

Horizon

Call Recording Portal – User Guide



Version control

Version	Date	Description
1.0	08/2016	Document created
1.1	04/07/2019	Ready for early release
1.2	25/09/2019	Ready for full release
1.3	30/06/2020	Added delete and restore feature details
1.4	07/08/2020	Added Call ID to Call Search.P.16 Screenshot updated, P.16 Updated Audit title
1.5	14/09/2020	company user added
1.6	09/11/2020	Team User role added

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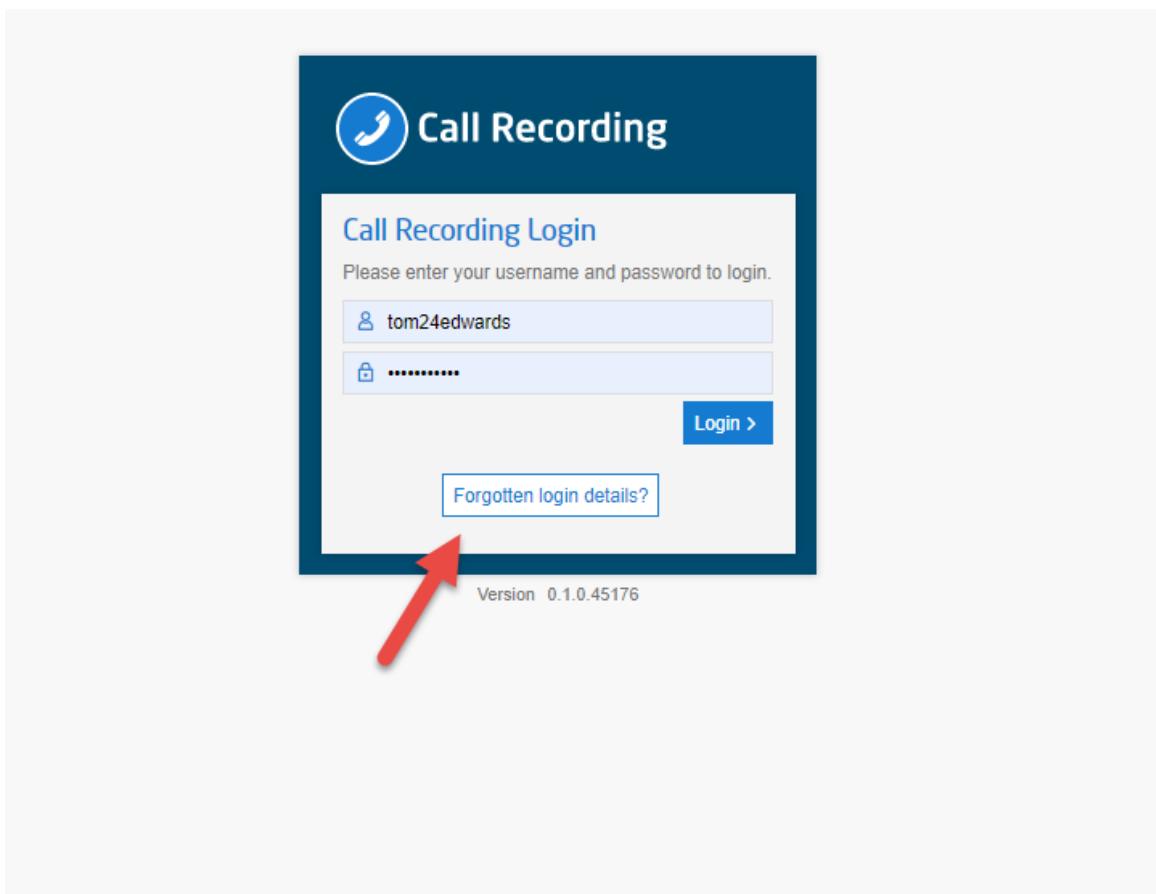
Introduction

The call recording portal offers different levels of access to cater for the needs of the business. From this portal you can view, stream and download calls along with many more features.

Sign in

Once you have been set up as a user of the call recording portal you will receive two emails, the first will be with your username, and the second will have a temporary password that you will need to change on your first login.

This password is only valid for 60mins. Should the password expire then you can easily reset this yourself. Click on the link to access the call recording portal and then use the “Forgotten login details” button to request a link to reset your password. If you are unable to complete this action, then please raise the request to your Global user (for more information on user policy's click [here](#)) and they will be able to manually resend the password like from the portal.

