

# **SIP Print Call Recording**

# SIP Print Call Recording

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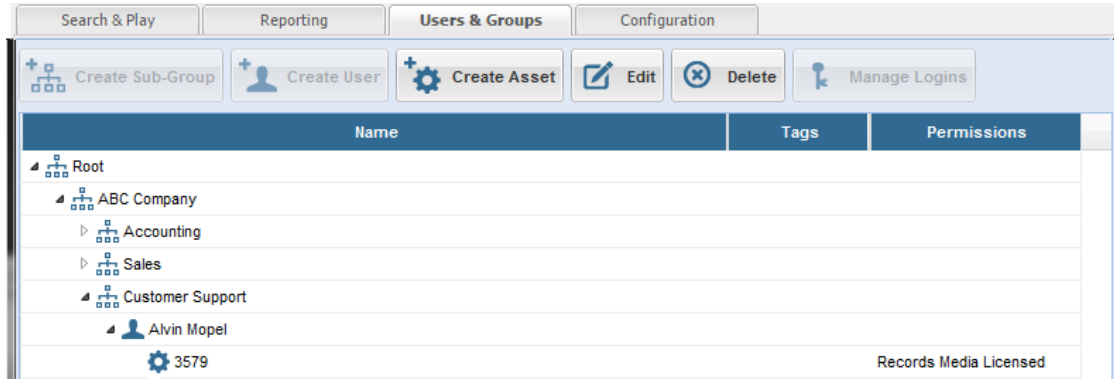
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# User Management

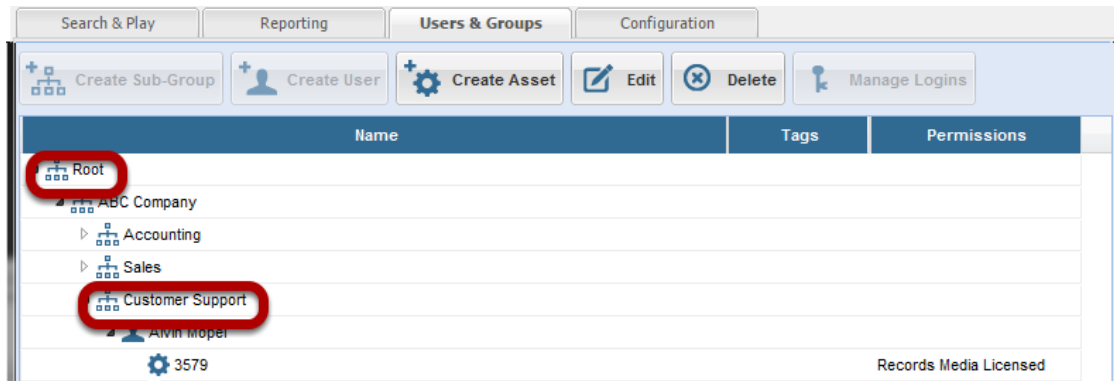
## How does the Resource Tree Work?

### Overview



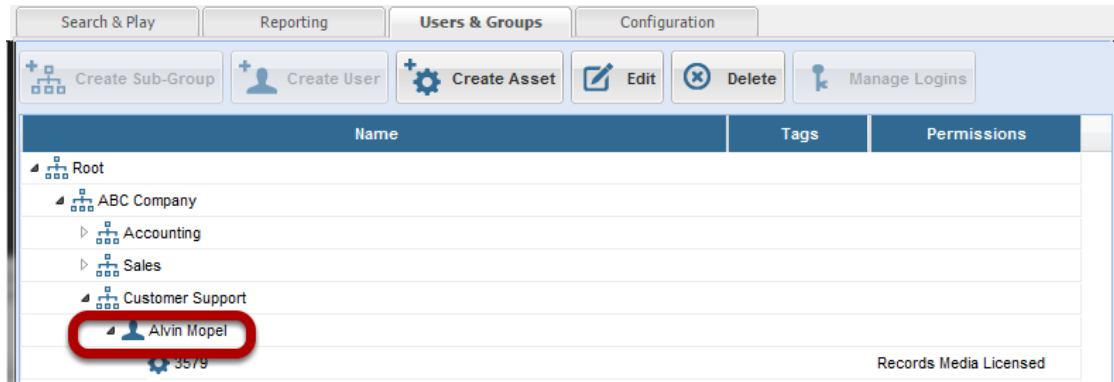
The Resource tree is designed to help organize and "map" people and assets so that the raw calls can be searched and reported on efficiently.

### Resource Groups



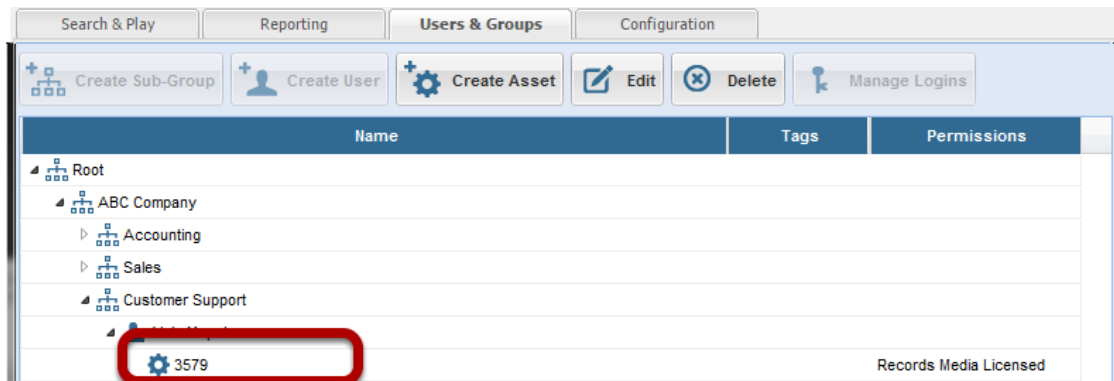
Resource Groups are simply containers for you to organize your records. Groups are hierarchial in nature so feel free to setup as many tiers as you would like

## Resource Users



Resource Users represent people, own Resource Assets and may only belong to Resource Groups.

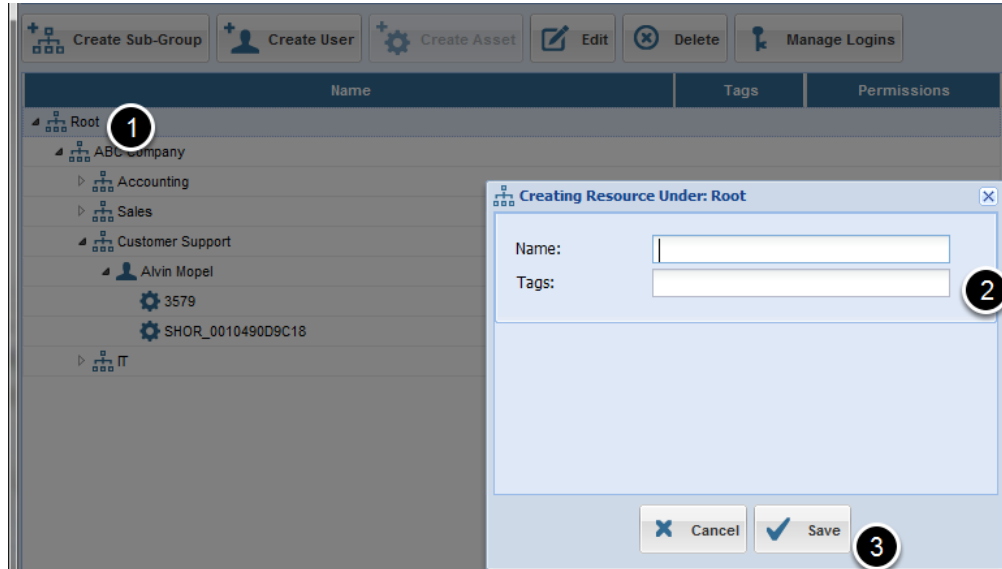
## Resource Assets



Resource Assets belong only to Resource Groups and help the system "map" raw records to the owning Resource User. For example Alvin has Extension 3579.

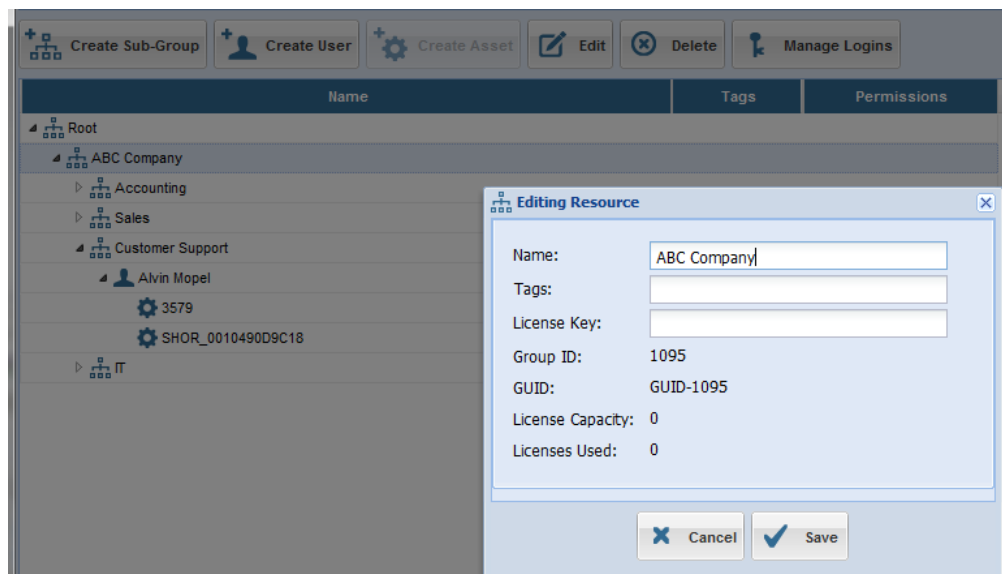
## How do I create or edit a Resource Group?

