OmniPCX RECORD version 2.4

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Ref. ALESVC50167 Ed.42   Page 2/71

Index Table

1   Document history

Edition	Date	Changes / Comments / Details
01	12/06/12	Initial Document
02	16/08/12	Corrected non technical and English
03	17/09/12	Corrected for English Updated both non technical & technical information Updated Known Limitations
04	26/09/12	IP Attendant Client Utility Documented
05	04/09/12	Removed (Attendant EE) from Known Limitations
06	21/11/12	Updated the IP Attendant limitations Included third party component download references
07	03/12/12	Updated Known Limitations to specify that VAD is NOT supported for IPDR Updated Known Limitations to specify that only 1 MSM connection is supported
08	28/01/13	Updated known issues to state that conference calls recorded in a multi-node environment could result in lost calls Updated known issues to state that nodes must be configured to use the same codec in a multi-node environment
09	05/03/13	Updated known limitations to state that ROD from IP Handsets is not supported for High Availability
10	20/03/13	Removed HA from known limitations for IP Attendant Recording as this is now supported Amended to refer to "OmniPCX Console Recording Agent" in installation guide rather than "IP Attendant Client utility"
11	03/06/13	Changed High Availability (HA) to Warm Standby (WS) throughout document Stated the maximum number of support recording channels Stated that IP handsets can only be recorded using IPDR or DR-LINK, NOT both
12	12/06/13	Updated the Attendant Console Limitations Updated Known Limitations with maximum supported Silent Monitoring Sessions Updated statement regarding static licenses Amended Known Limitations to state that the OmniPCX RECORD Server Regional settings must not be changed
13	15/07/13	Updated to state that CLI & DDI will be displayed as 'NA' for attendant calls. Renamed 'Warm Standby – WS' to 'Recorder Warm Standby – RWS'
14	31/10/13	Initial 2.3 Release
15	25/11/13	Stated that IP Attendant recording is only support using 4059EE with 4068 + 4038
16	10/12/13	Updated Known Limitations with Silent Monitoring Restrictions
17	13/01/13	Removed Screen Capture Hold from Known Restrictions Inserted statement on Screen Capture Hold Time Amended Statement regarding Screen Capture Server Access failure
18	04/01/14	Added statement explaining that recording Actions are disabled if the selected is matched by a system filter. Added statement explaining that 'Play Selected' is not supported for encrypted calls Updated Recording Action GUI Screenshots Updated Silent Monitor GUI Screenshots
19	07/04/14	Added new document reference to footer
20	06/05/14	Added Statement explaining that standard users can only access calls recorded on extensions assigned to them.
21	13/05/14	Updated ROD screenshots to include Primary & Secondary options
22	11-06-14	Removed limitation stating that only 1 MSM connection is supported
23	02-09-14	Updated various screenshots and added additional information that is relevant to this software release.
24	29-01-15	Added section covering Console Recording Agent Configuration
25	19-02-15	**Section 5.6.4** Updated to refer the user to their administrator for installing & configuring VLC

Edition	Date	Changes / Comments / Details
26	16-03-15	**Section 1.3** Removed the restriction stating that OmniPCX RECORD does not support more than 1 PRS and that ROD is not supported for Warm Standby **Section 1.3** Updated support for Attendant Handsets to include 8038 & 8068 **Section 1.3** Updated support for up to 25 console operators. **Section 1.3** Added Record on Demand restriction for IP Attendant Recording **Section 5.3.2** Included description & image for new file icon
27	16-06-15	**Section N/A** General Grammar Corrections **Section 5.3.2** - Updated Archived Call Icon - Added new note stating that Archived calls can be played without restoring them first. - Explanation added for 'Restore Call' - Included new screenshot showing message that is displayed when attempting to play multiple encrypted calls using the 'play selected method'
28	25-08-15	**Section N/A** Updated Legal notice **Section N/A** Updated footer copyright **Section N/A** Updated header logo **Section N/A** Last page URL changed **Section N/A** GUI changes screenshots validated **Section 5.6** Screenshots Validated
29	15-11-15	**Section 2.2** Added a limitation that IP address validation is not performed during the screen capture installation Removed limitation that ROD is not supported with IP attendant **Section 5** Validated login page screenshot **Section 5.3.1** Updated description **Section 7.1** Added new point for using Administrator account
30	21-01-16	**Section 5.1** Removed a note that ROD is not supported with IP attendant Updated description to add ignore call button **Section 5.7.1** Removed a note that ROD is not supported with IP attendant
31	01-03-16	**Section 5.3** Updated Screenshots **Section 6.2** Updated screenshots 32
32	16-06-16	**Section 4.3.2** Added a statement explaining that archived files cannot be downloaded. Added statement explaining that 'Download Selected File' is not supported for archived calls **Section 4.4** Screenshot has been updated. Added information regarding the new options

Edition	Date	Changes / Comments / Details
		available in the recording rule. **Section 5.3.2** Added information about how to check information about call hold and retrieval during playback.
33	15-09-16	As the web interface has been revamped so all the product screenshots have been updated in all the sections. **Section 5.4** Details have been updated along with the screenshots. Section 7 Details have been added. Screenshot has been updated.
34	15-02-17	**Section 5.3.1** Screenshot for view report option has been added. **Section 5.3.2** A note has been added about video call play behaviour when notes are clicked during playback. **Section 5.4** Detail about user level filters has been added. New filter parameters have been added. Details have been added about how to change the sequence of rules. An important note has been added about informing the user to click apply button if there is any change in the rule sequence. **Section 5.6.2** A note has been added about screen capture client utility. **Section 6.1.3** New section for custom field during silent monitoring. **Section 6.2.1** A note has been added about the auto adjustment of columns in search result grid.
35	15-06-17	**Section 5.3.2** New section for notes for a call. **Section 5.3.3** New section for flags for a call **Section 5.3.7** New section for bookmarks **Section 5.4** An important note has been added regarding Record From Now option that affects user level filters. **Section 5.6.2** A note has been added that the number and size of log files created for screen capture agent utility has been increased to 10 and 10 MB respectively. **Section 6.1.1** A note has been added that more than one flags can be assigned to a call record.
36	15-09-17	**Section 5.1** Screenshots has been updated. A note has been added about screen refresh. Details about update custom field option has been added. **Section 5.2** Screenshot has been updated. A note has been added about screen refresh. **Section 5.3.1** Screenshot has been updated. Details have been added for Results per page and Show options. **Section 5.3.4** Screenshot has been updated. **Section 5.3.15** New section for custom field update.
37	15-12-17	**Section 4** Previous details regarding modules have been removed as all these details are already available in feature list document.

Edition	Date	Changes / Comments / Details
		Section 5.1 An important warning has been added that recording action bar will only appear if the user has enable recording action permission. An important warning has been added that ignore call will once ROD is enabled on an extension and a ROD option is selected. An important warning has been added against each online recording action which is applicable and available for IPDR and SIP calls only.
38	15-03-18	**Section 5.1** Detail and screenshots have been updated. Details about trunk side recording action have been added. An important note has been added that the ability to switch between extension and trunk calls will only be available in the hybrid model. An important note has been added that ROD will only be available for default site in case of trunk side recording. **Section 5.2** An important note has been added that group admin override is not supported for trunk side recording. **Section 5.3.1** A note has been added about range criteria for call duration on call search screen. A note has been added about multiple device criteria for device on call search screen. **Section 6.1** An important note has been added about the availability of the options for trunk and extension side agents during silent monitor. Screenshots have been updated. **Section 6.2.1** A note has been added about range criteria for call duration on call search screen. A note has been added about multiple device criteria for device on call search screen.
39	15-06-2018	Legal notice has been updated. Page footer has been updated with the latest logo information. **Section 5.1** An important note has been added that now IOD will be available to an agent even if ROD is disabled for that agent. **Section 5.3.1** Screenshot has been update. Details have been amended. **Section 5.3.5** Screenshots has been updated. **Section 5.3.6** Screenshot has been updated.
40	15-09-2018	OmniPCX RECORD release references have been removed. **Section 5.1** Important note has been updated regarding attendant calls display. Screenshot has been updated. **Section 5.2** Screenshot has been updated. A limitation has been removed. **Section 5.3.1** Screenshots have been updated. Speech analytics search option detail has been added. **Section 6.1** Important note has been updated regarding attendant calls display. Screenshots have been updated. **Section 6.2.1** Screenshots have been updated.

Edition	Date	Changes / Comments / Details
		Speech analytics search option detail has been added.
41	15-12-2018	**Section 5.1** Screenshots and details have been amended. **Section 5.7.2** New section for ROD popup windows control parameter.
42	15-03-2019	**Section 5.3.1** Screenshots have been updated. Detail about recording filter under available column has been added. Detail about search results grouping and restrictions about child records have been added. **Section 6.2** Screesnshot has been updated. **Section 6.2.1** Screenshots have been updated. Detail about recording filter under available column has been added. Detail about search results grouping and restrictions about child records have been added.

2   Scope

2.1 Purpose of this guide

The purpose of this guide is to act as both a tutor and reference manual for the users of the OmniPCX RECORD application.

3   Glossary of Terms

CDR	➤	Call's Detailed Report
OXE	➤	OmniPCX Enterprise (PBX)
ROD	➤	Recording on Demand
SMTP	➤	Simple Mail Transfer Protocol
RWS	➤	Recorder Warm Standby

Ref. ALESVC50167 Ed.42

4 Introduction

4.1 The Product

Voice recording has always been a sophisticated and expensive application, until now. OmniPCX RECORD for enterprise companies is the first voice recording application from Alcatel-Lucent. The software is supplied as a full Windows based application and has been designed specifically for use interoperating with Alcatel-Lucent's OXE platforms.

There are a range of additional modules. Please check Feature List document for more details.

Whilst providing the features and functions of a high-end voice recorder, the application also accommodates the small to medium sized enterprises because it is so competitively priced. It's as good at 20 seats as it is at 400.

After installing the application, the administrator will have to set up users. These are the extensions or agents whose calls you want to record. Each of these extensions consumes one user license. If the extension is not configured in the system, then these extensions will not be recorded and are outside of the OmniPCX RECORD application.

This manual is for OmniPCX RECORD release #2.x

4.2 Intended Readership

This manual targets users of the application: OmniPCX RECORD 2.x. All types of users, including Group Admin users and Agents can use this guide. This guide is not relevant to the Administrator.

4.3 Applicability Statement

This manual applies to the use of: OmniPCX RECORD 2.x.

4.4 Overview of this manual

The manual includes a table of Contents with hyperlinks to the relevant sections. This enables you to jump to the section of your choice.

Screenshots are only provided for the relevant sections and may only show sections of the screen relevant to the topic.

4.5 Customer Support

For product support, please contact your system administrator or Alcatel-Lucent Business Partner

5 Using OmniPCX RECORD (Agent)

To use this application, the Administrator will need to provide you with web address that will allow you to access the user interface. The address provided will look similar to the one shown below:

http://<Server Address>/OmniPCXRecord/default.aspx

Open your web browser and key the address you have been given.

A new feature "Multi-Tenancy" has been introduced in OmniPCXRecord. Please see Feature List document for further details. The options on the login screen will depend on the multi-tenancy license. The following login screen will appear in case the site doesn't have multi-tenancy license.
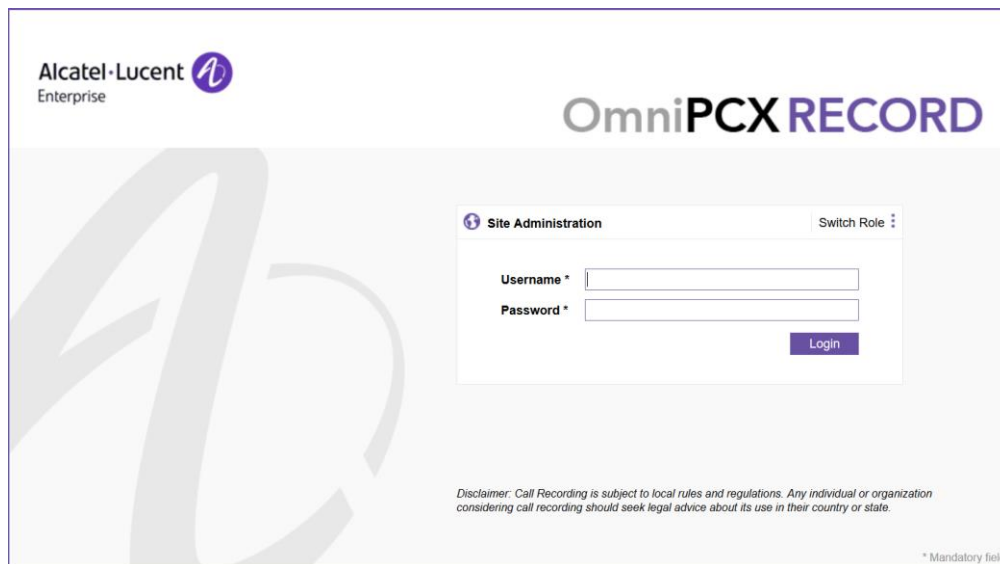
SCREENSHOT - Login screen

It will be same as it was in the past but with a slight difference. Now, a link will be available to access the **Server Administration** interface.

