User Guide

Masergy Call Recording

October 2021

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CALL RECORDING OVERVIEW

Masergy provides a Cloud Based Hosted Call Recording option, to easily record all incoming and outgoing telephone calls without the need for additional hardware or software. There are no limits to the number of calls recorded and no limit on the length of each call.

Recorded calls are easily managed, cataloged, retrieved, and can be played back for up to 60 days before purging. All call recordings may also be downloaded and kept locally. Customers can archive their call recordings using File Transfer Protocol (FTP), Secure File Transfer Protocol (SFTP), and Amazon Web Services (AWS) with several options that can be automated.

The current supported roles in the Masergy Call Recording portal are:

- Administrators – will have both Read and Write permissions to create Administrators, Supervisors, and Users who need web access for reviewing their call recordings, along with disabling web access for any person.
- Supervisor – Read only permission access to the call recordings of the Users they need to monitor.
- User – Read only permission to their call recordings only if, the user is allowed access to the portal. (Default is no access to call recording portal.)

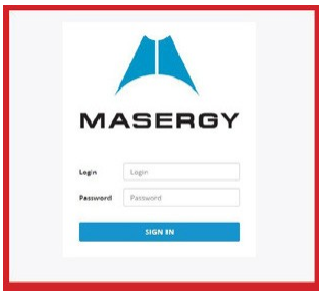
All users who are being recorded will have a 60-day retention period. When the time of 60 days has been reached, all calls older than 60 days are automatically purged in a First In/First Out (FIFO) sequence. Once the recordings are deleted, they are unrecoverable and there is no email notification sent prior to the purge.

GETTING STARTED

Masergy Call Recording portal uses a web-interface, which can be accessed on any standard browser over your network or over the internet. The Masergy Call Recording portal can be found at the following URL:

- Standard Platform https://recording.masergy.com.
- Canada Platform https://recordca.masergy.com
- Europe Platform https://record-europe.masergy.com

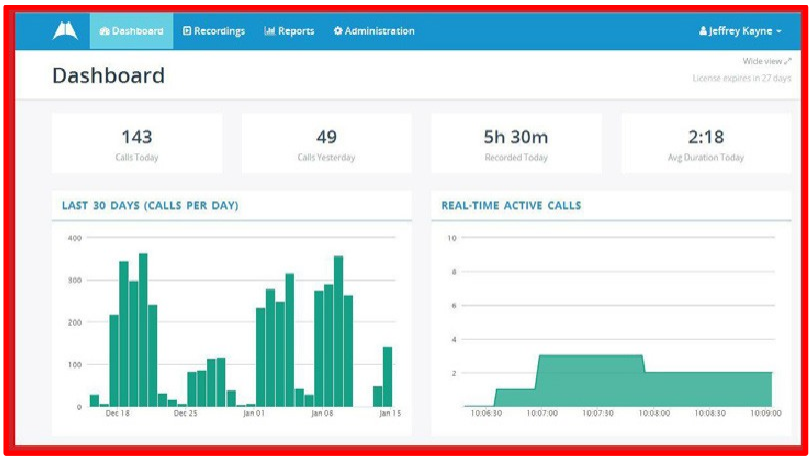
Please enter your login credentials to access the portal.



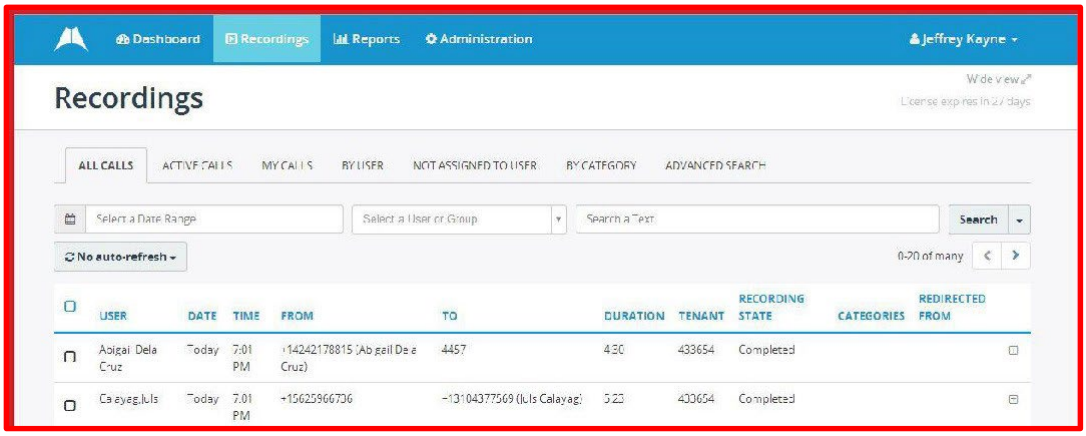
If you are unable to log in to the Masergy Call Recording Portal, then please contact Masergy Support for assistance.

MASERGY'S CALL RECORDING DASHBOARD

Masergy's Call Recording dashboard provides an at-a-glance view of calls-per-day, average call duration, current active calls and other details.



CALL RECORDINGS VIEWS



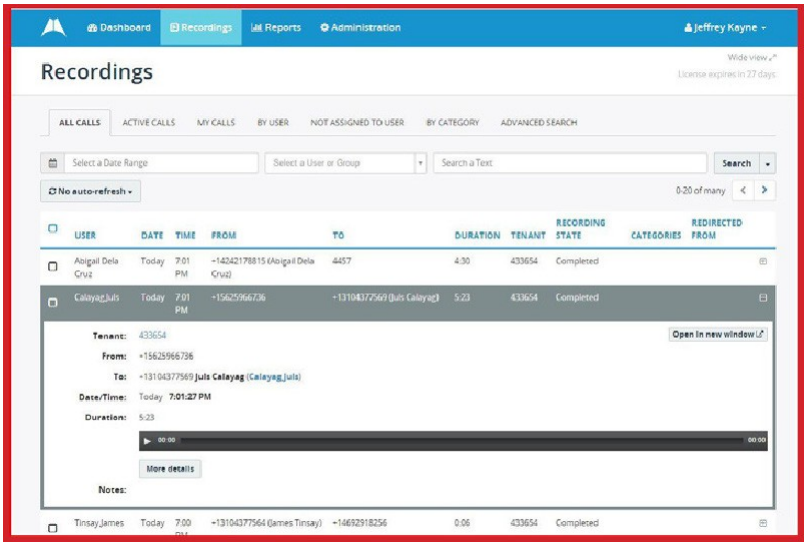
Masergy's Call Recording Portal supports the following:

View	Description
All calls	Displays all call recordings (including active calls)
Active calls	Displays only active calls
My calls	Displays call recordings associated with the currently logged in user
By user	Displays call recordings grouped by user and user group
Not assigned to users	Displays call recordings that were not assigned to any users. This view is visible to administrator accounts only.
By category	Displays call recordings grouped by category
Advanced search	Displays advanced search form

PLAYBACK CALL RECORDINGS

INLINE BASIC AUDIO PLAYER

Click right inside the call list and you will be able to see the call details along with a basic media player.

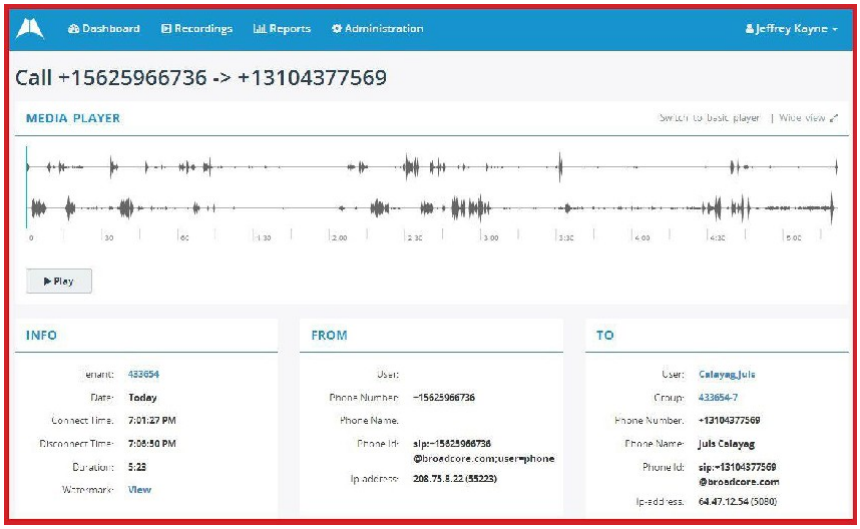


ADVANCED AUDIO PLAYER

Click on Open in new window (image above) and you will be able to see detailed call information with the advanced audio player.

Advanced audio player is shown only in supported browsers (Chrome, Firefox, Internet Explorer (Edge), and Safari). Visual presentation of audio allows the ability of easily detecting silence and talk- over periods in a conversation.

SEARCHING CALLS



Masergy Call Recording supports easy search of calls by different parameters:

- Date range
- User name or Group name
- Any text. The entered text is searched inside caller/called phone number/name fields as well as call notes.

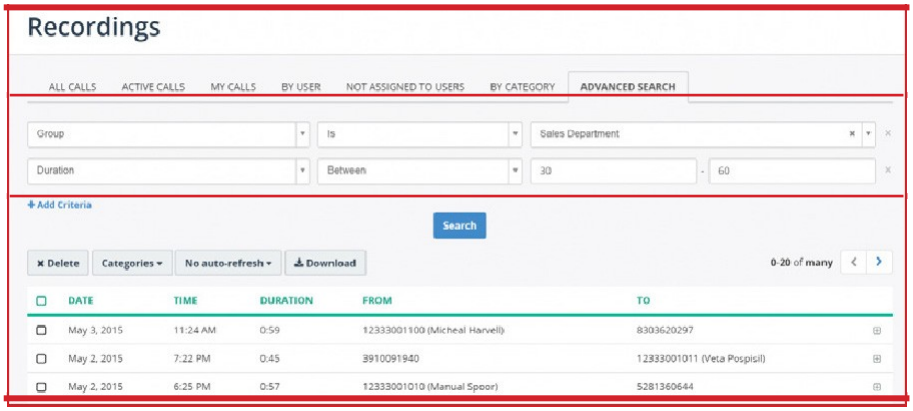
For a better understanding of these features, please review the Masergy Call Recording Searching Calls video.

ADVANCED SEARCHING CALLS

Advanced search web page provides capability to search call recordings by multiple criteria like:

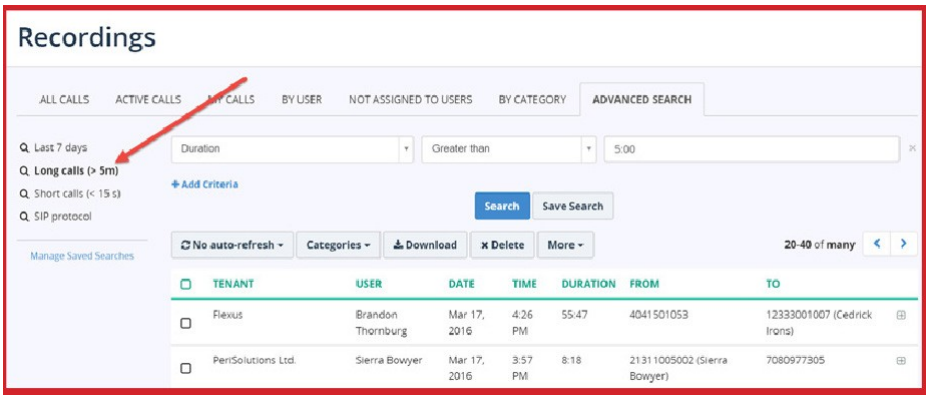
- User
- Group
- Call ID
- Phone number (FROM and/or TO) Date range
- Call duration

Each of these criteria supports different comparison operators like Equal To, Not equal to, Starts with, Ends with, Includes, Is empty, Not empty, Match simple pattern, Match regex pattern, Before, After, Between, Older than days, and Newer than days.



