How to use BT Cloud Voice Call Recording

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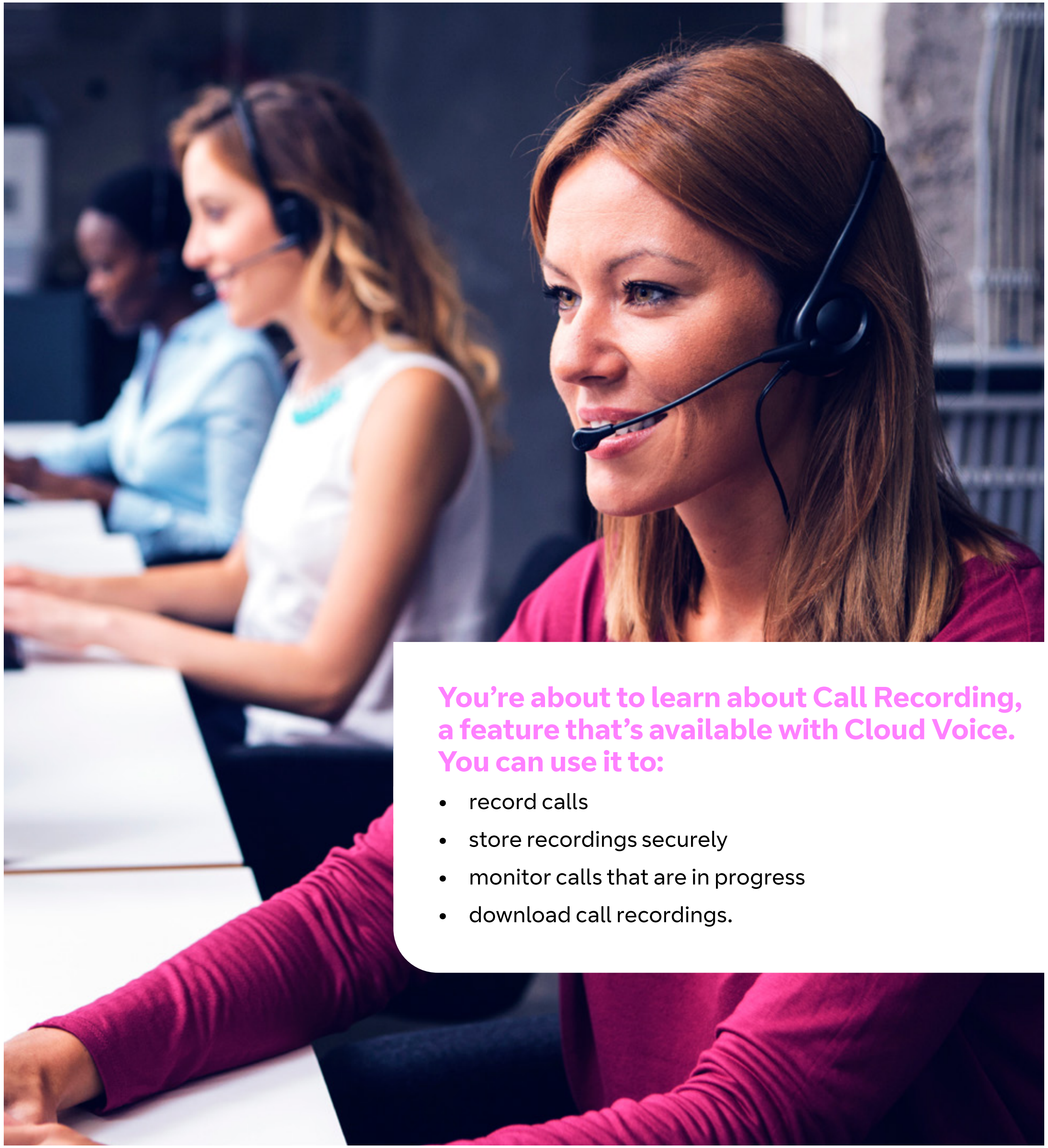


You're about to learn about Call Recording, a feature that's available with Cloud Voice. You can use it to:

- record calls
- store recordings securely
- monitor calls that are in progress
- download call recordings.

1. Overview

The Call Recording feature is available with the Connect or Collaborate licences for Cloud Voice.

It lets you record calls and store the recordings securely in the cloud.

Here's three tips that will help you get the most from the feature:

1. Decide how long you want to keep recordings

When you buy the Call Recording feature, you should decide how long you will need to keep your recordings. The feature will notify you when the period is coming to an end and your recordings are about to be deleted. This is a good prompt to download and archive your recordings on your PC if you need to keep them for longer.