### Creating a Resource Group



- 1) Select a Resource Group where you would like to create a Resource Group underneath.
- 2) Enter a name for the Resource Group
- 3) Click Save

### Editing a Resource Group



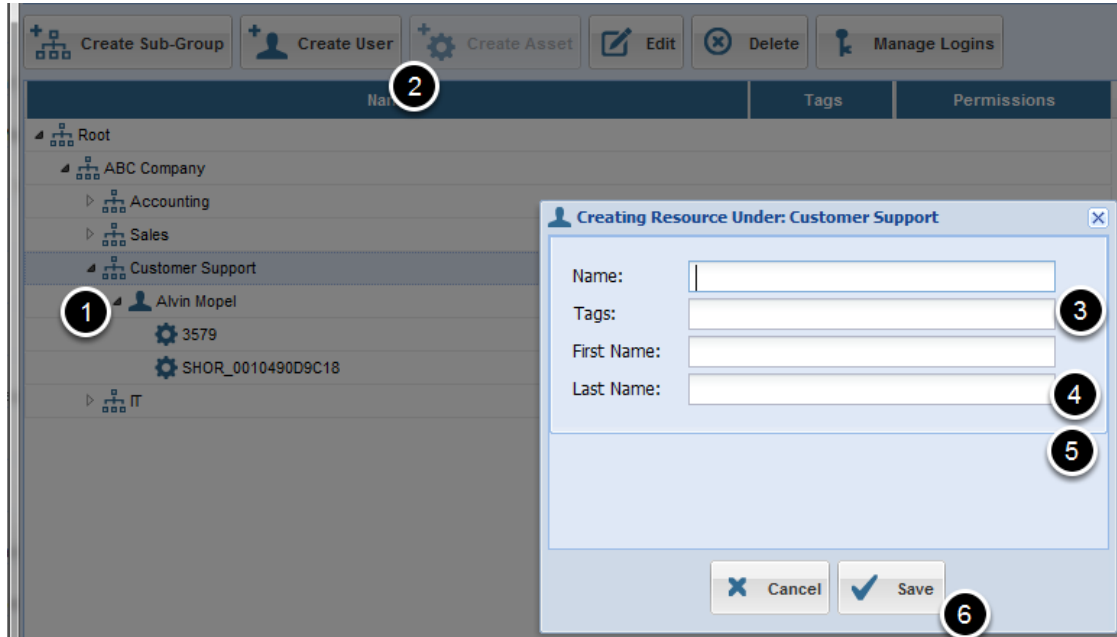
- 1) Select the Resource Group you would like to Edit
- 2) Update the name and tags (optional)
- 3) Update the License Key

4) Click Save



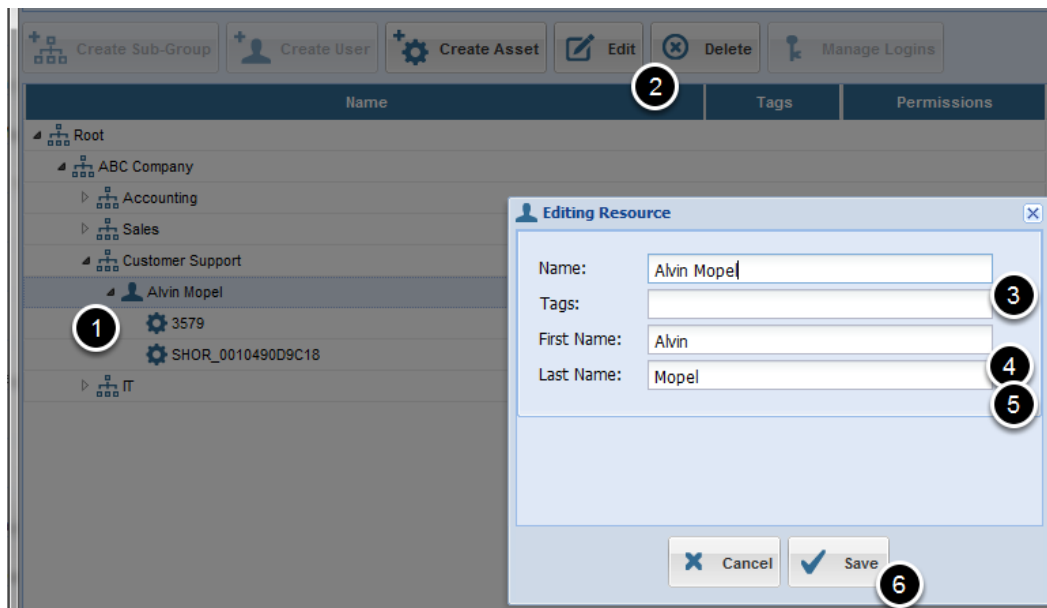
## How do I create or edit a Resource User?

### Creating a Resource User



- 1) Select a Resource Group under which you would like to create the Resource User
- 2) Click Create User
- 3) Enter the overall name
- 4) Enter the first name (optional)
- 5) Enter the last name (optional)
- 6) Click Save

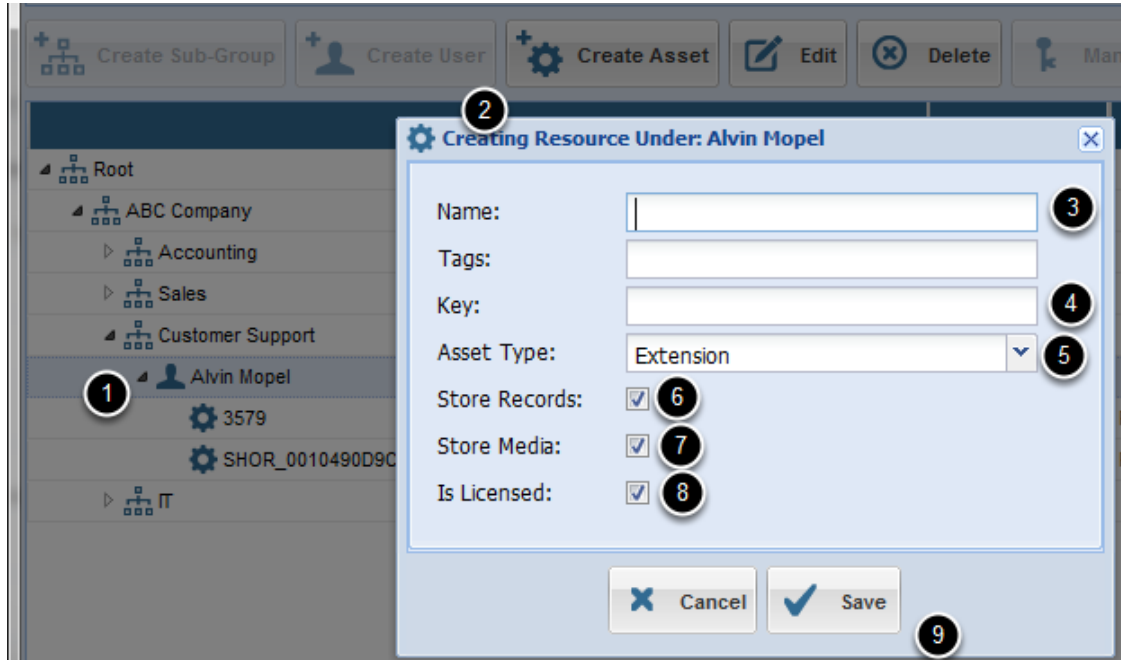
## Editing a Resource User



- 1) Select a Resource User you would like to edit.
- 2) Click Edit
- 3) Enter the overall name
- 4) Enter the first name (optional)
- 5) Enter the last name (optional)
- 6) Click Save

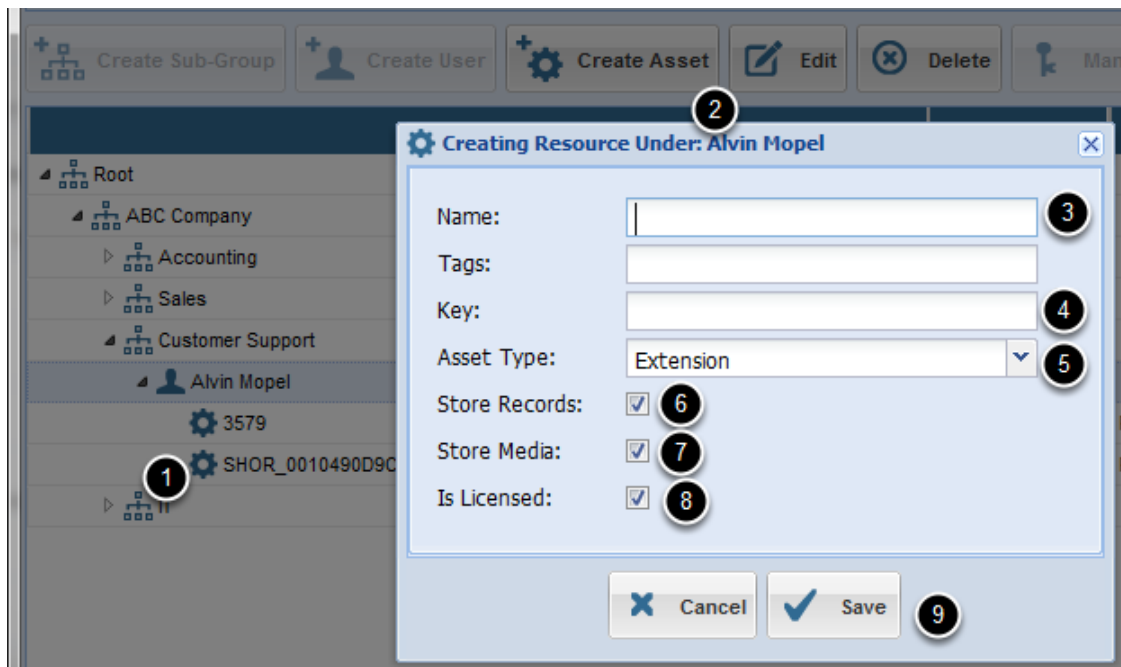
## How do I create or edit a Resource Asset?