The relevant portion of this screen is magnified. This is the login section. You will have to key in your Username and Password that will have been provided to you by your Administrator.

Important! If you forget your password, your account will be disabled after several failed attempts

On this screen, you will have to key in a Site Administrator's Username and Password. By default, they are:

Username - admin

Password - admin

After keying in your credentials, click the **Login** button.

However, if a server has a valid multi-tenancy license then the following login screen will appear:

Every site will have a specific site code that will distinguish it's users from other sites under a tenant.

On this screen, you will have to key in a site code, Site Administrator's Username and Password. By default, they are:

Site Code - 010001

Username - admin

Password - admin

Note: Please note that the site code for the default site will always be 010001 whether a server has a multi tenancy license or not.

Note: Please note that the organization name is only available on server administration login screen.

After keying in site code, username and password, click the **Login** button.

Note: The option to select the Authentication Type will only be available if it is configured on the server machine by the server administrator.

When logging in for the first time or after your account expiration period (Set By your administrator) you will be shown the following or similar screen:

Provide your existing password followed by your new password, then Click **Update**.

o Passwords cannot contain your username

o Passwords must be at least 7 characters in length

o Passwords must contain both numeric & Alpha numeric Characters

o Passwords cannot contain multiple identical characters. For example, if the password was set to 'Process123' it would not be allowed as it contains two 'S' characters

o Several prohibited words cannot be used as the Agents password. If you choose any of these words, you a message will appear and the password will not be allowed.

o Your password must be changed after 90 Days. If you do not change your password, your account will be disabled. However, you will receive notification 14 Days before this will happen

If your password does not require a change, when you login, you will be presented with the following screen:

SCREENSHOT - Default screen – My Calls - Search page

This is the OmniPCX RECORD user interface. To the left of the screen you have several options available to you. The image below provides a full view of the left panel:

SCREENSHOT – Complete list of links

Note: Your available menu options will depend on the account type that you have been given by the administrator. Therefore, if you do not have access to the correct features, you should contact you administrator.

5.1 Recording Action

When making or receiving a call, you have the option to record the call in full or only a specific part of the conversation. To do so, click on the recording action link and it displays the following screen. You can get this display, only when a call is in progress, otherwise it will display the message: No active calls found.

Important! With the inclusion of ISDN Trunk and SIP Trunk recording, the options availability will depend if you are running an extension side or trunk side or both in a hybrid model. By default, the system will display extension calls. Please note that attendant calls will also be displayed under extension calls.
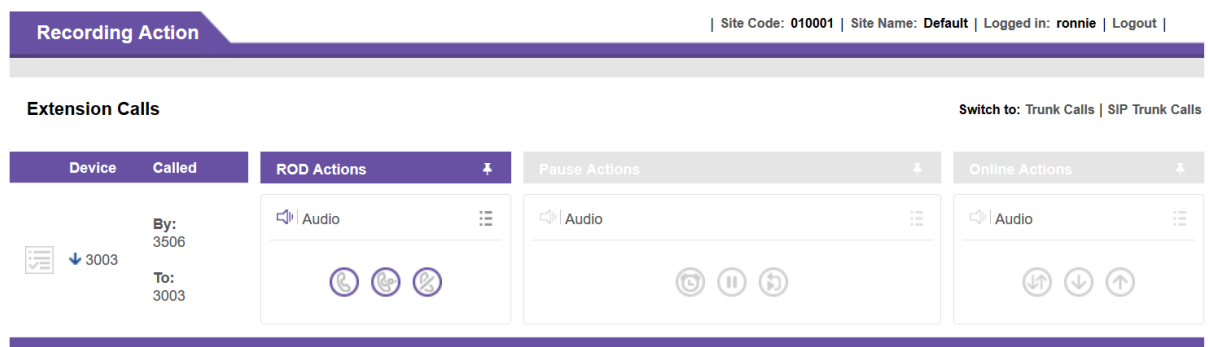
SCREENSHOT – Extension-Side Recording Action

Important! This screen refreshes after every 5 seconds.

Important! This screen will appear only if the user has enable recording action permission.

Important! The option **Switch to** will only be available if the recording is running in a hybrid model i.e. it is recording extensions and trunks both at the same time.

Important! Recording On Demand (ROD) option for trunk side recording is available for default site ONLY. Also, it does not support audio, video and online recording actions.

Pin/Unpin Actions

On this screen, icon refers to the options pinned on the screen. Depending on the number of options available, you would be able to either pin/unpin all actions or selected actions under a category.

Example-1:

- To unpin the actions under ROD Ations, click on icon and select All actions.
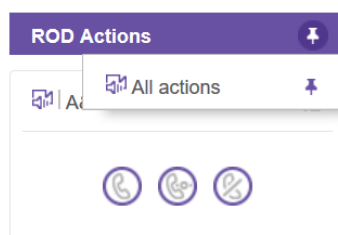
The above screen will appear as follows:
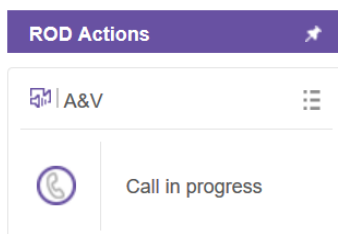
Example-2:

- To unpin actions under Pause Actions section, click on and you can either select one of the available actions such as Audio & Video, Audio or Video OR you can click on each of them to unpin all the actions.
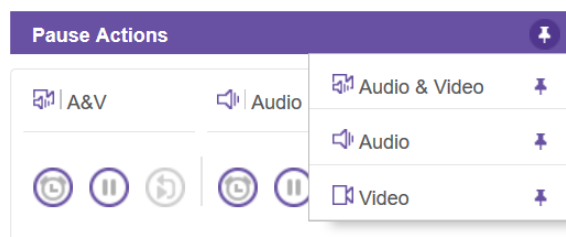
If you unpin all the actions then the screen will appear as follows:
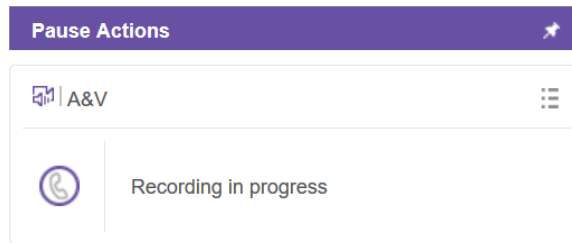
Similarly, if you want to pin the actions again then click on [pin icon] and click on All actions or selected actions to be pinned on the screen.

Menu Options:

The screen displays only icons under each section. You can click the icon to perform the required functionality or you can also select that option by clicking on the [menu icon] option that will display a menu of the available options under each section. Menu options are also useful in case all the actions are unpinned by the user.
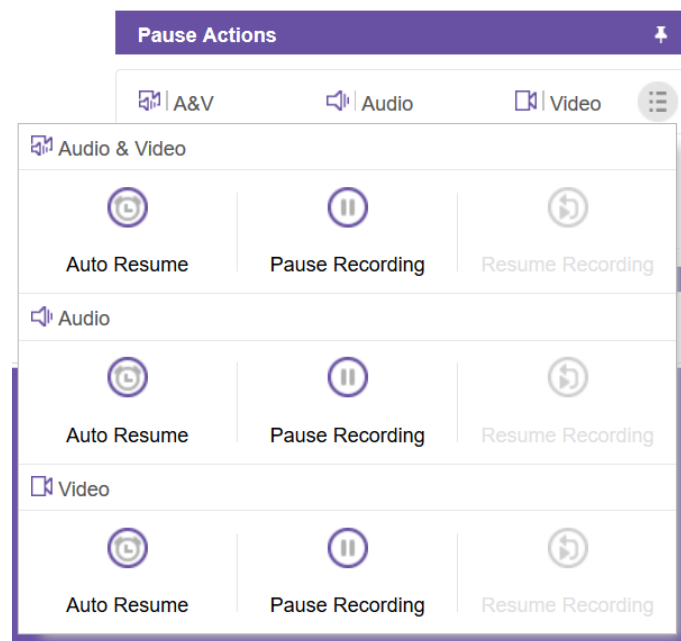
Extension Side Recording Action

- o Update Custom Fields
- o Device
- o Called

   Note: The 'Called To' field contains the OXE translated 'Called Number'. Please refer to the relevant OXE programming guide for more detail on number translation."
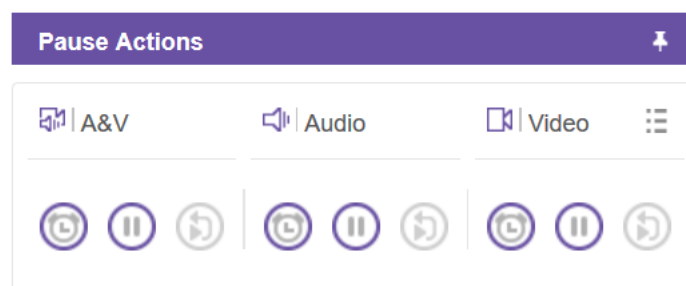
- o ROD Actions
- o Pause Actions (Including Audio & Video Actions)
- o Online Recording Actions

Below, you can see an explanation for each option:

Update Custom Fields:

This option will display a window with available custom fields for search:

It allows the custom fields to be updated for the current active call and the values will be displayed on the search screen.

Device:

This indicates that the call has been answered on Device #2005. The arrow refers to the direction of the call

Called:

This indicates that this call was originated from EXT 3506 to EXT 3003.

Note: The 'To' field contains the OXE translated 'Called Number'. Please refer to the relevant OXE programming guide for more detail on number translation."
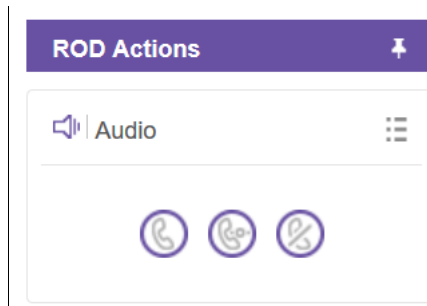
ROD Actions:

SCREENSHOT – ROD Actions

Here ROD refers to **R**ecord **O**n **D**emand. The difference between the 2 options is as follows:

- o The first option records the entire call, even if you click on it during the call, the call will be recorded from the very beginning

- o The second icon records the conversation from the point at which you clicked it.

- o The third option is ignore call, it will not record the call at all.

Important: Ignore call option will work even if ROD is not enabled on an extension.

Pause Actions:

SCREENSHOT – Pause Actions

The options in this section will only be available in the following scenarios:

- ROD is disabled.

- If ROD is enabled then one of the ROD options (Record From Now/Record Entire Call) is selected from ROD Actions section.

- The agent has permission for pause actions.

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If you click on this option then it will pause both audio & video recording temporarily and then automatically recommence after a predetermined time period defined by the application administrator. The time period can be seen by moving your mouse over the pause button as shown above.

If you click on this icon then it will pause both audio & video recording indefinitely.

Click this option to recommence audio & video recording.

Audio:

If you click on this option then it will pause audio recording temporarily and then automatically recommence after a predetermined time period defined by the application administrator. The time period can be seen by moving your mouse over the pause button as shown above.

If you click on this icon then it will pause both audio recording indefinitely.

Click this option to recommence audio recording.

Video:

If you click on this option then it will pause video recording temporarily and then automatically recommence after a predetermined time period defined by the application administrator. The time period can be seen by moving your mouse over the pause button as shown above.

If you click on this icon then it will pause video recording indefinitely.