2. Establish policies and practices

It's the job of your administrators to establish policies and practices that keep your business compliant with the relevant laws – letting end users and customers know they're being recorded, for example.

3. Think carefully about who needs the feature

Administrators can manage Call Recording through the Cloud Voice Business Portal, and decide which end users should get access to the feature. The Call Recording feature cannot be added to functions such as Hunt Groups, so if an administrator wanted a Hunt Group to have access to it, they would have to give the individuals in that group permission.

What else can you do on the Cloud Voice Business Portal?

The Cloud Voice Business Portal shows whether any calls have been recorded – or are in the process of being recorded.

Administrators and end users can see information about recorded calls by clicking on Details on the Dashboard page. Another portal will open – the Call Recording Portal.

The Call Recording Portal is filled with information about recorded calls. End users can only see information about their own calls, but administrators can see information about calls that have been recorded for a whole site or organisation.

The Call Recording Portal has these features for administrators and end users:

Feature	Function
Dashboard	See headline information and statistics about your recorded calls
Recorded calls	Play, download, email or export recordings
Downloaded calls	Download a batch of recordings as a zipped file
Archive	Archive and store recordings on your PC
Comments	Add a comment on calls – such as a reference or case number
Annotation	Comment on particular moments in a call, or review the comments left by others
Categories	Group calls into categories of your own making; you might divide them into 'Sales', 'Marketing' and 'Support', for example
Customer Relationship Manager (CRM) integration	Associate calls with the customers you manage through Salesforce.com or SugarCRM

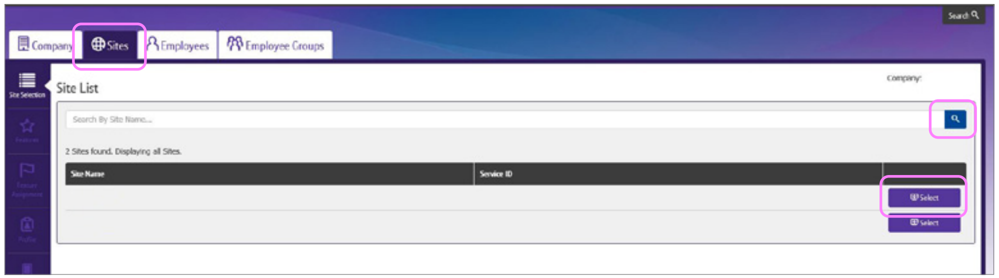
Then there's the **monitoring feature** that only administrators can use. It allows administrators to listen in on calls as they happen (with a few seconds delay). This is useful for training advisors and carrying out checks for quality assurance.

2. How to add Call Recording to a user

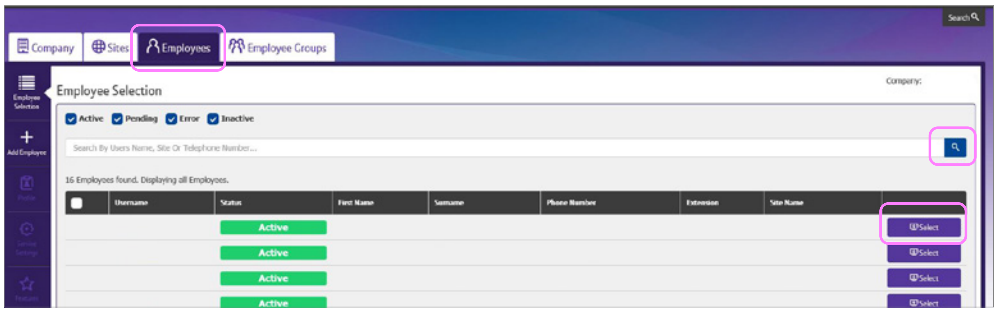
Once your business has bought the Call Recording feature, an administrator can give an end user permission to use it.

The administrator just needs to:

1. log onto the Cloud Voice Business Portal
2. go to the Sites tab
3. click the search button to see a list of sites

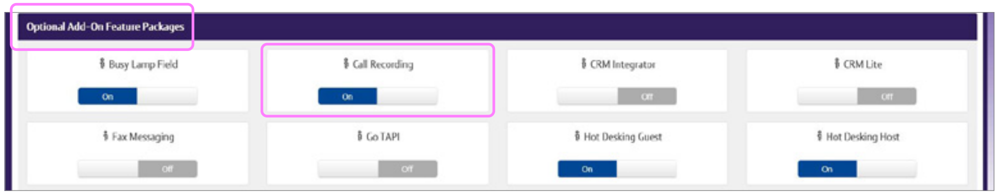


4. select the site that the user belongs to
5. go to the Employees tab



6. click the search button to see a list of end users
7. select the user they want to be able to use Call Recording
8. click on Service Settings in the toolbar on the left-hand side of the screen

9. scroll down to the section headed Optional Add-On Feature Packages
10. switch Call Recording on



11. scroll down and click Save
12. wait while they're automatically returned to the Employee page

The administrator can then check whether the end user has been granted access by clicking the search button on the Employee page. The Status column next to the user's name will tell them whether the permission is pending or active.

