USER GUIDE|CALL RECORDING

MASERGY

Masergy Call Recording Administrator Handbook

Document v 1.1
May 2021

Contents

Overview

Please read the Call Recording User Guide for an overall understanding of the Masergy Call Recording platform. On the Call Recording platform, the Administrator now has many new abilities:

- Create new Administrators and Supervisors.
- Allow web access to give the users access to their recordings.
- Password reset for everyone on the call recording platform.
- Create Agent Evaluation forms for the managers to grade recorded calls.
- Delete call recordings (if enabled).

Note: Administrators cannot evaluate recorded calls, as this is a function of a supervisor role.

Masergy UC service is a fully hosted and managed service. Masergy Support would be glad to perform any of the above tasks on your behalf.

Why would I need to have more than one role type assigned to a person?

A supervisor may be the best person to create the agent evaluation forms for use in their call centers. A Supervisor would need to be provided the role of an Administrator in order to create the evaluation forms. Supervisors are the only ones who have the permission to use these evaluation forms while reviewing the agent's recorded call.

Note: Agent Evaluation is an additional license assigned to all recorded users and has a Monthly Recurring Cost of $1.00. There is no limit on the number of Evaluation forms that can be created.

Naming Convention

When an Administrator creates a user for Administrator or Supervisor, they should follow the name with the appropriate title of that role. This allows the person to see the role type they are logged in as. (Example: Jane Doe Admin or Jane Doe Supervisor)

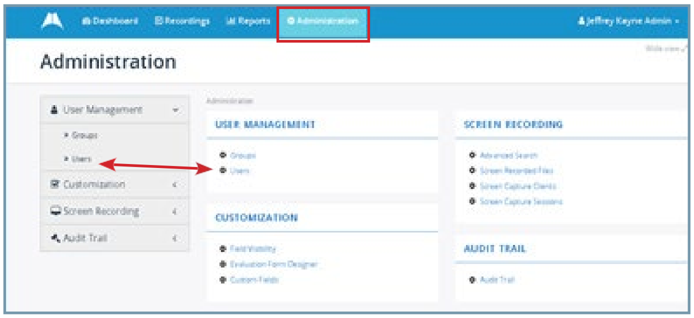
How do you add a new person to be recorded?

The call recording license (Hosted Call Recording/Call Recording) is added in the Masergy UC Admin portal to the user which automatically provisions them in the Call Recording platform.

Note: If the recording license is removed from, the user in the Masergy UC Admin portal, both billing and recording is stopped. However, the recorded calls will remain in the Call Recording platform until the retention period has been reached. If the user is deleted in the Masergy UC Admin portal, then all the call recordings move to the tab "Not Assigned to User" and retained until the retention period has been reached.

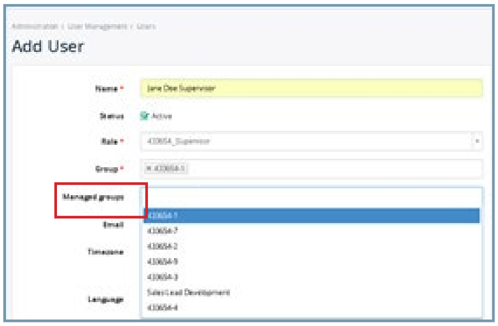
Section A: Call Recording Portal Login

1. Sign into the Call Recording portal with your credentials.
2. The Standard Call Recording Platform URL is https://recording.masergy.com
    - Canada Platform is https://recordca.masergy.com
    - Europe Platform is https://record-europe.masergy.com
3. You should see either the main Dashboard or the last page you visited.
4. On the top Menu select the **Administration** tab.
5. Select **Users** from the side Menu or the Main screen.



Section B: Administrator or Supervisor Set Up

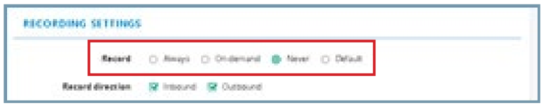
1. Click on the **Add User** button.
2. In the **Name** field, enter the name of the new person plus their role, for instance "Jane Doe Admin" or "Jane Doe Supervisor" (this helps differentiate which role the user has logged in as).
3. In the **Role** field from the drop-down menu, select the Admin role (i.e. 433654_Admin) or Supervisor role (i.e. 433654_ Supervisor)
4. In the **Group** field from the drop-down menu, select the Group site for where this person is located.
5. In the **Managed Groups** field:
    a. For Administrators leave it blank (Administrators have automatic access to all groups)
    b. For Supervisors add each group site to allow access to all of the users they need to manage (See **Section F: Creating Supervisor/Department Groups**).



