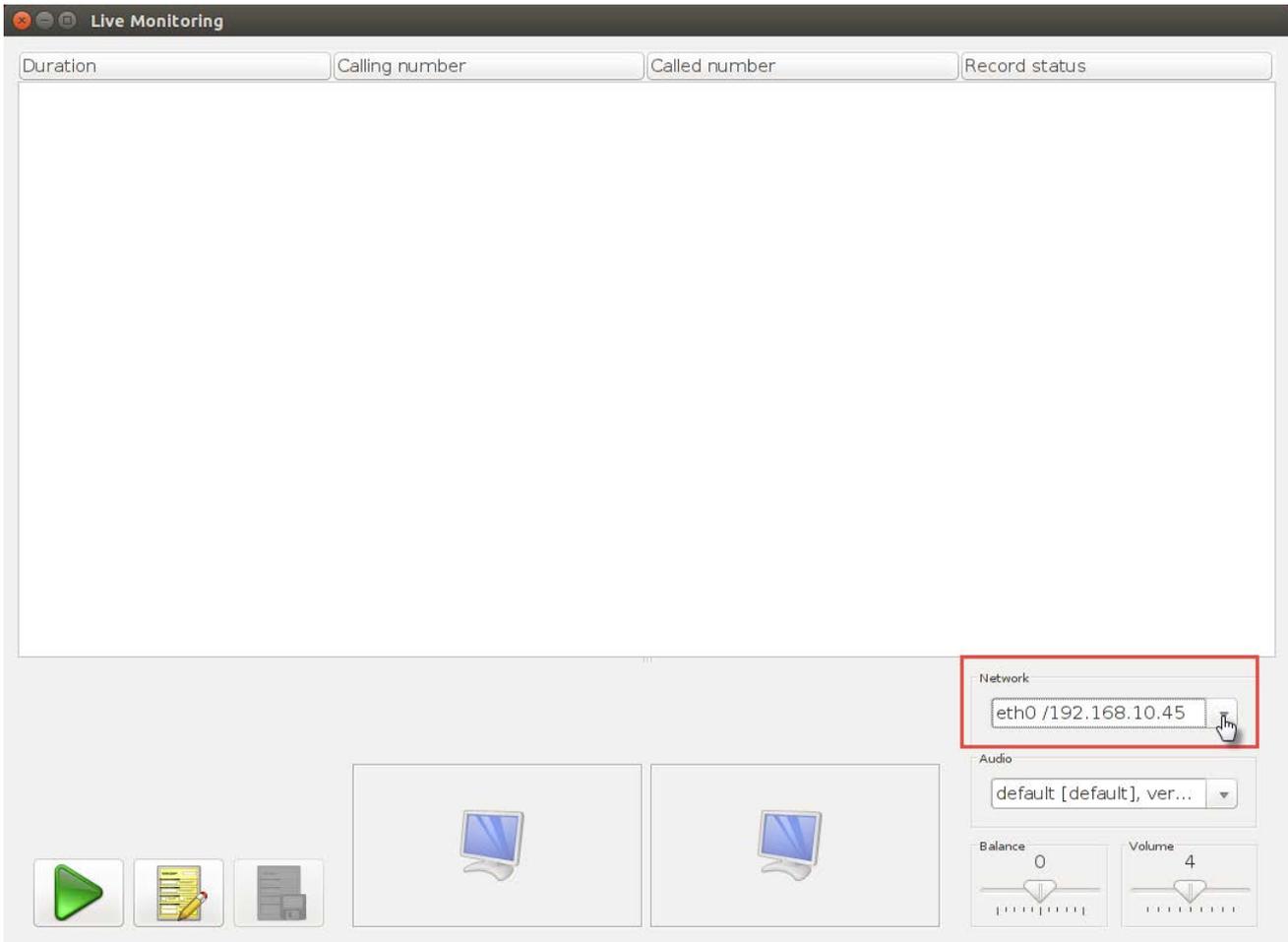
6. Check the "I accept the risk....." check box and then click the **Run** button

Please note that it is not currently possible to download the Live Monitoring application via Safari. In order to download the application it is necessary to install the most recent version of Google Chrome or Firefox.

Adjusting Network settings

Users having more than one network interface on their computer have to choose the network interface to which the streams will be sent to. This configuration must be done after the first launch of the LiveMonitor client but can be changed at any time in the future.

1. Launch the LiveMonitor client.
2. Go to the **Network** drop-down box.
3. Select the network interface of your choice.



Listening to Live Calls

Supervisors that have the Live Monitoring privilege can view calls within their assigned number range. This is the same list of calls that displays in the Recorded calls list in Call Recording.

Duration	Calling number	Called number	Record status
00:24	5554 (Donna Kilroy)	5565 (Larry Smith)	  
00:24	5556 (Fred Bloggs)	5567 (Michael Sprout)	  
02:03	5655 (Pavel Chrpa)	5535	  
00:24	5558 (Harry Spence)	5569 (Sally Olds)	  
00:22	5560 (Joe Bloggs)	5551 (Bob Soap)	  
00:19	5562 (Josephine Black)	5553 (Donald Drake)	  

When Live Monitoring launches each call that occurs after the program is started displays in a list (only those calls which the viewer has permissions to view as defined by the administrator on the [General Configuration page](#)). As new calls within the permitted number range start they are added to the list. Calls that finish disappear within ten seconds of finishing unless they are selected by the user. Each recorded or prerecorded segment within the assigned number range in a conference call displays as a separate row.

Filtering Live Calls

The calls listed in Live Monitoring are filtered **ONLY** by the phone numbers defined for the user and groups that the user belongs to.

To filter calls from within the LiveMonitor client. Simply right click on the Table Column Header to specify a filter (As an example – by entering 56 * in the header section "Calling number" the system will display all calls where the calling number starts with 56)

Duration	Calling number	Called number	Record status
00:05	5564 (Kevin James)	5555 (Frank Strong)	  
00:14	5550 (Alan Masters)	5561 (Joe Public)	  
00:05	5552 (Charlie Farnsbarns)	5563 (Herman Jones)	  
00:03	5655 (Pavel Chrpa)	5535	  
00:05	5568 (Michelle Fischer)	5559 (Isabel Williams)	  
00:05	5554 (Donna Kilroy)	5565 (Larry Smith)	  








Audio

Primary Sound Driver, version Unkn...