3. Removing someone's access

To take Call Recording away from an end user, an administrator should follow steps 1 to 9 from the previous section.

They should then:

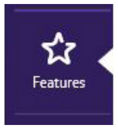
10. switch Call Recording off
11. scroll down and click Save
12. wait while they're automatically returned to the Employee page.

4. How to set calling policies

Calling policies determine which calls will be recorded. By default, company administrators can set policies; group administrators need special permission.

Administrators with the right level of authority can set policies if they:

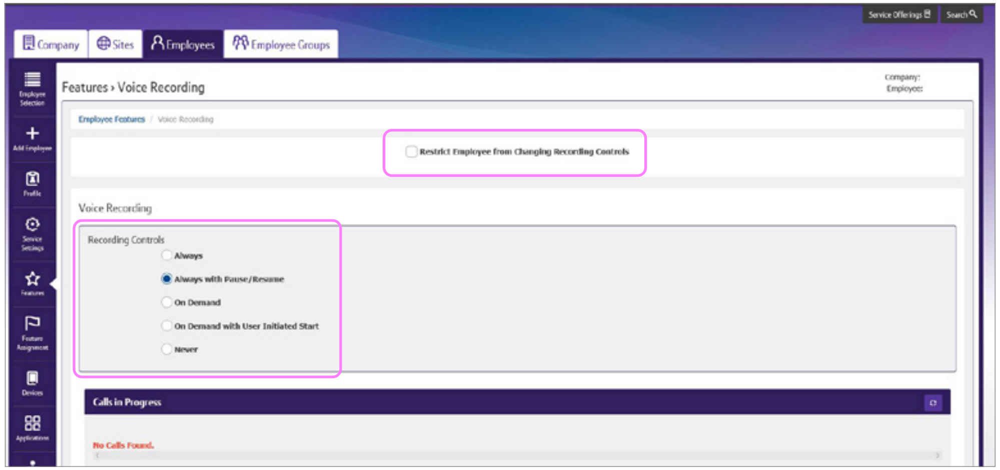
1. log onto the Cloud Voice Business Portal
2. go to the Sites tab
3. click the search button to see a list of sites
4. select the site that the user belongs to
5. go to the Employees tab
6. click the search button to see a list of end users
7. select the user they want the policy to affect
8. click on Features in the toolbar on the left-hand side of the screen



9. scroll down to the section headed Voice Recording
10. click Configure

11. check the box if they don't want the end user to be able to change your policies
12. choose from the list of policies:

Policy	Outcome
Always	All calls will be recorded
Always with Pause/Resume	All calls will be recorded, but the end user can stop and start the recording function
On Demand	Calls will not be recorded unless the end user starts the recording on the Cloud Voice business portal, BT Communicator App or by dialling *44 on their desk phone before the call finishes
On Demand with User-Initiated Start	Calls will not be recorded unless the end user starts the recording before the call finishes; the end user can also stop and start the recording function. They can do this on the Cloud Voice business portal, BT Communicator app or by dialling *44 on their desk phone
Never	No calls will be automatically recorded (however, an administrator may still choose to record a call using the Voice Recorder Portal)



13. scroll down and click Save.

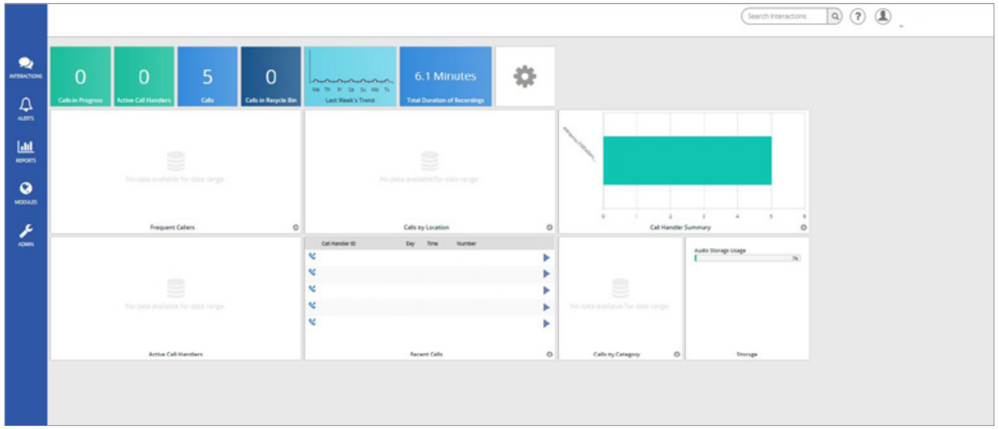
5. How to use advanced functions

The Call Recording feature has advanced functions that end users and administrators can access if they:

1. log onto the Cloud Voice Business Portal
2. go to the Call Recording Feature on the Dashboard page
3. click Details to open the Call Recording Portal.