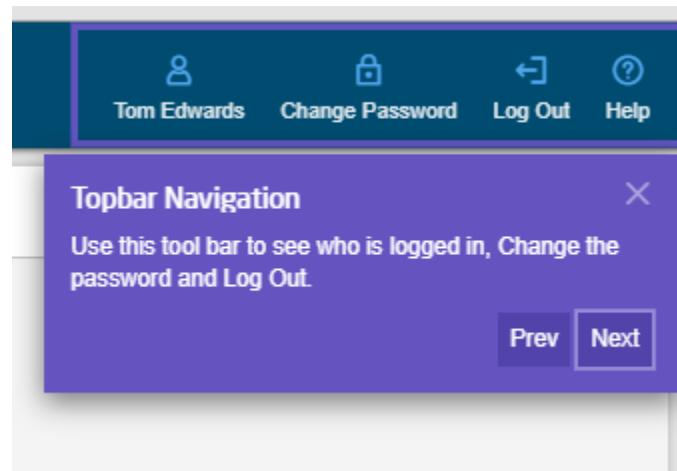
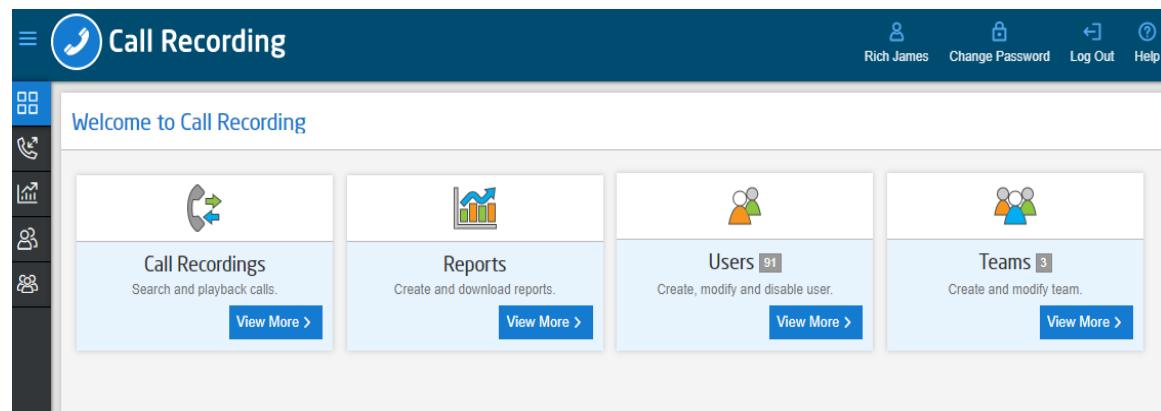


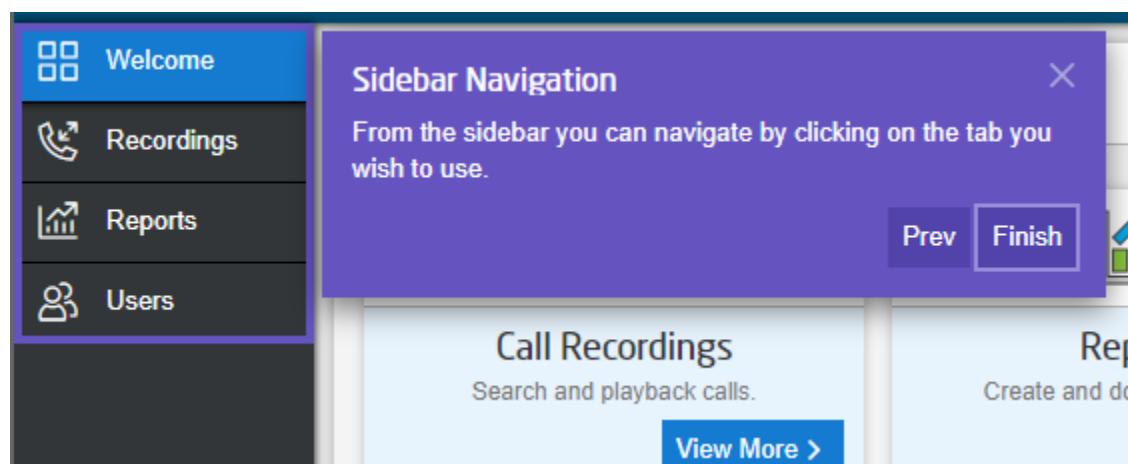
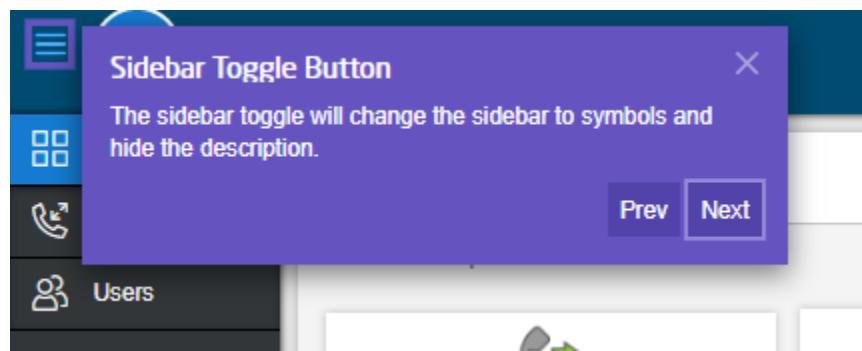
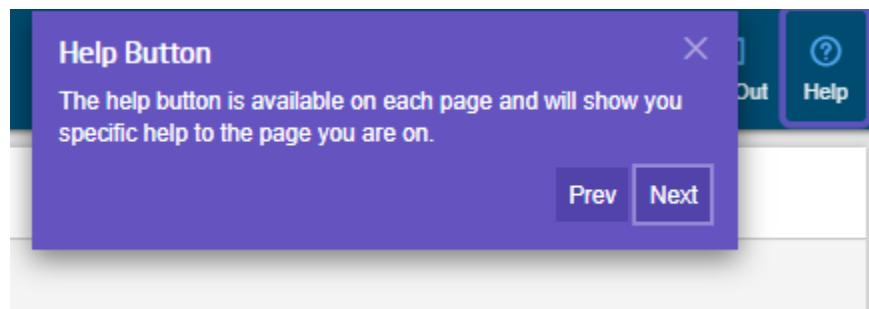
Welcome Tour