SAVED SEARCH

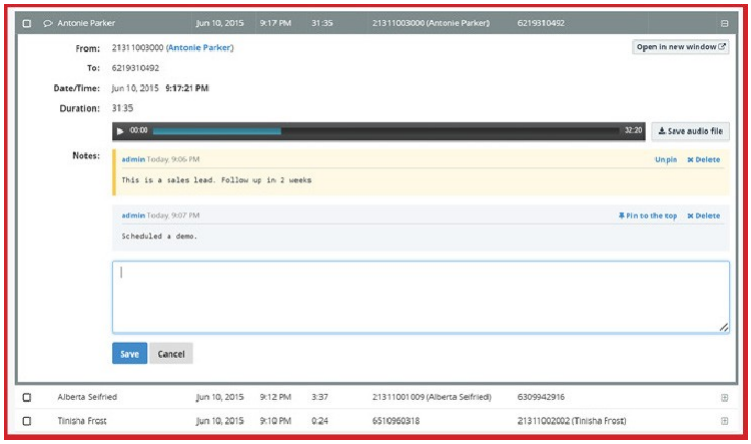
You can save searching criteria for later usage:



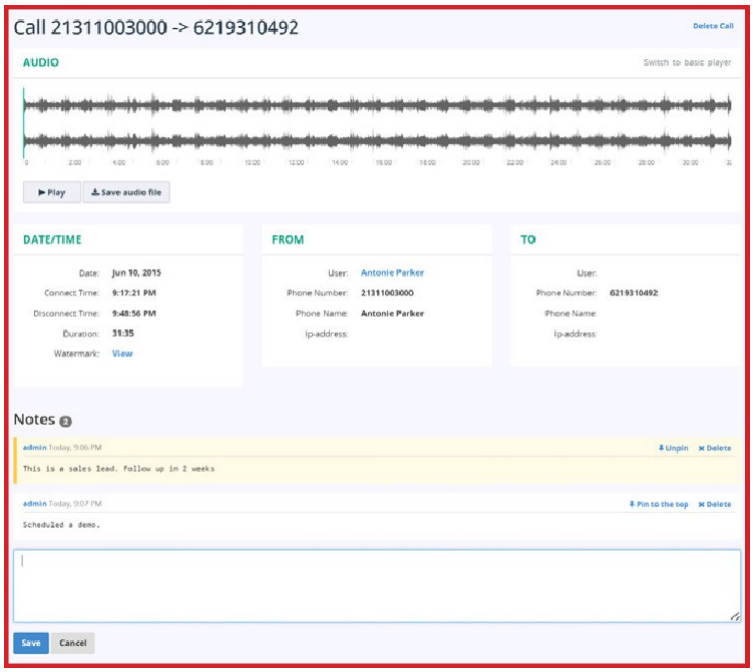
ADD NOTES TO CALLS

When a user has appropriate permissions, they will be able to view and optionally add new notes for call recordings. Call notes are displayed inline and in new window. Call notes are displayed in the order in which they are created (oldest first). It is also possible to pin any notes on top.

CALL NOTES INLINE



CALL NOTES IN NEW WINDOW

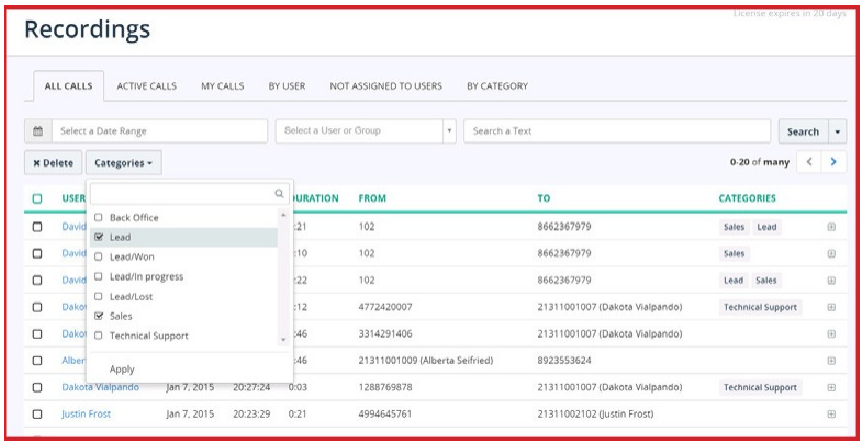


CATEGORIZING CALLS

Masergy Call Recording supports categories for call recordings. When a user has appropriate permissions, they may assign categories to calls, create new categories, and so on.

For a better understanding of these features, please review the Masergy Call Recording Categorizing and Adding Notes video.

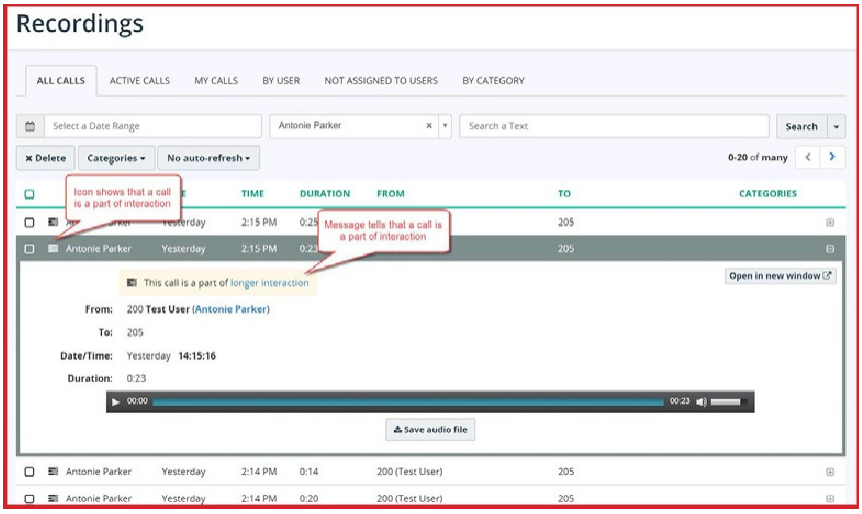
Check one or more call recordings in a list and click the Categories button. Then select one or more categories, which you would like to assign to this call.