Once they have the Call Recording Portal open, end users and administrators can:

- view the dashboard
- listen to, categorise and comment on recorded calls
- listen to, categorise and comment on calls in progress
- export, download and archive recorded calls
- view, filter and export reports
- send a recording to an email address or upload it to a supported CRM application (SugarCRM or Salesforce.com)
- change time zones.



End users will only have access to their own call recordings. Administrators can see more calls and can also recover, download and delete calls from the Recycle Bin.

6. How to use access codes

End users can use access codes to control the Call Recording tool if certain policies are in place.

Access Code	Function	Policy
*44	Start recording	This code will work when the policy is: • On Demand • On Demand with User-Initiated Start
*45	Stop recording	This code will work when the policy is: • On Demand with User-Initiated Start
*48	Pause recording	This code will work when the policy is: • Always with Pause/Resume • On Demand • On Demand with User-Initiated Start
*49	Resume recording	This code will work when the policy is: • Always with Pause/Resume • On Demand • On Demand with User-Initiated Start

These are the default codes. An administrator can set up custom codes by:

1. opening the Cloud Voice business portal
2. clicking on the Sites tab
3. selecting the site they want to give new codes to
4. going to Features in the menu
5. selecting Feature Access Codes.

How might an end user use these codes on an active call that's being recorded?

If they wanted to stop recording, before asking a customer for confidential information, they would:

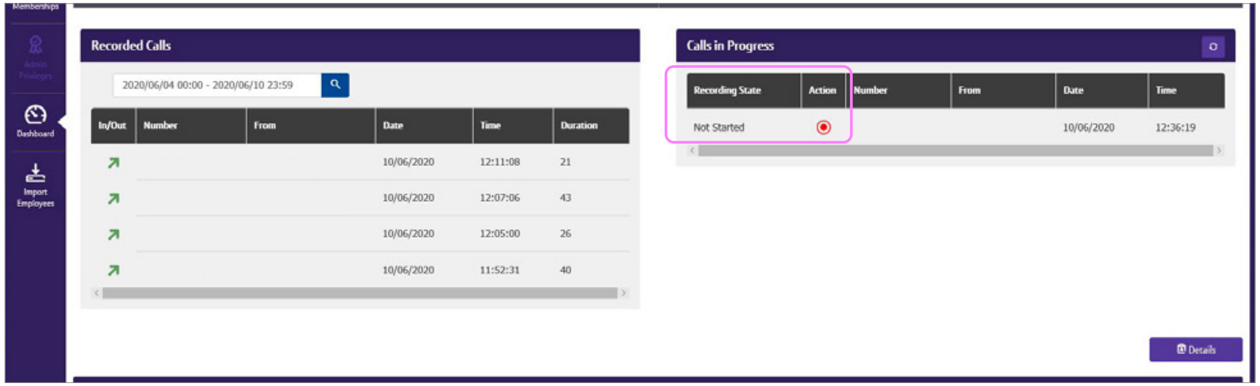
1. press Hold
2. press New Call
3. dial *48#
4. press Resume.

Once the conversation moves onto less sensitive matters, the end user might well want to resume recording. To do this, they would:

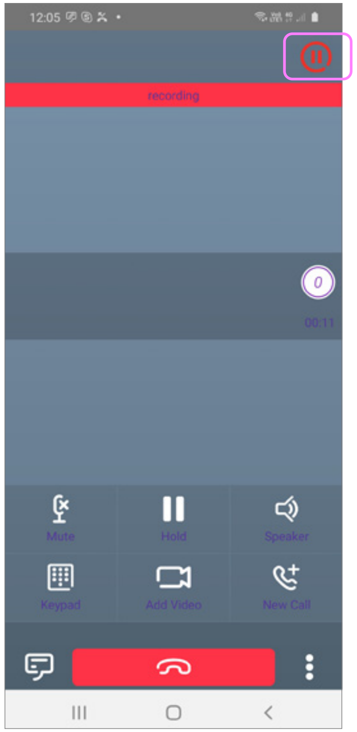
1. press Hold
2. press New Call
3. dial *49#
4. press Resume.