On entering the call recording portal for the first time you will be met with a virtual tour of the tools and features that can be accessed from the landing page.

Note that this will only appear on your first login.

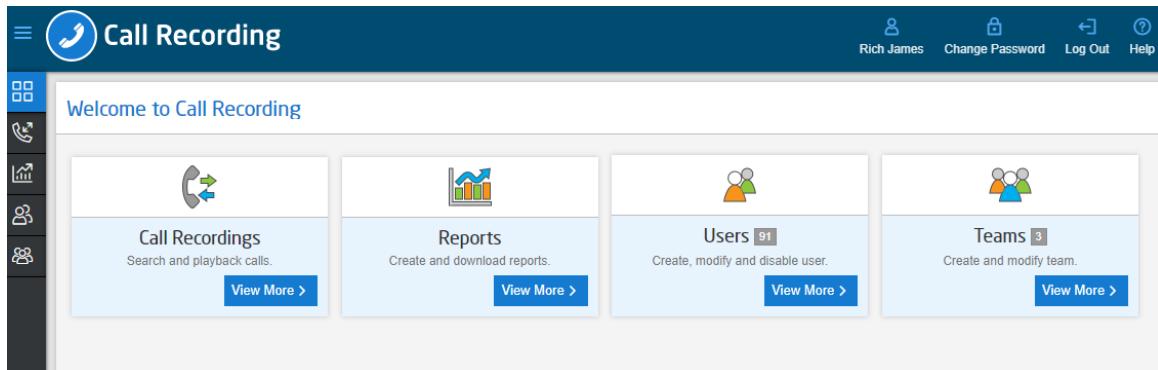
Screenshots of welcome tour





Landing Page

From the landing page you are able to see three areas depending on your policy. For policy information please click [here](#).



Call Recordings – By clicking view more this will take you a list of all the call recordings. From here you can view stream or download the recording.

Reports -By clicking view more you will be able to create and download Audit and Call Recording Detail reports.

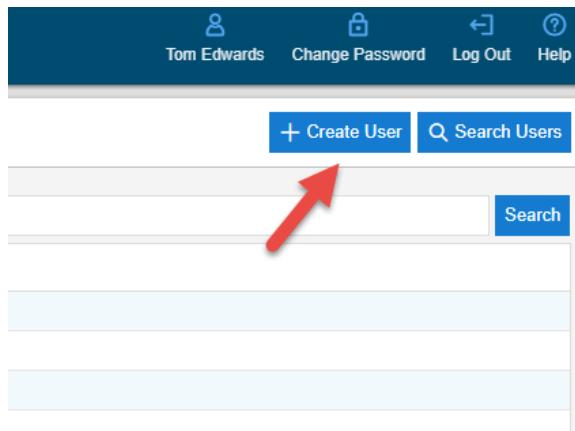
Users – By clicking view more you will be able to modify, create or disable users. Again, this is policy dependant so not all users will have access to this.

Teams- By clicking view more you will be able to create, modify or disable users within a team. This is policy dependant so not all users have access to this.

Users

From the users tab you can manage who can have access to the platform and also what they can see and do.

To create a new user head over to the users tab and click the create user button.



From here you will be presented with the below form. Please fill in all the details and give the user the correct policy. For more information on the policy's click [here](#).

Telephony username is very important and can be found within the unlimited horizon portal. If you don't have this, please contact your reseller.

After completing the form and clicking save, two emails will be generated to the user with login credentials. The temporary password will expire after 60mins, if it expires they can use the "Forgotten Password" button to get a new password.

Click [here](#) for information about the policy's.