VIEW MULTI-PART CALLS

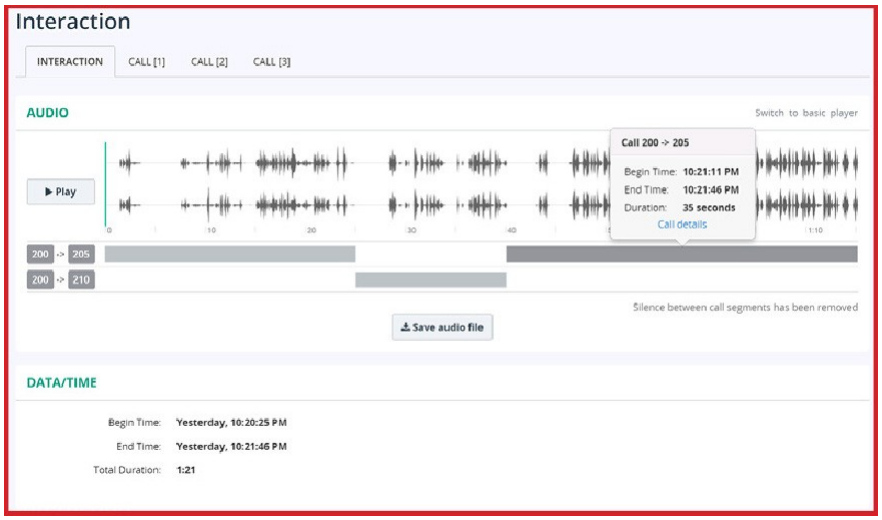
Masergy Call Recording automatically recognizes multiple call parts of longer interaction; for example, when a call that has been transferred from one agent to another or when the agent puts a call on hold, then the agent makes a consultative call to their supervisor and then resumes the initial call.

When a call is a part of a longer interaction, then a special icon is displayed in the calls list as well as a link to an interaction web page.



VISUALIZATION OF MULTI-PART CALLS

Multi-part calls are stored internally as multiple calls, but they are displayed to the user as a single audio file. This allows to easily playing back the whole interaction in one click.



SUPPORTED CALL SCENARIOS

Masergy Call Recording merges multiple call parts into a single interaction in the following call scenarios:

1. Inbound call is transferred from one agent to another. In this case, both call parts will be added to interaction.
2. Agent puts on hold the first call, then makes an outbound consultative call and then returns to the original call. In this case, all 3 calls will be added to the interaction.
3. Agent has an active call at the moment and they receive a second incoming call. The agent places the first call on hold and answers the new call. Then the agent returns to the original call. In this scenario, an incoming call between hold/resume events is treated as outside of interaction. Only the 1st and the 3rd call parts will be added to the interaction. The 2nd call (incoming) is treated as an out of interaction.

ON-DEMAND RECORDING

Agents may use their IP phones/Softphones to start/stop call recording during a call and use pause/resume of call recording to comply with PCI requirements. For more information on Masergy call recording options via the IP Phone or the Communicator Softphone, please reach out to the Masergy Training Team at uctraining@masergy.com.

In order to enable Record on- Demand call recording it is necessary to change recording settings on the agent's profile page in the Masergy Admin Portal from:

- Record all calls "Always" to "On Demand with User Initiated Start" for record on-demand.

ON-DEMAND RECORDING VIA API

Masergy Call Recording provides a Restful API which may be used by a third- party application to control on- demand recording.

PAUSE/RESUME RECORDING

When an agent is configured for Call Recording Always or Record on Demand call recording, they will have the ability to pause/resume the call recording to comply with PCI compliance.

In order to enable pause/resume on Call Record Always or on Record on Demand call

recording it is necessary to change the recording settings on the agent's profile page in the Masergy Admin Portal as follows:

- Always record all calls to "Always with Pause/Resume".
- Record on-Demand to "On Demand with User Initiated Start".

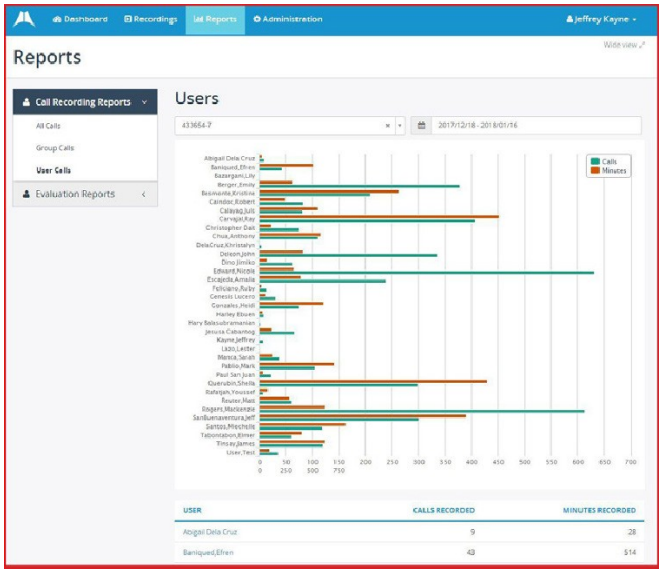
REPORTS

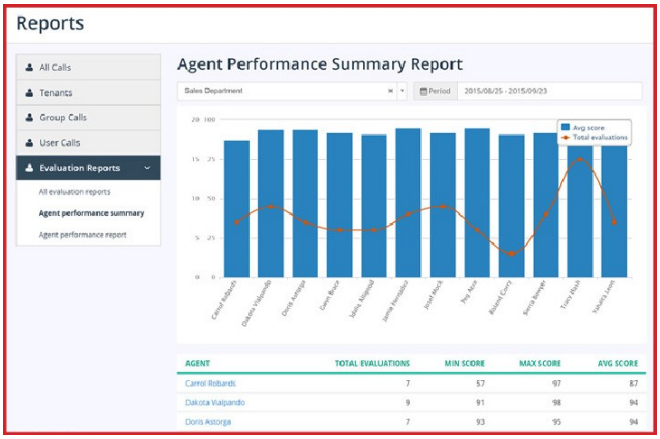
Masergy Call Recording provides extensive reporting.

