



CALL RECORDING USER GUIDE

May 2015

Applicable for SIP Print Call Recorder software version 2.0.185 and newer
Visit www.SIPPrint.com/support for the most current Administrative Guide
Please contact SIP Print @ 866-655-3555 for information on system updates

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PART I: LISTENING TO/MANAGING CALL RECORDS

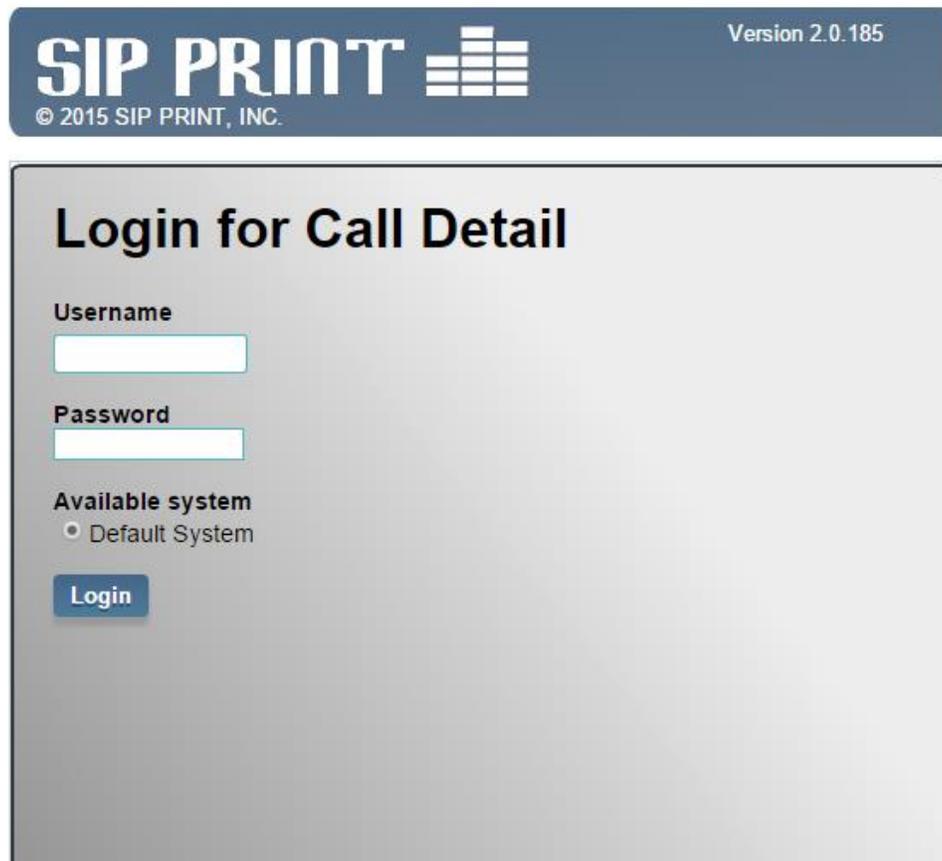
This section of the guide will cover the basic use of the recorder, as well as more advanced settings of the Call Recorder, to include managing the initial Call Records page and utilizing searches.

Chapter 1: Logging in, Using the Main Call Records Page

This chapter will focus on how to log into the unit, listen to the calls, perform searches, manipulate how the records are shown to you, and how to do a quick bulk copy of what is displayed on the screen.

Log into the unit by typing into a browser the IP address that was assigned to it during installation; this information may be provided by your local administrator. The Call Recorder interface is designed for optimal use in Internet Explorer versions 11 and newer, Firefox version 29 and newer, and Chrome version 34 and newer. There may be formatting problems if using mobile browsers or other 3rd party browsers, so the newest versions of IE, FF, or Chrome are recommended for use.

Section 1: Logging In and Pulling Today's Records



The screenshot shows the SIP PRINT login interface. At the top, there is a dark blue header with the SIP PRINT logo and the text "Version 2.0.185" and "© 2015 SIP PRINT, INC.". Below the header, the main content area is titled "Login for Call Detail". It contains three input fields: "Username", "Password", and "Available system". The "Available system" field has a radio button next to "Default System". A blue "Login" button is located below the "Available system" field.