Balance

Volume

To listen to a call:

1. Click a row in the list to select a call to monitor. The row for the selected call turns orange.
2. Click  play on the user interface to play the call. Alternatively double-click the row with the call. In both cases Live Monitoring plays the conversation.
3. When playing the call  is replaced by . To stop listening to the call click  or select another call.



Adjust the call **Balance** and **Volume** as appropriate.

Once a call is selected it stays selected even if the call terminates. This allows the supervisor the time needed to view any external data or to add a comment. However, the call is not available in the **Recorded calls** list until it is deselected.

4. To deselect the call press **Ctrl** + click the call row and select any other call, or click below the list in the empty space immediately above the play  or notes  and  save buttons.

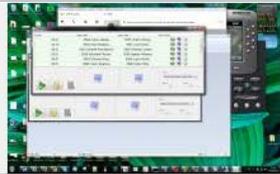
Viewing Screen Captures

If there are screen captures available then the row associated with the call displays .

Duration	Calling number	Called number	Record status
00:05	5564 (Kevin James)	5555 (Frank Strong)	
00:14	5550 (Alan Masters)	5561 (Joe Public)	
00:05	5552 (Charlie Farnsbarns)	5563 (Herman Jones)	
00:03	5655 (Pavel Chrpa)	5535	
00:05	5568 (Michelle Fischer)	5559 (Isabel Williams)	
00:05	5554 (Donna Kilroy)	5565 (Larry Smith)	








Audio

Primary Sound Driver, version Unkn...

Balance

Volume

- Click the row in the list to select the call to which you would like to monitor. The row for the selected call turns orange. The thumbnails for the screen capture display below the call list. If thumbnails are disabled in order to reduce bandwidth, but there are screen captures available, then the **Captures Available** icon displays where the thumbnails normally display. If an agent is talking to a customer or another agent's screen is not captured the **Not Capturing Screen** icon displays in place of the thumbnail for that side.

5552 (Charlie Farnsbarns)	5563 (Herman Jones)	
5655 (Pavel Chrpa)	5535	
5568 (Michelle Fischer)	5559 (Isabel Williams)	
5554 (Donna Kilroy)	5565 (Larry Smith)	



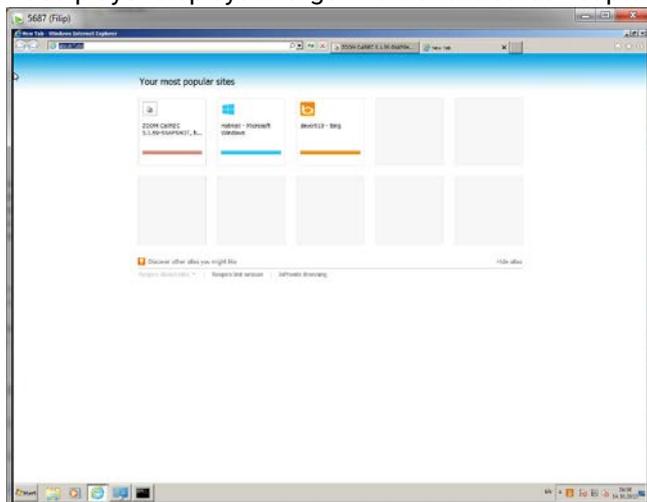

Audio

Primary Sound Driver, version Unkn...

Balance

Volume

- Double-click the thumbnail or on the user interface to play the call and view the screen captures. The video player displays a larger view of the screen capture chosen by the user.



When viewing the images in the video player the following options are available:

- Re-size the viewer by dragging the edges.

- Double click the viewer to see the open the video in full size. The dimensions displayed depend on the shape and size of the monitor from which it originated.
 - Double-clicking the other thumbnail, if available, stops displaying the first agent's desktop and starts displaying the other agent's desktop.
3. To close the player click the exiticon . When closing the video player, the position, aspect ratio, and size are stored so that when the player is reopened, the image position, aspect ratio, and size remain the same.
 4. To deselect the call press **Ctrl** + click the call row, select any other call, or click below the list in the space immediately above the play  or notes  and save  buttons.

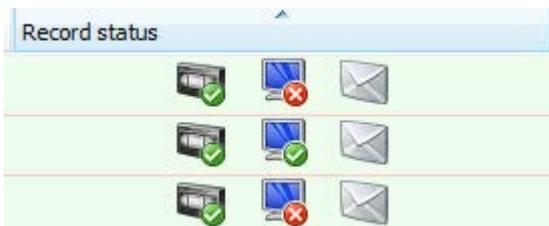
Saving Live Call Recordings and Prerecordings

Live Monitoring provides a feature of on demand recording. This section describes the usage of it.

- [Live Monitoring Recording Statuses](#)
- [Saving Prerecorded Calls](#)

Live Monitoring Recording Statuses

Live Monitoring displays the current call recording statuses for each call within the call monitoring GUI. The status shown depends on the recording rules configured on your QM Suite server.



- The  recording icon indicates that the voice part of the call is being recorded and will be permanently stored on your server for later playback.
- The  prerecording call icon indicates that a call is being prerecorded and can be permanently saved on the server for later playback.
- The  capturing screen icon indicates that the screen is being captured.
- The  not recording call icon header indicates that the call is not being recorded and so cannot be saved.
- The  not capturing screen icon indicates that the screen is not being captured and so cannot be saved.
- The  email call icon provides an option to send the media file via email. More details can be found here [Emailing Live Call Recordings](#)
- The  confirmed email icon indicates that the call will be sent via email. More details can be found here [Emailing Live Call Recordings](#)

Saving Prerecorded Calls

Click the  prerecording icon to save the call. The icon changes to  indicating that the recording will be permanently stored on your QM Suite server for later playback.

If you select a call the call will be locked by Live Monitoring so you can work on it without worrying that it will disappear from the Live Monitoring window after call is finished. The call will stay locked and will not be saved to the database until you deselect it.

To deselect the call press **Ctrl +** click the call or select any other call.

Please note that as soon as the call disappears from Live Monitoring you will not be able to change the recording status for it using the Live Monitoring. There is another similar feature called On Demand Prerecording that provides changing the record status of the calls directly from the phone. In this feature you have a configurable timeout until you can still decide to change the record status of your calls. For more information refer to [On Demand Prerecording](#)

Emailing Live Call Recordings

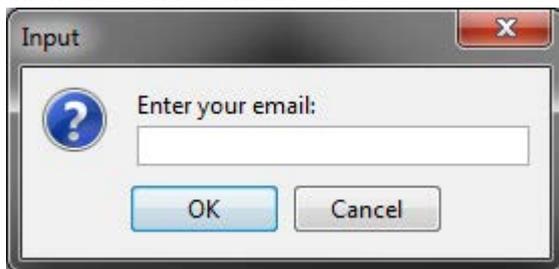
It is possible to mark a call which is in progress to be sent as an attachment to an email after it has been completed.