Example of Supervisor Managed groups assignment

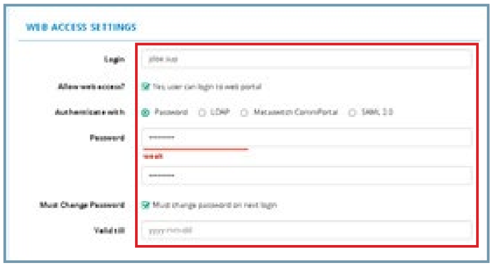
6. In the Email field, enter the person's email address (optional).
7. In the Time Zone field from the drop-down menu, select the person's time zone (optional).

8. In the Language field from the drop-down menu to select the person's language (optional). The default language is English. Users have the ability to change their language from the Call Recording portal.
9. In the **Recording Settings,** section, in the Record field, set this to **Never**. Leave all other fields in this section as defaulted.



Note: Call recording permission is by license assignment in the Masergy UC Admin portal.

10. In the **Web Access Settings** section and in the "**Allow web access?**" field, check the box to allow this user to have web access to the Call Recording portal.
11. In the Login field, enter the person's login name (i.e. jdoe.admin or jdoe.sup).
12. In the Password field, click on **Password** and enter the temporary password twice (Passwords must include a Capital case, a Lower case, and a Number with a minimum of six (6) characters. Special Characters are allowed such as #, $, !, *) (Example: Password#1)
13. In the Must Change Password field, check off the box to "Must change password on next login."



Note: The Valid until field can be left blank.

14. In the **Licensing** section, uncheck any boxes that may be checked.
15. Select Save.
16. Email the login information to the new Administrator/Supervisor with the following:
    a. The URL: https://recording.masergy.com
    b. The Login name: jdoe.admin or jdoe.sup
    c. The temporary Password: Password1

Note: There is no automatic email notification being sent to the new administrator or supervisor by the Call Recording platform.

Section C: Web Access for User

1. On the top Menu, select the Administration tab.
2. Select Users from the side Menu or the Main screen.
3. Search for User in the search field who needs access to their call recordings. You can search by first or last name or telephone number.
4. Click on the Edit button to the right of the selected user.

Note: *Do not edit any of the following fields:*

- Name field
- Role Field
- Group field
- Managed Group field
- Email field
- Time Zone
- Language

5. In the **Web Access Settings** section, check the box in the “**Allow Web Access?**” field.
6. In the Name field, enter the person’s login name (i.e. jdoe.user).
7. In the Password field, click on **Password** and enter the temporary password twice (Passwords must include a Capital case, a Lower case, and a Number with a minimum of 6 characters. Special Characters are allowed such as #, $, !, *) (Example: Password#1)
8. In the Must Change Password field, check off the box to “Must change password on next login.”
9. Select Save.
10. Email the User login information with the following:
    a. The URL: https://recording.masergy.com
    b. The Login name: jdoe.user
    c. The temporary Password: Password1

Note: *There is no automatic email notification being sent to the new User with portal access by the Call Recording platform.*

Section D: Editing To Correct Name or Password Reset

1. Search for the person by first or last name or telephone number.
2. Click on the Edit button to the right of the selected user.

Edit Name

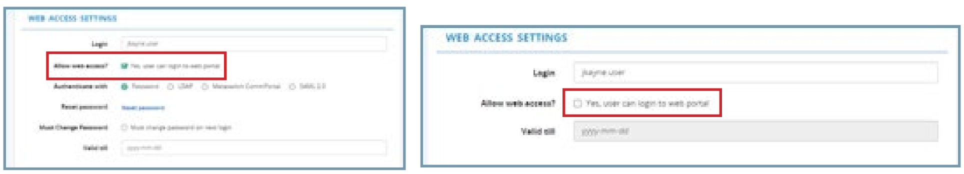
3. To Edit User select any of the fields for this user you wish to modify, such as their name, email address, or password

Password Reset

4. To Reset the Password of a user, go to the **Web Access Settings** section, select Reset password and remember to check the box to make sure they “*Must change password on next login.*”
5. Select **Save** and notify the user of the new temporary password.

Section E: Disabling Web Access

1. Search for the person by first or last name or telephone number.
2. Click on the Edit button to the right of the selected user.
3. Scroll down to the **Web Access Settings** section.
4. Uncheck the box to allow web access.