### Create a Resource Asset



- 1) Click a Resource User you want to create the Resource Asset underneath
- 2) Click Create Asset
- 3) Enter the name (Example: Ext. 1000)
- 4) Enter the key. (Example: 1000). The key will be used as a unique identifier in conjunction with the Asset Type in order to map records to this Resource Asset.
- 5) Select an Asset Type
- 6) Store Records: Checked means that the system will store records for this Resource Asset
- 7) Store Media: Checked means that the system will store media for this Resource Asset
- 8) Is Licensed: Checked means this Resource Asset will consume 1 of the licenses underneath the first Resource Group above (that has a License Key)
- 9) Click Save.

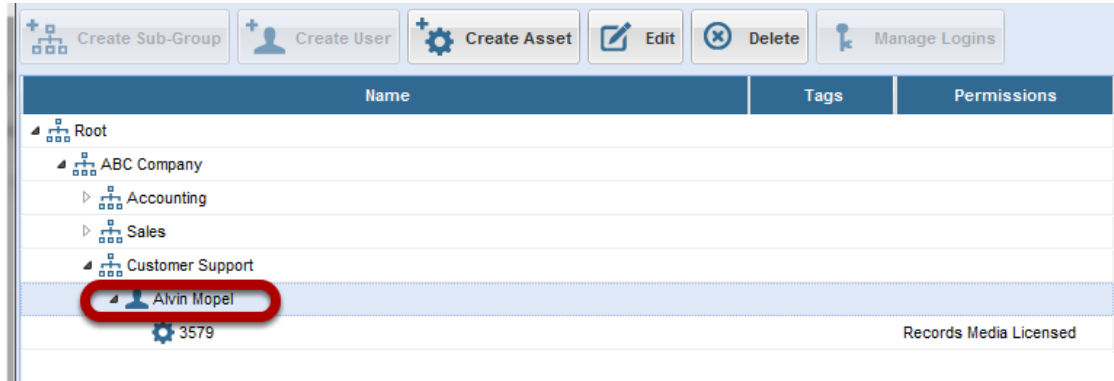
## Update a Resource Asset



- 1) Click the Resource Asset you want to Edit
- 2) Click Edit
- 3) Enter the name (Example: Ext. 1000)
- 4) Enter the key. (Example: 1000). The key will be used as a unique identifier in conjunction with the Asset Type in order to map records to this Resource Asset.
- 5) Select an Asset Type
- 6) Store Records: Checked means that the system will store records for this Resource Asset
- 7) Store Media: Checked means that the system will store media for this Resource Asset
- 8) Is Licensed: Checked means this Resource Asset will consume 1 of the licenses underneath the first Resource Group above (that has a License Key)
- 9) Click Save.

## How do I move Resource Groups, Users and Assets?

### Drag and Drop: Select "Source" resource



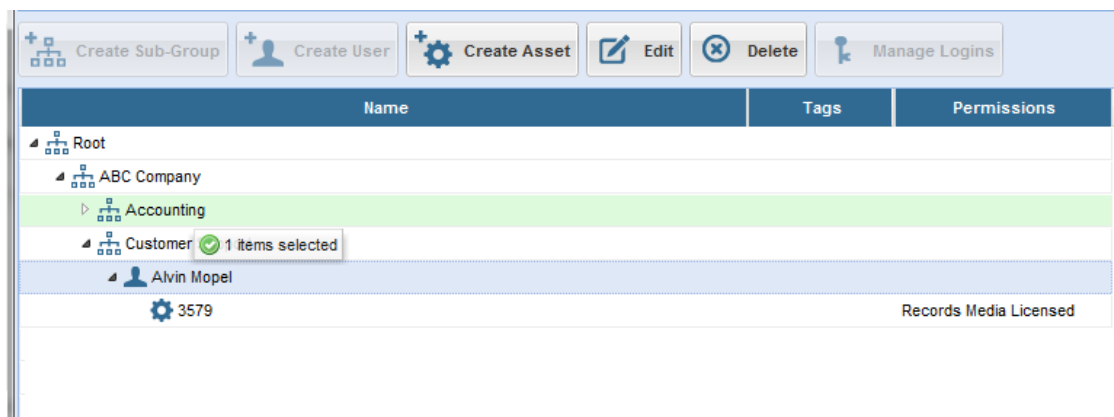
You can move any Resource item whether it is a Group, User or Asset simply by dragging into a destination. That being said there are a few rules:

- a) Groups can only belong to Groups
- b) Users can only belong to Groups
- c) Assets can only belong to Users

Examples of things you can do:

- i) Move a Resource User to a different Group. Drag the Resource User to the target Resource Group
- ii) Move a Resource Group under a different Resource Group. Drag the Resource Group to the target Resource Group
- iii) Move a Resource Asset to a different Resource User. Drag the Resource Asset to the target Resource User

### Drag and Drop: Drag, then drop on target



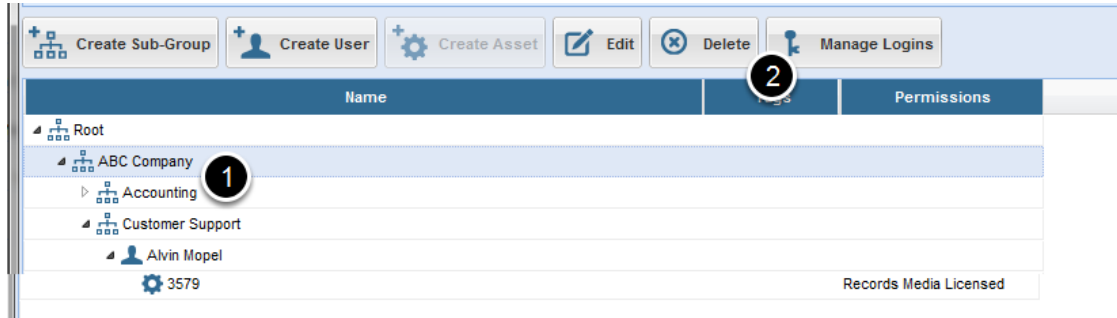
In this case Alvin Mopel will now belong to the Resource Group: "Accounting"

## Reprocessing records

Depending on the move, the system may ask if you want to reprocess records. This would happen if for instance you moved a Resource Asset say Extension 1000 to a different Resource User. If you select Yes then the system will reprocess all records going back in the database and reassigning Extension 1000 to the new Resource User. If you select No then only new records coming in will be assigned to the new User.

## How do I delete a Resource Group, Resource User or Resource Asset?

### Find the Resource and delete it

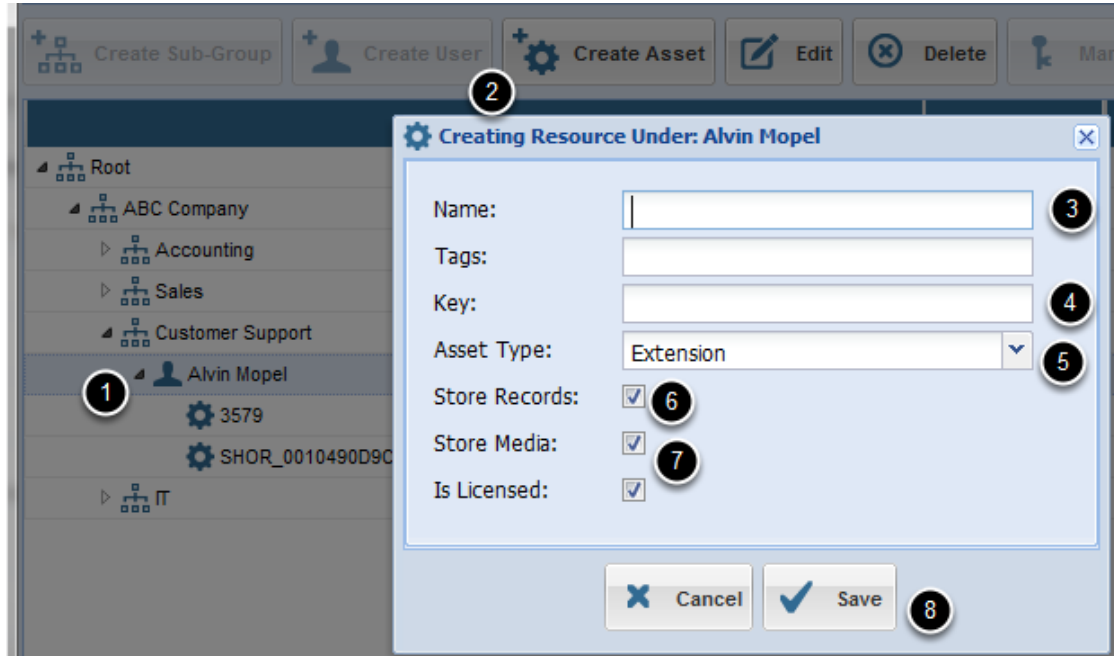


- 1) Find any Resource Group, Resource User or Resource Asset
- 2) Click Delete
- 3) Confirm that you want to delete it.

Warning: Everything underneath the given Resource will be deleted as well!