Emailing of live call recordings does NOT work when call encryption is enabled.

While a call is in progress the  send to email icon is visible in the record status.



1. Click the  send to email icon.



2. Type your email address in the **Enter your email** section.
3. Click **OK**. The  send to email icon changes to  to confirm the request.

Please note, that the combination of the sending recorded calls via email functionality together with the use of Speech Analytics is not recommended.

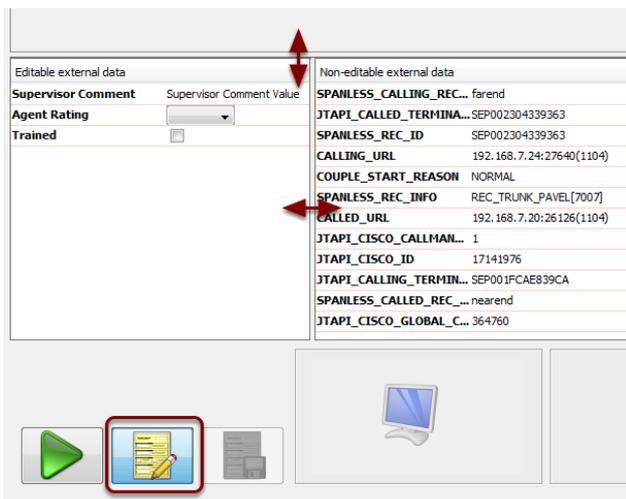
Since the Speech Analytics engine requires audio files in wave format, the data size which should be sent will most probably exceed the allowed attachment size set on your SMTP servers (MTAs). Please consult this with your mail server administrator, how large attachments are allowed in an email and ask them to change the limit, if necessary. Mail server administrator may set allowance for a bigger attachments from you ZQM servers.

When the call is completed Live Monitoring sends the call recording as an attachment to the email address entered.

From:	5655
To:	5535
Date:	24.07.2013
Time:	08:02
ID couple:	77
ID call:	77
ID database:	77
Capture file 1:	UNKNOWN
Capture file 2:	UNKNOWN

If the call audio is not available then Call Recording sends an email including details to forward to the administrator.

Viewing External Data in Live Monitoring



To view the external data related to the call:

1. Select a call from the list.

- Click  to display the external data. This displays both editable and non-editable external data information panes.

If necessary drag the dividers between the external data types and the call to view more data.

Adding Editable External Data to Live Calls

Additional data added to a call 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 Monitoring by the system administrator. The administrator must enable External Data Customization in order for these fields to be editable.

06:46	5655	5534
00:46	5550	5567
00:45	5552	5563
00:45	5554	5568
00:43	5556	5567

Editable external data

Supervisor Comment: Must improve greeting

Agent Rating: Average

Trained:

Non-editable external data

SPANLESS_CALLING_REC.

JTAPI_CALLED_TERMINA

SPANLESS_REC_ID

CALLING_URL



- Select a call from the list by clicking the row with the call. The row turns orange.
- Click  to display the external data.
- Add Supervisor comments, select from the available drop-down lists, or select the appropriate checkboxes.
- To save the changes, click  the save notes button.

When the call is complete this data is available in both Call Recording and Quality Management and can be used for filtering and searching for calls.

Once a call is selected it stays selected even if the call terminates. This allows the supervisor time to view the external data or to add a supervisor comment. However, the call is not available in the recorded calls list until it is deselected.

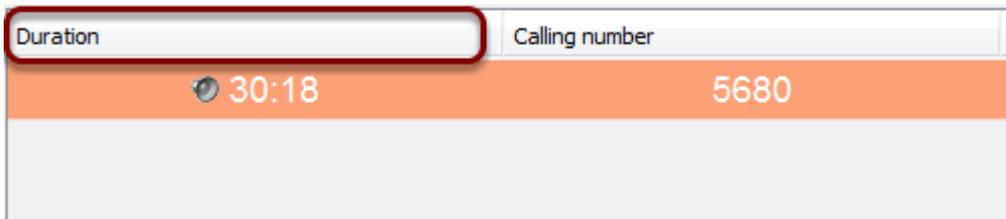
To deselect the call press **Ctrl +** click the call row, select any other call, or click below the list in the space immediately above the   and  save notes buttons.

Sorting Live Calls

Change the display of Live Monitoring by right-clicking a column heading. Enter a filter, such as a phone number or an agent name, and display only the matching calls in the list.

To clear column display settings and return to viewing all available calls right-click a column heading and then press Enter on the keyboard.

Setting duration thresholds:



The **Duration** column displays calls by how long they have remained connected. To screen out longer or shorter calls the user can change the **Duration** threshold. Right-click on the **Duration** column heading.

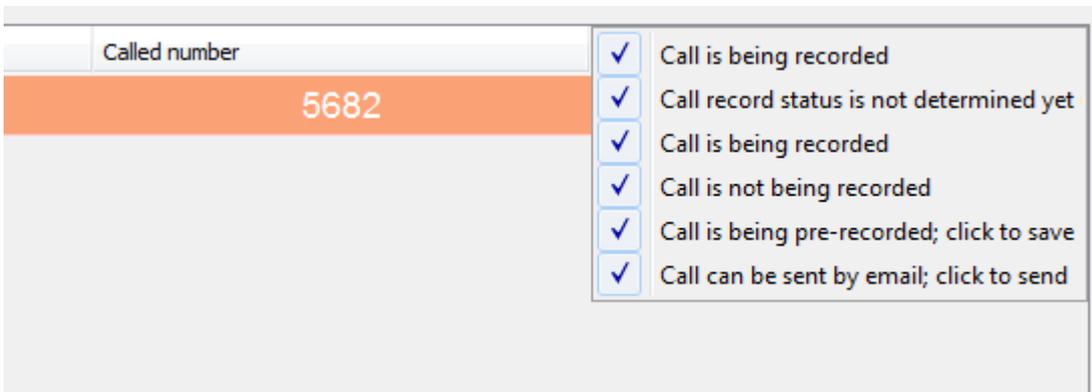


Select Less than < or Greater than > and enter the number of minutes. Click ... to apply the **Duration** threshold.

Only calls under or over the threshold display in the Live Monitoring call list.