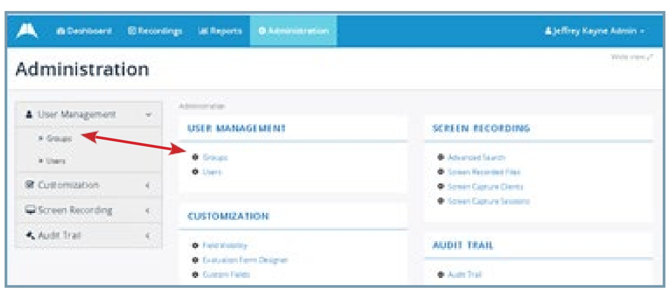
Example: Web access being removed from a user with before and after images.

5. Click on Save and the user will no longer have access to the Call Recording portal.

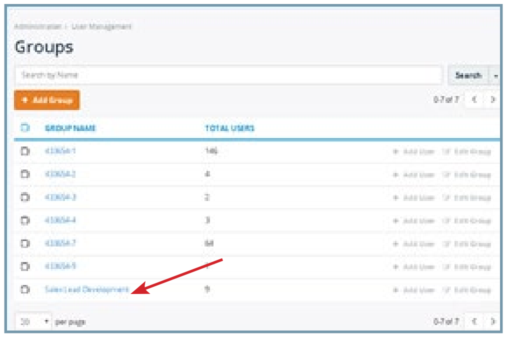
Section F: Creating Supervisor/Department Groups

Supervisors can be assigned to manage only their agents. Please follow these steps:

1. Select the Administration tab on the top menu.
2. Select Groups from the left side menu or the main screen.

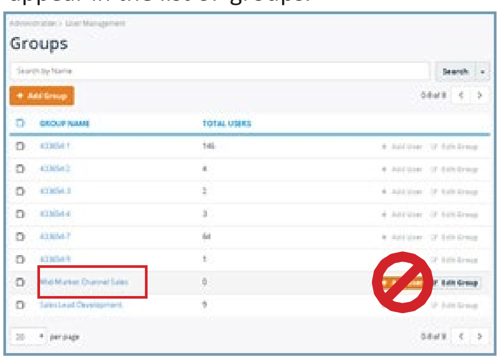


3. Select the **Add Group** button. The list of groups shown is automatically provisioned from the Masergy UC Admin portal that begins with for instance 433654-1, 433654-2, and so on. Any other groups shown with a name were manually created. (See arrow below)



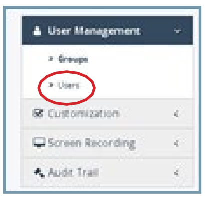
4. The **Add Group** page will allow you create and name this new group. The Time zone is optional. The naming schema should be logical for instance “Lead Generation Team,” “Customer Support,” “Billing,” etc. Then select **Save** to create this group.

5. The newly created group will now appear in the list of groups.



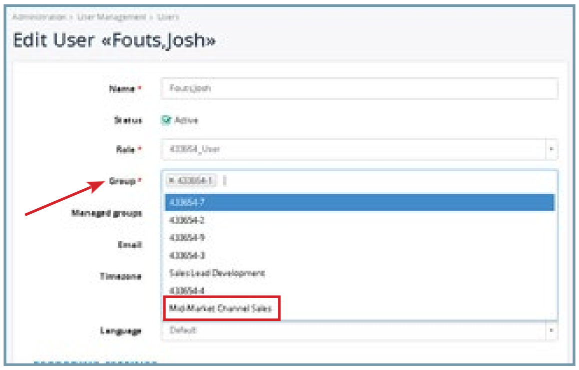
Note: After you have created the group, please do not select Add User from this screen. All recorded users are automatically provisioned by the license assignment in the Masergy UC Admin portal. The next few steps will walk you through the process to add users to the newly created group. (See steps 6-9 below).

6. From the left side menu under **User Management**, select **Users** to find each agent/user to add to this Managed Group.



7. Use the **Search** window and enter the first or last name or phone number of the user. On the right hand side of the selected user click on the **Edit** button.

8. In the **Edit** window of the selected user under the **Group** field, use the drop down menu and select the group(s) you need to add to this user. (Note: The user can be a member of multiple groups)

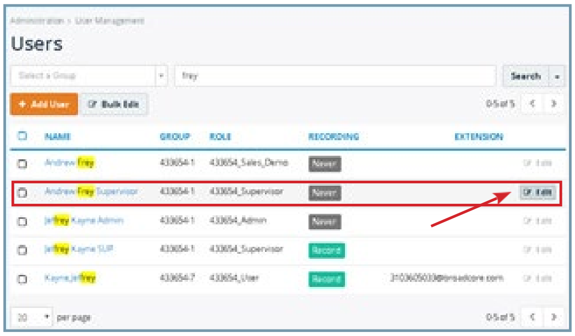


9. When finished scroll down to the bottom and click on **Save**. You will be returned to the **User** page and you will see this user has been successfully added to the new **Managed Group**.