For a better understanding of these features, please review the Masergy Call Recording Reporting video. Reports are available from the top menu bar. Masergy Call Recording supports multiple reports:

- PER DAY
- PER GROUP
- PER USER
- ALL CALLS PER ENTERPRISE
- AGENT EVALUATION REPORTS

Sample Report on All Users





CHANGE OWN PASSWORD

In order to change your own password, click on your login name on the top right corner of the menu bar and select Change password from the drop-down menu.

AGENT EVALUATION

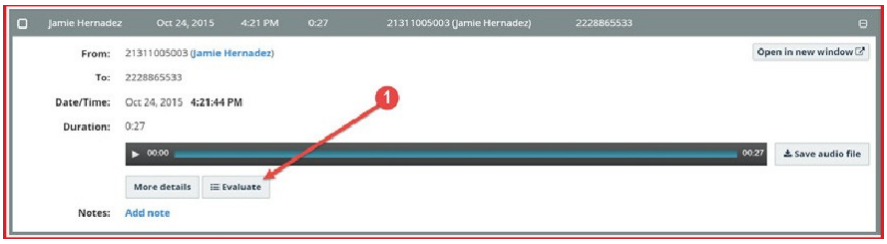
Agent Evaluation Add-on module licensed feature providing call center managers a tool to evaluate and monitor agent performance.

For a better understanding of these features, please review the Masergy Call Recording Agent Evaluation video.

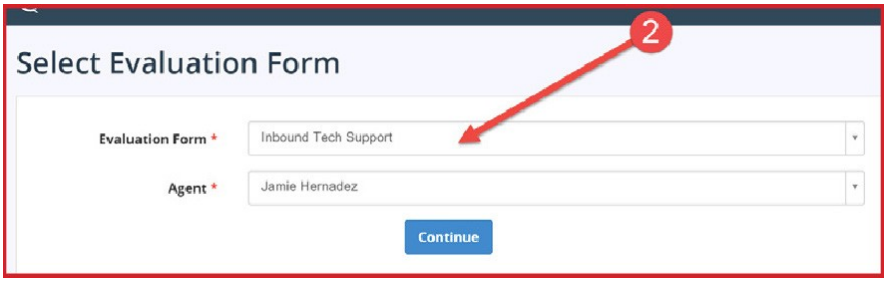
Prerequisites:

- The Evaluator should have the appropriate Supervisor permissions to evaluate agents.
- All monitored agents need to be licensed and provisioned in order for the information to be available for evaluation purposes.

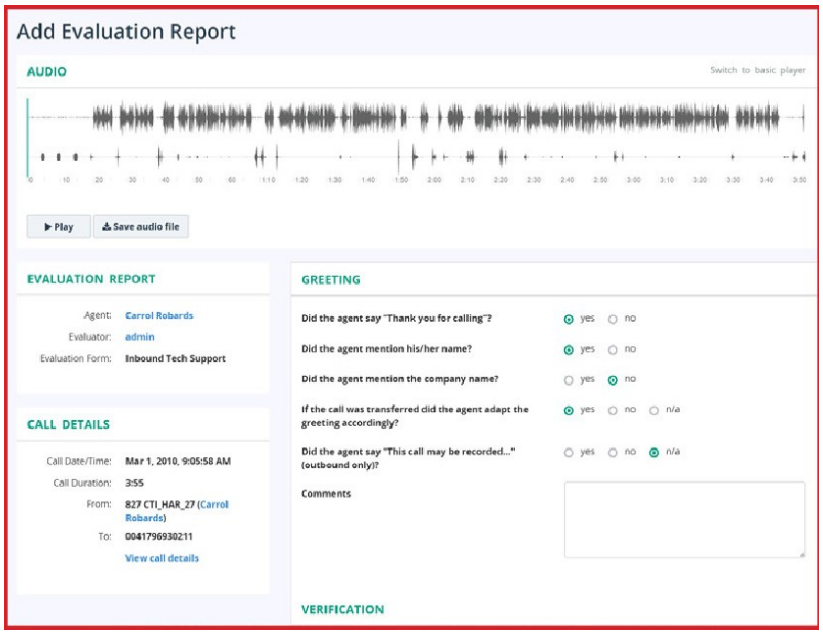
To evaluate agent, select a call recording and click the “Evaluate” button in call details.



Select which evaluation form to use for this call.



Listen to the call recording and answer all the questions in the evaluation form. When all questions have been answered, this call will be scored from 0 to 100 points.