Displaying calls by **Record status**.

By default Live Monitoring displays all calls in the Call Recording system. To show all calls set the value back to 0.



To change the display to only show calls with a specific recording status right click on **Record status** a drop-down list appears with the following Options:

- **Call is being recorded**
- **Call record status is not determined yet**
- **Call is not being recorded**
- **Call is being pre-recorded: click to save**
- **Call can be sent by email: click to send**

Finesse User Guide- Recording Status Indication and Control

The following page describes the use of Finesse gadgets which are integrated with ZOOM Call Recording. Functionality provided by this gadget includes recording indication and recording control options directly on the Finesse dashboard. The following information is displayed or controlled from the Finesse dashboard:

How to use ZOOM Finesse Gadgets



- **Recording:** It is possible to control call recording. This includes the option to pause or resume recording on demand
- **Recording indication:** On the Finesse gadget it is possible to view the status of call recording. Information displayed indicates that the call is in progress, is recorded or has been paused. This information is available for both call and screen recordings.
- **Tagging of active calls.** Tags added by agent from his Finesse agent desktop are stored within ZOOM QM suite as additional attached data related to the specific call or its segment.
- **Transfer to Survey button:** This feature allows agents or users to transfer a customer directly to a post call IVR Survey.

This page is intended for end users, including contact center managers and agents.

- [How to use ZOOM Finesse Gadgets](#)

[General overview](#)

[Supported browsers](#)

[Logging into the Finesse agent desktop](#)

[Working with the recording status indication tool](#)

[Working with the recording control tool](#)

- [Control Buttons](#)

[Working with Tagging Tool](#)

[Working with the transfer to survey tool](#)

General overview

The Recording Status Indication and Control tool (RSIC) is one gadget developed by ZOOM for users of the Cisco Finesse agent desktop.

The RSIC gadget combines four functional block, each of which can be enabled by an administrator of the Finesse desktop. These can be configured as globally or for specific teams. This is dependent on how they are configured within the contact center.

- **Recording Status Tool:** Determines the actual recording status of the agent's phone number and visualization of this information directly in the Finesse agent desktop environment.
- **Recording Control Tool:** Is a controlling mechanism which enables the user to manually pause and resume recording of a phone number assigned to him.
- **Tagging Tool.** enabling agent to tag call with one of the tags, defined in the ZQM configuration.
- **Transfer to Survey:** Permits the manual transfer of an active call to a voice survey. Voice of the Customer is a ZOOM product which is available under license. (more info can be found on the page [Voice of the Customer](#))

Supported browsers

ZOOM currently supports the use of the Finesse gadget in the following web browsers:

- Internet Explorer 11
- Firefox (Version 42 and above)
- Chrome (latest version)

To ensure that gadgets function as intended it is necessary to ensure that the browser is correctly setup to work with Finesse agent desktop. Please refer to the [Cisco documentation](#) which describes the relevant settings required for your version of the Finesse server.

ZOOM gadgets doesn't require any special requirements in addition to those specified for the Finesse desktop itself.

In certain contact center deployment scenarios combined with the agent's specific activity, the RSIC gadget can cause the UCCE agent account to be locked.

This error occurs when users defined within the UCCE deployment are authenticated with their Windows domain account, while logging into their Finesse desktop environment (UCCE is integrated with Microsoft AD), and the user changes the domain password without being previously logged out of his / her Finesse desktop.

Occurrence of this error can be eliminated by following steps, processed in correct order:

1. agent logs himself / herself out from his / her Finesse desktop environment
2. agent changes password of his / her Windows domain account
3. agent log himself / herself into Finesse desktop environment using his Windows username and newly changed password.

Logging into the Finesse agent desktop

To log into your Finesse agent desktop use the login page provided by your administrator. This is usually provided in the following format **https://<serverName>/desktop/container/**. The field **<serverName>** is the IP address or hostname of the Finesse server which can be provided by the Finesse server administrator.



Working with the recording status indication tool

If your administrator configured the system to display the RSIC gadget correctly the Recording Status Indication tool (RSI) will be displayed above the Cisco Call Control gadget as part of the ZOOM Recording gadget.

The RSI gadget can display one of the following status messages:

1. **ACTIVE** – the status is displayed in green and indicates that there is an active call to or from the agent's phone extension and based on the information provided by ZOOM Quality Management server the call is being recorded.



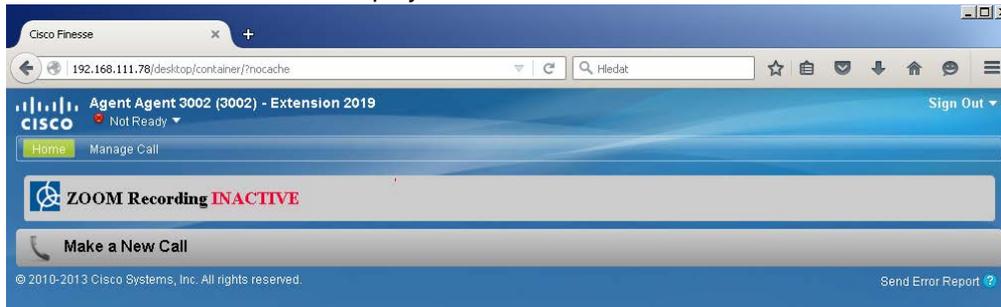
Status ACTIVE will be displayed as a recording status when Total recording method is configured on ZOOM QM suite for agent's phone extension, or after agent presses button Save, when Pre-recording method is configured on ZOOM QM suite for agent's phone extension.

2. **PRE-RECORDED** – status displayed in green font indicates that there is an active call related to agent's phone extension and based on the information provided by ZOOM Quality Management server, this call is being recorded.



Status PRE-RECORDED will be displayed as a recording status when Pre-recording method is configured on ZOOM QM suite for agent's phone extension, before agent presses button Save stating that call recording should be stored. Without Save button being pressed by agent, call will be deleted by the system automatically after passing pre-configured time period.

