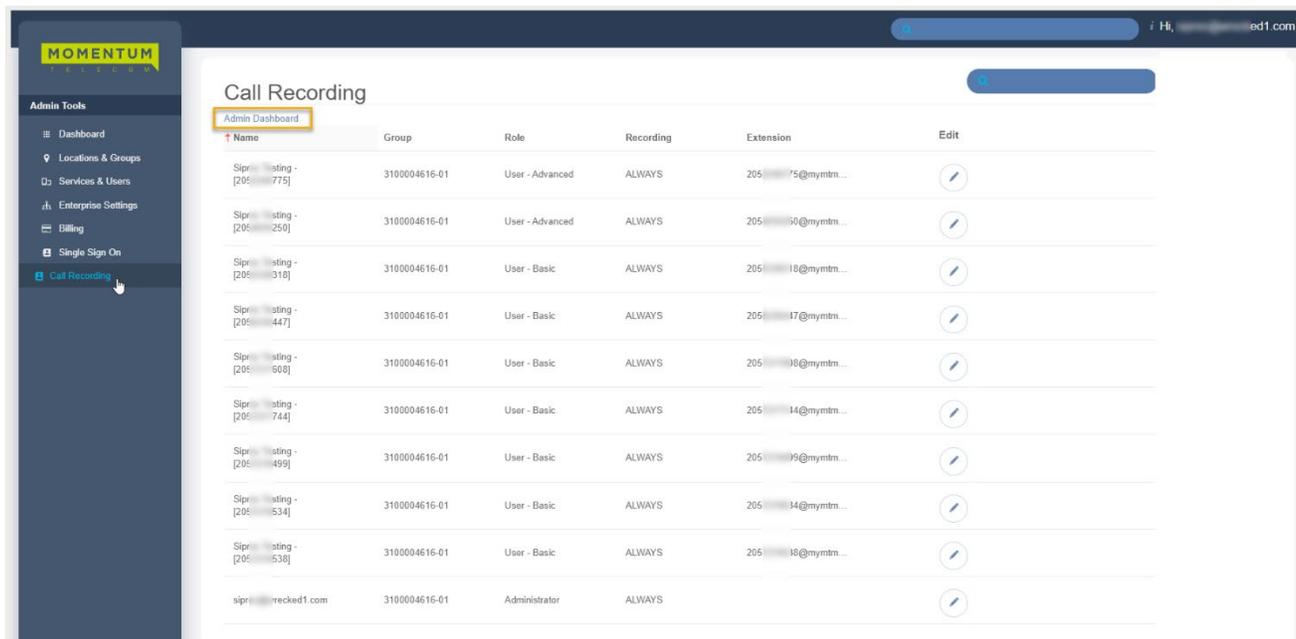## Admin Tools

Call Recording Section

Limited Access section for Call Recording service Administration tasks. Authorization required.
The Call Recording section in Admin Tools displays to authorized Cloud Services Portal Administrators <u>only</u> if Call Recording licenses have been provisioned for them and users on the enterprise account.

The display within the Call Recording page offers useful information about the users on the company's account that have been granted Call Recording licenses for BroadWorks voice. This area offers tools to search the list of users in the display, view or manage the basic BroadSoft voice settings related to Call Recording for each licensed user, and a link at the top of the page for the Administrator (who is currently logged into the Cloud Services Portal) to access their Call Recording portal Admin (or Supervisor) account (if enabled) within a new web page.

Search Call Recording Users

The Search bar within the Call Recording page offers a useful way to filter the page and find a user based on the data displayed within the table. Like the general site search bar, this field offers a dynamic search. As the Admin enters text into the page search field, the system locates all matches in the table below and displays them as a list for review. The Admin may click on a search result option to select it.

Manage Call Recording-Related Voice Settings

While viewing the Call Recording page:

1. Locate the user in the list.
2. Click on the listing's Edit icon ✏ (far right column).
   The User Voice Settings dialog displays.
3. Select and/or enter information as needed in the following sections within the Voice Settings dialog:

   Record Call - Click to select one of the following record options:

   - ⊙ Always - (Default) call recording is always on and saved and the user cannot pause or stop recording. This option is best for basic agent/users who should <u>not</u> have access to the Call Recording portal and for those who do not need to control when or whether calls to or from their line are being recorded.

- ⊙ **Always with Pause/Resume** - call recording is always on, and the user can pause and resume as needed for privacy compliance. This option is good for basic agent/users who should not have access to the Call Recording portal and those who have need to occasionally pause the recording on their device to accept private information and then resume recording.

- ⊙ **On Demand** - call recordings will be saved from the start of the call when the user manually starts the recording. This option is good for any licensed user who should be able to control whether calls are being recorded on their line/extension.

- ⊙ **On Demand with user initiated start** - call recordings are started by the user and the recording is saved only from the time the user initiates the recording during the call. This option is often assigned to more advanced license users (Supervisors or Administrators) who should be able to control whether their calls are recorded and how much of the call should be saved as a recording.

- ⊙ **Never** – If selected, the user's calls will not be recorded or saved at any time. This option is often assigned to users who may be C-level but are call recording license holders, Administrators, HR staff, and/or those in the organization who should not have their calls recorded normally. The setting may be changed by an Administrator to allow call recordings to occur and be saved when needed.

- ☑ **Play Call Recording Start/Stop Announcement** - Click to enable the use of an automated announcement when call recording is manually started or stopped by the user (when a Pause/Resume or On Demand record call setting is selected). See the *Recording Notification* setting information below.

- ☑ **Record Voice Messaging** - Option for some executive seat types (if enabled for use) - Click to turn on the recording and saving of voicemails on this line for review in the Call Recording portal.