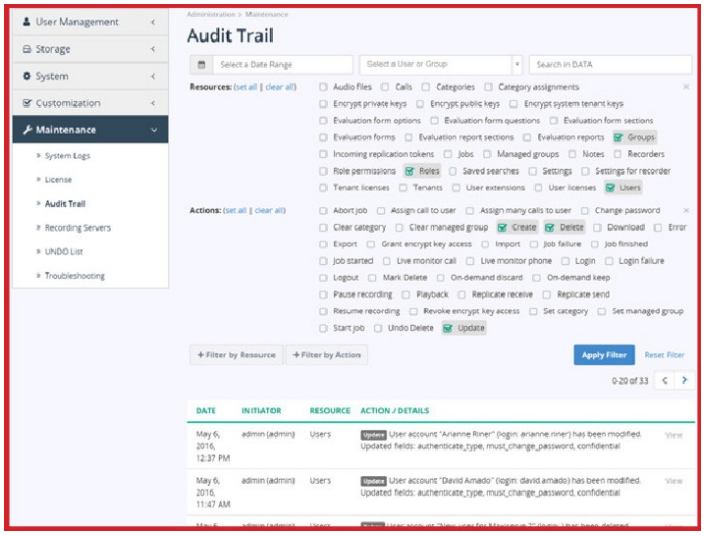


AUDIT TRAIL

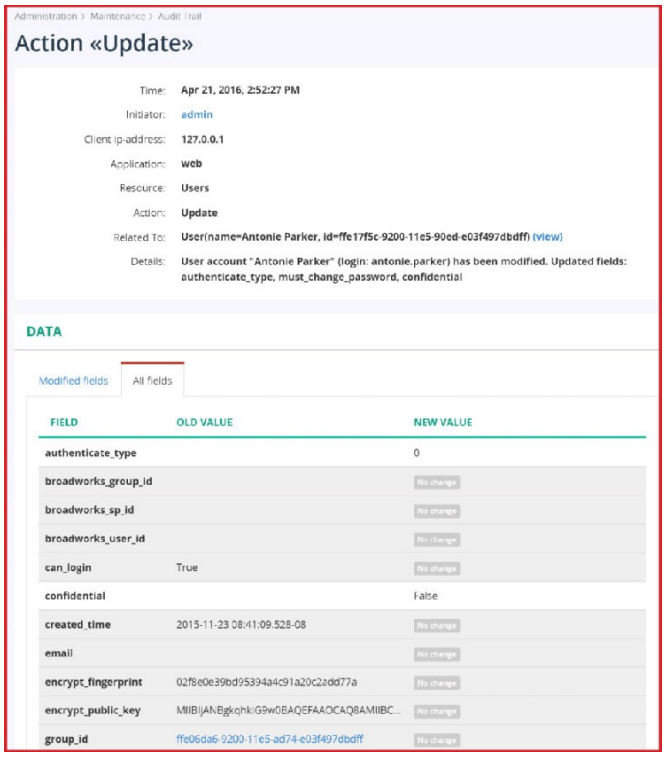
The Audit Trail provides Administrators the ability to get more details about the call recording such as who has listened to a call recording. To access the Audit Trail navigate to top menu bar Administration > Maintenance > Audit Trail to see the audit log. You can filter the message by many parameters:

- Date of action
- Initiator (user that performed the logged action)
- Resource that is associated with the logged action, for example, “call”, “user”, “group”, etc.
- Action such as “create”, “update”, “delete”, “change password”, etc.

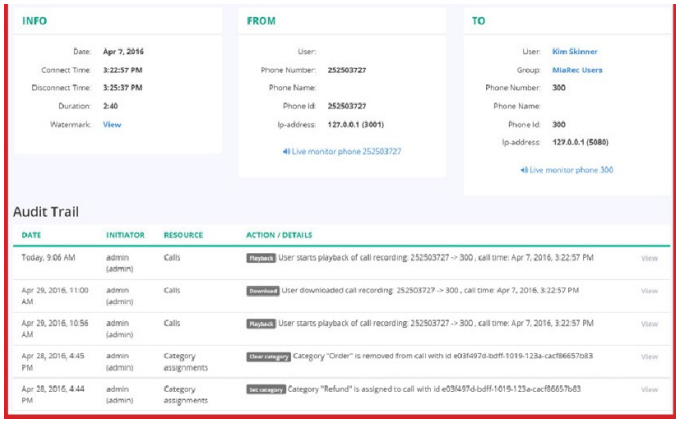
Additionally, you can search inside the DATA field of the audit log message.



To view the details of the Audit Trail message, click the “View” button and you will see the associated data. For example, you will see which fields have been modified in the “Update” action:

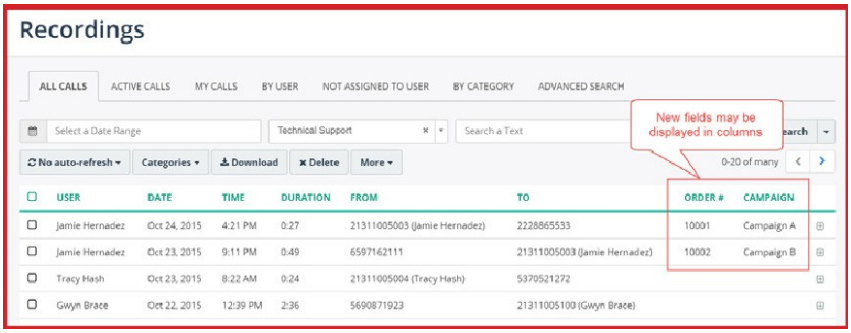


Additionally, when you view call details, user profile, or any other resource; you will be able to see all audit log messages associated with that particular object:

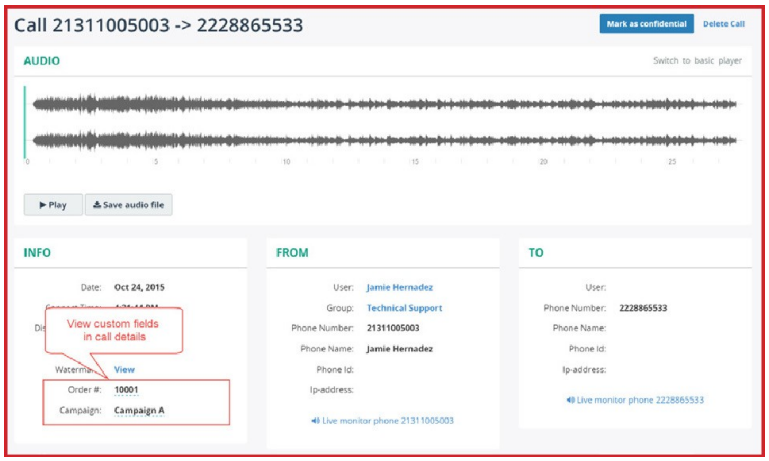


CUSTOM FIELDS

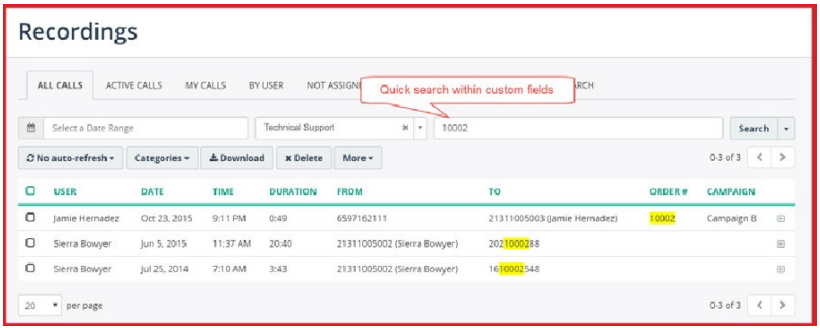
Masergy Call Recording supports custom fields, which may be used for storing any data, like order number, support ticket number, product name, call campaign, etc. The custom fields may be displayed in the call list.