## How do I make sure a given Extension or Resource Asset never records a call?

### Create a Resource Asset

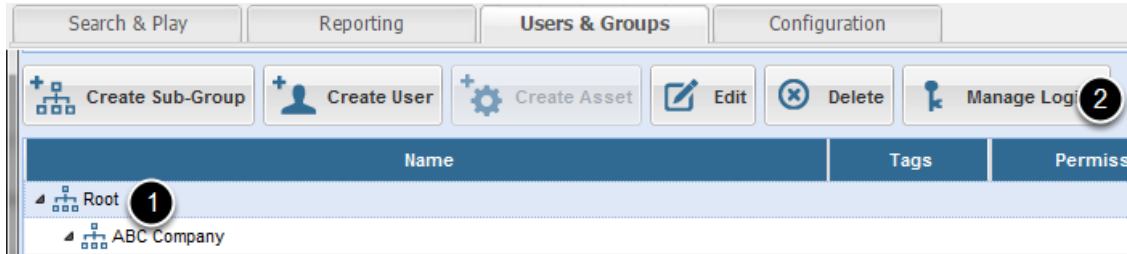


- 1) Click a Resource User you want to create the Resource Asset underneath
- 2) Click Create Asset
- 3) Enter the name (Example: Ext. 1000)
- 4) Enter the key. (Example: 1000). The key will be used as a unique identifier in conjunction with the Asset Type in order to map records to this Resource Asset.
- 5) Select an Asset Type
- 6) Store Records: Uncheck this box so that call record is not stored in the database
- 7) Store Media: Uncheck this box so that the call is not recorded (this will happen automatically when you click Uncheck Store Records)
- 8) Click Save.



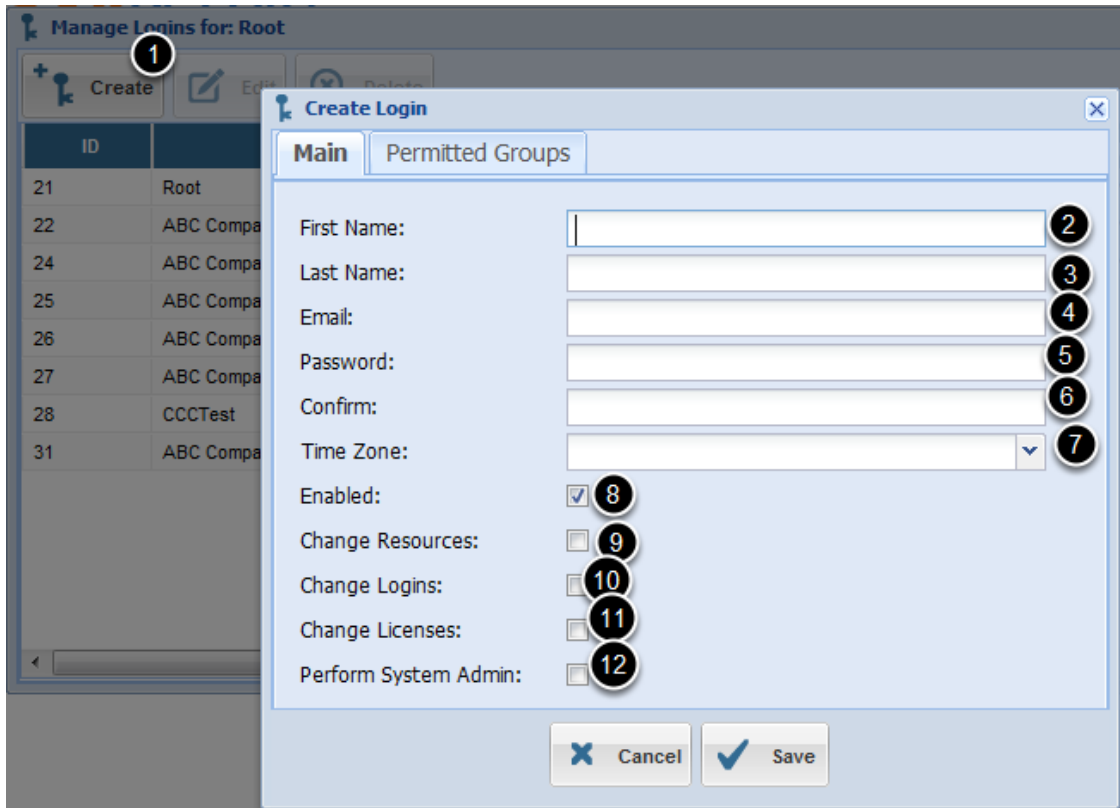
## How do I allow other people to login?

### Create a Login



- 1) Select a Resource Group under which the new user will be assigned to. This will also govern what calls they will be able to see.
- 2) Click Manage Logins

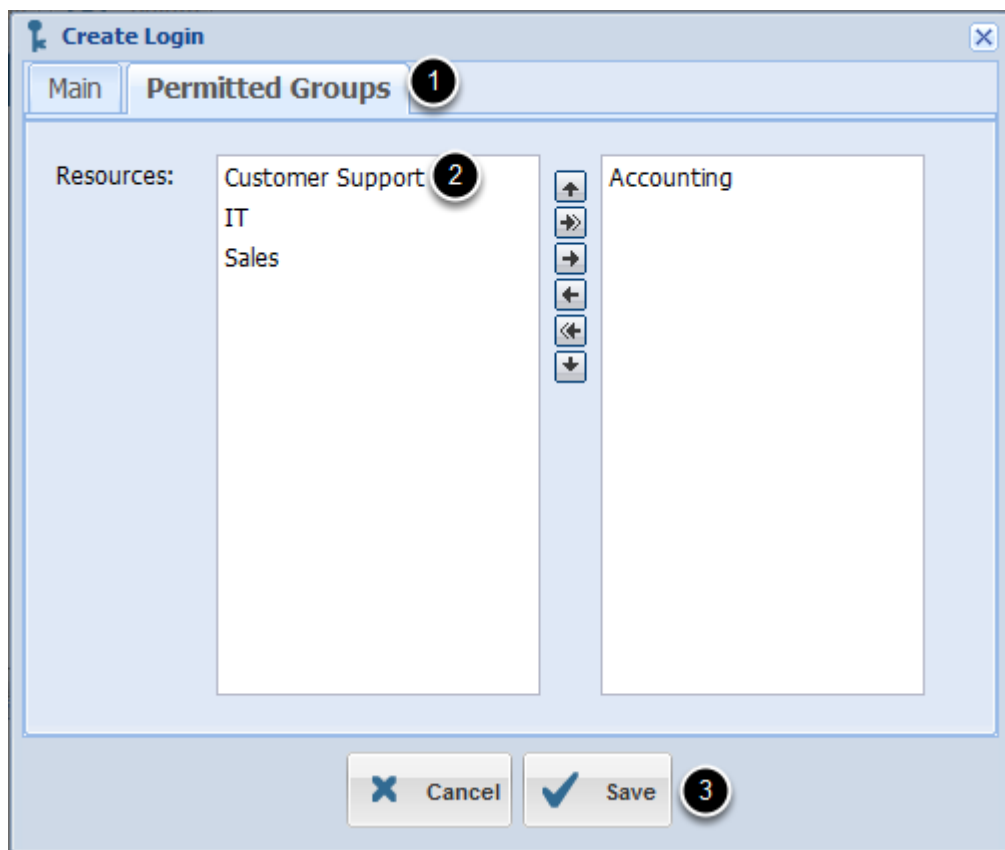
### Create a Login



- 1) Click the Create Button
- 2) Edit the First Name
- 3) Edit the Last Name
- 4) Edit the Email (This is the unique identifier they will use to login)
- 5) Edit their password

- 6) Confirm the password
- 7) Select their time zone
- 8) Enabled: checked means they are allowed to login
- 9) Change Resources: checked means they are allowed to create, edit & delete Resources underneath their part of the Resource Tree
- 10) Change Logins: checked means they are allowed to create other users under their part of the Resource Tree
- 11) Change Licenses: checked means the user can update license keys as well as add, and remove licensed Resource Assets
- 12) Perform System Admin: checked means they can see the global Administration tab.

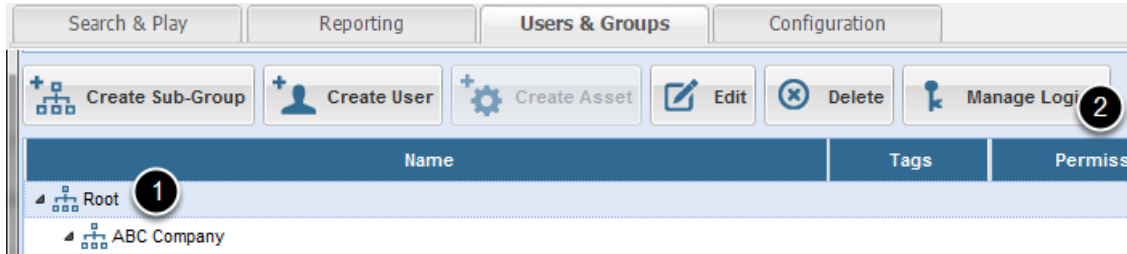
## Assign Peer Groups



- 1) Click the Permitted Groups tab
- 2) Select the Resource Groups this user has access to
- 3) Drag them to the right hand side
- 4) Click Save

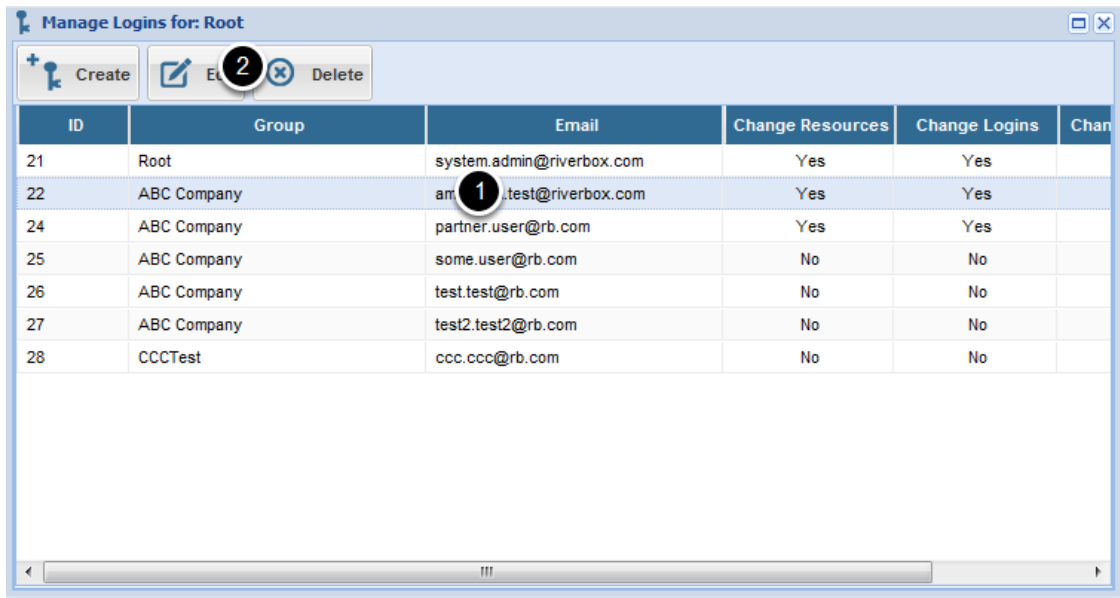
## How do I edit existing logins?