Click this option to recommence video recording.

Online Recording Action:
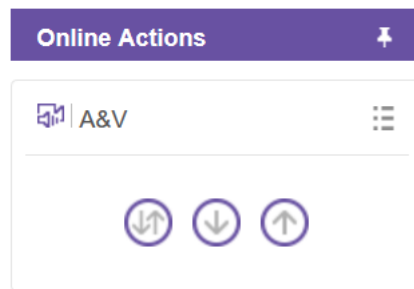
SCREENSHOT – Video Action

The Online Recording Action has been provided as in some geographical locations it is only legal to record specific sides of a call. The Online Recording Action provides three options and these are as follows:

- Record Both Parties - if this option is instigated during a call, OmniPCX RECORD will record both call parties.

- Record Local Party – if this option is instigated during a call, OmniPCX RECORD will only record the Agents side of the call and the External party will be omitted.

  IMPORTANT: This option is applicable and available for IPDR and SIP calls only.
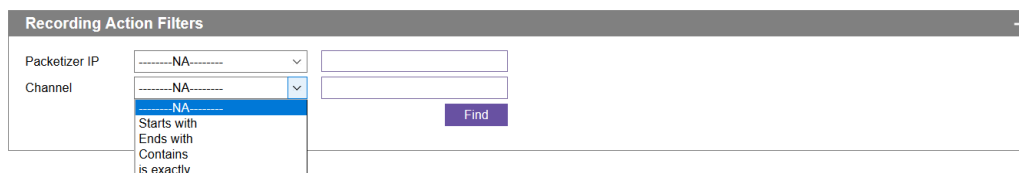
- Record External Party – if this option is instigated during a call, OmniPCX RECORD will only record the External side of the call and the Agent party will be omitted.

  IMPORTANT: This option is applicable and available to IPDR and SIP calls only.

Note: The available options can be located by placing the mouse over the three buttons displayed in the image above.

Note: The Online Recording Actions are only available when Record On Demand is disabled.

Important! If the selected call is matched by a system filter, the call is **NOT** displayed on the 'Recording Actions' Screen

Trunk Side Recording Action

On this screen you can filter the calls according to it's packetizer IP and channel number. The filter options are as follows:

- Starts with
- Ends with
- Contains
- is exactly

Call related information will be displayed as follows:

- o Update Custom Fields
- o Packetizer IP
- o Channel
- o Called

  Note: The 'Called To' field contains the OXE translated 'Called Number'. Please refer to the relevant OXE programming guide for more detail on number translation."
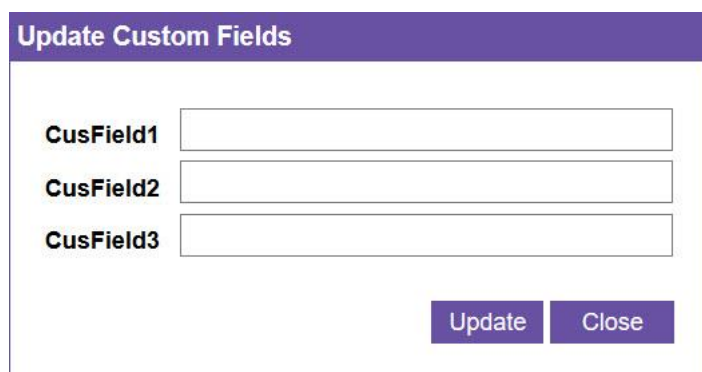
- o ROD Action
- o Pause Action

Below, you can see an explanation for each option:

Update Custom Fields:

SCREENSHOT – Update Custom Fields

This option will display a window with available custom fields for search:

It allows the custom fields to be updated for the current active call and the values will be displayed on the search screen.

Packetizer IP:

Packetizer IP

↓ 172.20.3.87

SCREENSHOT – Packetizer IP

This indicates that the call has been answered on Packetizer IP 172.20.3.87. The arrow refers to the direction of the call

Channel:

Channel

2

SCREENSHOT – Channel

This indicates the this call is using channel #2 on the packetizer.

Called:

Called

By:0208432994
To:3006

SCREENSHOT – Called by

This indicates that this call was originated from 0208432994 to EXT 3006.

Note: The 'To' field contains the OXE translated 'Called Number'. Please refer to the relevant OXE programming guide for more detail on number translation."
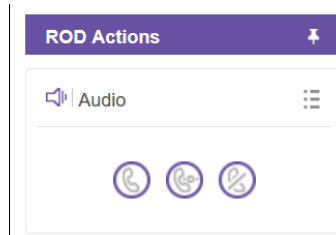
ROD Actions:

Screenshot – ROD Action

Here ROD refers to <u>R</u>ecord <u>O</u>n <u>D</u>emand. The difference between the 2 options is as follows:

- o The first option records the entire call, even if you click on it during the call, the call will be recorded from the very beginning

- o The second icon records the conversation from the point at which you clicked it.

- o The third option is ignore call, it will not record the call at all.

Important: Ignore call option will only work if ROD is enabled on an extension and a ROD option (Record from now/Record entire call) is selected.

Pause Actions:
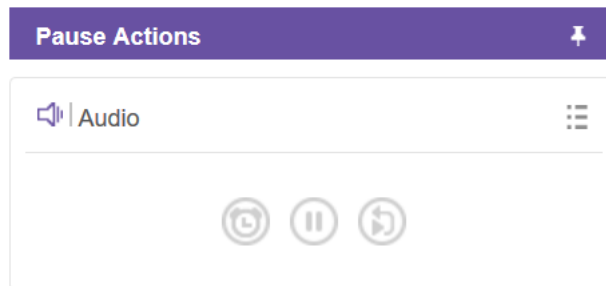
Screenshot – Pause Action

Audio:

 If you click on this option then it will pause audio recording temporarily and then automatically recommence after a predetermined time period defined by the application administrator. The time period can be seen by moving your mouse over the pause button as shown above.

 If you click on this icon then it will pause both audio recording indefinitely.

 Click this option to recommence audio recording.

5.2 Group Admin - Recording Action Override

In addition to the standard Recording Action outlined above, Group Admin users also have the ability to instigate or override the recording action for members that belong to their team.

To do so, click on the Recording Action link while a team member has an active call and a screen similar to the one below will be displayed:
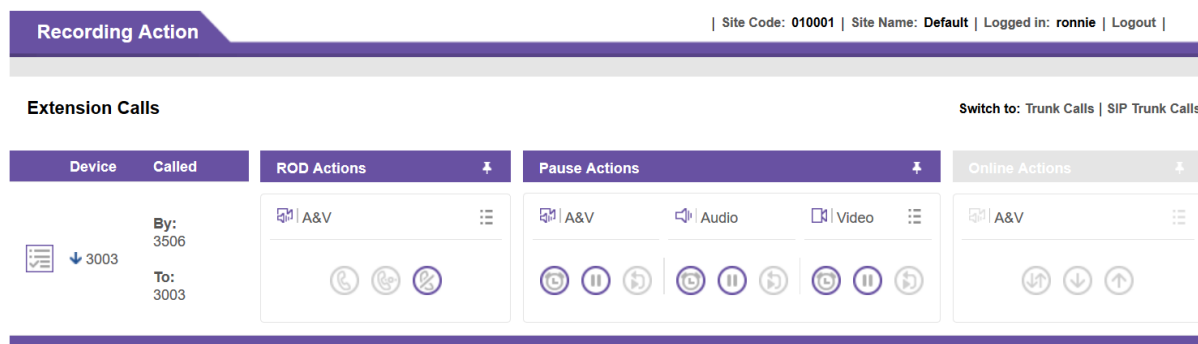
SCREENSHOT – Override Recording Action

Important! This screen refreshes after every 5 seconds.

In the example screenshot above the Group Admin user can see an active call. Even though the call does not belong to the Group Admin user, he/she can instigate or override the recording action for the call by using the standard controls that were mentioned previously.

- o **Instigate Recording on Agents behalf**

  Using the ROD/ Pause & Online recording actions, the Group Admin user can instigate recording on the Agents behalf

- o **Override Agents Recording Action**

  If the Agent chooses a recording action, the recording options will change accordingly. Now, using the ROD/ Pause & Online recording actions, the Group Admin user can override the Agents chosen recording method.

  Override Example: If the Agent selects to record the 'Entire Call' the Group Admin user can override this action at any time and may choose to only record the call from this point onwards

Note: Please note that if both the supervisor and the agent are using the update custom fields option then the values in the custom fields will be updated by the user who pressed the update button in the last.

5.3 My Calls

5.3.1 Search for Calls

Note: When using the 'My Calls' search option, you will only be able to review calls that were recorded on extensions that have been assigned to you. If you cannot access calls that you require, please contact your administrator.

Over time you may have thousands of saved and archived recordings. But there will be times when you will have to refer to a specific call. Here we show you how to retrieve a single call. Using the many filters available, you will be able to find the call that you are looking for.

When you login, this is the default page that opens. You can also access this page at any point in time by clicking on the link – My Calls –at the top of the menus. When you do so, the following page opens:

SCREENSHOT – Search for calls

Here you have various filters that can be used to narrow down your search results. These filtering options are as follows:

Call Date and Time:

To ease your task of specifying date and time in this field, some pre-sets are given in this dropdown box. They are:

- o Occurring Today
- o Occurring Yesterday
- o Occurring in past 1 Hour
- o Occurring in past 4 Hours
- o Occurring in past 7 Days
- o Occurring in past 30 Days
- o Occurring in past N Days
- o User Specified

If you select any of the first 6 in the list, there will not be any change in the screen format. But if you select: **Occurring in past N Days**, then one more field is added as shown below, for you to specify the value of "N".

SCREENSHOT – Field qualifier for N days

If you select the last item: **User Specified**, then the screen will also change as given below, to accommodate your detailed specifications:

SCREENSHOT – Field qualifier – user specifications

In this newly created portion, you can specify from and to dates. For this purpose, you can use the 📅 icon next to the entry box, which displays the calendar, or use the three dropdown cells below to specify the date.

Speech Analytics:

This field will show you the speech analytics options in a dropdown list as follows:

- o   Silence
- o   Conversation with low voice
- o   Standard conversation
- o   Louder conversation

Please note that only those options will be available that are enabled on the speech analytics page. Only one option from the dropdown list can be selected.

Other Criteria:

In this field, you have the following options:

- o   Archived Calls
- o   Call Direction
- o   Call Status
- o   Called By
- o   Called To
- o   Correlator ID
- o   Custom Fields
- o   Call Type
- o   Device
- o   Device Hang-up
- o   Duration
- o   Flag
- o   Global Call ID
- o   Notes
- o   Primary Node IP

- o Recording Interface
- o Recording Rule
- o Secondary Node IP
- o Server ID
- o Server Role
- o Video Calls
- o Trunk Group
- o Channel

> **Note:** The 'Called To' field contains the OXE translated 'Called Number'. Please refer to the relevant OXE programming guide for more detail on number translation."

> **Note:** Custom fields will only be visible if 1 or more are enabled.

The way you use this facility is slightly different from others previously mentioned. You can select either none, or one or more criteria. The method of using this is as follows:

1. Select the preferred criterion from the dropdown box

2. The button: Add displays at right.

3. Click the **Add** button.

4. An entry box pertaining to the criterion for which you had clicked **Add** is displayed below

5. You can also add more than one criterion. The screenshot below shows an example of multiple criterion that have been applied to the search

Archived calls	Show	☒
Trunk Group	Sales	--------- All Boards ---------- ☒
Channel	---------------- All ---------------	☒
Video Calls	Show	☒
Device hangup	Show	☒
Global Call ID	Starts with	☒
Correlator ID	Starts with	☒
Device	Starts with	☒
Call Direction	Inbound	☒
Called By	Starts with	☒
Called To	Starts with	☒
Duration	Less than	00:05:00 ☒
Server ID	Starts with	☒
Server Role	Primary	☒
Flag	Training required	☒
Notes	Starts with	☒
Call Status		☒
Recording Interface	IPDR	☒
Recording Rules	System Filters	Record ☒
Call Type	Internal	☒
Call	Scored	☒
Primary Node IP	Starts with	☒
Secondary Node IP	Starts with	☒

SCREENSHOT – Other criteria qualifiers

Note: Trunk Group and Channel are now available in other search criteria. These options provides the facility to the user to search the calls according to a specific trunk group and channel.