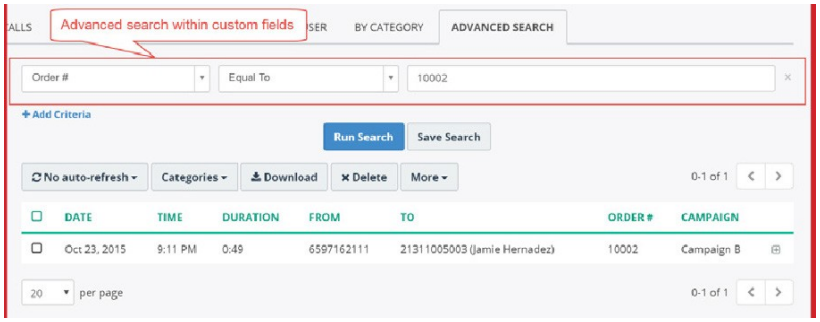


Additionally, customer field values are displayed in the call details.

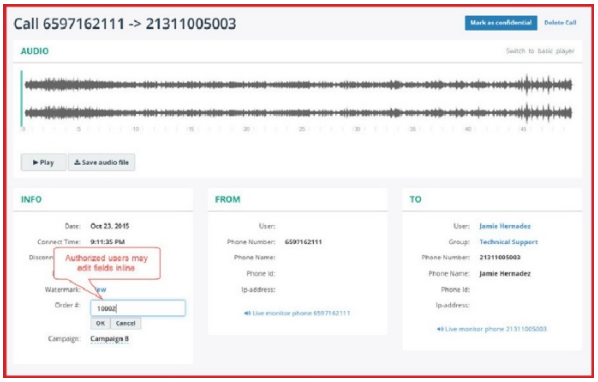


Users may use quick search or advanced search capability.

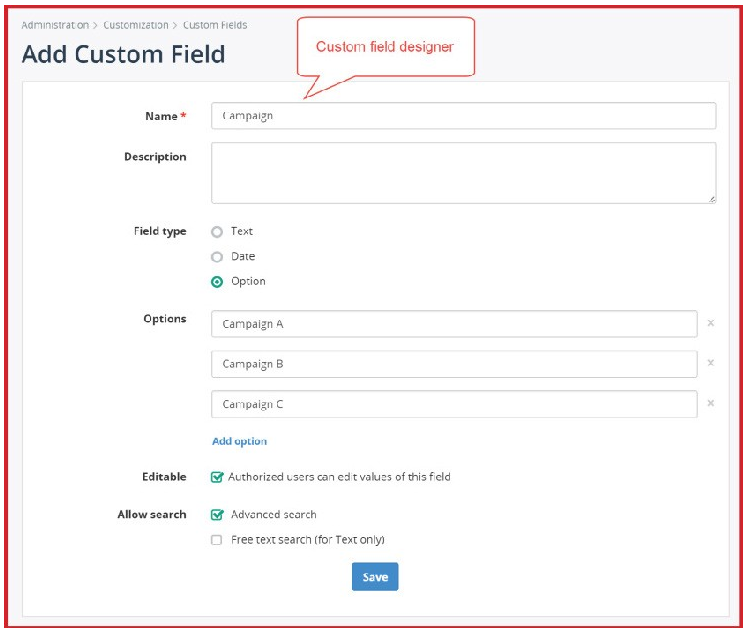




Only administrators are authorized to edit custom field values on the call details page.

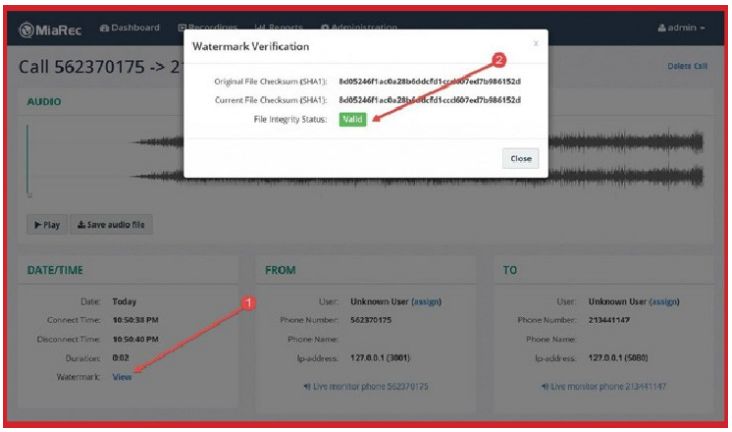


In order to create custom fields, navigate to the top menu Administration ➔ Customization ➔ Custom fields and click the Add button. You can select the field type (Text, Date or Option) and edit or search the custom fields.



FILE INTEGRITY CHECK (WATERMARK)

Masergy Call Recording supports tamper- proof watermarking of audio files.



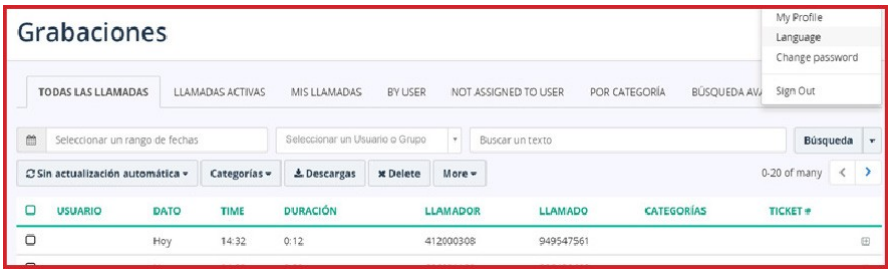
MULTI-LANGUAGE INTERFACE

Masergy Call Recording supports a multi-language user interface. To access the multi-language interface select from the top menu Administration ➔ Customization ➔ Language then click on the Change button and make your selection from the drop-down menu.

Different users may select different languages. It is possible to set languages on multiple levels:

- Default language for all users is done by Masergy.
- Default language for enterprise/tenant is done by administrator only.
- Default language for group is done by administrator only.
- Language for individual user is done by supervisor or user personally.

The following screenshot shows the Masergy Call Recording web portal in the Spanish language.