Pause Resume Notification - Select one of the following options for notifications. The Default = *None*.

- ⊙ **None** - no notification is played when Pause or Resume are applied for call recording.
- ⊙ **Beep** - a beep plays when Pause or Resume are used.

- ⊙ **Play Announcement** – If enabled, a brief automated announcement plays at Pause/Resume.

Recording Notification
- *Optional:* ☑ Click to enable the use of a repeating warning tone during recorded calls and set the number of seconds between the tones being played. Minimum = 10 sec | Maximum = 1800 sec. Example: 120 = a tone sounds every 2 minutes. *15 seconds is displayed in the field as a reference.*

- ☑ **Display Call Recording Link on User Dashboard** - Click to display the access link to Call Recording from the user's Dashboard. Default = OFF.
*Tip: Leave this setting turned* **OFF** *if the user is* <u>not</u> *a Call Recording Supervisor or Admin and should not access the secured data found in the Call Recording portal.*

4. Click the **Save** button at the bottom of the dialog when finished to update the user's settings, or Cancel.

Direct Access to the Call Recording Portal from Cloud Services Portal

The Cloud Services Portal offers a direct link to access the Call Recording Portal using your system sign-in credentials.

For Cloud Services Portal Users (NON-Admins) the Connect link is found in the **Applications** card on the Dashboard within the Cloud Services Portal online. Once logged into the My Cloud Services Portal, a click on this link opens a new browser window to the Dashboard so the user can quickly go work in Call Recording as needed. This helps reduce the number of sign in credentials you have to remember and adds an extra layer of protection to keep important private data safe and secure.
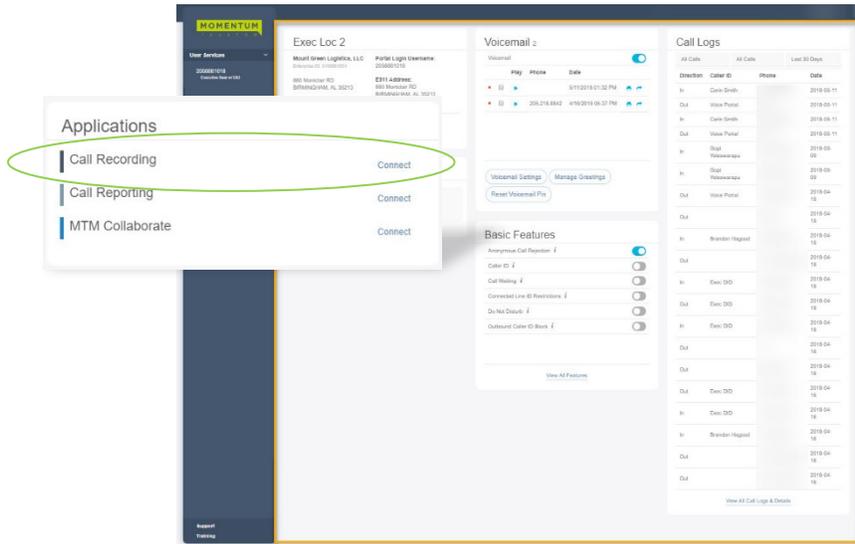
For Administrators in the Cloud Services Portal, the Call Recording section in Admin Tools and offers an Admin Dashboard link to directly access the Call Recording portal at the top of the Call Recording section page. Note: Call Recording checks permissions and authorization to view Call Recording for the account holder and notifies the user if the account cannot be granted access.
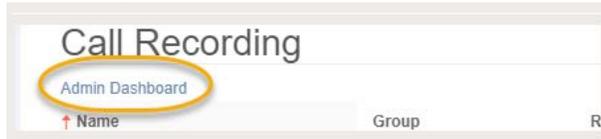
Once the Call Recording account is added and the user's permissions to work within the Call Recording Portal are defined by a Call Recording Admin, a simple click on the link displayed in the Cloud Services portal opens a new browser window and seamlessly launches the user directly into their Call Recording Dashboard view. Once there, the Admin or Supervisor may review information and/or select from the available sections and tools displayed to them in Call Recording per their role and permissions.
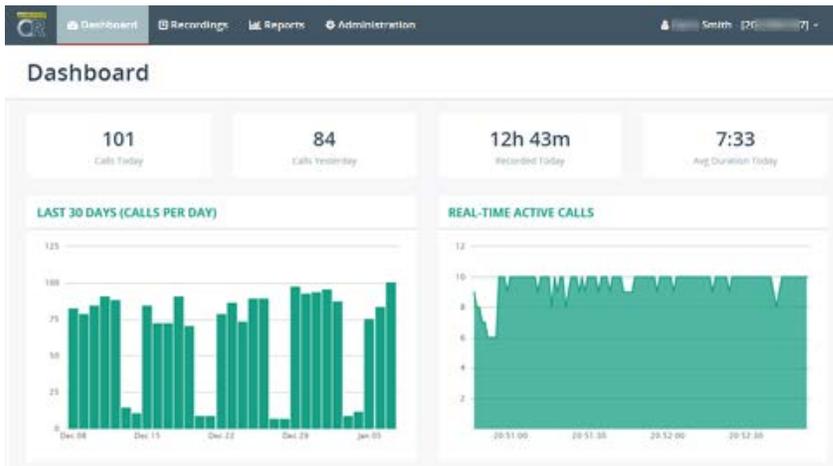
Authorization for access is required to see sections or tools in the Call Recording Portal.

This example shows a Dashboard view for a Supervisor who has access to view the Recordings and Reports and see read-only information in Administration for her groups.

Non-Administrators will only see the sections they have been granted permission to view.