Call Recordings

As soon as users have been enabled for call recording by the telephony system their calls will start to show within the call recordings section. After selecting the call recordings tab you will be presented with the below table. From here there are 4 main actions you can complete; they are as follows

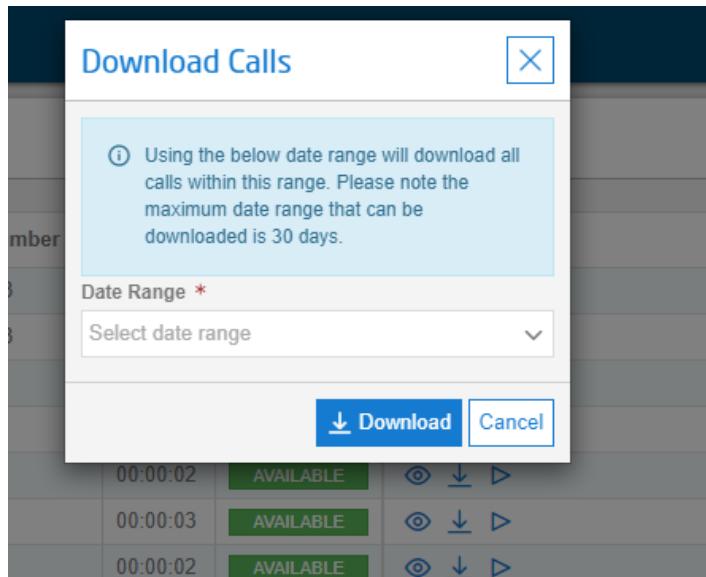
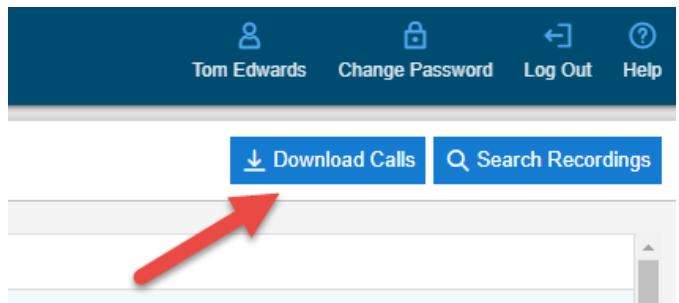
-  View – This will allow you to get a detailed view of the call and playback in a modal window.
-  Delete / Restore – This will allow you select and delete or restore (for a limited period) an individual recording.
-  Download – This will allow you to download the single call in the web browser.
-  Playback – This will allow you to playback the call and see the visual call flow.

Call Recordings						
Direction	Connect Time	Telephony Username	User Number	Other Party Number	Duration	Status
OUT	2020-06-17 13:08:59	SLC01_TestSite01	+441156710298	7077	00:00:03	AVAILABLE
IN	2020-06-17 11:59:06	Dave.VVX411	+441650570352	+447460864623	00:00:17	AVAILABLE
IN	2020-06-17 11:06:39	Dave.VVX411	+441650570352	+447460864623	00:00:24	AVAILABLE
OUT	2020-06-11 16:02:25	Dave.VVX411	+441446509965	8000	00:00:02	DELETED
OUT	2020-06-11 15:58:41	Dave.VVX411	+441446509965	8000	00:00:02	TO BE DELETED
OUT	2020-06-10 15:28:42	Dave.VVX411	+441446509965	8000	00:00:04	DELETED
IN	2020-06-10 15:27:52	Dave.VVX411	+441446509965	+447460864623	00:00:06	AVAILABLE
OUT	2020-06-10 15:26:53	Dave.VVX411	+441446509965	+447460864623	00:00:06	AVAILABLE
OUT	2020-06-10 15:26:35	Dave.VVX411	+441446509965	8000	00:00:03	AVAILABLE
OUT	2020-06-10 09:10:06	Dave.VVX411	+441446509965	123	00:00:06	AVAILABLE
OUT	2020-06-10 09:09:45	Dave.VVX411	+441446509965	8000	00:00:05	AVAILABLE
OUT	2020-06-04 15:48:40	Dave_Cisco504	7327	8000	00:00:35	AVAILABLE
OUT	2020-06-04 15:42:34	Dave_Cisco504	7327	8000	00:00:19	AVAILABLE
OUT	2020-06-04 15:40:33	Dave_Cisco504	7327	8000	00:00:09	AVAILABLE
OUT	2020-05-29 09:11:44	Dave_Cisco504	7327	+447460864623	00:00:05	AVAILABLE

Bulk Download

Do download calls in bulk then you will need to use the Download Calls button located next to the search recordings icon. On clicking this you can set your date range to download. Please note that this is limited to a maximum of 30 days.

Once you have clicked download your calls will be processed, please note that this may take a few minutes. Once completed these will be presented in the browser in a zip file.