Masergy Call Recording supports the following languages:

- English - default
- French
- Portuguese (Brazil)
- Russian
- Spanish

ARCHIVING OF CALL RECORDINGS

The Masergy Call Recording platform supports several methods for the customer to archive their call recordings. The methods are File Transfer Protocol (FTP), Secure File Transfer Protocol (SFTP), and Amazon Web Services (AWS). The SFTP and AWS are both secure and can be automated. The customer's call recordings would be archived to the customer provided long-term retention storage facility. The customer would still use the Masergy Call Recording portal to easily access current and archived call recordings throughout the retention period.

An archiving procedure will be scheduled for any customer who subscribes to the remote archiving of their call recordings. The archiving procedure will move all call recordings to the customer's storage location.

Secure File Transfer Protocol (SFTP)

This method will allow the platform to transfer call recordings to the customer owned storage using the SFTP protocol. The customer will need to provide the following information for a successful setup:

- Storage IP / FQDN.
- Access credentials.
- Directory structure (location).
- SFTP uses the standard port 22 for connection and transfer. The customer for use with SFTP may request a nonstandard port.
- The connection request will come from IPs that https://recording.masergy.com resolves to (today these are 208.75.8.156, 64.47.12.56).
- Customer will be responsible for any firewall changes on their end to allow the Masergy call recording platform to access their storage.

Amazon Web Services (AWS)

This method allows the recording platform to transfer call recordings to the customer's AWS S3 storage. The customer will typically provide a set of connection details for connecting to

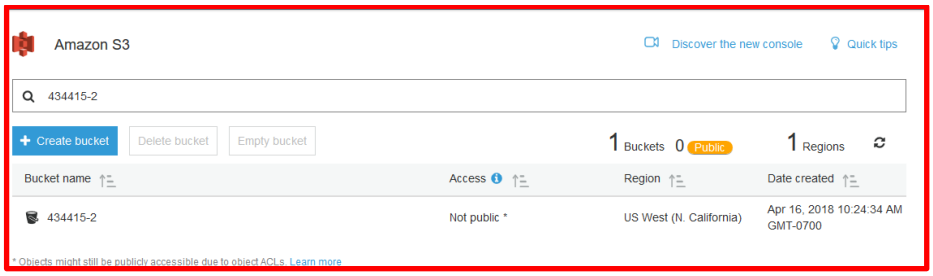
their storage. AWS would require at a minimum the following information:

- S3 Bucket name.
- AWS Access Key ID.
- AWS Secret Access Key
- AWS Storage Region Location
  - For US regions for AWS S3
    - US East (Ohio): us-east-2
    - US East (N. Virginia): us-east-1
    - US West (N. California): us-west-1
    - US West (Oregon): us-west-2

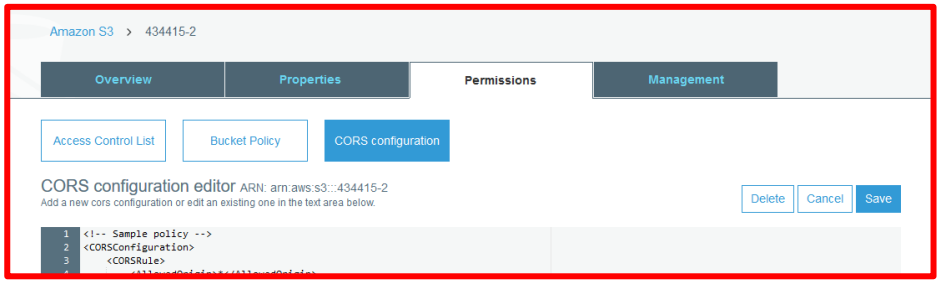
Additional Step for Amazon Web Services, adding Cross-Origin Resource Sharing (CORS) configuration to an S3 bucket. Cross-Origin Resource Sharing (CORS) allows client web applications that are loaded in one domain to interact with resources in another domain. This configuration is required for our setup because the Masergy call recording solution is accessible via https://recording.masergy.com, but audio files are located at your Amazon S3 domain (https://s3.amazonaws.com)

To add a CORS configuration to an S3 bucket:

1. Sign in to the AWS Management Console and open the Amazon S3 console at https://console.aws. amazon.com/s3/.
2. In the Bucket name list, choose the name of the bucket that you want to create a bucket policy for.



3. Choose Permissions, and then choose CORS configuration.



4. Copy the following CORS configuration and paste it into the CORS configuration editor field:

```
<?xml version="1.0" encoding="UTF-8"?>
<CORSConfiguration xmlns="http://s3.amazonaws.com/doc/2006-03-01/">
<CORSRule>
    <AllowedOrigin>*</AllowedOrigin>
    <AllowedMethod>GET</AllowedMethod>
    <MaxAgeSeconds>3000</MaxAgeSeconds>
    <AllowedHeader>*</AllowedHeader>
</CORSRule>
</CORSConfiguration>
```

5. Choose Save.

File Transfer Protocol (FTP)

File Transfer Protocol (FTP) is a supported protocol, which can be manual or be automated for archiving call recordings. It is not recommended because FTP is not secure.

Secondary Redundant Archiving Location (Optional)

Masergy Call Recording platform supports a redundant secondary location for any customer using any of the above long term archiving methods. Customers will have the option to move their call recordings to a separate secondary location for redundancy.

To enable the redundant secondary location, the customer would need to provide Masergy with the secondary storage location information. The secondary location can be FTP, SFTP, or AWS, which may not be the same as the primary location.

In all scenarios, the customer will be able to access all of the call recordings by using the Masergy Call Recording portal. For security reasons, Masergy staff will need to enable and make any modifications for this archiving service for our customers.

CALL RECORDING FILE FORMAT

By default, the call recording file format only includes the date, time, and call ID. Masergy can customize the file format to include additional fields such as calling (caller) party or called party information in the naming format to make it easier to sort on. The default and customized field formats are:

Default File Name Format:

%{setup-time#%Y%m%d}/%{setup-time#%Y%m%d%H%M%S}-%{call-id}

Customized File Name Format:

%{setup-time#%Y%m%d}/%{setup-time#%Y%m%d%H%M%S}-%{caller-number}-%{callee-number}-%{call-id}

Note: if you decide to customize the file format when you request archiving, please let Masergy know.