Note: A search criteria option 'SIP Trunk' is available under Recording Interface that will return a list of all the DiDs created on SIP Trunk page and it will fetch the list of calls where selected DiD exists in either Called By or Called To column. Also, Recording Rules criteria is also available but it will only be visible if there are system or user level filters created in the system.

Note: A search option **Range** is available in **Call Duration** search criteria. This option provides the facility to the user to search the calls for a given range in minutes i.e. calls with a duration between 30 to 45 minutes.

Note: A option **Range** is available in **Device** search criteria. This option provides the facility to the user to search the calls for multiple devices. The device number values can be comma separated or a range with a – sign. For e.g. 3005,2145,5320 OR 2000 – 2150.

6. When you add a criterion, that criterion is removed from the dropdown box list against **Other Criteria**.

7. At the right of each added entry box, you will find an "**X**". When you click on it, that entry box is removed, and the criterion to which it belongs, is added back to the list against **Other Criteria**.

8. When you add a new criterion, (if required) you must provide details in the adjacent box provided.

Results per page:

Default value is: 10. Available choices: 10, 20, 30, 40, 50.

Using this value, the application only fetches the number of records per page from the database while the user navigates from one result page to another.

Show:

This values should be manually keyed in. The Default is 100% which means all records. However, if there is requirement to limit the number of records for a search criteria then this option can be used. For e.g. if there are 10 calls and this parameter is set to 50% then the system will display 5 calls.

Note: Please note that the value in Order By options affects the records as by default it is set to 'Descending' so the system will display first 5 records. If the order is changed to 'Ascending' then the system will display the last 5 records.

Once you have input all the details explained above, you can check how many entries will be returned for these parameters. This is called the "count". To do so, click on the button: **Count Results** at the bottom of the page. Immediately, to the right of that button, the total number of entries to be returned will be displayed as shown below:

Select Columns:

Choose the information that you would like to display as part of every result row. To do this, select the required field from the 'Available' list box on the left and move the field to the 'Assigned' list box on the right by using the arrow buttons. All fields placed in the 'Assigned' list box will be displayed for every result row that is returned by the search criteria.

Note: Recording Filter is available in the list under Available column. This will display a rule name for which a call is recorded as follows:

Note: With the introduction Trunk Group identification implementation, Board, Trunk Group and Equipment fields will be in the list under Available column.

Note: With the introduction of ISDN Trunk Recording functionality, a field "Channel" will be in the list under Available column. The information under this field is only relevant for calls recorded with Trunk Recorder.

Note: If you have no custom fields available and need to be able to search on them, you will first need to make your custom fields searchable. To do this, review the section of this document labelled: *Custom Search Fields*.

To view the actual results, click the **Search** button. Below is a sample view of the search results:

Note: Search results can be grouped based on the following options:

1- Global Call ID

2- Correlator ID

3- Channel

4- None

To use this option, click on ➕ icon and a menu will be displayed as follows:
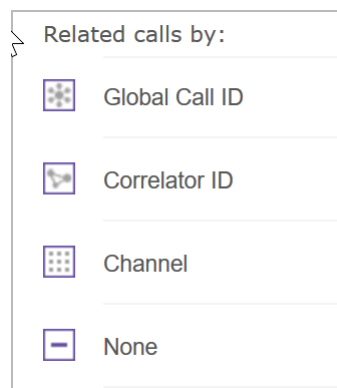
Related calls by:
⊞ Global Call ID
⊠ Correlator ID
⠿ Channel
⊟ None

Once you select any option (Globald Call ID, Correlator ID or Channel) from this menu, the related records will be displayed in a grid under the parent record.

☐ ⊞ ◀ ☰	02-19-2019 16:59:00	3506	↓ ⌂ 3002	3506	00:00:12	Judd Trump	…
⊘ ☰	02-19-2019 16:59:00	3002	↑ ⌂ 3002	3506	00:00:12	Mark Selby	…
◀ ☰	02-19-2019 16:59:13	3506	↑ ⌂ 3002	3506	00:00:04	Judd Trump	…
⊘ ☰	02-19-2019 16:59:13	3007	↓ ⌂ 3002	3007	00:00:04	Dorians Williams	…
⊘ ☰	02-19-2019 16:59:13	3002	↑ ⌂ 3002	3506	00:00:03	Mark Selby	…

Although, these child record will have the same format as the parent record but there are certain options that will not work. These options are as follows:

- Play All

- Play Selected

- Download Selected Files

- Email File

The above options will work with parent records ONLY.

To close a child grid, click on ➕ and select None.

Note: The listed recordings can be re-sorted in Ascending or Descending order by clicking on the column header.

Note: Please note that the columns in the search result grid will adjust themselves automatically according to the available space and number of selected columns.

Also the width of the columns in the search grid can be adjusted manually by placing the mouse pointer at the start of a column, press & hold the mouse button and drag right or left to adjust the width of the column. The column adjustments will be saved in the cookies for the current session and will be reset once the session is closed.

Note: Previously, a question mark ? icon was displayed for both internal and external SIP not on DR-Link calls. Now, all SIP not on DR-Link calls will have the same icons as they are being displayed for IPDR and DR-Link calls.

View Report:

IMPORTANT: This option, which can be seen in the Image above, requires "*Microsoft Report Viewer*" to be installed on the OmniPCX RECORD server. If you are having trouble viewing the report, please contact your Administrator.

Call Details:

When a call is listed, it is presented with several details. These can be modified if required. However, the following explains the default information that is displayed. (See Below)

SCREENSHOT – CALL DETAILS

5.3.2 Notes

The third column for each entry refers to notes. For each recorded call you have the facility to add your own notes to the call. There are 2 icon types that will be displayed in this column, and these are as follows:

Icon: ☰ - No notes are present for this call

Icon: ☰ - Notes are present for this call
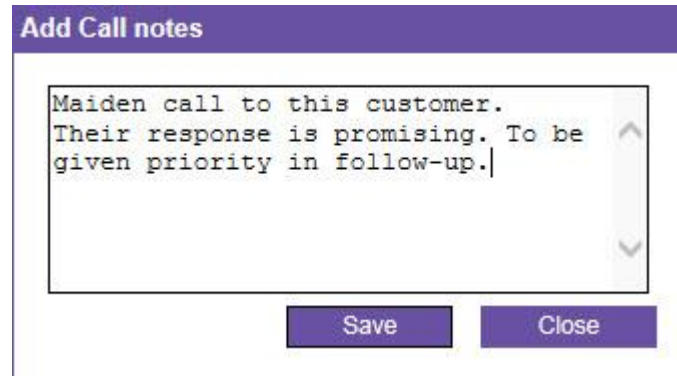
SCREENSHOT – NOTES MENU

To add notes click on: Add Notes. This opens the following box.

Add Call notes

Maiden call to this customer.
Their response is promising. To be
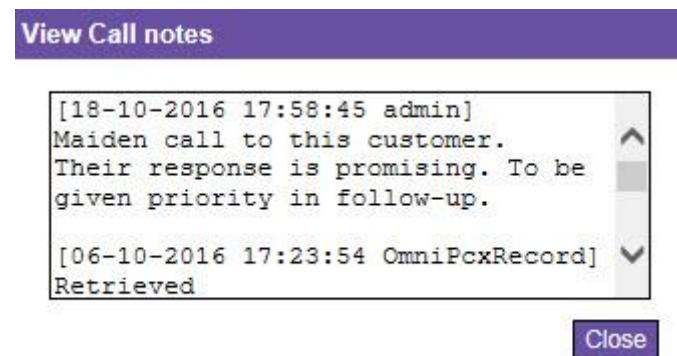given priority in follow-up.|

Save   Close

SCREENSHOT – BOX FOR ADDING NEW NOTES

Into this box, enter the required notes as shown above, then click **Save**

Once you have added a note to a call, you can view the notes, using the **View Notes** option. When you click it, you will notice some additional details were included, namely:

- o Date of entry
- o Time of entry and the
- o Name of the person who had created the entry.

View Call notes

[18-10-2016 17:58:45 admin]
Maiden call to this customer.
Their response is promising. To be
given priority in follow-up.

[06-10-2016 17:23:54 OmniPcxRecord]
Retrieved

Close

SCREENSHOT – VIEWING NEWLY ADDED NOTES

Email Notes: Using this menu item you can email the notes of the selected call. When you click on it, you will be asked to enter the destination email address. See below:

SCREENSHOT – SENDING NOTES THROUGH EMAIL

Once you have supplied a destination email address, click on **Send**. The text of this call will automatically be attached to the email and sent.

Download Notes: This provision is for you to download the text of those notes and save them to your local disk drive in text format.

When you click on this link, the download screen will appear shown below
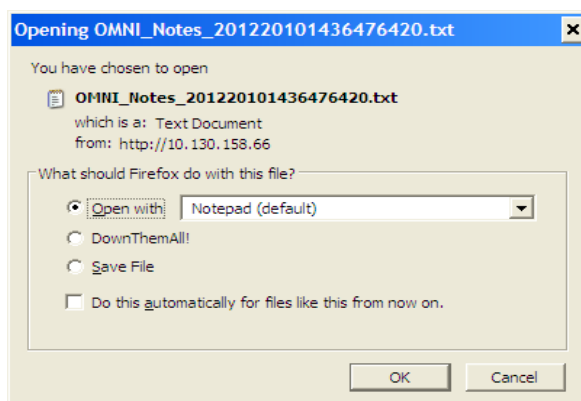
SCREENSHOT – DOWNLOADING NOTES ADDED EARLIER

5.3.3 Flags

It is possible to assign single or multiple call flags to a call in search result grid for future reference. To do this, click the Flag icon (see below) and choose the appropriate flag.

The selected flag will appear in the grid.

If you want to assign more than one flag to a call then click on the Flag icon again and choose appropriate flag.

Repeat the above step to add more flags.

Note: Please note that only one flag can be added at a time. Also, same flag cannot be added again.

5.3.4 Call Options

To the left of each entry will be an icon, which you can click to show more options in a pop-up window. The options available are explained below:

SCREENSHOT – Recorded Call options

5.3.5 Play

This performs differently with different types of media, signified by the icons. To activate this, you can select Play. When it plays, you get the following display, depending upon the type of file and medium:

Icon: ▨ - This indicates an audio file. When you click Play for this entry, you get the following display and can hear the recorded audio conversation.

Playing recorded call						✕

Called by	11243	**Called to**	11255	**Device**	11243
Call time	06-19-2018 22:13:43	**Name**	No associated agent		
Duration (sec)	188	**Call Direction**	↑	**Flags**	...

00:00 / 00:00

Playing recorded call					✕

Called by	11243	**Called to**	11255	**Device**	11243
Call time	06-19-2018 22:13:43	**Name**	No associated agent		
Duration (sec)	188	**Call Direction**	↑	**Flags**	...