### Find the Login



- 1) Select the highest level Resource Group
- 2) Click Manage Logins

### Select the Login



- 1) Select a Login
- 2) Click Edit

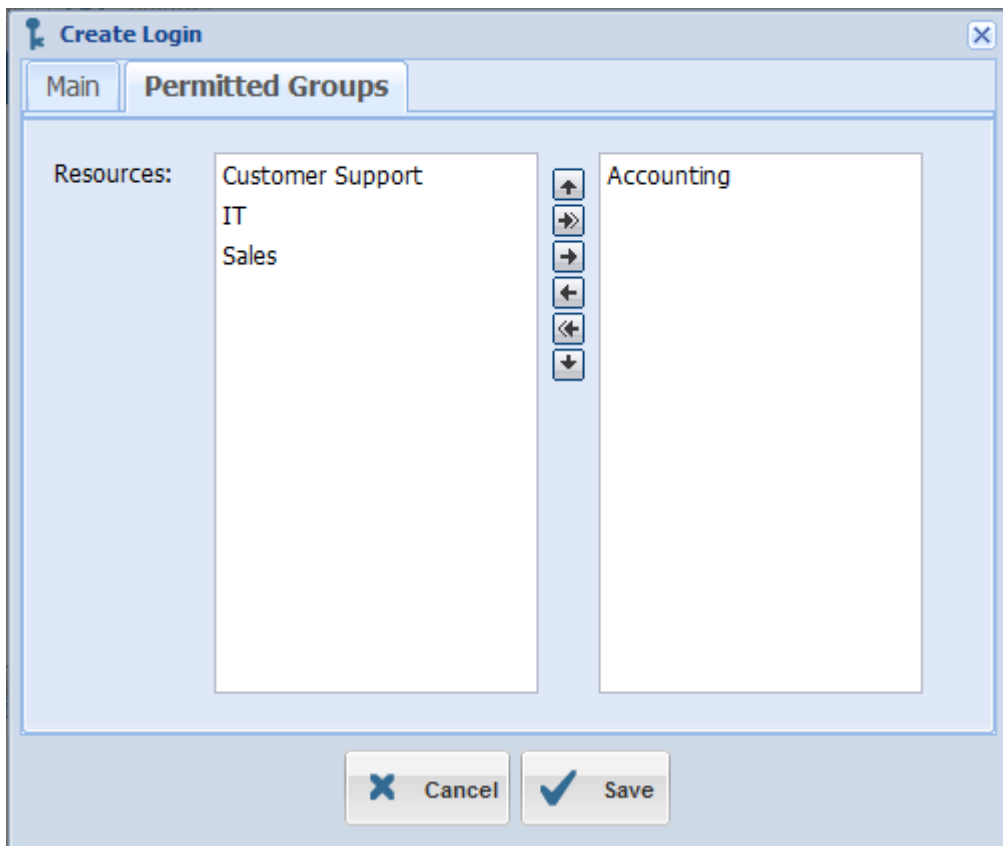
## Edit Login

The screenshot shows a 'Edit Login' dialog box with two tabs: 'Main' and 'Permitted Groups'. The 'Main' tab is active. It contains the following fields and controls:

- First Name:** Text input field containing 'some' (callout 1).
- Last Name:** Text input field containing 'user' (callout 2).
- Email:** Text input field containing 'some.user@rb.com' (callout 3).
- Password:** Password input field (callout 4).
- Confirm:** Password input field (callout 5).
- Time Zone:** Dropdown menu showing '(GMT-06:00) Central America' (callout 6).
- Enabled:** Check box, which is checked (callout 7).
- Change Resources:** Check box, which is unchecked (callout 8).
- Change Logins:** Check box, which is unchecked (callout 9).
- Change Licenses:** Check box, which is unchecked (callout 10).
- Perform System Admin:** Check box, which is unchecked (callout 11).

At the bottom of the dialog are two buttons: 'Cancel' (callout 12) and 'Save'.

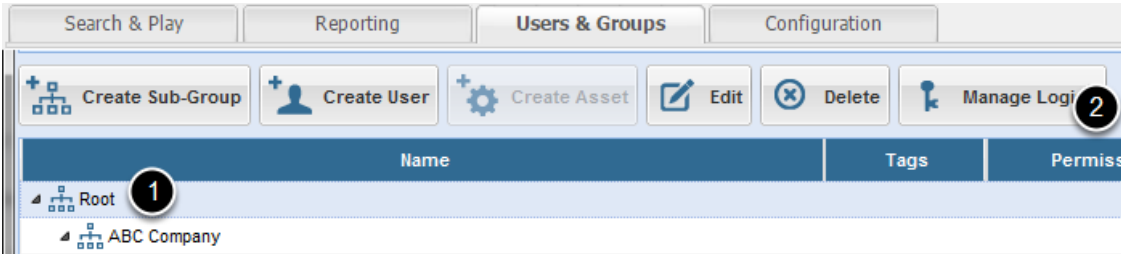
- 1) Edit the First Name
- 2) Edit the Last Name
- 3) Edit the Email (This is the unique identifier they will use to login)
- 4) Edit their password
- 5) Confirm the password
- 6) Select their time zone
- 7) Enabled: checked means they are allowed to login
- 8) Change Resources: checked means they are allowed to create, edit & delete Resources underneath their part of the Resource Tree
- 9) Change Logins: checked means they are allowed to create other users under their part of the Resource Tree
- 10) Change Licenses: checked means the user can update license keys as well as add, and remove licensed Resource Assets
- 11) Perform System Admin: checked means they can see the global Administration tab.
- 12) Click Save



- 1) Click the Permitted Groups tab
- 2) Select the Resource Groups this user has access to
- 3) Drag them to the right hand side
- 4) Click Save

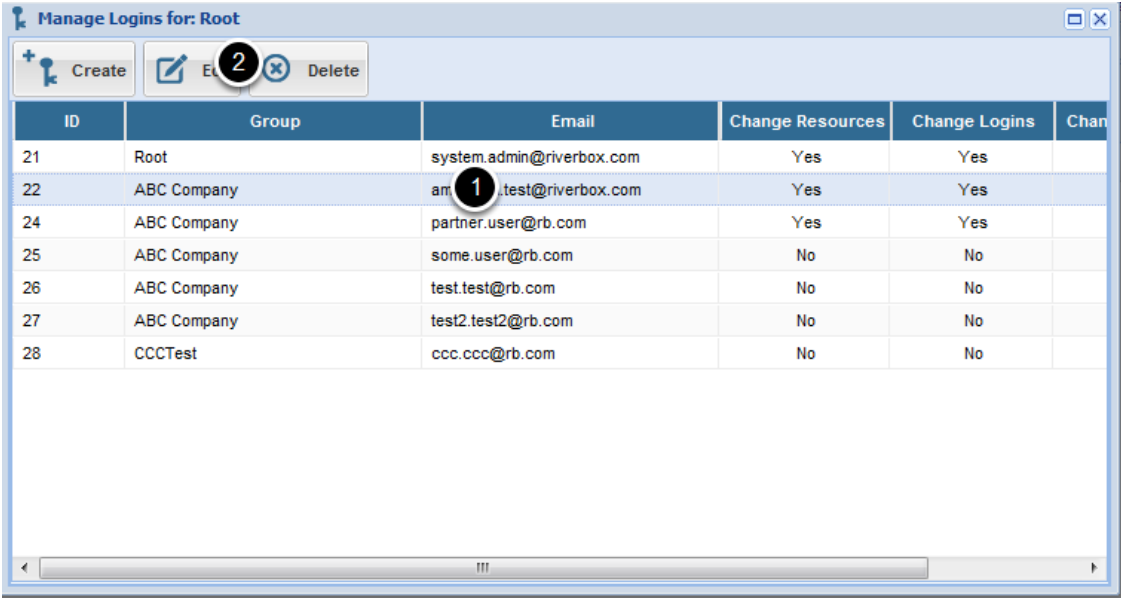
# How do I create a "read-only" login?

## Find the Login



- 1) Select the highest level Resource Group
- 2) Click Manage Logins

## Select the Login



- 1) Select a Login
- 2) Click Edit

## Edit Login

**Edit Login**

**Main** | Permitted Groups

First Name: some

Last Name: user

Email: some.user@rb.com

Password: .....

Confirm: .....