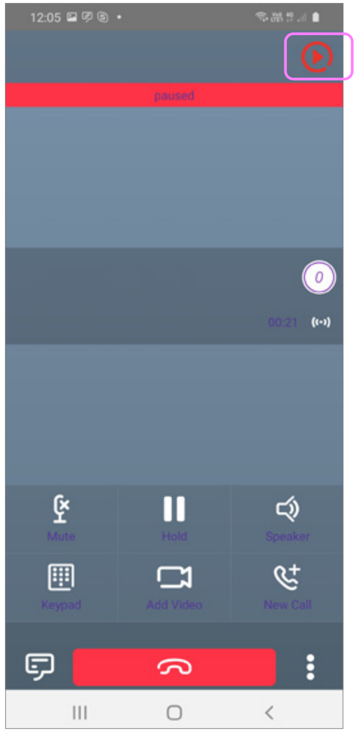
7. How to control the Call Recording feature

End users can control the Call Recording tool from the Cloud Voice Business Portal, if they have the right level of authorisation.



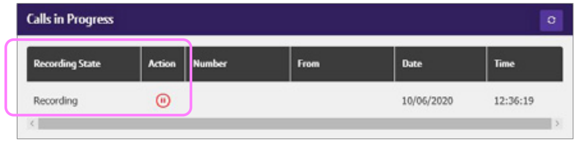
Some users will be able to start, pause and resume recording a call with the BT Communicator App.

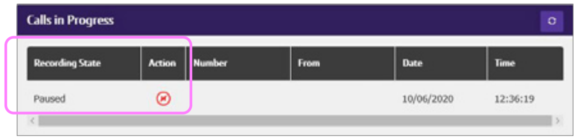




They can start recording a call and pause and resume the Call Recording if they:

1. log onto the Cloud Voice Business Portal
2. go to Dashboard and scroll down to the Calls in Progress section.





8. Listening to call recordings

End users and administrators can listen to recordings on the Cloud Voice Call Recording Portal.

End users just need to:

1. log onto the Cloud Voice Business portal
2. go to Dashboard
3. scroll down to the Recorded Calls section
4. click Details to open the Call Recording Portal
5. play recordings from the list of Recent Calls or Interactions page.

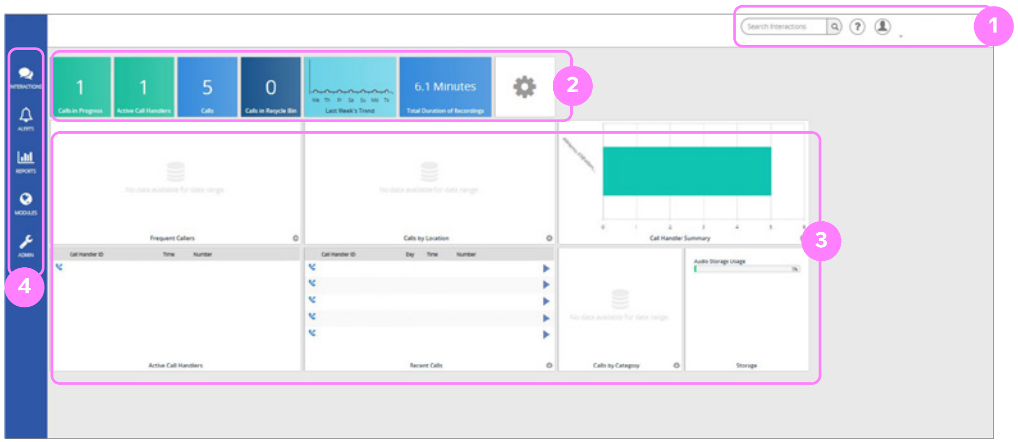
Administrators just need to:

1. log onto the Cloud Voice Business Portal
2. go to the Employees page
3. click the search button to see a list of end users
4. select the user whose calls they want to listen to
5. click Dashboard
6. scroll down to the Recorded Calls section of the dashboard
7. click Details to get the same options as an end user looking at their own recordings.

9. How to use the dashboard on the Call Recording Portal

The Call Recording Portal is an important part of the Call Recording feature. It’s filled with information about recorded calls.