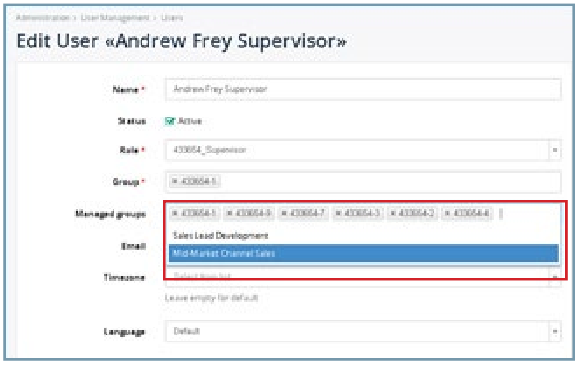
10. Repeat steps 6 to 9 for each user.

Supervisor

11. For the Supervisor, you will need to assign the newly created group (s) and remove any other groups they do not need to manage. Search for the Supervisor from the **User** page. On the right hand side of the selected user click on the **Edit** button.



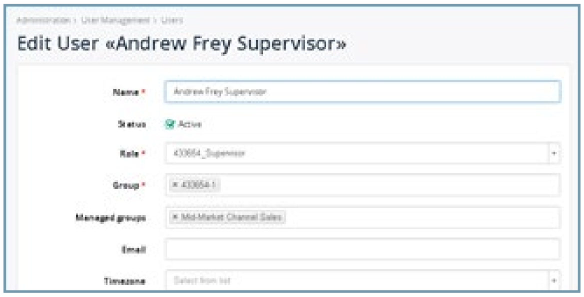
12. In the **Edit** window of the supervisor in the **Managed Group** field, use the drop down menu for a list of available groups. Select the Managed Group(s) which needs to be assigned to the supervisor and remove any other groups that are no longer applicable.



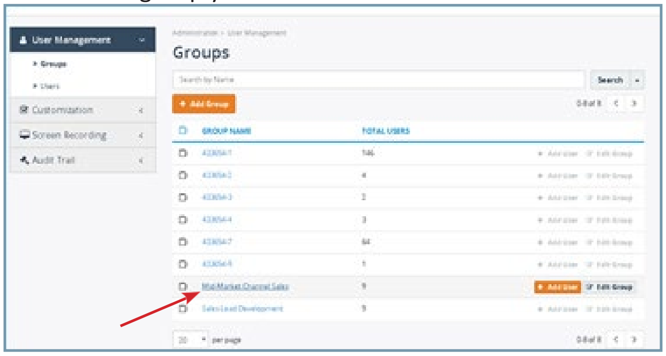
13. When finished scroll down to the bottom and click on **Save**. You will be returned to the **User** page.

Note: users can be members of many groups and they can be assigned to many different Supervisors. Try to be logical in your naming convention for the supervisor managed groups.

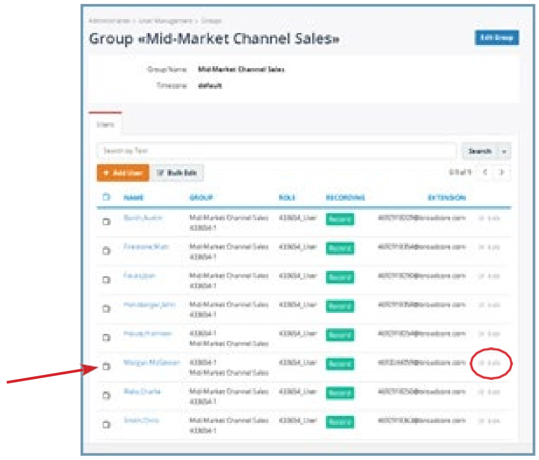
14. If you select the same supervisor to review, the changes you will see this supervisor is only assigned to the one managed group ➔ Mid-Market Channel Sales.



15. To review the members of a specific **Managed Group**, select **Groups** under the **User Management** left side menu. In the **Groups** page, click on the name of the group you wish to review.



16. Here you will see the members of the Mid-Market Channel Sales group.



17. Removing a user from a group for instance, “Mid-Market Channel Sales”, can be done directly from the group (image above) by selecting the **Edit** button on the right hand side of the selected user. From the **Edit User** screen of the selected user, you would remove the managed group from them and scroll down to **Save**. This removal procedure can also be done by directly searching for the user and editing their **User** page.