Time Zone: (GMT-06:00) Central America

Enabled: ☒

Change Resources: ☐ 1

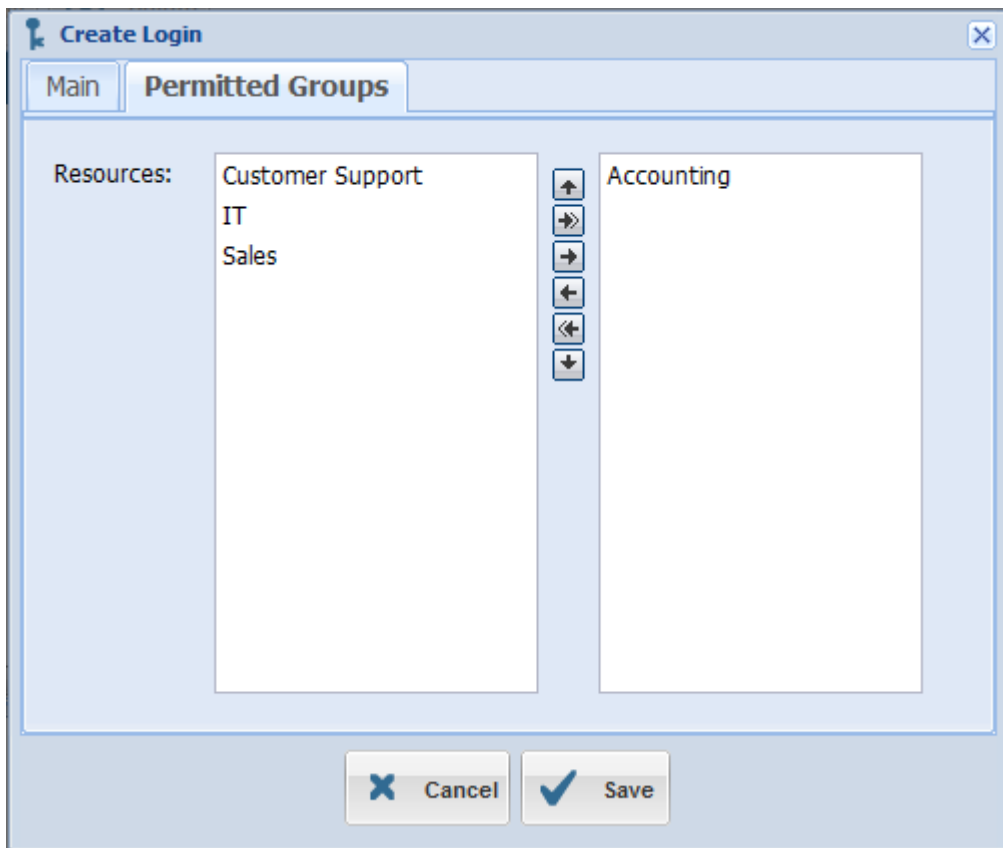
Change Logins: ☐ 2

Change Licenses: ☐ 3

Perform System Admin: ☐ 4

5

- 1) Change Resources: uncheck
- 2) Change Logins: uncheck
- 3) Change Licenses: uncheck
- 4) Perform System Admin: uncheck
- 5) Click Save

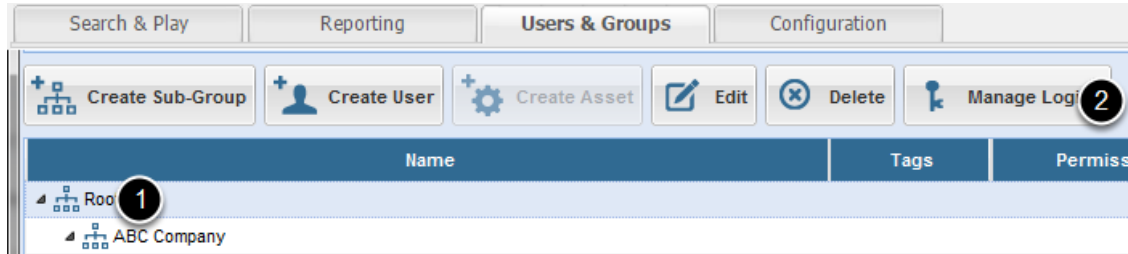


- 1) Click the Permitted Groups tab
- 2) Select the Resource Groups this user has access to
- 3) Drag them to the right hand side
- 4) Click Save



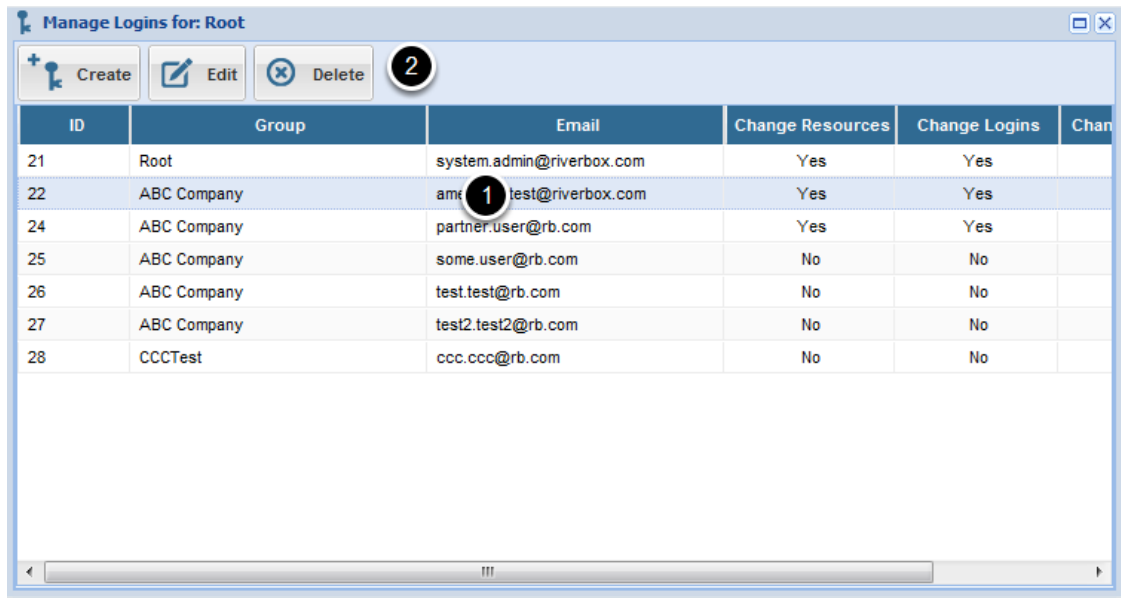
## How do I delete a login?

### Find Login



- 1) Click the highest level Resource Group
- 2) Click Manage Logins

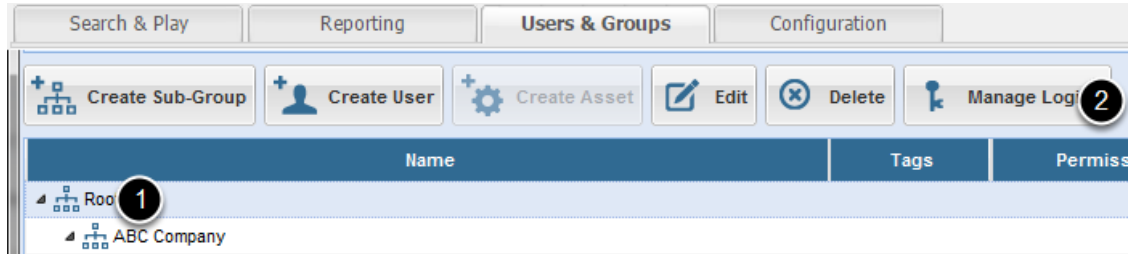
### Delete Login



- 1) Select the Login
- 2) Click Delete
- 3) Click Yes when asked to confirm.

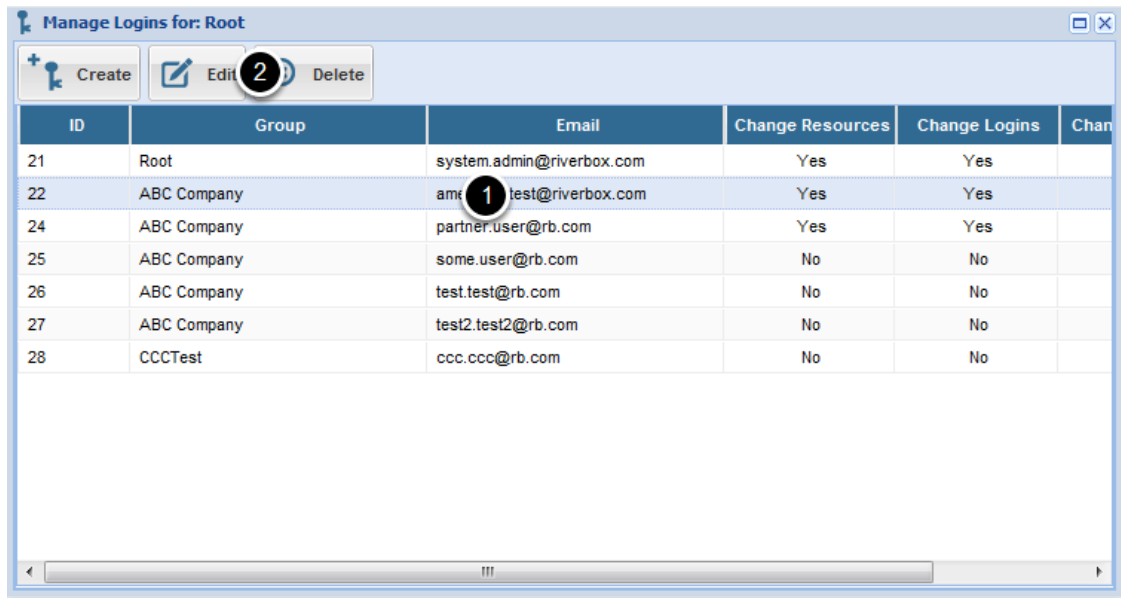
## How do I disable a Login?

### Find Login



- 1) Click the highest level Resource Group
- 2) Click Manage Logins

### Edit Login



- 1) Select the Login
- 2) Click Edit

## Disable Login

**Edit Login**

**Main** | Permitted Groups

First Name: some

Last Name: user

Email: some.user@rb.com

Password: .....

Confirm: .....