When you open the portal, you’ll see a screen with these parts:



Part 1: This menu is for searching for a recording or changing your profile (this includes settings like time zone, default home page and display items, download tools like the Archive Scheduler or Desktop Notifier and connections to SugarCRM or Salesforce.com systems). It also includes detailed online Help

Part 2: This banner is for getting a quick overview of activity. It carries these headings:

Heading	Function
Calls in Progress	This is the total number of ongoing calls taken by either a single end user or a group of users. (Clicking here takes you to the Calls in Progress page.)
Active Call Handlers	This is the total number of end users who are on a call. (You'll only see information for the end users you're permitted to analyse.)
Calls Recorded	This is the total number of call recordings you can listen to.
Calls in Recycle Bin	This is the total number of calls that have been manually deleted and are waiting to be permanently removed
Last Week's Trend	This is last week's call history. This displays the number of calls per day when you scroll the mouse over a point on the chart.
Total Duration of Recordings	This is the total duration of all the calls that have ever been recorded for an end user or group of end users.
Cog icon	This is where you can change how frequently the statistics on the banner refresh.

Part 3: This dashboard summarises current call activity in a series of panes. By clicking on the cog icon in the lower right hand corner of the panes, you can change how the information's displayed. You might want to see information for the past day, week, month, or year for example, or prefer to see it displayed as a table, rather than a chart. In addition, these filters can help you manage the amount of information displayed. It can return the top 5, 10, 15, 20 or 25 results.

Pane	Meaning
Frequent Callers	This pane displays the numbers that ring in most frequently. (Click on a number for more information. Click on parts of the graph to hide or reveal data.)
Calls by Location	This pane displays the number of time each location has received or made a call. (Click on a location to see a list of calls.)
Call Handler Summary	This pane displays statistics for each call handler, such as maximum and average call duration or total number of calls. (Click on a call handler ID to see a list of calls.)
Active Call Handlers	This pane displays the IDs of active call handlers, as well as the numbers involved in each call. (You might be able to monitor calls and see information about their past interactions by clicking the buttons in this pane.)
Recent Calls	This pane displays the IDs of call handlers who have recently been on calls, as well as information about those calls. (Click on a call handler ID to see information about their past interactions.)
Calls by Category	This pane displays the total number of calls in a certain category. (Click on the categories in the legend to hide or reveal data.)
Storage	This pane displays current levels of use.

Part 4: This menu is for visiting the portal's main pages: Interactions, Alerts, Reports, Modules and Admin. On these pages, this menu will expand to include a Home button.

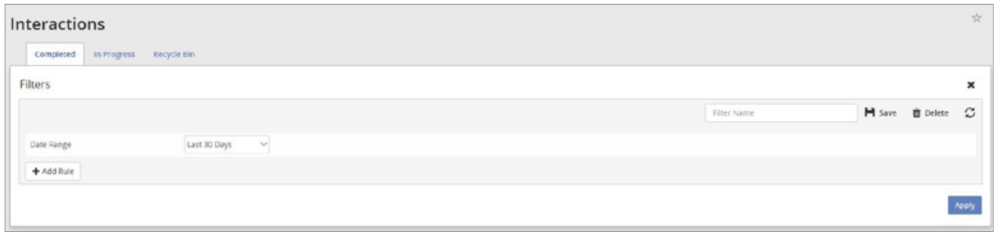
10. How to use the Interaction page

The Call Recording Portal has five main pages: Interactions, Alerts, Reports, Modules and Admin.

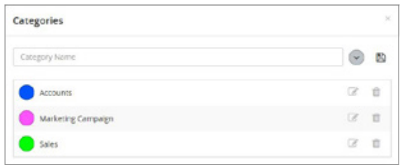
If you select Interactions from the portal's side menu, you'll see a page with these parts:

Part 1: Tabs to toggle between information about calls that are completed or in progress and the Recycle Bin

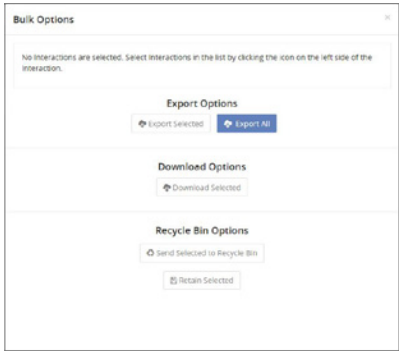
Part 2: Filters to sort call recordings



Part 3: Categories you've chosen to label calls with



Part 4: Bulk options for a group of recordings, including options for exporting them as CSV files, downloading them as MP3 files and sending them to the Recycle Bin