00:00 / 00:00

SCREENSHOT – Playing recorded call

Icon: ▨ - This icon represents a screen capture file. When you play it, the player will display screen capture as shown below, and you will also be able to hear the recorded call:
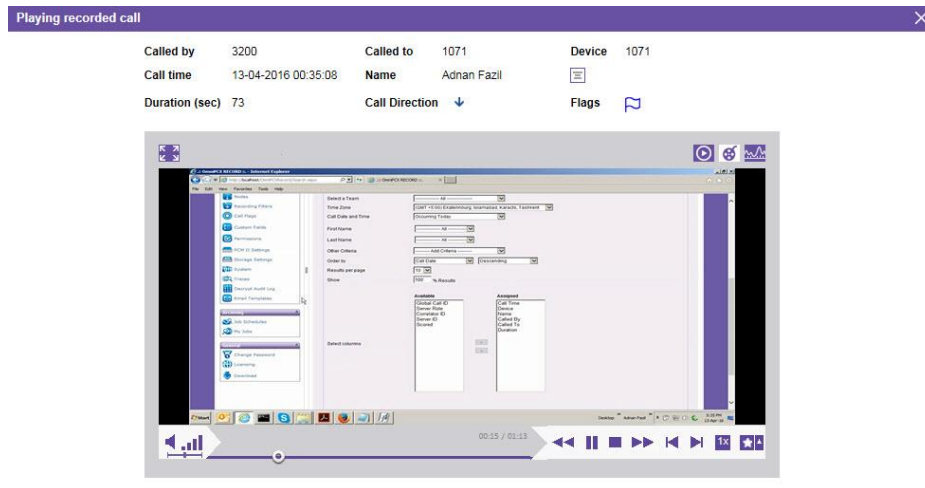
SCREENSHOT – Playing Video Call

If you find this display too small, you can double click on the video area, and you get a full screen display as shown below:
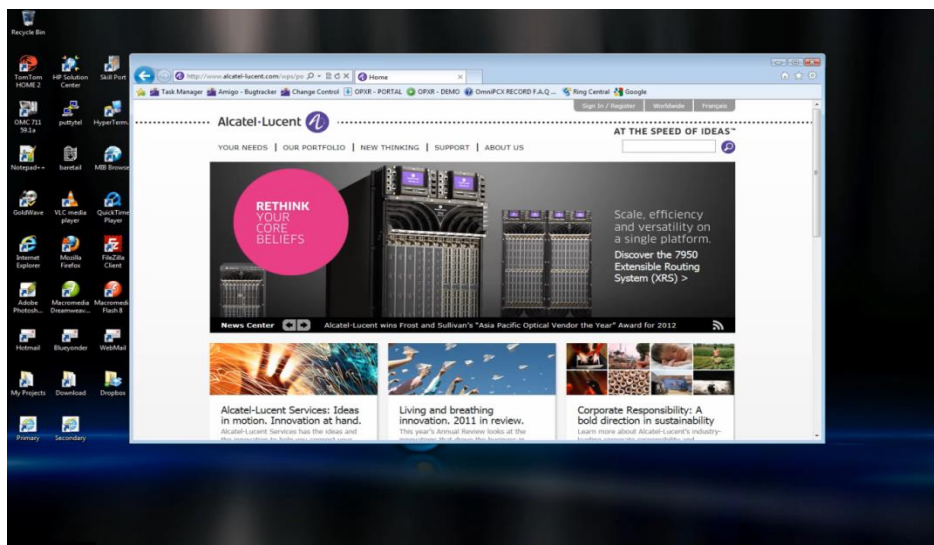

SCREENSHOT – Playing Video Call – Full screen

Note: To capture screen activities, you will need to install the Screen Capture Agent Utility, which is included in the download section of the application. See the Download section of this document for more information on the Screen Capture Client.

Note: If your selected call was placed on hold during recording, the screen capture playback will appear blank during this period.

Note: To playback video files from a PC, you will also need to install XVID, which is included in the download section of the application. A download link for the XVid component can be found in the download section of the OmniPCX RECORD Portal

Ref. ALESVC50167 Ed.42

5.3.6   Player Controls
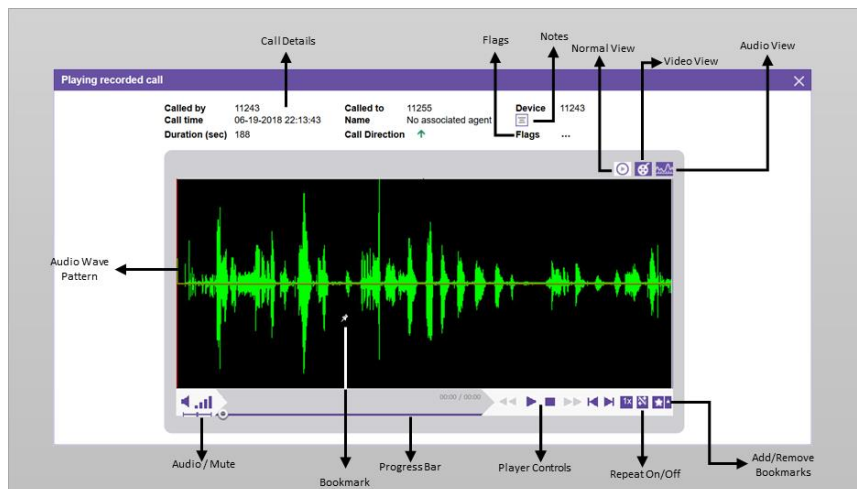
Icon: 🔒 - This indicates that the file is encrypted.

Icon: 🔒 - This indicates that the file is both encrypted and archived

Icon: 📦 - This indicates that the file is non encrypted and archived

Note: Calls that have been archived (both Encrypted or Non-encrypted) can be played without the need to restore them first. However, this feature must first be enable from the Storage Settings Configuration Page. For information on enabling this feature please see 'Storage Settings' or refer to your system administrator.

During playback, a user can also check how many times a call was put on hold and when it was retrieved. To check this information, please click on the Notes icon 📄 and it will display the information as follows:
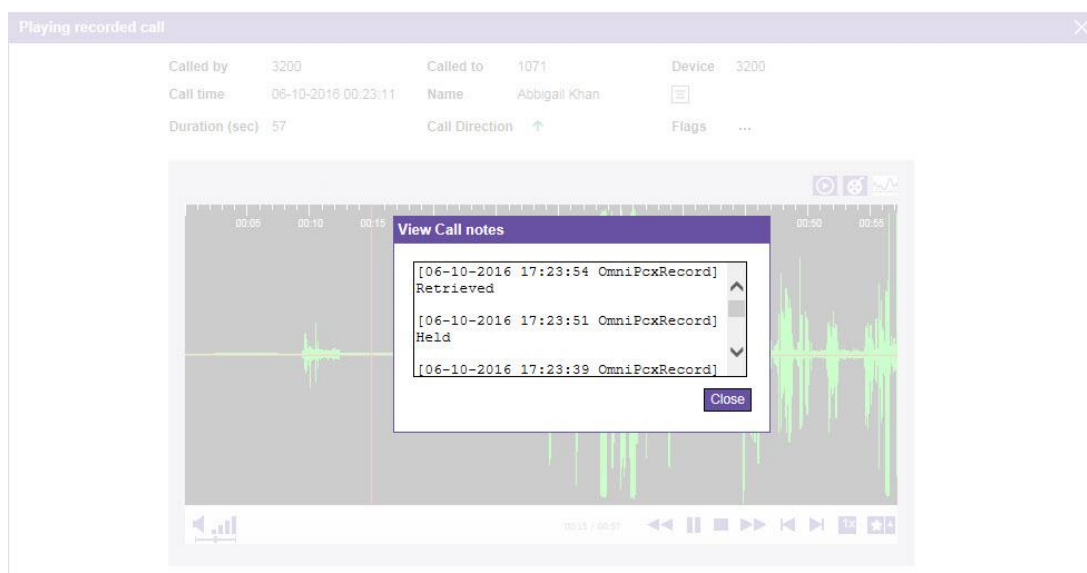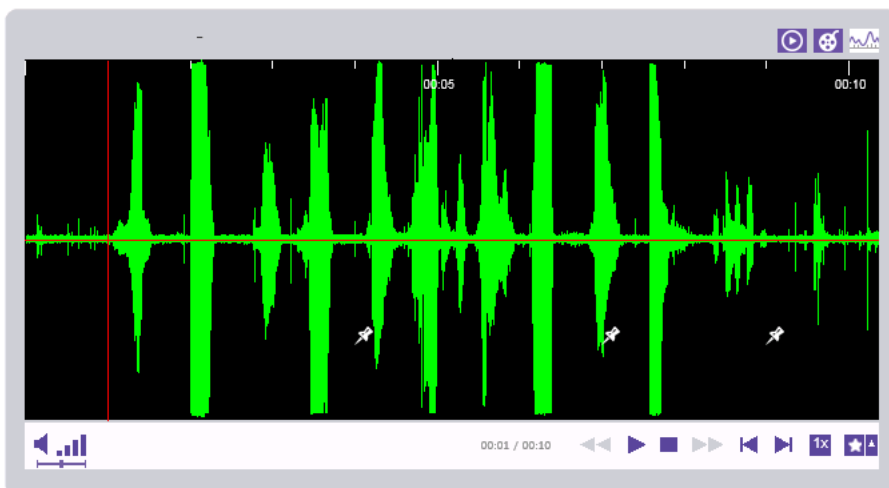

5.3.7   Bookmarks

Bookmark(s) can be added to a call during playback and a 📌 icon will be displayed at the places where bookmarks are added. To add a bookmark click on the ⭐ icon on the player interface and a dialog box will be displayed as follows:
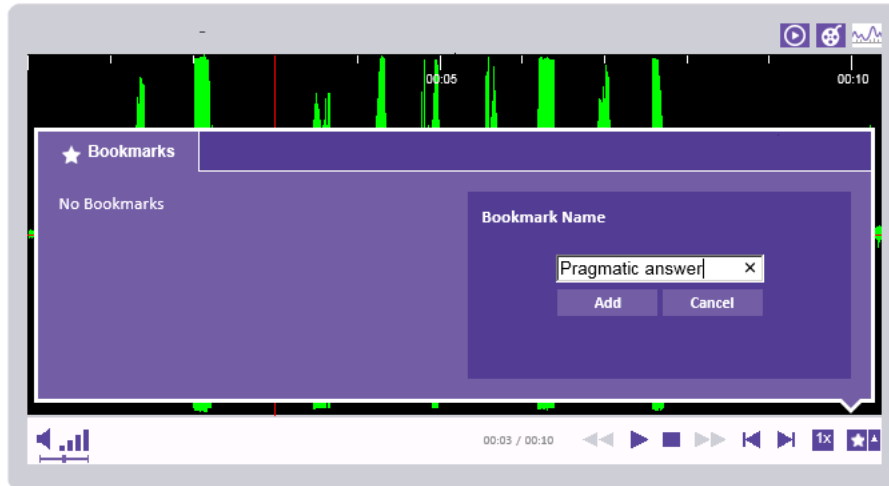
Type a name for bookmark and click Add button. Bookmark icon will be displayed as follows:

If you want to delete a bookmark then click on the 🔖 icon and a list of bookmarks will be displayed as follows:

Click on the **X** icon in front of the bookmark you want to delete.

5.3.8 Play All

This option plays all of the calls that your search returned, by playing them one after the other.

5.3.9 Play Selected

At the left of each entry, you can find check boxes. To select multiple files, you can tick the box next to each call and then click **Play Selected** on any of the selected files. This plays all the selected files sequentially, one after the other.

Note: This option is not supported for encrypted calls. Encrypted calls can only be play one at a time. If you try to play multiple encrypted calls using this method, the following message will be displayed
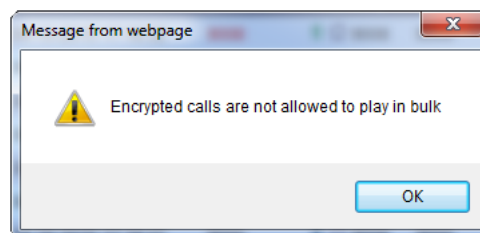
Warning! If notes are clicked while playing a video call then the player stops playing the call until the notes window is closed.

5.3.10 Download CDR

You can download the Call Detail Report (CDR), using this facility. This would initiate the download. The file when opened will look like the box below.

```
Agent Name: Bryan May

Device: 2000

Device hangup first: No

Called By: 2000

Called To: 2001

Call Time: 27-06-2012 16:04:57

Direction: Outbound call

Call detail ID: 2706201216045718100

Call ID: 891AEB4F34000100

Correlator ID:

Duration: 00:00:19

Extension: 2000

Type: IP

Flag:

Notes:
```

SCREENSHOT – Call Detailed Report

5.3.11   Download File

This enables you to download the selected file so that you can save it in your storage device. This is particularly relevant when you need to access an encrypted call.

Warning! Calls downloaded using the above download option are automatically decrypted and can therefore be played on any 3rd party media player that supports the file format.

Warning! Archived Call 'CANNOT' be downloaded using the above download feature unless it is restored.