Time Zone: (GMT-06:00) Central America ▼

Enabled: ☒ 1

Change Resources: ☐

Change Logins: ☐

Change Licenses: ☐

Perform System Admin: ☐

Cancel Save 2

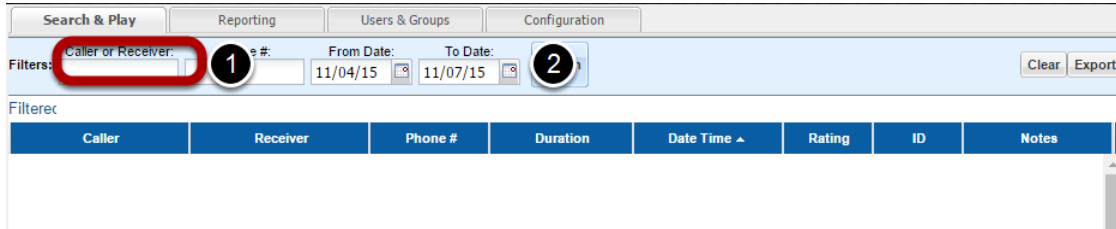
1) Uncheck the Enabled field.

2) Click Save

# Searching & Reporting

## How do I search for a call?

### Enter a Search Term



Search & Play | Reporting | Users & Groups | Configuration

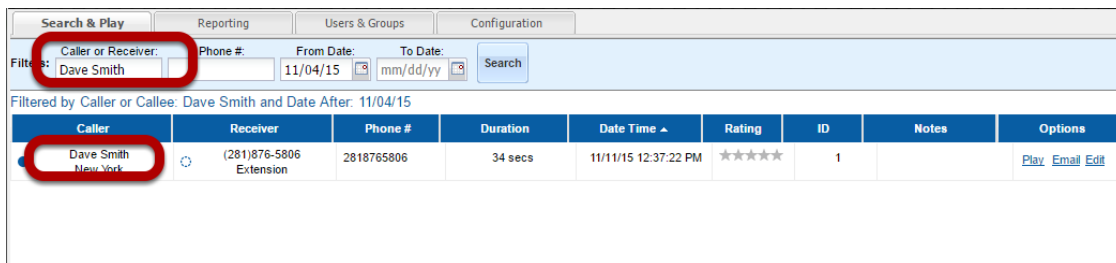
Filters: **Caller or Receiver:**  **1** **Phone #:**  **From Date:**  **To Date:**  **2**

Filtered:

Caller	Receiver	Phone #	Duration	Date Time	Rating	ID	Notes
--------	----------	---------	----------	-----------	--------	----	-------

- 1) Search by any part of the Resource User's name. The system will make a case insensitive, wildcard search on both the left and right hand side.
- 2) Hit Enter or Click Search

### Review Search Results



Search & Play | Reporting | Users & Groups | Configuration

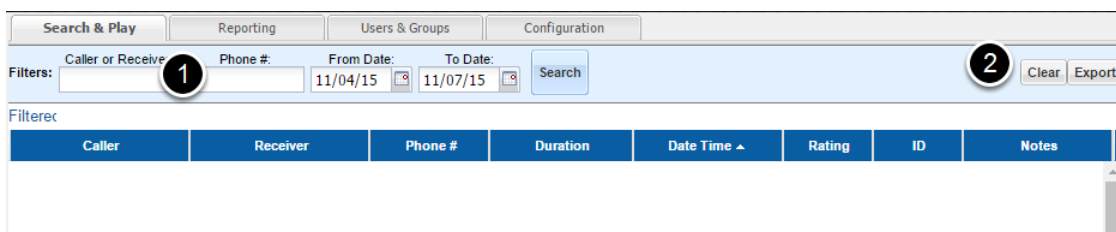
Filters: **Caller or Receiver:**  **Phone #:**  **From Date:**  **To Date:**

Filtered by Caller or Callee: Dave Smith and Date After: 11/04/15

Caller	Receiver	Phone #	Duration	Date Time	Rating	ID	Notes	Options
<b>Dave Smith</b> New York	(281)876-5806 Extension	2818765806	34 secs	11/11/15 12:37:22 PM	★★★★★	1		<a href="#">Play</a> <a href="#">Email</a> <a href="#">Edit</a>

The system will find calls either made by or directed to any Resource User that matches your search term

### Remove or Change Search Terms



Search & Play | Reporting | Users & Groups | Configuration

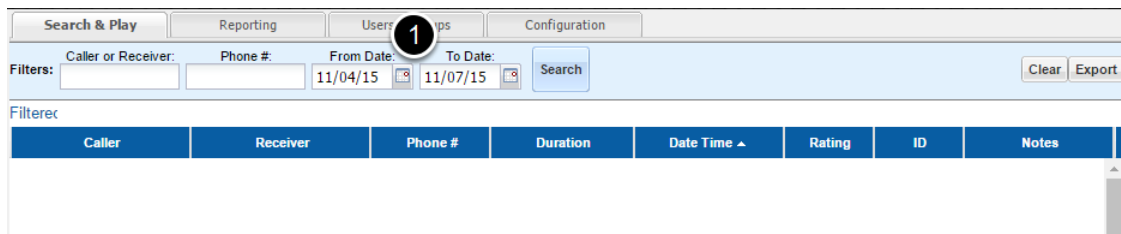
Filters: **Caller or Receiver:**  **1** **Phone #:**  **From Date:**  **To Date:**   **2**

Filtered:

Caller	Receiver	Phone #	Duration	Date Time	Rating	ID	Notes
--------	----------	---------	----------	-----------	--------	----	-------

- 1) Simply change the Search Term and the search will begin anew
- 2) To clear your search term you can Click the Clear - Search button as well

## Filter the Search Results by Date



The screenshot shows a web application interface with a top navigation bar containing tabs: Search & Play, Reporting, Users, and Configuration. Below the navigation bar is a search filter section. It includes fields for 'Caller or Receiver:', 'Phone #:', 'From Date:', and 'To Date:'. The 'From Date' field is set to '11/04/15' and the 'To Date' field is set to '11/07/15'. A red circle with the number 1 is placed over the date selection icons in these fields. To the right of the date fields is a 'Search' button. Further right are 'Clear' and 'Export' buttons. Below the search filter section is a table with the following columns: Caller, Receiver, Phone #, Duration, Date Time ▲, Rating, ID, and Notes. The table is currently empty.

1) Use the Calendar Icons to change the Date range

## How do I play a call?

### Find a Call

Search & Play   Reporting   Users & Groups   Configuration

Filters: Caller or Receiver: Dave Smith   Phone #:   From Date: 11/04/15   To Date: mm/dd/yy   Search

Filtered by Caller or Callee: Dave Smith and Date After: 11/04/15

Caller	Receiver	Phone #	Duration	Date Time	Rating	ID	Notes	Options
Dave Smith New York	(281)876-5806 Extension	2818765806	34 secs	11/11/15 12:37:22 PM	★★★★★	1		<a href="#">Play</a> <a href="#">Email</a> <a href="#">Edit</a>

1) Click Play link in the row of the call in question

### Default Audio Player

Search & Play   Reporting   Users & Groups   Configuration

Filters:   From Date: 11/05/15   To Date: 11/17/15   Search   Clear   Export

Filtered by Date After: 11/05/15 and Date Before: 11/17/15

Caller	Receiver	Phone #	Duration	Date Time	Rating	ID
Dave Smith New York	(281)876-5806 Extension	2818765806	34 secs	11/11/15 12:37:22 PM	★★★★★	1

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[session-7857.wav](#)   [Show all downloads...](#)

1) The WAV File will then download locally and you can use your Media player of choice to listen.

## How do I email a recorded call?

### Find a Call

Search & Play   Reporting   Users & Groups   Configuration

Filters: Caller or Receiver: Dave Smith   Phone #:   From Date: 11/04/15   To Date: mm/dd/yy   Search

Filtered by Caller or Callee: Dave Smith and Date After: 11/04/15

Caller	Receiver	Phone #	Duration	Date Time	Rating	ID	Notes	Options
Dave Smith New York	(281)876-5806 Extension	2818765806	34 secs	11/11/15 12:37:22 PM	★★★★★	1		<a href="#">Play</a> <a href="#">Email</a> <a href="#">Edit</a>

1

1) Click the Email link

### Enter Fields and Send

Email Session

From:      1

To:      2

CC:      3

Subject: Audio file attached.      4

Send      5

- 1) Enter the From email address
- 2) Enter the To email address (comma delimited)
- 3) Optional CC email address
- 4) Change the subject as appropriate
- 5) Click Send

The email will be sent by the Appserver service.

Warning: Administration Mail Settings must be configured properly to enable this feature



# How can I export the search results?

## Click Export Button

Search & Play

Reporting

Users & Groups

Configuration

Filters:

Caller or Receiver:

Phone #:

From Date:

To Date:

Search

Clear

Export

Filtered by Date After: 11/05/15 and Date Before: 11/17/15

1

Caller	Phone #	Duration	Date Time	Rating	ID	Notes	Options
876-5806 tension	2818765806	34 secs	11/11/15 12:37:22 PM	★★★★★	1		<a href="#">Play</a> <a href="#">Email</a> <a href="#">Edit</a>

1) Click Export button

## Save File

Jennifer Coulier	(801)725-0400	(801)725-0400	52 secs	12/19/11 1...	★★★★★	Yes	Yes	2	17
10.250.250.72	Rick Heisner		46 secs	12/19/11 1...	★★★★★	Yes	Yes	2	17
Jennifer Coulier	(888)427-0379	(888)427-0379	37 secs	12/19/11 1...	★★★★★	Yes	Yes	2	17
Jennifer Coulier	(775)750-4439	(775)750-4439	33 secs	12/19/11 1...	★★★★★	Yes	Yes	2	17
Jennifer Coulier									17

Page 1

The sessions.csv download has completed.