Figure 1.1.1.1

Once logged in, you will be presented with the following screen, which we will utilize to view the call records. Note that depending on your specific permissions granted by the local administrator, you may not have the Delete or Copy functions:

From: Date Time To: Date time Direction

Filter Value Both Incoming Outgoing

Filter Value Rows:

Filter Value Returned: 0

Total: 0

Please select the date range

Figure 1.1.1.2

At first, no information will be displayed since the unit is awaiting a prompt to show specific date data. By default, if you click on the 'Search' button, it will show the current calls from that day. Here is an example of the information that will be shown:

From: Date Time To: Date time Direction

Filter Value Both Incoming Outgoing

Filter Value Rows:

Filter Value Returned: 921

Total: 921

Sorted

ID	Play	Agent Nam	Agent Num	Mode	RemoteName	RemoteNi	Date & Time	Duration
87237	<input type="checkbox"/>	Cathy Kurtz	5106	Incoming	Walton Michelle	92703198064	2015-04-27 09:01:40	01.21
87236	<input type="checkbox"/>	Cathy Kurtz	5106	Incoming	Walton Michelle	92703198064	2015-04-27 09:01:40	01.21
87235	<input type="checkbox"/>	Cathy Kurtz	5106	Incoming	SO. CAROLINA	98645463968	2015-04-27 09:07:05	00.17
87234	<input type="checkbox"/>	Beth Turpin	5110	Incoming	SO. CAROLINA	98645463968	2015-04-27 09:07:25	01.02
87233	<input type="checkbox"/>	Hollie Charles	5109	Incoming	Beth Turpin	-	2015-04-27 09:10:21	00.53
87231	<input type="checkbox"/>	Trish Jones	5102	Incoming	Tapio Frankie	96068622048	2015-04-27 09:13:33	00.19
87230	<input type="checkbox"/>	Hollie Charles	5109	Outgoing	-	916062071488	2015-04-27 09:13:31	00.35
87229	<input type="checkbox"/>	Hollie Charles	5109	Outgoing	-	916062071488	2015-04-27 09:14:10	00.33

Figure 1.1.1.3

As you can see, there is a lot of information that can be taken from this. We can tell that on that specific day, there were 921 calls recorded (as seen in the 'Returned' and 'Total' section near the top right of the picture), we are displaying both incoming and outgoing calls (as seen by 'Both' being selected in the top right as well), and that so far, there have been 87,237 calls recorded on the recorder since it was installed (as viewed in the first column of the call records titled 'Call ID'). You may also note that the Call ID in these examples are in bold; this is due to our example unit having a 'Call Scoring' key entered, which will be discussed in the Administrator Guide in Part II Chapter 3. If your unit does not have this feature or you lack the permissions to access this feature, your Call ID numbers will not be in bold.

Looking at the top call, we can see that it was an incoming call to Cathy Kurtz (who has a Handset ID of 5106) by Walton Michelle, and we can see the phone number of that outside line as well. We can see that the phone call was initiated on April 27th 2015 at 9:01:40 AM (9:01 AM and 40 seconds), and that the call lasted 1 minute and 21 seconds. You can also see that the phone system in place uses a '9' prefix in front of all their calls; this may differ from site to site, and is dictated by the phone system, not the Call Recorder.

Observing the bottom call in that list, we can see that Hollie Charles, who has a Handset ID of 5109, made an outgoing call at 9:14:10, and that call lasted 33 seconds. Note that for most circumstances, outgoing calls will not have a RemoteName, since this acts similar to a "Caller ID" that you have on your cell phone.

You can listen to any of the calls simply by clicking on the speaker as if it was an internet link; depending on your browser and system, it may automatically open in the media player currently set as the default on your computer, or it may prompt you to open or save the file. The files are in a .WAV format, and are easily played on most Windows and Apple computers. You may choose to open it which will cause it to play, or save it for an email attachment or to listen later on. Please contact your local IT support for questions on default media player settings and computer configuration.

Section 2: Searching and Sorting the Calls

Now that you understand how to display call records, you will likely need to know how to perform searches of calls that you have recorded at one point. Generally, you will be searching by one of three things: the date the call took place, the agent involved in the call, or the phone number the agent was in contact with. Depending on specific permissions for your login, you may be able to view the calls from numerous agents, or only your own calls.

Let's begin by selecting the date that we want to search for calls on. By clicking the date field, we will see a new window that we can select the date from.

From: Date Time 2015-4-28 00:00 x To: Date time 2015-4-28 23:59:59 Search Direction ↑ ↓

Filter Filter Filter

Both
 Incoming
 Outgoing

Rows: Show all

Returned: 407
Total: 407

default

Figure 1.1.2.1

After selecting the date, the window will close. You may choose your "From" date and "To" date as necessary; do bear in mind that the longer your time span chosen is, the longer it may take to pull records. Our recommendation is to keep your searches no longer than a month's time if necessary.

Next, you will enter in your search parameters using the 'Filters' at the top of main page:

From: Date Time 2015-4-28 00:00:00 To: Date time 2015-4-28 23:59:59 Search Direction ↑ ↓

Filter Value

Filter Value

Filter Value

Both
 Incoming
 Outgoing

Rows: Show all

Returned: 0
Total: 0

default

Figure 1.1.2.2

By using the drop-down choices in the Filter section, you may notice that the choices coincide with the names of the columns as shown in the next picture. Choosing the Filter "Agent Name" will allow you to search by the name of local agent, and RemoteNum will allow us to search by the number the agent spoke with.