View Recording screenshot



Recording Audit History Tab

6403 OUT 7070

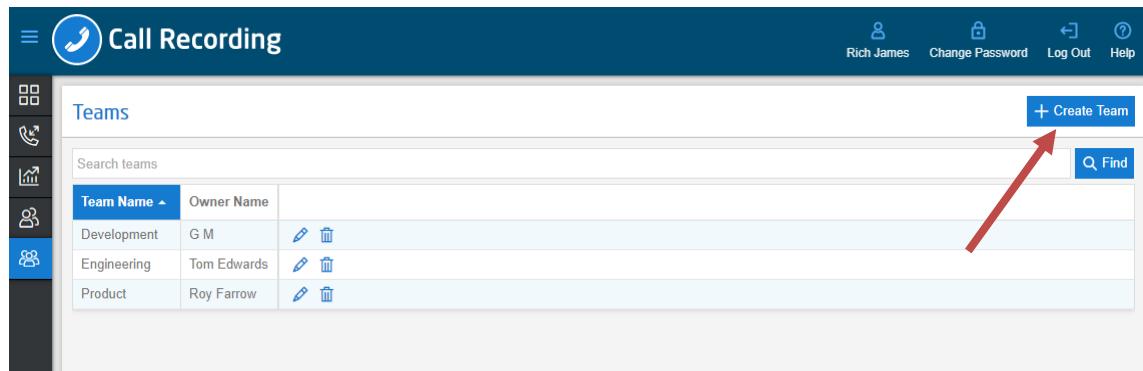


Call(s) Details				
Username	Action Time	IP Address	Action	Reason
royfarrow	2020-06-30 10:29:48	10.6.14.142	Call Deleted	Right to be forgotten
testadmin	2020-06-29 11:25:43	88.215.61.57	Call Bulk Downloaded	
royfarrow	2020-06-29 11:12:09	10.6.14.138	Call Streamed	
royfarrow	2020-06-29 11:12:06	10.6.14.138	Call Restored	Deleted in error
royfarrow	2020-06-29 11:11:45	10.6.14.138	Call Deleted	Card details taken
royfarrow	2020-06-29 11:10:45	10.6.14.138	Call Streamed	

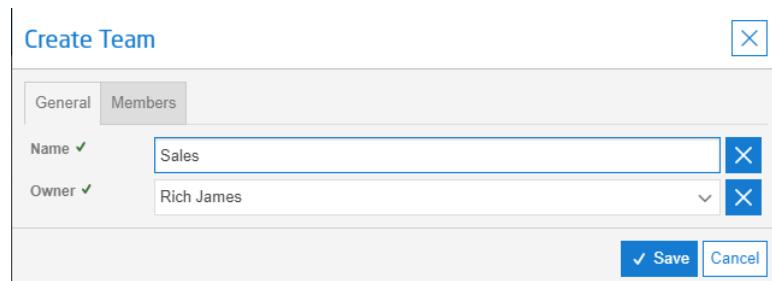
Teams

From the Teams tab you can manage Team users can have access to the platform and also see Team members recordings.

To create a new team head over to the Teams tab and click the create Team user button.



The screenshot shows the 'Teams' section of the 'Call Recording' portal. On the left is a vertical sidebar with icons for Home, Call Recording, and Teams. The main area has a table with columns for 'Team Name' and 'Owner Name'. The table contains three rows: 'Development' (Owner: G M), 'Engineering' (Owner: Tom Edwards), and 'Product' (Owner: Roy Farrow). In the top right corner of the table header, there is a blue button labeled '+ Create Team' with a red arrow pointing to it. The top navigation bar includes 'Rich James', 'Change Password', 'Log Out', and 'Help'.



The screenshot shows the 'Create Team' dialog box. The 'Members' tab is selected. It has fields for 'Name' (set to 'Sales') and 'Owner' (set to 'Rich James'). At the bottom are 'Save' and 'Cancel' buttons. The dialog box has a close button in the top right corner.

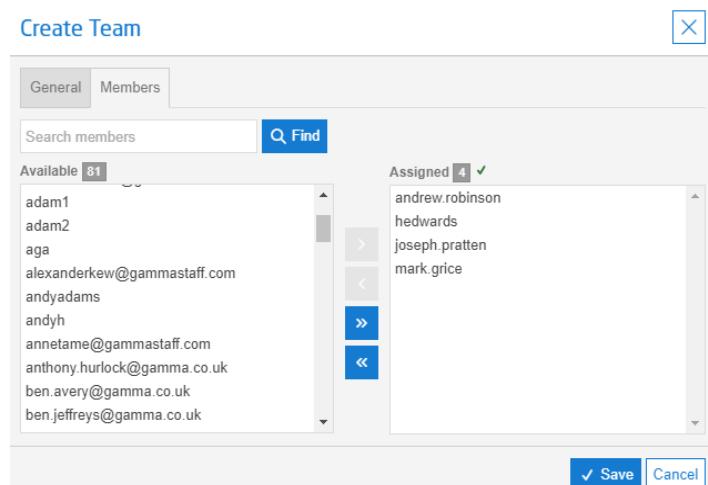
Teams can be given a unique name and select the Owner of the team.

*If the user is not appearing in the “owner” list it means that they are not set up as Team user

"Available" window presents the users available to be added within the company

Select the users and then click the arrow to move them to assigned. Users that are already assigned to one team cannot be assigned to another team at this time.

Clicking the double arrows will move everyone from the Available or Assigned



The screenshot shows the 'Create Team' dialog box with the 'Members' tab selected. It has two lists: 'Available' (containing 81 users) and 'Assigned' (containing 4 users). Between the lists are two sets of double-headed arrows: one for moving individual users and one for moving all users at once. At the bottom are 'Save' and 'Cancel' buttons. The dialog box has a close button in the top right corner.

panel into the opposite panel.