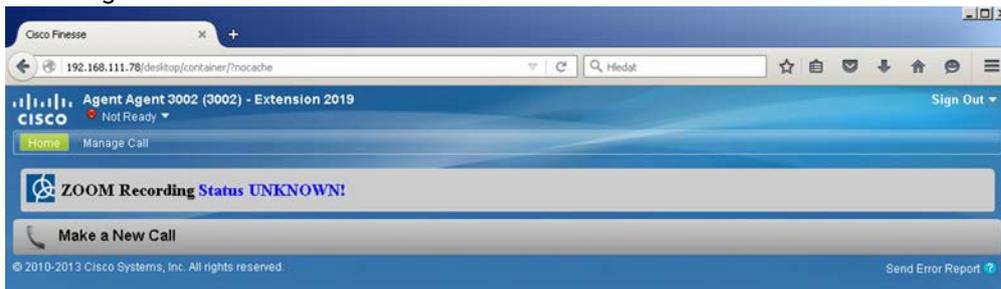
3. INACTIVE – the status is displayed in red indicates that:



- At the moment there is no active call to or from the agent's phone extension. The system is not recording.
- There is an active call to an agent's extension number but recording has been paused; either manually or by some 3rd party automated tool with pause and resume functionality.

4. PAUSED – status displayed in orange font indicates that there is an active call related to agent's phone extension but agent, or 3rd party application with Pause & Resume capabilities, requested ZOOM QM recorder to pause recording of active call.

5. Status UNKNOWN! – This status message is displayed in blue and indicates that the gadget on the Finesse agent desktop is not receiving replies from the Call Recording core and therefore the actual recording status is unknown.

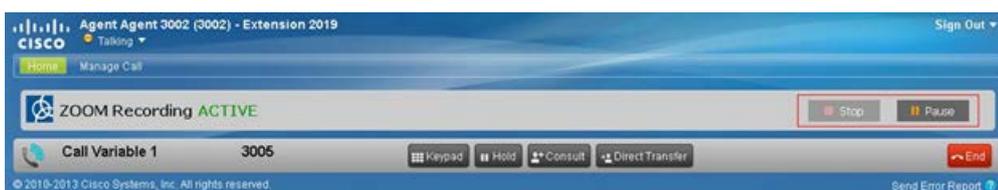


- If you see this status message please contact the administrator of your ZOOM Quality Management solution.

Working with the recording control tool

If you have permission to use the ZOOM Recording control function, and your administrator has configured the system to display the RSIC gadget correctly, the Recording Control Tool (RCT) will be displayed above the Cisco Call Control gadget as part of the ZOOM Recording gadget.

If RCT tool is enabled, it will display combination of Recording Status Indicator RSI, described in a previous section and Recording Control Tool RCT



RCT functionality block currently combines functions for Pause & Resume and Pre-recording. In one of the upcoming release of RSIC gadget, RCT block will also integrate functions of Selective recording, to offer complete control over ZOOM call recording.

When gadget is loaded, it will initially display “*Status Unknown!*” in RSI section, while having both buttons in RCT section disabled. After receiving status information from ZOOM Quality Management server, RSI section of gadget will change recording status to either ACTIVE when total recording mode is configured, PRE-RECORDED when pre-recording mode is configured (written in green font), or Inactive when agent extension is currently not recorded (written in red font). In rare cases, when gadget is unable to connect to core component of ZOOM QM suite, “Status UNKNOWN” (written in blue font) can be displayed.

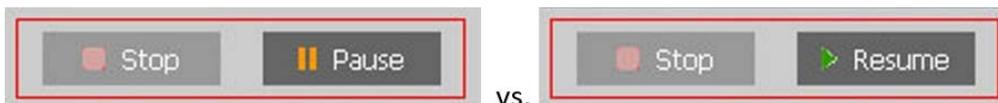
Control Buttons

RCT controls offer one of the following combinations of buttons, depending on state of recording and configuration of recording mode for agent phone extension:

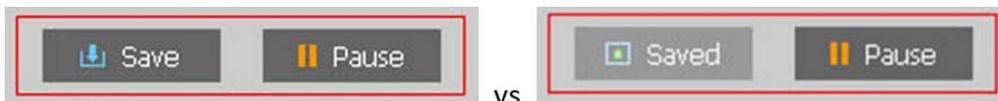
- Pre-recording controls (left button of RCT block) + Pause & Resume controls (right button of RCT block), when Pre-recording is configured in ZQM configuration for agent phone extension.
- Selective recording controls (left button of RCT block...currently disabled) + Pause & Resume controls (right button of RCT block), when agent’s phone extension is recorded in Total recording mode.

Every button of RCT block acts as switch of two complementary buttons, displaying only that button, which can be used at the given moment based on the actual call state, configuration of recording status, as well as recording status.

Pause button is exchanged with **Resume** button for Pause & Resume functionality:



Save button is exchanged with **Saved** button for Pre-recording functionality



Current functionality of Pre-recording doesn’t allow user to issue „Do-not-save“ request after Save request was sent.

Start button is exchanged with Stop button for Selective recording functionality (functionality will be delivered as part of one of the upcoming releases of RSIC gadget).

When call state, or state of call recording doesn’t allow specific functionality, button related to this functionality is disabled.

Working with Tagging Tool

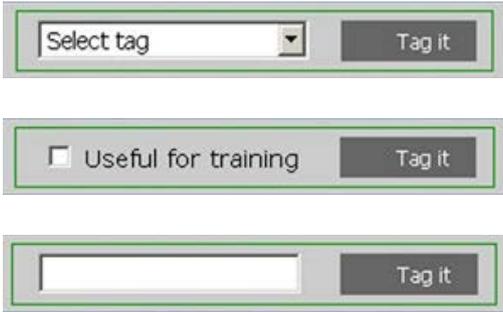
On order take the functionality previously available only to contact center supervisor, through usage of ZQM Live Monitoring tool and offer it also to each of the agents, ZOOM extended its Recording Status Indication and Control gadget (aka RSIC) with additional functionality block, allowing agents to tag active call with tags, predefined by administrator in ZOOM QM configuration, or even with the free text.

Unlike Live Monitor, which allows contact center supervisor to tag calls with multiple call tags at the same time the TAG functionality of RSIC gadget offers agent only one tagging option. If a supervisor defines more than one agent tag on the [configuration page](#), only the first tag will be displayed as part of RSIC layout.



Reconfiguration of agent's tags in ZOOM QM configuration requires agent to log out and log in again in his Finesse desktop, before configured changes would become available to the agent.

Depending on ZOOM QM configuration done by system administrator, tagging functionality can offer agent tags in form of dropdown menu, checkbox, or text input:



More information about configuration of call tags can be found here on [Call Recording Web Service API - Adding tags to calls in progress](#) page.

Functionality delivered by ZQM suite allows user to tag individual call segments. As such agent can mark call with multiple tags, following content of particular part of the call with the customer. ZQM will however store only single call tag with each of the call segments. This means that if agent decides to send multiple call tags for particular call segment, ZQM will only store the latest tag received from the agent.