From: Date Time 2015-4-28 00:00:00 To: Date time 2015-4-28 23:59:59 Search Direction ↑ ↓

Filter Value

Filter Value

Filter Value

Both
 Incoming
 Outgoing

Rows: Show all

Returned: 407
Total: 407

default

Sorted

ID	Play	Agent Nam	Agent Num	Mode	RemoteName	RemoteNi	Date & Time	Duration

Figure 1.1.2.3

To search by an agent name, select the Agent Name drop-down choice, and in the 'Value' text field, enter the first and/or last name of the agent you want to search for. You may want to include both first and last if you have many agents in your system, since the system will show all users that happen to have in their name the parameter you search for (i.e., if you have multiple named "Steve" at your company, searching simply by "Steve" will show all of them, as opposed to entering the first and last name will show the results you want.)

Searches are not case sensitive, though you do have to spell the agent name correctly. Asterisks are also not able to be entered either as wildcards. After entering the name, click on 'Search'. The next picture is an example of what it would look like if we wanted to do a search for calls by Cathy Kurtz for the second full week of April in 2015. Note the details that are given when you do searches: You can see that out of the total number of calls that week (1,185), Cathy was involved with 494 of them (shown by 'Returned'). The calls are also listed in order of newest to oldest, with the newest on top. This order can be reversed by changing the arrow next to 'Direction' to be pointing up, then hitting refresh, or by changing the sort order, which we will go into shortly.

From: Date Time To: Date time Direction

Filter Agent Name Value Both Incoming Outgoing

Filter Value Previous Home Next

Filter Value Rows: Returned: 494 Total: 1185

Col Select

Sorted

ID ▼		Play	Agent Nam ▼	Agent Num ▼	Mode	RemoteName ▼	RemoteNi ▼	Date & Time	Duration
47584	<input type="checkbox"/>		Cathy Kurtz	5106	Outgoing	-	98853361	2015-04-10 11:58:58	00.11
47583	<input type="checkbox"/>		Cathy Kurtz	5106	Outgoing	-	916066695573	2015-04-10 11:56:51	00.49
47578	<input type="checkbox"/>		Cathy Kurtz	5106	Outgoing	-	94103341	2015-04-10 11:44:58	01.25
47576	<input type="checkbox"/>		Cathy Kurtz	5106	Outgoing	-	94103341	2015-04-10 11:44:45	00.05
47574	<input type="checkbox"/>		Cathy Kurtz	5106	Outgoing	-	916069209998	2015-04-10 11:39:37	00.42
47573	<input type="checkbox"/>		Cathy Kurtz	5106	Incoming	ACTION RECOVERI	96069209998	2015-04-10 11:38:50	00.23
47570	<input type="checkbox"/>		Cathy Kurtz	5106	Outgoing	-	917024662929	2015-04-10 11:34:48	00.20
47569	<input type="checkbox"/>		Cathy Kurtz	5106	Outgoing	-	96149858724	2015-04-10 11:31:15	02.49

Figure 1.1.2.4

For something a bit more advanced, you can also change *how* you want the information to be sorted. As you may have noticed, there is a red bar above the call records; this bar can be moved across each column by clicking and holding it as you move your mouse, and it will change which column the information is sorted by after clicking 'Refresh'. By default, records are sorted by Call ID, which again shows the sequential number of the call in the Call Recorder as it was started. Shown below is how to sort the information by longest call first:

Sorted									
ID	<input type="checkbox"/>	Play	Agent Nam ▼	Agent Num ▼	Mode	RemoteName ▼	RemoteNt ▼	Date & Time	Duration ▼
45052	<input type="checkbox"/>		Cathy Kurtz	5106	Outgoing	-	916064328606	2015-04-08 09:48:46	15.46
46949	<input type="checkbox"/>		Cathy Kurtz	5106	Incoming	WELLS FARGO	96149858724	2015-04-09 10:07:55	11.54
46599	<input type="checkbox"/>		Cathy Kurtz	5106	Incoming	WELLS FARGO	96149858724	2015-04-09 10:07:55	11.54
46317	<input type="checkbox"/>		Cathy Kurtz	5106	Incoming	WELLS FARGO	96149858724	2015-04-09 10:07:55	11.54
47133	<input type="checkbox"/>		Cathy Kurtz	5106	Incoming	AAR	96064328606	2015-04-09 13:05:06	07.27
46783	<input type="checkbox"/>		Cathy Kurtz	5106	Incoming	AAR	96064328606	2015-04-09 13:05:06	07.27

Figure 1.1.2.4

As you can see, the search of all of Cathy's calls from the second week of April have now been sorted by longest call to shortest. Like how you changed seeing the calls from newest on top to oldest on top, this search can be changed to show shortest calls on top with the longest on the bottom by changing the direction of the arrow next to 'Direction' near the top of the page.