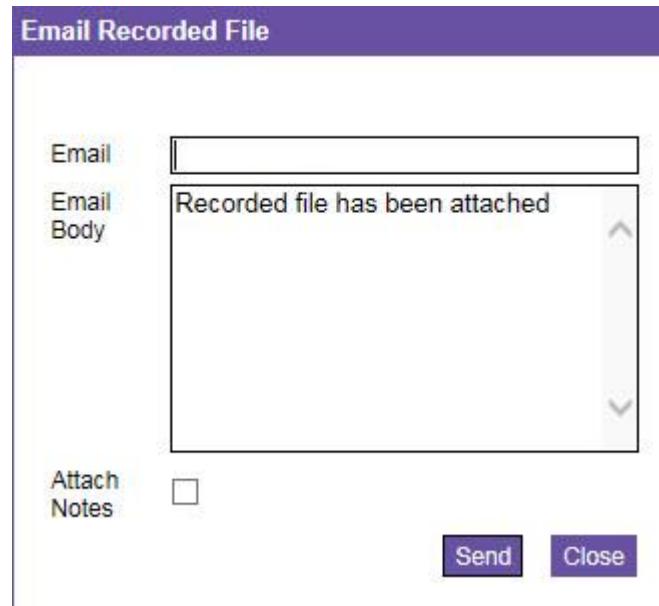### 5.3.12   Download Selected Files

This enables you to download multiple selected files and save them in your storage device / HDD. Multiple files are downloaded as a single 'Zipped' file and you will require Winzip, WinRar or equivalent utility to access your calls.

Note: A maximum of 10 calls can be downloaded together and encrypted files cannot be downloaded using this option.

Warning! Encrypted and Archived Calls 'CANNOT' be downloaded using the above download feature.

5.3.13   Email File

When you click on this option, a window opens as shown below:

Email Recorded File

Email

Email Body | Recorded file has been attached

Attach Notes ☐

Send   Close

SCREENSHOT – Sending recorded file through email

In this window, you will have to key-in the email address of the recipient in the box: **Email**. In the box below, titled **Body**, you can see a default message. You can change this text as needed. This text will form part of the email. Below it, you can see a check box **Attach Notes**. If you check it, any notes belonging to the entry you have selected will be attached to the email.

Note: The audio file of the selected entry is attached automatically and will be sent in the format in which it was recorded.

On completion of these entries, click on **Send**. This displays the following message:

The page at http://10.130.158.51 says: ✕

⚠ Email has been sent successfully

OK
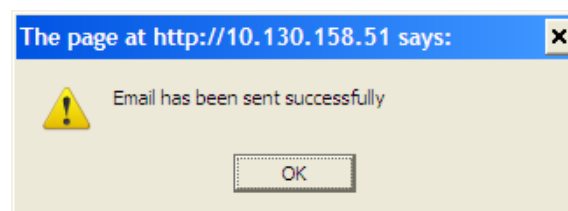
SCREENSHOT – Successful dispatch of email

This indicates that the mail was successfully sent to the SMTP server. From this server, the mail will be sent to the specified recipient

5.3.14   Do Not Archive

Icon:

This option disables archiving feature for the selected call.

5.3.15 Update Custom Field

When you click on this option, a window will appear as follows:

SCREENSHOT – Update Custom Fields

This window will display the custom fields which are available for search. Fill in the text boxes against custom fields and press Update button. The call record will be updated.

	Notes	Call time	Device	Called by	Called to	Duration	Name	CusField1	CusField2	CusField3	Flag
☐ 🔊 ☰		09-13-2017 1…	3250	↓🏠 3208	3250	00:00:15	Jhon Wick	Sales	Marketing	Commercial	…

5.3.16 My Searches

In the main page you will see the **Save Search** towards the bottom right. When the button is pressed the following window appears:

SCREENSHOT – SAVE SEARCH

First, provide a name for the saved search.

Second, using the drop down, specify if you want the number of calls matching the criteria to be displayed on the search bar. If yes, select 'Display' otherwise, select 'Hide'.

Finally, Click **Save Search**

Your Saved Search is now displayed under Search Calls (See Below). This will enable you to view the results immediately, without having to rebuild the criteria.

Search calls

My Searches		—
⋮⋮ Today's Call Count	[21 call(s)]	☒
⋮⋮ Video calls for the last 7 days	[0 call(s)]	☒
⋮⋮ Archived calls	[18 call(s)]	☒

SCREENSHOT – MY SEARCHES

To execute any of your saved searched, simply click on them. To remove a saved search, click the "X" button to the right of the entry.

5.4 Recording Rules

Recording rules or User Level Filters are the filters that can be added/enabled by a site administrator or the agent himself. A user level filter, as the name suggests, is a filter applied on calls for a specific user.

When you click on this link, the page below is displayed:

SCREENSHOT – Recording (User) Rules

In this page you can specify which numbers should be recorded, and which should be ignored. When you set a rule here, it is automatically executed when a call arrives. The options available are as follows:

Rule Name:

You can give any arbitrary name here, but it is mandatory. This is used for identifying the rule.

Call Type: Applies this filter to a specific call type

- o Both – Filter applies to all calls
- o Internal – Filter only applies to Internal Calls
- o External – Filter only applies to External calls

When:

This field provides the ability to add multiple criteria that will use the logical AND condition which means all the conditions in the criteria must be true. Following options are available:

- o Number is exactly
- o Number begins with
- o Number ends with
- o Number contains
- o Number Length is Exactly
- o Number Length is less than
- o Number Length is Greater than
- o Called by is exactly
- o Called by begins with
- o Called by ends with
- o Called by contains
- o Called by Length is Exactly
- o Called by Length is less than
- o Called by Length is Greater than
- o Called to is exactly
- o Called to begins with

- o Called to ends with
- o Called to contains
- o Called to Length is Exactly
- o Called to Length is less than
- o Called to is Greater than
- o Extension is exactly
- o Extension begins with
- o Extension ends with
- o Extension contains
- o Extension Length is Exactly
- o Extension Length is less than
- o Extension Length is Greater than
- o Correlator Data is exactly
- o Correlator Data begins with
- o Correlator Data ends with
- o Correlator Data contains
- o All Calls

Using these qualifiers, you can specify a single or multiple criteria.

For example, if you choose **Number begins with** and you give the number 2 in the box at right, all numbers starting with 2 will come under this rule.

For example, if you choose Number Is exactly 02084321234 and Correlator Contains sales then this rule will only be applicable when both conditions are true.

All Calls
When All Calls is selected then the system will display a warning message that the existing criteria will be removed.

Take This Action:

In this dropdown box you will be specifying what action will take place should this rule be matched to an incoming call. Here, you have the following two choices:

- o Record Both Parties (Default), Records both sides of the call
- o Record Internal Party Only, Records Only the Internal Party

---

> o Record External Party Only, Records Only the External Party
> o Ignore. Prevents the call being recorded

Once you have provided all the required information, click the '+' sign. This adds the rule. Once it is successfully added you can see it listed below.

The rules will be applied in a sequential manner. These rules can also be shuffled by dragging a selected rule up or down. To change the position of a rule, take the mouse pointer to the ⁞⁞ icon with a rule and press & hold left mouse button and drag it up or down to change it's position.

IMPORTANT: Please note that it is mandatory to click on **Apply** button after any change in the sequence of rules otherwise the new sequence of rules will not function and the system will continue to apply the previous sequence of rules.

IMPORTANT: Please note that it is if ROD with Record From Now option is enabled on an extension then user level filter will not be applied.

5.5 Change Password

When you click on this link, the following page opens:

SCREENSHOT – Password change screen

The fields above are self explanatory. Give your existing password first then supply a new password. You must also re-enter the password to confirm it. Once done, click the **Update** button. Your new password has now been changed.

5.6 Download

5.6.1 IP Attendant Client Utility

The IP Attendant Client Utility needs to be installed on all PC's that handle calls via an attendant phone and keyboard. To install the IP Attendant Client Utility, choose the download link: **IP Attendant Client Utility** from the **General** pane as show below:
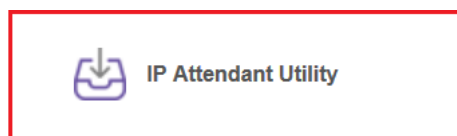

SCREENSHOT – DOWNLOAD IP ATTENDANT CLIENT UTILITY

Note: For more information on installing the IP Attendant Client Utility – refer to section "Installation - OmniPCX Console Recording Agent" in the OmniPCX RECORD Installation Guide

5.6.2 Screen Capture Agent Utility

The Screen Capture Agent utility needs to be installed on all PC's that also require the ability to capture the agents screen activities during a call. To install the Screen Capture Agent, choose the download link: **Screen Capture Agent Utility** from the **General** pane as shown below:
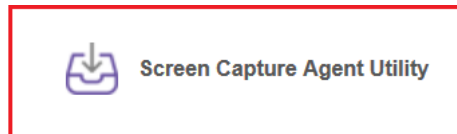
SCREENSHOT – DOWNLOAD SCREEN CAPTURE UTILITY

Note: The screen capture server records Agent screen activity by communicating directly with the Screen Capture Agent utility. If the Screen Capture server is unable to access the Agent Utility an email will be sent to the 'System Alert Email' address.

Note: When wrap-up is enabled, the Screen Capture Server will wait for a wrap-up start signal to be received from the Telephone System. If no wrap-up start signal is received from the Telephone system, Screen Capture will automatically become available after the 'Wrap-up Initial Wait' time expires. The 'Wrap-up Initial Wait' time is pre-configured by your Administrator.

If, however, a wrap-up start signal is received from the telephone system, Screen Capture will NOT become available until a wrap-up finished signal is received from the Telephone system

IMPORTANT: Please note that the color of Screen Capture Agent Utility tray icon turns green when the utility is connected with Screen Capture Server during the call. If the color of tray icon remains red during the call then this means that utility is not connected with the Screen Capture Server and the video of this call will not be available.

Note: The number of log files has been changed to 10 and log file size has been changed to 10MB by default.

Note: For more information on installing the Screen Capture Agent Utility – refer to the OmniPCX RECORD Installation Guide.

5.6.3 XVid

The XVid (64 bit) Component is required in order to playback video calls from your PC and is freely available from http://www.xvid.org. To download the XVid component choose the download link: **XVid** from the **General** pane as shown below:
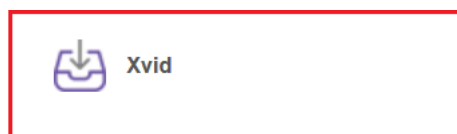
SCREENSHOT – DOWNLOAD XVID COMPONENT

5.6.4 VLC

Silent monitoring requires a third party component called VLC. If this component is not installed, silent monitoring will not work as expected.
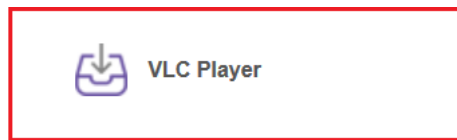
SCREENSHOT – DOWNLOAD VLC COMPONENT

Note: For details on how to install & configure the VLC player, please contact your system administrator.

5.7 Additional Features

5.7.1 Record on Demand

This facility is not listed in the links of the OmniPCX RECORD application, but is instead accessed via your IP Touch Phone. This facility is only available to IP Touch Phone users and must be made available by the Administrator.

In the screenshot above you can see two buttons displayed as 'OmniPCX-RE…'. One is for ROD on the Primary server and other is for the Secondary server. Pressing either button shows the corresponding information as shown below:
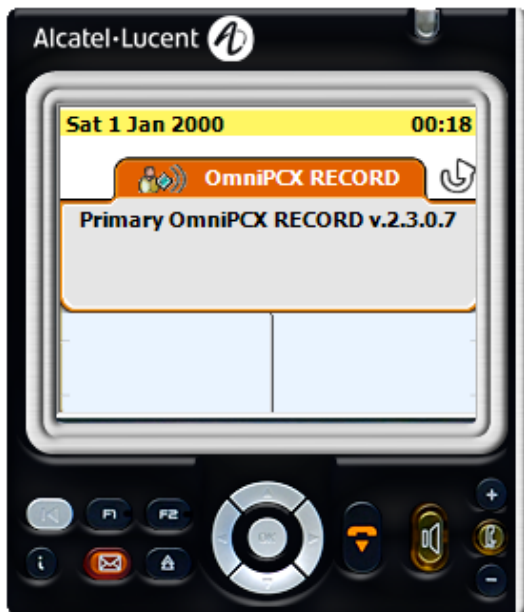
Primary Server   Secondary Server

The Record on Demand Options is only displayed when a call is made or received. When this feature is active and you make or receive a call, the following options are displayed automatically:

SCREENSHOT – Record on Demand Options

Note: When using Primary & Secondary servers, the options displayed will be made available 'Automatically' from the OmniPCX RECORD server that is currently active.

In the above screen, you are provided with the following 2 choices:

o   Record entire call -this option records the entire call, even if you click on it during the course of the conversation

o   Record from now – This option records the conversation from the point at which you clicked it.