To let agent know whether, or which call tag is kept by ZQM for active call segment, tag will display value of the tag, which was sent last for the call segment and text of the tag button will clearly state, that this value was accepted by ZQM.



After call is segmented (for example by HOLD), call tag object is set to his default value, allowing agent to tag this new call segment again.

Working with the transfer to survey tool

If you have permission to use the manual Transfer to Survey functionality and your administrator has configured the system to display the RSIC gadget correctly then the manual Transfer to Survey button will be displayed above the Cisco Call Control gadget as part of the ZOOM Recording gadget.

The Transfer to Survey button becomes active when a call to an agent's phone extension is connected. The button is deactivated again when the call is terminated by the agent or after the call is transferred to a pre-configured pilot number (Route Point) representing a survey.



Transfer to Survey detail:



ZOOM CRM Toolbar User Guide for Bucher and Suter Connects for Salesforce

Introduction

This is a brief guide to using the ZOOM CRM Toolbar (Pause and Resume functionality) within the Bucher+Suter (b+s) Connects for Salesforce. The ZOOM integration allows users to pause and resume recording from directly within the Bucher and Suter Gadget.

ZOOM provides a toolbar which allows agents to pause and resume recording from directly within third party applications. The ZOOM CRM toolbar integrates with the Bucher and Suter® plugin (that has its own licensing model) for Salesforce® (that has also its own licensing model). The ZOOM integration presented here is provided as an add-on to an existing, properly licensed, installation of the Bucher+Suter (b+s) Connects for Salesforce. The ZOOM Pause and Resume functionality enables agents to Pause and Resume recording on demand from within Salesforce® via the Bucher and Suter® gadget and add a selected tag to the conversation.

The ZOOM CRM Toolbar integrates seamlessly with the Salesforce integration provided by B&S. The toolbar provides integrated Agent and Call information and displays the Recording Status (live) directly on the agents screen. The call recording status is displayed within the toolbar which allows the agent to Pause and Resume the ZOOM recording from directly within Salesforce as well. In addition to this Pause and Resume capability the Toolbar supports Integrated and Configurable Call Tagging. Agents can select or add a tag to a recorded call without changing screens. The Tag information is saved alongside the Call Recording in the ZOOM Server and can be accessed later along with other searchable metadata from within ZOOM applications.

This page is intended for end users, including contact center managers and agents.

CONTENTS

- [Introduction](#)
- [Supported Features](#)
- [Using the CRM Toolbar within Salesforce](#)
- [Confirm recorded calls contain tagging and other data.](#)

Supported Features

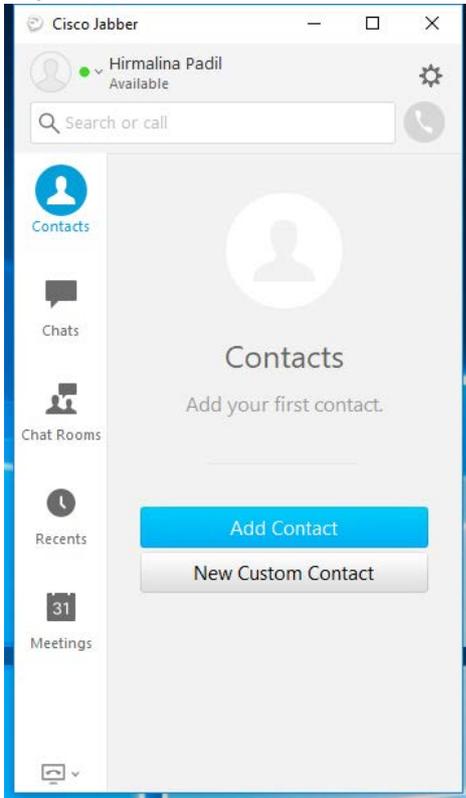
- **Pause and Resume of Call Recording:** called by an API
- **Tagging of calls:** from within the Toolbar
- **External metadata saved to ZOOM Call Recording may include:**

- Tag data added by an agent
- Pause and Resume timestamps

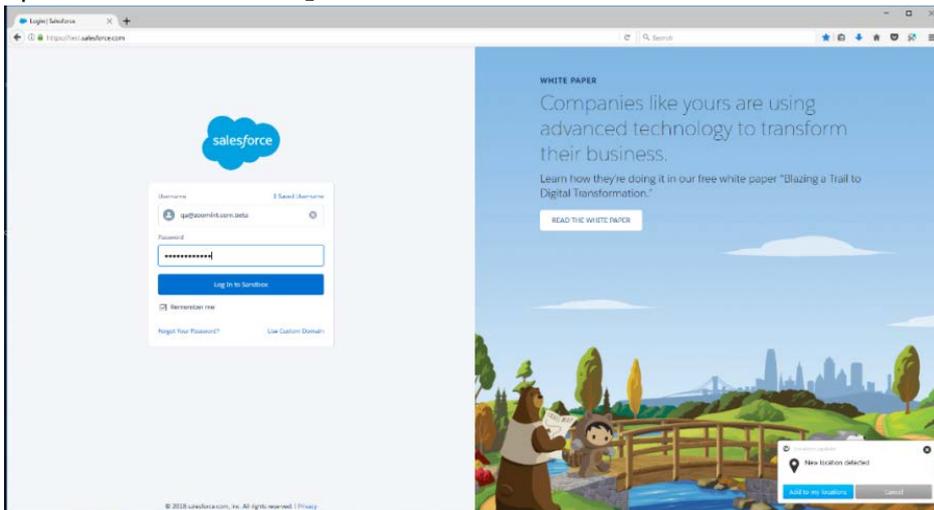
Using the CRM Toolbar within Salesforce

To test the functionality provided by the ZOOM toolbar follow the steps below.