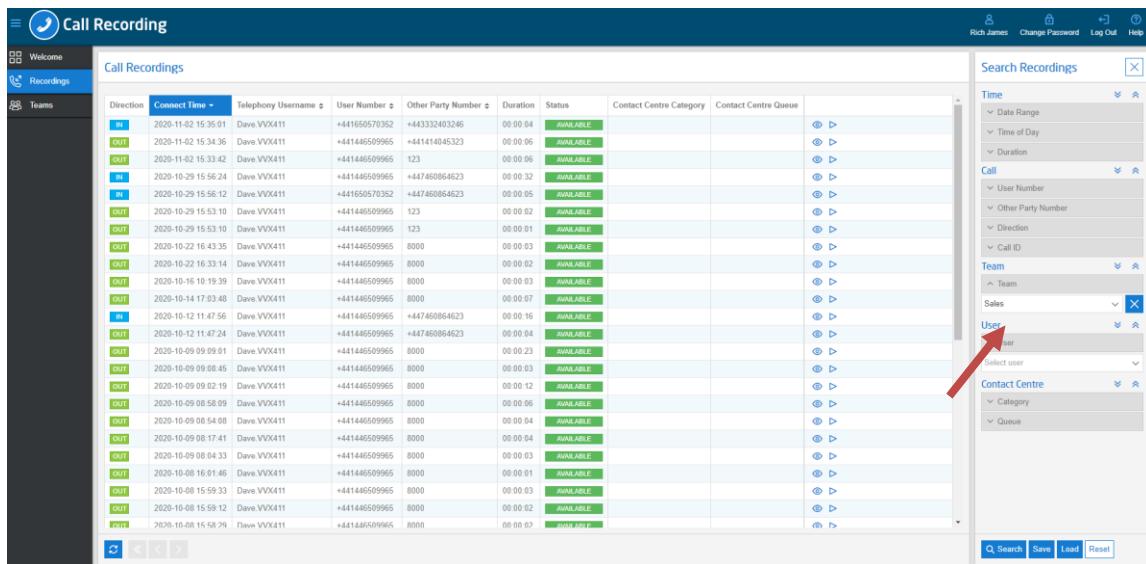
You can also press "Ctrl" and then click on multiple users before you click on the arrow to move across.

Once you are ready, click "Save" and your team is created! You can modify the Team at any time by click on the Edit button.

Viewing Call Recordings as a "Team User"

Please note when you are logged in as a Team User, you will only be able to see calls from users that are assigned to your Team by the Global User.

However, you can be an Owner of multiple teams, and if so, you can filter on which team you want to search for by using the new "Team" filter within Search Recordings.



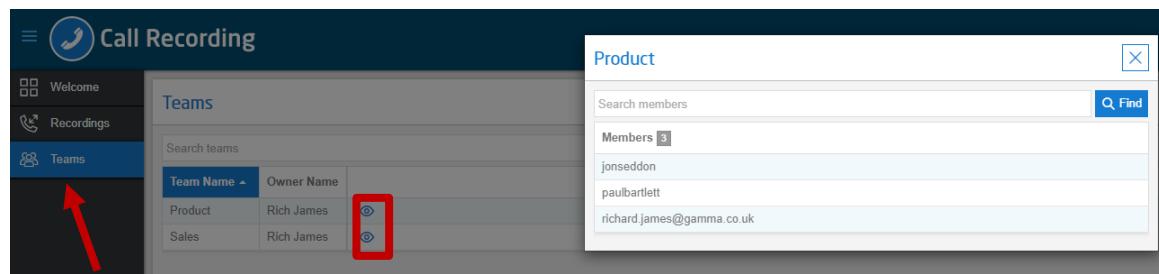
The screenshot shows the 'Call Recording' interface. On the left, there's a navigation menu with 'Welcome', 'Recordings' (selected), and 'Teams'. The main area is titled 'Call Recordings' and shows a table of call logs. The table columns include: Direction, Connect Time, Telephony Username, User Number, Other Party Number, Duration, Status, Contact Centre Category, and Contact Centre Queue. The 'Search Recordings' sidebar on the right allows filtering by various parameters. A red arrow points to the 'User' dropdown in the 'Team' section of the sidebar, which is currently set to 'Sales'.

When using the "Team" filter, you can then select the user from that team using the "User" drop down as well.

Check who is in my Team

As a Team User, you can see all the users that a Global User has assigned to you by selecting the "Teams" icon in the left hand menu and then clicking the eye icon next to the team. This will then load up a new window which will let you know all the users within your team.

If this is incorrect, contact your Global User who will be able to add and remove users as required.



Call Search

There is a call search located to the right hand side of the page. From here you can use the pre-programmed search criteria or custom your own search criteria.

For those complex searches that you may use frequently you can use the save function that will save the search locally for you. If you want to deploy the search then just click load and click the tick followed by search.