After choosing one of the options, or by pressing your IP Touch back button, the IP Touch screen will revert to its standard mode as shown above.

If, while still on a call, you wish to access the recording options, you can do so as follows:

First, click the back button as shown above.

SCREENSHOT – Personal tab

Now, using the arrow keys on your IP Touch Phone, select the **Menu** tab. The following page is displayed:

SCREENSHOT – Move to **Menu** Page

On this page you can find: **OmniPCX-RE…** at the bottom right (See Above). Select the button on your IP Touch phone that is located next to this option.

SCREENSHOT – RECORD ON DEMAND Options

The Recording on Demand options will now be displayed and you can select the action of your choice by clicking the button on your IP Touch Phone next to the appropriate option.

SCREENSHOT – THE call is being Recorded
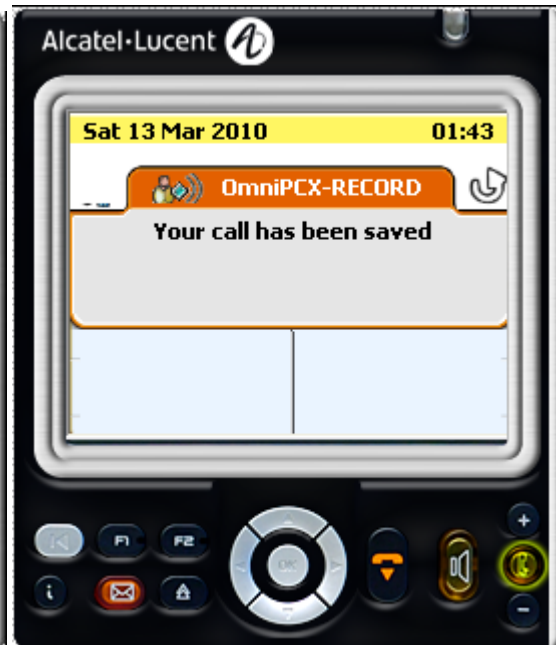
SCREENSHOT – Your call has been saved

Note: When you select either recording action, a message is displayed informing you that the call is being recorded and when the call is finished you will receive an additional message letting you know that your call has been saved. (See Above)

5.7.2   Record On Demand Popup Windows Control Parameters

The duration of the popup windows is configurable with a timer value. There are 3 timer parameters as follows:

```
<add key="PhoneTimeDelay" value="5" />
<add key="PhoneTimeVersionFormDelay" value="2" />
<add key="PhoneTimeHangUpDelay" value="2" />
```

PhoneTimeDelay
This parameter controls the duration of popup windows that display ROD options.

PhoneTimeVersionFormDelay
This parameter controls the duration of popup window that displays OmniPCX RECORD version.

PhoneTimeHangUpDelay
This parameter controls the duration of the popup window that displays after the call hang up.

Note: Please note that setting a higher timer value may generate problems such as popup window remains on phone even after the call is finished.

6   Using OmniPCX RECORD (Group Admin)

The OmniPCX RECORD user application also provides some additional group admin features. These features are accessed from the standard user interface, but will only be displayed if the user has been configured as a Group Admin by the application administrator.

If you have been configured as a Group Admin, your menu options will include the following options:

- o   Silent Monitor
- o   My Team Calls

Note: If you believe you should have access to the above features, but they are not visible from on your left hand menu, you should contact you administrator.

6.1 *Silent Monitor*

Note: IMPORANT, in order to perform silent monitoring you must install the VLC third party component. A download link for the VLC component can be found in the download section of the OmniPCX RECORD Portal, however, if you are unable to perform silent monitoring correctly, please contact your Administrator.

When you click on this link, you will first be presented with a number of filter options. If a large number of extensions are displayed in the monitored list it can be difficult to identify the calls you are looking for. However, you can filter the list so that only the relevant extensions are displayed. To do this, provide the appropriate criteria using the drop down boxes as shown below:

Important! With the recent inclusion of ISDN Trunk and SIP Trunk recording, the options availability will depend if you are running an extension side or trunk side or both in a hybrid model. Please note that attendant calls will also be displayed under extension calls.

SCREENSHOT – Extension-Side Silent Monitor Filters

The criteria above will filter the monitored extensions and only display calls as per given criteria.

SCREENSHOT – Extension-Side Silent Monitor Filter Applied

While listening to a call, you may decide that the call should be recorded. This is possible by clicking the green icon which will instigate recording of the entire call.

Note: Agents will only be seen in this list if they are assigned to your team, and on a call.

From this list of calls, you can click on any call to listen to it 'Live' via your PC speakers as shown below:

SCREENSHOT – Listening to the live call

6.1.1 Silent Monitor Flags

While listening to a call, it is possible that you may decide you need to take action. Therefore while listening to a call it is possible to flag the call for future reference. To do this, click the Flag icon (see below) and choose the appropriate flag

SCREENSHOT – Flag a call for Future Reference

Ref. ALESVC50167 Ed.42

Once you have chosen the appropriate flag, it will appear against the call as shown below.

<p style="text-align:center">SCREENSHOT – Flagged Call</p>

Note: Please note that you can assign more than one flag to a call.

6.1.2 Silent Monitor Notes

Similarly, it is possible to add call notes while listening to a call. To do this click on icon, add call notes and click save button.
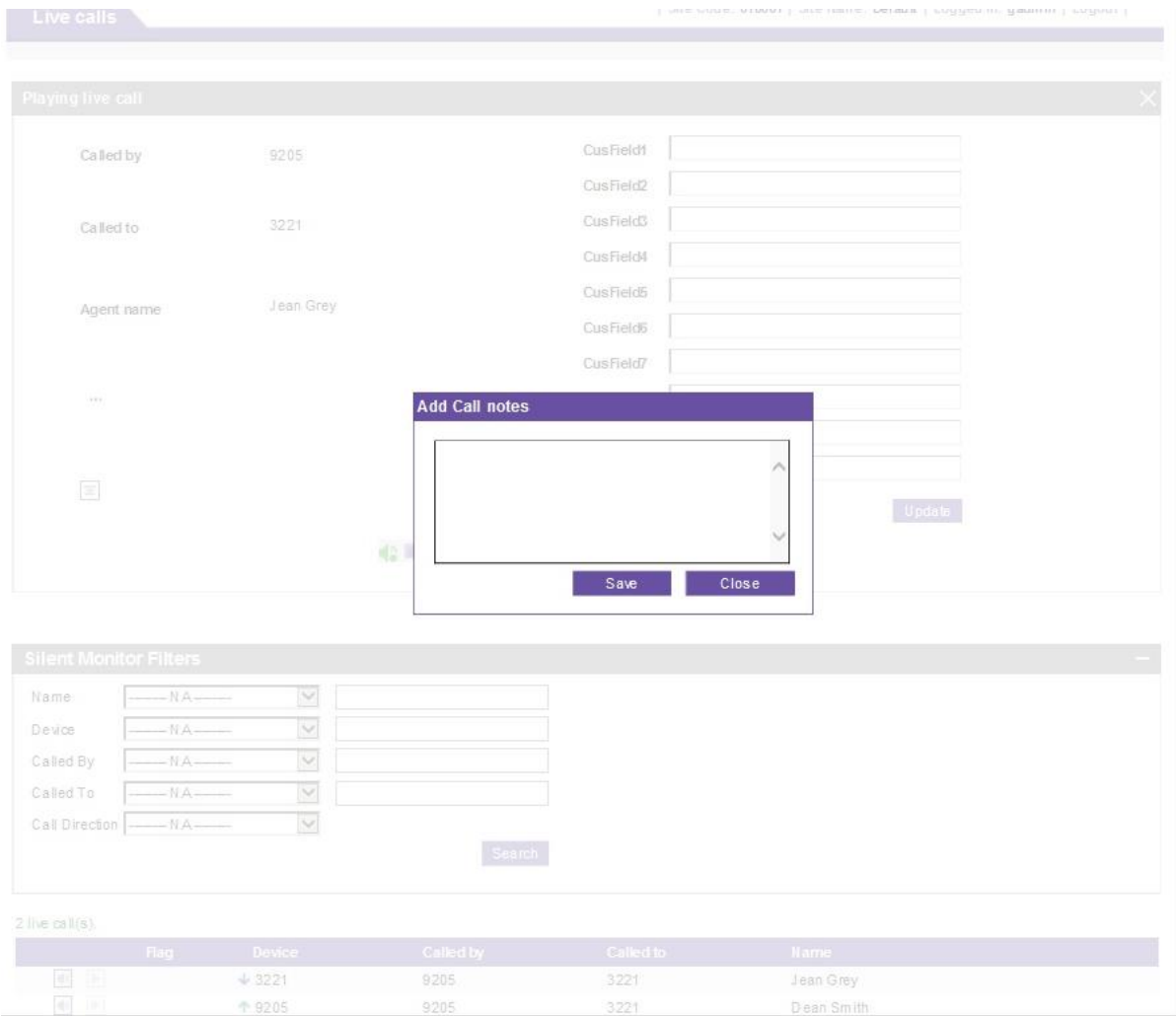
<p style="text-align:center">SCREENSHOT - ADD CALL NOTES</p>

6.1.3 Silent Monitor Custom Fields

Also, it is possible to add data to the custom call notes while listening to a call. To do this, add data against the custom fields and click save button.

Note: Please note that this screen will not display all custom fields rather the custom fields which are enabled for this site.

6.2 My Team Calls

As time goes on the database of recorded calls will increase significantly and when it comes to finding one call from many you will need some powerful search criteria. This is the screen that will allow you to do this. Using the many different filters permissible by the application; you will be able to find the call that you are looking for more easily. When you click on this link, the following page opens:

SCREENSHOT – Search Calls – Opening Page

6.2.1 Search for Calls

Here should look at the second portion of the page: Search for calls. In this section you have various filters to narrow down your search results. These filter fields are explained below:

Select a Team:

This dropdown box lists the available teams. You can select the name of the team whose call you are searching for. If you leave as the default, results are shown from all existing teams.

Call Date and Time:

To make your selection easier for date and time, some presets are given in this dropdown box. They are:

- o Occurring Today
- o Occurring Yesterday
- o Occurring in past 1 Hour
- o Occurring in past 4 Hours
- o Occurring in past 7 Days
- o Occurring in past 30 Days
- o Occurring in past N Days
- o User Specified

If you select any of the first 6 in the list, there will not be any change in the screen format. By if you select: **Occurring in past N Days**, then one more field is added as given below, for you to specify the value for the variable "N".

SCREENSHOT – Field qualifier for N days

If you select the last item: **User Specified**, then also the screen would change as given below, to accommodate you detailed specifications:

SCREENSHOT – Field qualifier – user specifications

In this newly created portion, you can specify from and to dates. For this purpose, you can use the 📅 icon nearby entry box, which displays the calendar, or use the three dropdown cells below to specify the date. You can choose whichever is convenient to you.

Speech Analytics:

This field will show you the speech analytics options in a dropdown list as follows:

- o Silence
- o Conversation with low voice
- o Standard conversation
- o Louder conversation

Please note that only those options will be available that are enabled on the speech analytics page. Only one option from the dropdown list can be selected.

Other Criteria:

In this field, you have the following options:

- o Archived Calls
- o Call Direction
- o Call Status
- o Called By
- o Called To
- o Correlator ID
- o Custom Fields
- o Call Type
- o Device
- o Device Hang-up
- o Duration
- o Flag
- o Global Call ID
- o Notes

- o Primary Node IP
- o Recording Interface
- o Recording Rule
- o Secondary Node IP
- o Server ID
- o Server Role
- o Video Calls

Note: The 'Called To' field contains the OXE translated 'Called Number'. Please refer to the relevant OXE programming guide for more detail on number translation."