Part 5: Icons to indicate whether a call was inbound or outbound

Part 6: Usernames belonging to the call handlers

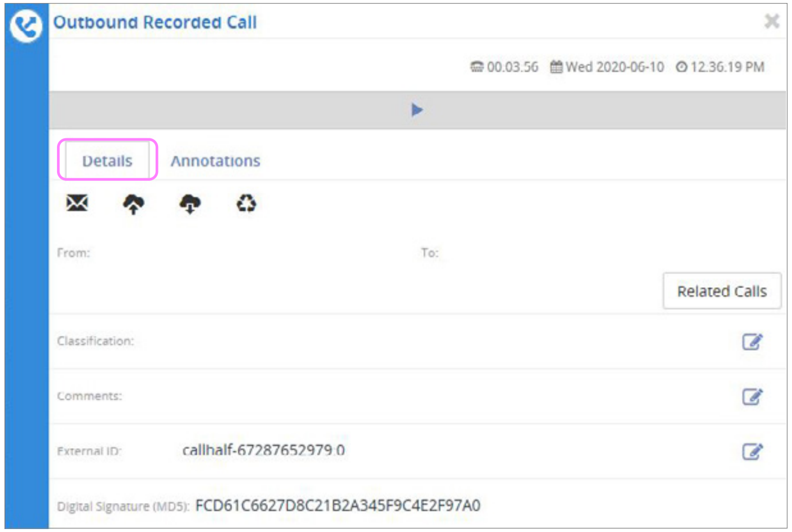
Part 7: Basic information about a call: it's duration and the date and time when it took place

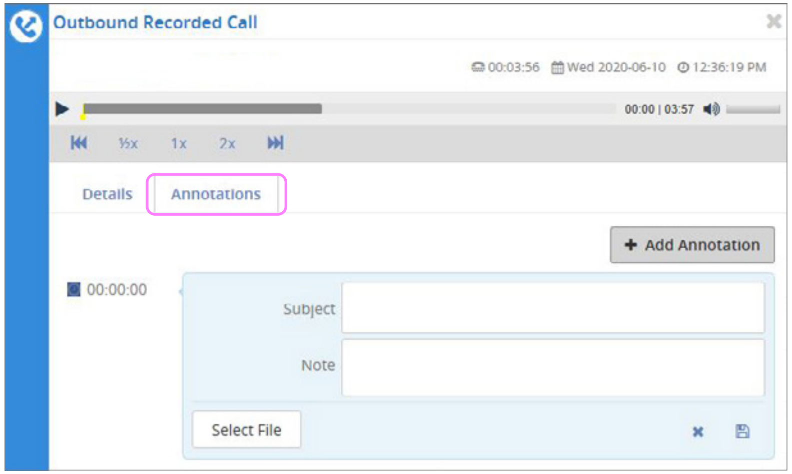
Part 8: The phone numbers involved in each call

Part 9: Buttons for playing recordings

Part 10: Buttons for downloading recordings.

Part 11: Buttons for viewing call details and downloading, forwarding by email, archiving or binning recordings (these are also the buttons to click for associated calls, comments, external IDs, digital signatures or annotations).





If you use the tabs to bring up information about calls in progress, you'll be able to monitor, save and see details (as long as you have the authority).

Click this icon to monitor and listen in without being detected by the people on the call (there will be a delay of a few seconds)

Click this icon to save a call recording (it won't appear if policies dictate that every call should be recorded)

Click this icon to leave a comment about a call.

If you use the tab to open the Recycle Bin, you'll be able to see recordings that have been manually selected for deletion. You can then choose to restore or permanently delete these recordings. Once a recording has been deleted from the Recycle Bin, it can no longer be restored.

11. How to use the Alerts page

You can set up a notification on the Alerts page. This is helpful if, for instance, you want to be notified when a particular number calls, or if you're interested in calls going to a specific person, such as a new employee.

You might decide you want to be notified when:

- a call starts
- a call ends
- a particular number is used
- a call is redirected from or to a particular number
- a call involves a particular location.

As well as controlling whether you get notified by email, you can choose whether you want to get notifications all the time or only at certain times on certain days.

You can also apply a comment and a category to calls which triggered notifications on this page.

Finally, you can find past notifications under Alerts History.

12. How to use the Reports page

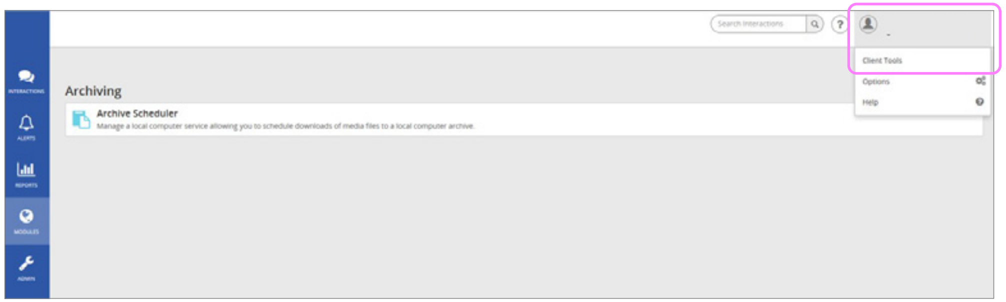
The Reports page holds detailed information about the Call Recording feature.