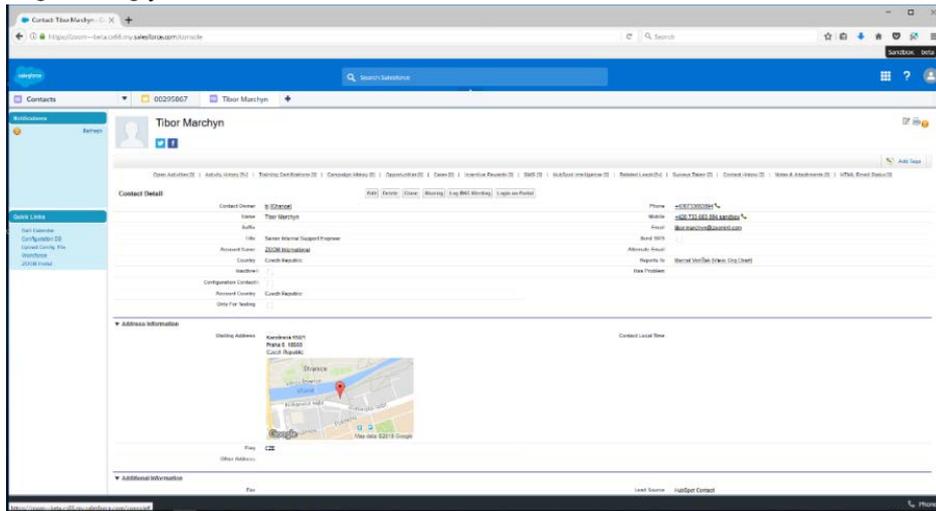
1. Login to Cisco Jabber.



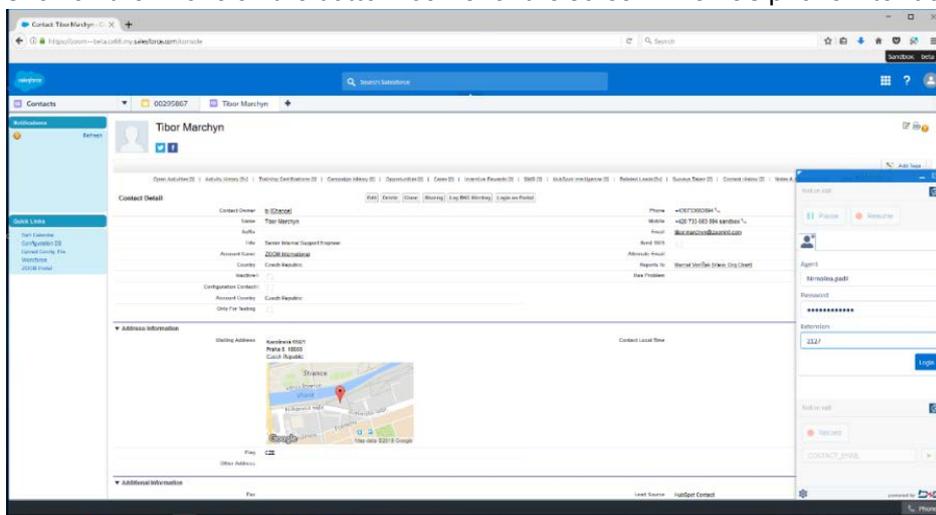
2. Open Salesforce at: <http://<url>.Salesforce.com/>



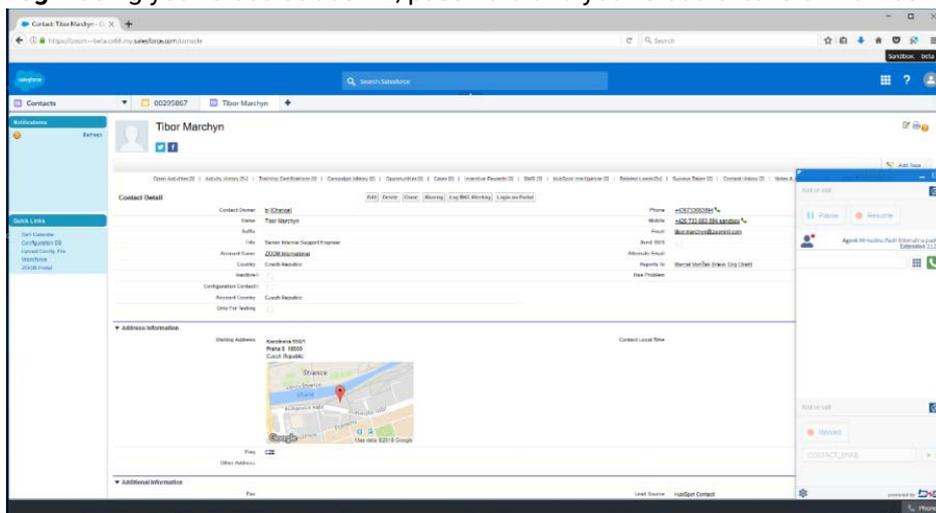
3. Login using your credentials.



4. Click on the Phone on the bottom corner of the screen. The B&S phone interface will display.



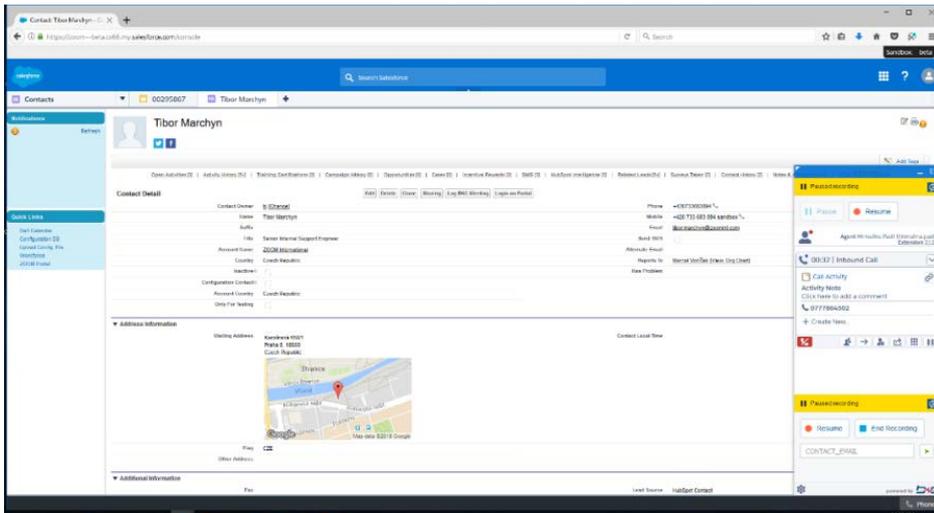
5. Login using your Cisco Jabber ID, password and your Cisco extension number



6. You are successfully logged in once you see your name appear as shown in the picture above.

You should be able to see:

- a. Recording status element
- b. Pause / Resume element
- c. Start / Stop element
- d. Tag call element