You can search on the below criteria

- Time
- Date
- Call Duration
- Number
- Call Direction
- Call ID
- User

Search Recordings

X

Time ▼ ▲

- ▼ Date Range
- ▼ Time of Day
- ▼ Duration

Call ▼ ▲

- ▼ User Number
- ▼ Other Party Number
- ▼ Direction
- ▼ Call ID

User

- ▼ User

Contact Centre ▼ ▲

- ▼ Category
- ▼ Queue

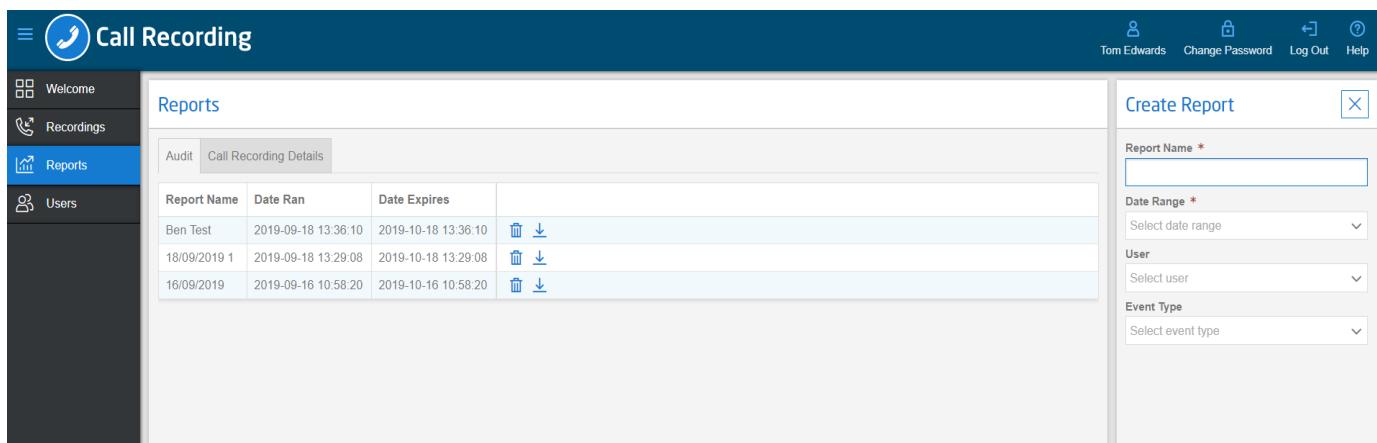
Q Search Save Load Reset

Reports

Reports can be run by clicking the report tab then selecting the report you need to run. If you are a Global user you will have permission to run both reports where as a Team user can only run the call recording details report.

Audit Report

Select reports then select the Audit tab. On the right you will need to enter a report name and also a date range. **Please note that the maximum date rage that a report can cover is 30 days.** You can then either select a user or leave this blank to run for all users, then you can select an event type or again leave blank to run for all events. Once done click the run button and the report will be stored and also downloaded in the browser for you.



The screenshot shows the 'Reports' section of the Call Recording Portal. The 'Audit' tab is selected. On the right, a 'Create Report' form is open with fields for Report Name, Date Range, User, and Event Type. The 'Report Name' field is empty. The 'Date Range' field shows 'Select date range'. The 'User' field shows 'Select user'. The 'Event Type' field shows 'Select event type'.

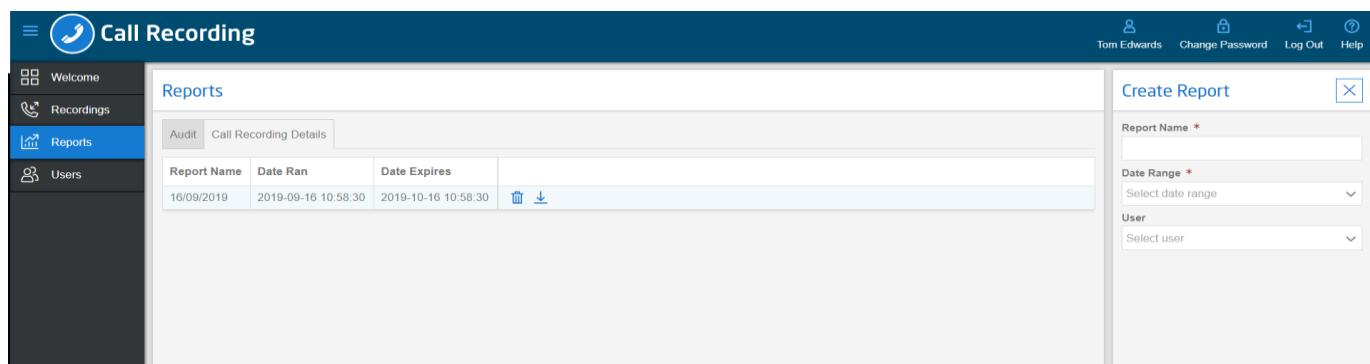
The fields of an audit report are defined below:

Column Name	Description
Action	The type of the audit event: <ul style="list-style-type: none"> • Login • Add User • Delete User • Recording Accessed (streamed or downloaded) • Bulk Download Accessed • Change Password • Reset Password • Add Policy • Delete Policy • Update User
Portal User ID Portal User/Call ID	The username of the user who performed the action This can be either <ul style="list-style-type: none"> • the username of the user who performed or was impacted by the action OR • the Call ID of the record that was accessed (streamed or downloaded) or bulk downloaded

IP	The IP address of the device, this is shown only for the actions Login and Recording Accessed
Date & Time	Date and time of the audit event (i.e. of the action)
Reason	Provides the reason details behind why a call recording has been deleted or restored

Call Recording Details

Select reports then select the Call recording details tab. On the right you will need to enter a report name and also a date range. **Please note that the maximum date range that a report can cover is 30 days.** You can then either select a user or leave this blank to run for all user. Once done click the run button and the report will be stored and also downloaded in the browser for you.



The fields of a Call Recording Details report are defined below:

Column Name	Description
Call ID	The unique identifier of the call recording
Other party	The telephone number of the other party on a call with the user
User number	The telephone number of the user
Telephony username	The unique username of the user
Status	Status of the call recording file on the portal (A = Available, P = Processing)
Direction	Call direction (I = Inbound, O = Outbound)
Connect Time	Date and time of the call. Time is in UTC
Duration	Call duration in seconds
Retention period	How long the recording will be stored for, calculated from the day of the call

Policy controls

There are a number of different policy's that can be applied to give users different levels of access.

If the user is reporting they cannot see certain calls then it would be a good starting point to check the policy that they have as this could be restricting their access.

Please use the below to see what controls are available for each policy.

Policy Name	Policy Access
Global User	Global user access is the highest level of access and this user can access the main three areas of the interface. These are Recordings, Users & Reporting. Within each of these sections the global user has full write permissions.
Team User	Team user access allows the user to see the Recordings and Reporting tab. They have access to listen to all the call recordings for all users and run audit and usage reports. This user cannot see the users tab and will not have permissions to manage users
Staff User	Staff user access allows a user to see the recordings tab only and will only show them their own call recordings. This policy is aimed at staff who will need to listen to their calls for training and improvement purposes. They do not have access to the reports tab or the users tab.
Support User	Support user access is used for anyone who isn't in the end user's organisation but may need access to help support. The support user access will show relevant information on the recordings and user tabs to help with any potential issues. There will be a reduced detail to comply with GDPR. You can create a support user directly from the interface or alternatively you can use the Single sign on from the Gamma Portal. See more below on this tool.

Policy control by feature

Access Area	Description	Global User (Full access to all features and areas of the CR portal.)	Company User (Company user role for someone who needs to listen to calls, add comments view comments and run reports)	Team User (Team leader role for someone who needs to manage a specific team of users and listen to these user's calls)	Staff User (Only has access to listen to own recordings, no access to reports or user creation)	Support User (Gamma staff/CP user should have limited view that doesn't breach GDPR)
Help by Topic		Y	Y	Y	Y	Y
Changing Your Password		Y	Y	Y	Y	N
Locked Out (these users will be able to unlock a users account)		Y	N	N	N	N
Logging Out (these users will have the ability to log out of the call recording portal)		Y	Y	Y	Y	Y

Search Calls Save Search (users will have the ability to save a search)	Ability to search for calls using the search criteria and bookmark and specific searches	Y	Y	Y	Y (but just their own recordings)	Y
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Playback Calls	Ability to playback recordings and change the playback speed	Y	Y	Y (but just their own recordings)	N
Change Playback Speed					
Delete / Restore a call recording file	Ability to delete or restore individual recordings and creation of reason within the Metadata	Y (By default for the 1 st Global User created on the Company but then only by assigning the role to the user)	Y (only by assignment)	Y (only by assignment)	Y (only by assignment)
Download Call Recording	Ability to download call recording	Y	N	N	N
Recordings - View Properties	This is to allow the specific user access to look at the properties and history of a call but not allow them to playback the call.	Y	Y	Y (but just their own recordings)	Y
Recordings - History					
Run Report	Ability to run reports from the reporting area of the call recording portal	Y		N	N
Audit Report			N		
Call Recording Extract			Y		

Create User	Ability to manage users from Creating to editing the user information.	Y	N	N	N
Edit User					
Disable User					
Enable User					
Unlock User					
Resend Welcome Email					
Assign roles					
Read Only Access toUsers tab		N/A	Y	N	Y
Single delete	Ability to delete a single call before the retention period is reached	Y (Only automatically given to the first global user, need to be assigned to all other users)	Y	Y	Y

Safe Metadata	Safe Metadata is where the SSO user logs in and they see a restricted view of the Metadata so not exposing any personal information about the recordings and they shouldn't be able to download or listen to the recording.	N	N	N	Y
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