Doing a search by a phone number is just as easy: Changing the Filter drop-down to 'RemoteNum', you can enter in the text field the number that you want to search for. And, just like searching for an Agent Name, you do not need to enter the entire phone number, which may be convenient for phone systems that add in prefixes. The best recommendation is to type in the local 7-digit number (example, instead of typing in the full area code as well as the number, like 8666553555, you can simply search for 6553555). Note that when searching for phone numbers, do not include dashes or parenthesis.

You can type in as few numbers as you want, or as many as you want, but the less information you enter, the broader your results will be (the same when searching for Agent Names). So, since every phone number that includes the numbers you indicate will be shown in the results, entering just the number 4 in the text field will show every phone number with the number 4 in it, as opposed to searching for the entire number will show only the conversations that took place with that specified number.

You can also combine searches, searching for a call from a specific agent along with a specific phone number; this can be done by using a second Filter. Shown below is an example of what it would look like if we wanted to display Cathy's calls with the phone number 410-3341:

From: Date Time 2015-04-06 00:00:00 To: Date time 2015-04-10 23:59:59 **Search** Direction ↑ ↓

Filter Agent Name Value Cathy Both Incoming Outgoing

Filter RemoteNum Value 4103341 Previous Home Next

Filter Value Rows: Show all

Returned: 2 Total: 1185

Delete Copy Col Select ↑ ↓ default Save Delete Refresh Clear Display

Sorted

ID	Play	Agent Name	Agent Num	Mode	RemoteName	RemoteNum	Date & Time	Duration
47578	<input type="checkbox"/>	Cathy Kurtz	5106	Outgoing	-	94103341	2015-04-10 11:44:58	01.25
47576	<input type="checkbox"/>	Cathy Kurtz	5106	Outgoing	-	94103341	2015-04-10 11:44:45	00.05

Figure 1.1.2.5

You can now see that out of the 1,185 calls from that time period, Cathy made outgoing calls to the phone number 410-3341 twice.

Section 3: Copying and Deleting Calls

Part of managing the Call Records includes having the ability to quickly copy and/or delete calls. Depending on your specific permissions granted by the local administrator, you may be able to perform some of these actions. If you have the proper permissions set for your login, you will see the 'Delete' and 'Copy' function above the call records. You can select individual calls by clicking the box next to each one, or, you can select all the calls displayed in the call records by clicking the box in between the columns 'ID' and 'Play'. The first option you have, Delete, will allow you to delete any call that you have selected.

SIP Print technicians cannot restore calls that have been deleted, so take care when using this function. It is irreversible unless you have configured the Automatic Backup solution (detailed in Part IV).

The second option will allow you to quickly copy all the calls you have selected, giving you the option to open the .zip file they are placed in, or downloading the .zip file to the location your browser is preset for (contact your local IT department for browser-related or download questions). Once you open the .zip file, you will see all of the calls listed. There is a limitation of how many files can be grabbed using this quick-copy however, so it is best to grab calls one day at a time, depending on your call volume (no more than 50 or so calls at a time).

As you can see below, the calls are saved in .WAV files, and the file names are configured so they display [year][month][day][hour][minute][second], followed by an internal lettering scheme utilized by the Call Recorder.

Name	Type	Compressed size	Password ...	Size
 20150210_083214_EVS	Wave Sound	133 KB	No	134 KB
 20150210_090218_EVV	Wave Sound	53 KB	No	53 KB
 20150210_091053_EVW	Wave Sound	9 KB	No	9 KB
 20150210_091106_EVY	Wave Sound	53 KB	No	53 KB
 20150210_091109_EWA	Wave Sound	162 KB	No	163 KB
 20150210_091206_EWC	Wave Sound	169 KB	No	171 KB
 20150210_091419_EWF	Wave Sound	26 KB	No	26 KB
 20150210_091643_EWG	Wave Sound	162 KB	No	163 KB
 20150210_091748_EWI	Wave Sound	12 KB	No	12 KB
 20150210_091853_EWM	Wave Sound	92 KB	No	92 KB
 20150210_092046_EWO	Wave Sound	30 KB	No	30 KB
 20150210_092209_EWP	Wave Sound	59 KB	No	59 KB
 20150210_092322_EWQ	Wave Sound	93 KB	No	93 KB

Figure 1.1.2.6

So, using the first call as an example, we know that the call took place in 2015 on February 10th, at 8:32AM and 14 seconds. Using this information, you can cross-reference with the Call Recorder to see the agent name and the phone number by searching for that date as previously discussed.