The way you use this facility is slightly different from others previously mentioned. You can select either none, or one or more criteria. The method of using this is as follows:

1. Select the preferred criterion from the dropdown box

2. The button: Add displays at right.

3. Click on that **Add** button.

4. Entry box pertaining to the criterion for which you had clicked on **Add**, display below

5. Likewise, you can add more than one criterion. The screenshot below shows an example of multiple criterion that have been applied to the search

Archived calls	Show		☒
Video Calls	Show		☒
Device hangup	Show		☒
Global Call ID	Starts with		☒
Correlator ID	Starts with		☒
Device	Starts with		☒
Call Direction	Inbound		☒
Called By	Starts with		☒
Called To	Starts with		☒
Duration	Less than	00:05:00	☒
Server ID	Starts with		☒
Server Role	Primary		☒
Flag	Training required		☒
Notes	Starts with		☒
Call Status			☒
Recording Interface	IPDR		☒
Recording Rules	User Filters	TEST	☒
Call Type	Internal		☒
Primary Node IP	Starts with		☒
Secondary Node IP	Starts with		☒

SCREENSHOT – Other criteria qualifiers

Note: A new search option **Range** is available in **Call Duration** search criteria. This option provides the facility to the user to search the calls for a given range in minutes i.e. calls with a duration between 30 to 45 minutes.

Note: A new option **Range** is available in **Device** search criteria. This option provides the facility to the user to search the calls for multiple devices. The device number values can be comma separated or a range with a – sign. For e.g. 3005,2145,5320 OR 2000 – 2150.

6. When you add a criterion, that criterion is removed from the dropdown box list against **Other Criteria**.

7. At the right of each added entry box, you can find an "**X**" mark. When you click on it, that entry box is removed, and the criterion to which it belongs, is added back to the list against **Other Criteria**.

8. When you add a new criterion, (if required) you must provide details in the adjacent box provided.

Results per page:

Default value is: 10. Available choices: 10, 20, 30, 40, 50.

Show:

You can manually key in this value. The Default is 100%. This will be of use, when you have too many calls displayed for 100% display.

Once you have given all the details as detailed above, you can check how many entries will be returned from this selection. To do so, click on the button: **Count Results** at the bottom centre of the page. Immediately, to the right of that button, the total number of qualifying entries displays at the right of that button as below:

| Search | Count Results | 347 |

Select Columns:

Choose the information that you would like to display as part of every result row. To do this, select the required field from the 'Available' list box on the left and move the field to the 'Assigned' list box on the right by using the arrow buttons. All fields placed in the 'Assigned' list box will be displayed for every result row that is returned by the search criteria.

Note: Recording Filter is available in the list under Available column. This will display a rule name for which a call is recorded as follows:

Note: With the introduction Trunk Group identification implementation, Board, Trunk Group and Equipment fields will be in the list under Available column.

Note: With the introduction of ISDN Trunk Recording functionality, a field "Channel" will be in the list under Available column. The information under this field is only relevant for calls recorded with Trunk Recorder.

Note: If you have no custom fields available and need to be able to search on them, you will first need to make your custom fields searchable. To do this, review the section of this document labelled: *Custom Search Fields*.

To view the actual results, click on the **Search** button. Below is a sample view of the search results:
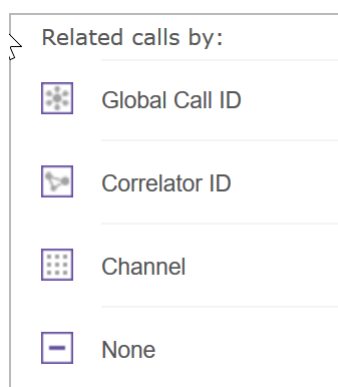

SCREENSHOT – List of Recorded Calls

Note: Search results can be grouped based on the following options:

5- Global Call ID

6- Correlator ID

7- Channel

8- None

To use this option, click on ➕ icon and a menu will be displayed as follows:

Once you select any option (Globald Call ID, Correlator ID or Channel) from this menu, the related records will be displayed in a grid under the parent record.

Although, these child record will have the same format as the parent record but there are certain options that will not work. These options are as follows:

-   Play All

-   Play Selected

-   Download Selected Files

-   Email File

The above options will work with parent records ONLY.

To close a child grid, click on and select None.

Note: The listed recordings can be re-sorted in Ascending or Descending order by clicking on the column header.

Note: Please note that the columns in the search result grid will adjust themselves automatically according to the available space and number of selected columns. Also the width of the columns in the search grid can be adjusted manually by placing the mouse pointer at the start of a column, press & hold the mouse button and drag right or left to adjust the width of the column. The column adjustments will be saved in the cookies for the current session and will be reset once the session is closed.

Note: Previously, a question mark **?** icon was displayed for both internal and external SIP not on DR-Link calls. Now, all SIP not on DR-Link calls will have the same icons as they are being displayed for IPDR and DR-Link calls.

Note: Once your search results have been returned, you can play & manage the calls using the same methods described under section: "My Calls → Call Options"

Note: Please note that the columns in the search result grid will adjust themselves automatically according to the available space and number of selected columns.

6.2.2 My Searches

Once you have created a search criterion, you may want to save it as a template for use later. You can do this by selecting the **Save Search** button which can be found at the bottom right of the search page.

When you save a search, an entry is added to the list at the top of the search page as shown below:
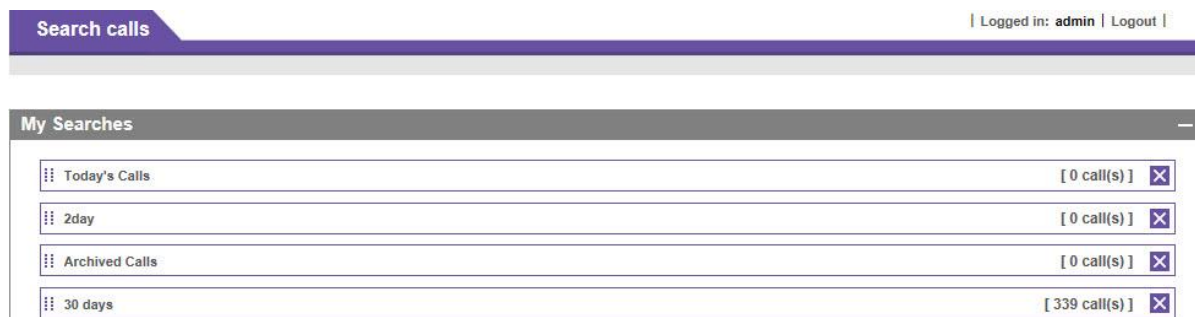
SCREENSHOT – Saved searches

To execute any of your save criterion, simply click on the item appropriate item and the relevant calls will be displayed automatically.

Note: To delete a saved criterion, click the 'X' button located on the right.

# 7 Console Recording Agent

7.1 Configuration

Once you have installed the OmniPCX Console Recording Agent (See installation Guide), the application icon will appear on your desktop. Double click the icon and the application will appear in your PC's System tray (See below)

In case, if you are not logged in as an administrator, then right click the application icon and click **Run As,** as shown below:
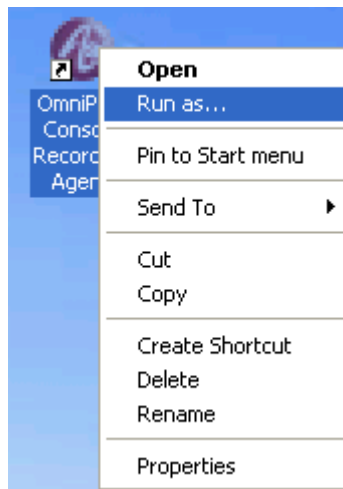
Following screen will appear, select **Administrator** provide the password and click **OK.**
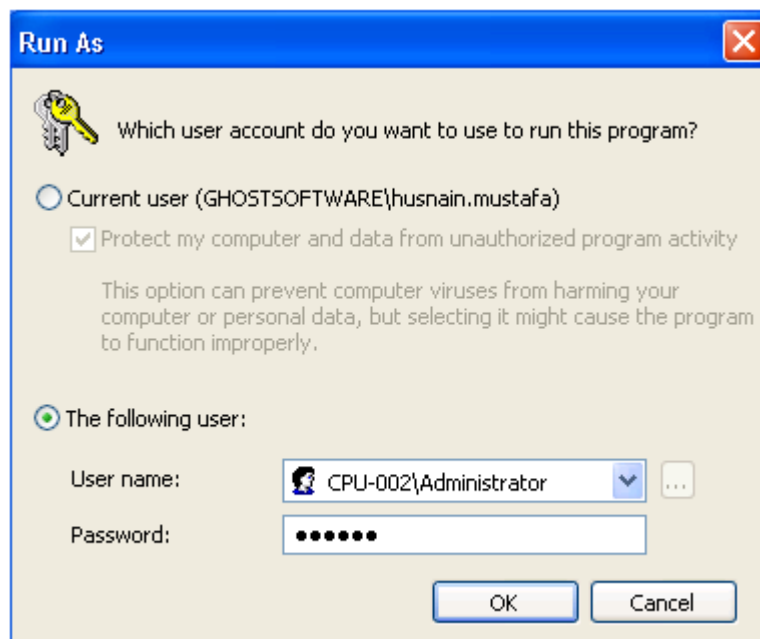
1. Now, you need to open the configuration Window. To do this **Right Click** on the icon appearing in the PC tray and select **"Configuration"** from the popup menu as shown below and the configuration Window will be displayed.
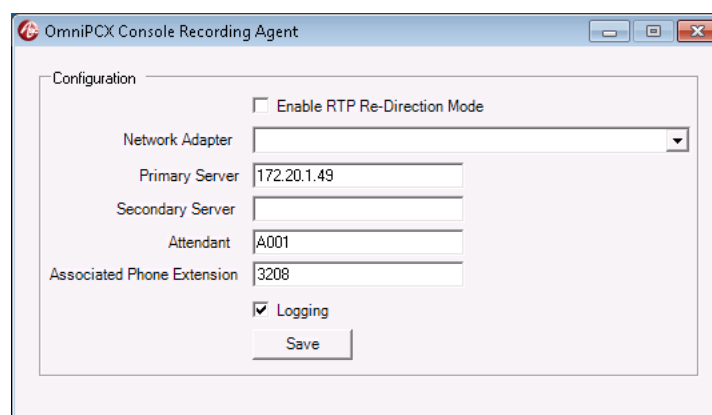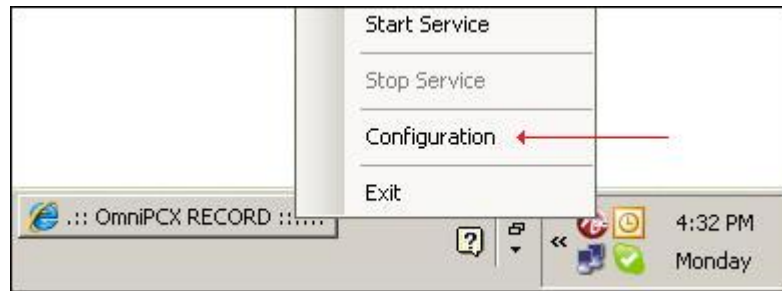
2. The configuration window is used to specify the following parameters:

   Enable RTP Re-Direction Mode
   Click this checkbox only if you are using a softphone (IPDSP)

   Network Adapter
   This dropdown will be enabled once Enable RTP Re-Direction Mode checkbox is checked.

   Primary Server
   IP address of the primary server

   Secondary Server
   IP Address of the secondary server

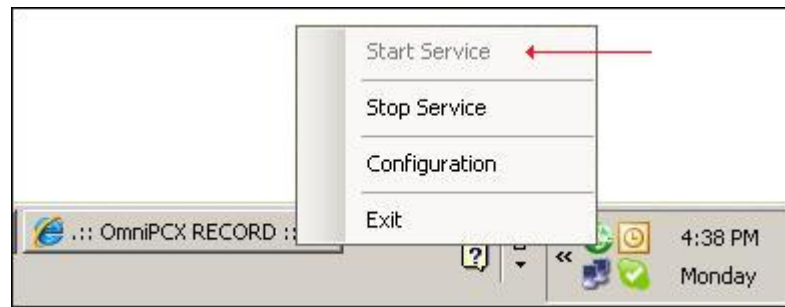   *Attendant*
   Physical directory number configured in OXE.

   Associated Phone Extension
   Extension number of the phone.

   Logging
   Enable/disable creation of log files.

   Click **Save.**

---

3. Once you have provided the appropriate configuration details, you will need to start the service. To start the service, **Right Click** on the application icon and from the popup menu **Click Start Service**

   IMPORTANT: The Alcatel-Lucent 4059 EE Attendant must be running before starting the "OmniPCX Console Recording Agent"

4. Once the OmniPCX Console Recording Agent is connected, the Application Icon will turn green (See Above). This indicates that the service is running and that calls for the designated attendant will be now recorded.

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