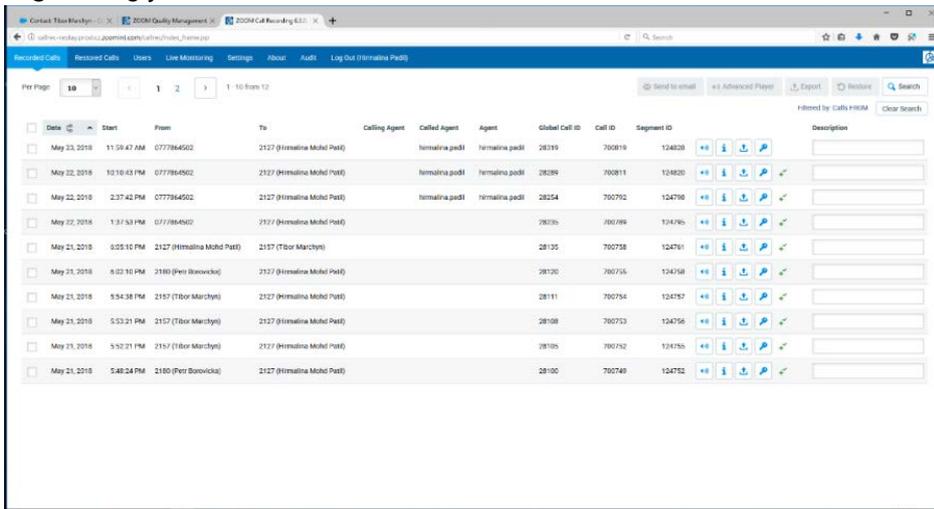


7. Make a call and test all of the elements - **Click** pause and resume, start/stop and add a tag in order to test functionality.

Confirm recorded calls contain tagging and other data.

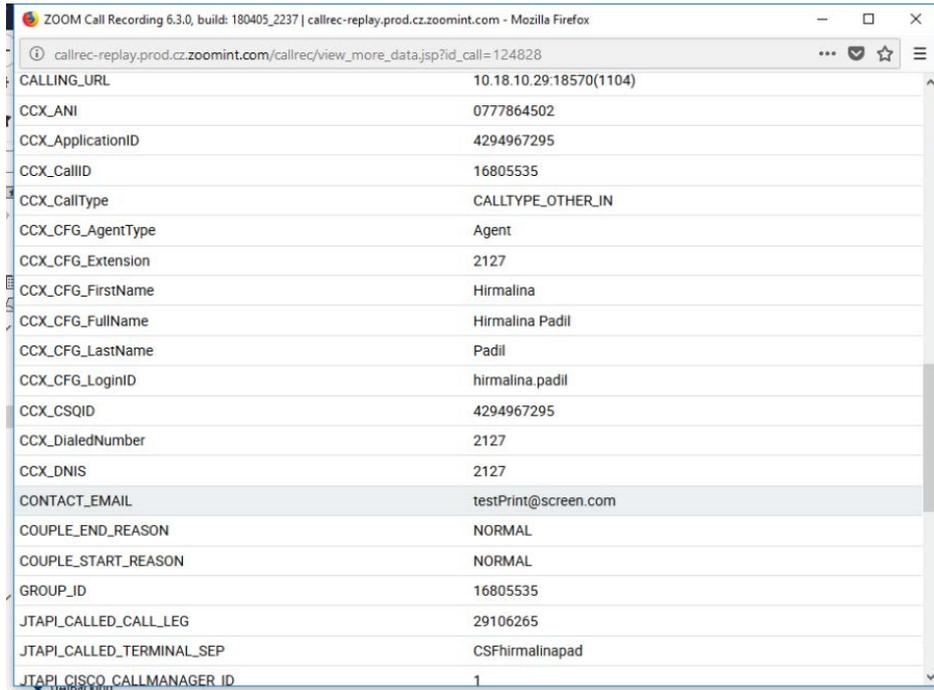
Open ZOOM Call Recording in your web browser.

1. **Login** using your credentials



Date	Start	From	To	Calling Agent	Called Agent	Agent	Global Call ID	Call ID	Segment ID	Description
May 23, 2018	11:59:47 AM	0777864502	2127 (Himalina Mohl Past)	himalina.padi	himalina.padi	28199	700819	124828		
May 22, 2018	10:18:43 PM	0777864502	2127 (Himalina Mohl Past)	himalina.padi	himalina.padi	28286	700811	124820		
May 22, 2018	2:37:42 PM	0777864502	2127 (Himalina Mohl Past)	himalina.padi	himalina.padi	28254	700792	124798		
May 22, 2018	1:31:50 PM	0777864502	2127 (Himalina Mohl Past)	himalina.padi	himalina.padi	28256	700789	124796		
May 21, 2018	6:05:10 PM	2127 (Himalina Mohl Past)	2127 (Tibor Marchyn)			28135	700758	124761		
May 21, 2018	6:02:30 PM	2180 (Per Borovicka)	2127 (Himalina Mohl Past)			28120	700756	124758		
May 21, 2018	5:54:38 PM	2157 (Tibor Marchyn)	2127 (Himalina Mohl Past)			28111	700754	124757		
May 21, 2018	5:53:21 PM	2157 (Tibor Marchyn)	2127 (Himalina Mohl Past)			28108	700753	124756		
May 21, 2018	5:52:21 PM	2157 (Tibor Marchyn)	2127 (Himalina Mohl Past)			28106	700752	124755		
May 21, 2018	5:48:24 PM	2180 (Per Borovicka)	2127 (Himalina Mohl Past)			28100	700749	124752		

2. Click on the Call Details icon to view additional information about the call.



Field	Value
CALLING_URL	10.18.10.29:18570(1104)
CCX_ANI	0777864502
CCX_ApplicationID	4294967295
CCX_CallID	16805535
CCX_CallType	CALLTYPE_OTHER_IN
CCX_CFG_AgentType	Agent
CCX_CFG_Extension	2127
CCX_CFG_FirstName	Hirmalina
CCX_CFG_FullName	Hirmalina Padil
CCX_CFG_LastName	Padil
CCX_CFG_LoginID	hirmalina.padil
CCX_CSQID	4294967295
CCX_DialedNumber	2127
CCX_DNIS	2127
CONTACT_EMAIL	testPrint@screen.com
COUPLE_END_REASON	NORMAL
COUPLE_START_REASON	NORMAL
GROUP_ID	16805535
JTAPI_CALLED_CALL_LEG	29106265
JTAPI_CALLED_TERMINAL_SEP	CSFHirmalinapad
JTAPI_CISCO_CALLMANAGER_ID	1

3. You should see additional information about the call. Including the tag added to the call from the Toolbar.