You can read, filter, print or export these reports:

Title	Description
Call Handler Activity	This report shows how people have been using the feature recently. It can tell you how many calls a call handler has been involved in, as well as the average, minimum and maximum duration of those calls.
Calling Locations	This report shows how many calls have been made from each location.
Calls by Category	This report shows statistics for calls which fall into each category you have created.
Daily Usage	This report displays call activity in recent days – including number of calls, average, minimum and maximum duration for the day.
Hourly Usage	Similarly, this report shows call activity across each hour of the day.
Frequent Callers	This report shows statistics for the numbers which ring most often.
Unused Numbers	This report lists numbers which have not been used.
User Details	This report gives information about the people who use call recording. The information includes usernames, email addresses, the date profiles were created, the dates that users were last active and more.

13. How to use the Modules page

If you download and set up any Client Tools, you'll find them on the Modules page.



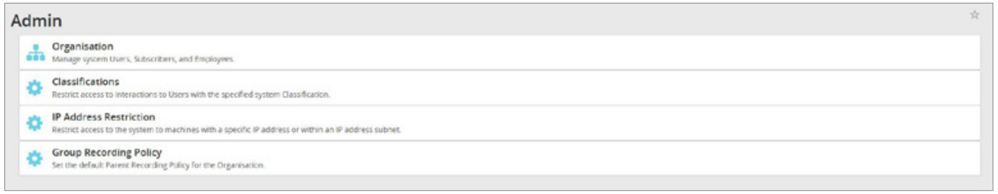
Examples include Archive Scheduler (a tool that downloads call recordings as a one-off task or on a regular schedule) and Desktop Notifier (a tool which can notify you of incoming alerts and present shortcuts).

14. How to use the Admin page

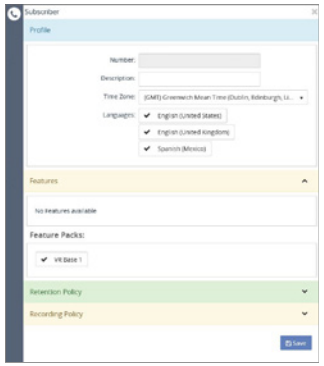
As you might expect, the Admin page is for administrators.

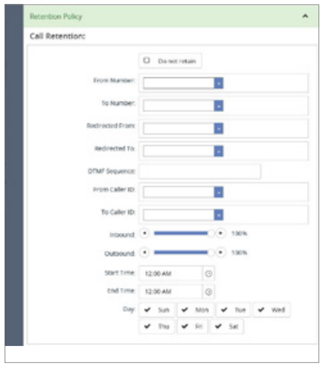
They can manage policies and the shape of the organisation on this page.

Here are the sections they can open:

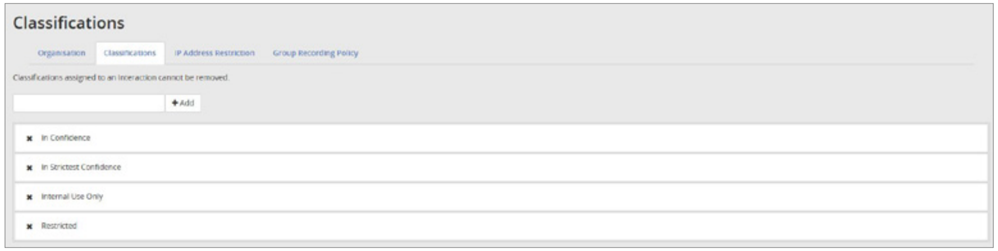


Organisation
This section is for managing the hierarchy of an organisation. Administrators can update information for many end users at once using Subscriber Bulk Update.





Classifications
This section is for making classifications which can be used to set access permissions for users and calls, such as In Confidence, In Strictest Confidence and Restricted. The permissions for users are then set within the Organisation section.



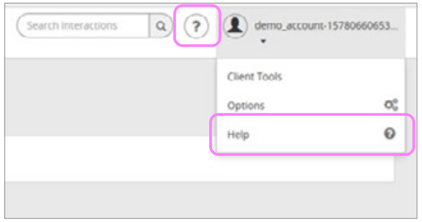
IP Address Restriction
This section is for restricting activity to particular IP addresses. An administrator could prevent end users from accessing the Call Recording application outside of the office, for example.

Group Recording Policy
This section is for creating and managing policies. Administrators might chose to create, disable, override or copy a policy.

15. How to get further help

If you have a question that isn't answered by this guide, use these buttons to access Help online.

Please note, the Help offered online is generic and may cover options not included in your package.



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