Open

Open folder

View downloads

playing 1

1) Save file as directed by your browser

## What do the little blue people icons mean?

### Blue Icons

Search & Play		Reporting		Users & Groups	
Filters:		Caller or Receiver:	Phone #:	From Date:	To Date:
				11/05/15	11/17/15
Filtered by Date After: 11/05/15 and Date Before: 11/17/15					
Caller		Receiver		Phone	
● Dave Smith New York		○ (281)876-5806 Extension		2818765806	

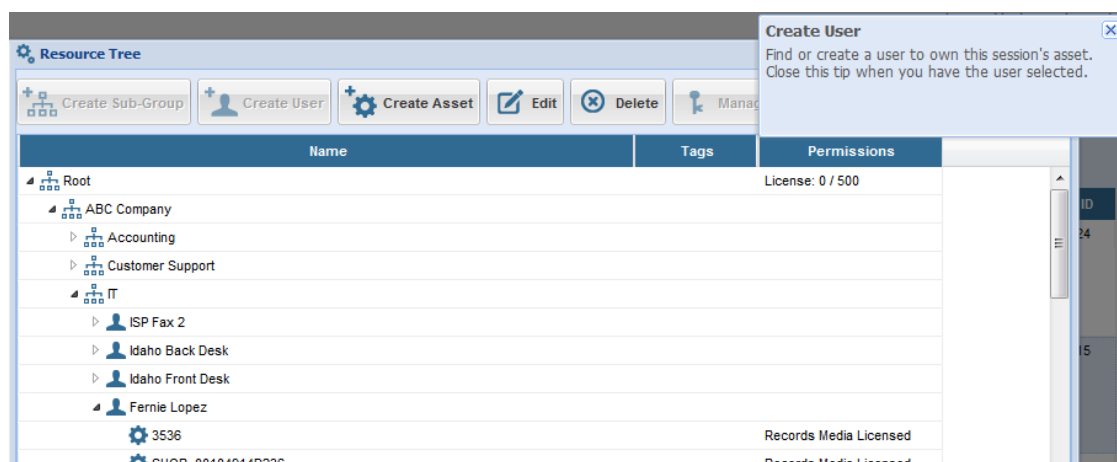
The full blue icon tells you that the Resource Asset was correctly mapped in the Resource Tree. The empty blue icon tells you that the Resource Asset was not mapped because it was not found in the Resource Tree.

### Map It

Search & Play		Reporting		Users & Groups	
Filters:		Caller or Receiver:	Phone #:	From Date:	To Date:
				11/05/15	11/17/15
Filtered by Date After: 11/05/15 and Date Before: 11/17/15					
Caller		Receiver		Phone #	
● Dave Smith New York		(281)876-5806 Map Resource		2818765806	

- 1) Click or Right click the Unmapped Resource
- 2) Click the "Map Resource" menu item

## Map it to a Resource User



The Resource Tree will open up with instructions for how to complete the mapping

## How can I add notes to a call?

### Find a Call

Search & Play Reporting Users & Groups Configuration

Filters: Caller or Receiver: Phone #: From Date: 11/05/15 To Date: 11/17/15 Search Clear Export

Filtered by Date After: 11/05/15 and Date Before: 11/17/15

Caller	Receiver	Phone #	Duration	Date Time	Rating	ID	Notes	Options
Dave Smith New York	(281)876-5806 Extension	2818765806	34 secs	11/11/15 12:37:22 PM	★★★★★	1		Play Edit

1) Click big Edit link

### Add Notes

Session Editor

Notes:

1

Rating:

★★★★★

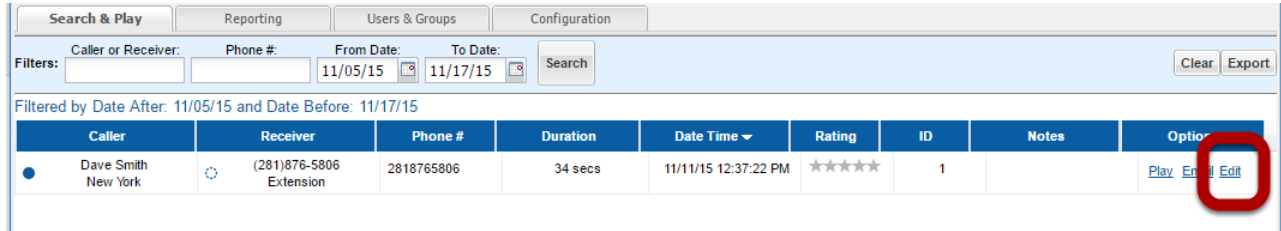
Cancel Save 2

1) Add or edit Notes

2) Click Save

## How do I rate a call?

### Find a Call



Search & Play   Reporting   Users & Groups   Configuration

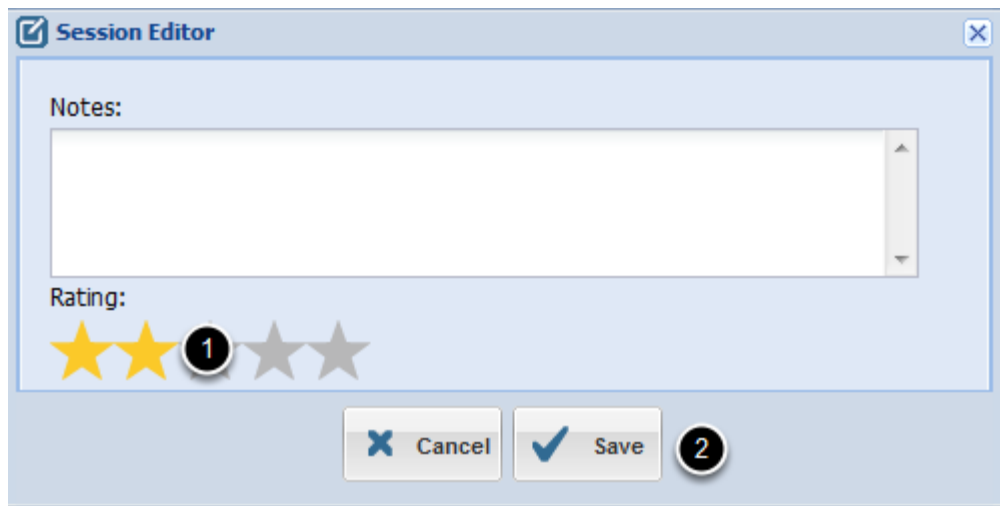
Filters: Caller or Receiver: Phone #: From Date: 11/05/15 To Date: 11/17/15 Search Clear Export

Filtered by Date After: 11/05/15 and Date Before: 11/17/15

Caller	Receiver	Phone #	Duration	Date Time	Rating	ID	Notes	Options
Dave Smith New York	(281)876-5806 Extension	2818765806	34 secs	11/11/15 12:37:22 PM	★★★★★	1		<a href="#">Play</a> <a href="#">Print</a> <a href="#">Edit</a>

1) Click Edit link

### Add Notes



Session Editor

Notes:

Rating:

★★★★★ (1 star selected)

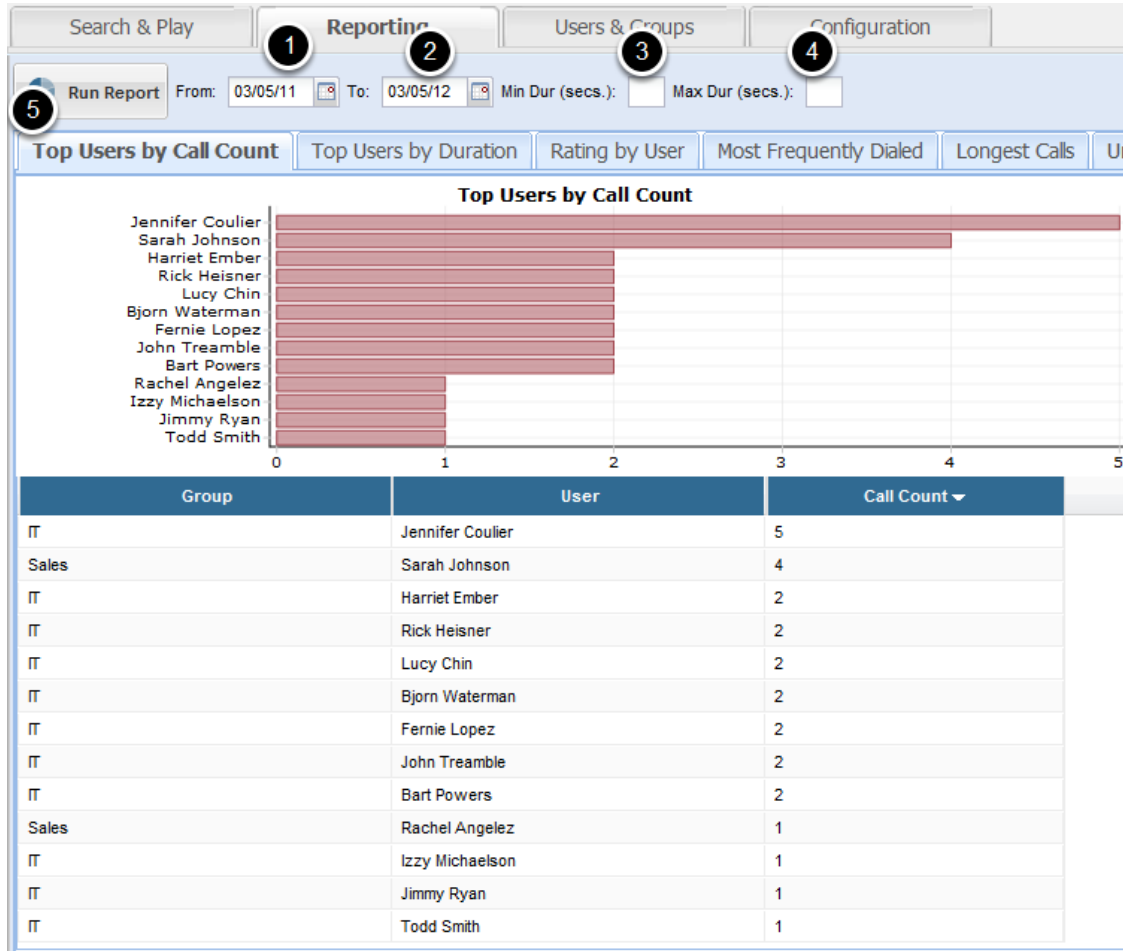
Cancel Save (2)

1) Mouseover or click on the number of stars as appropriate

2) Click Save

## How do I run a Top Users by Call Count report?

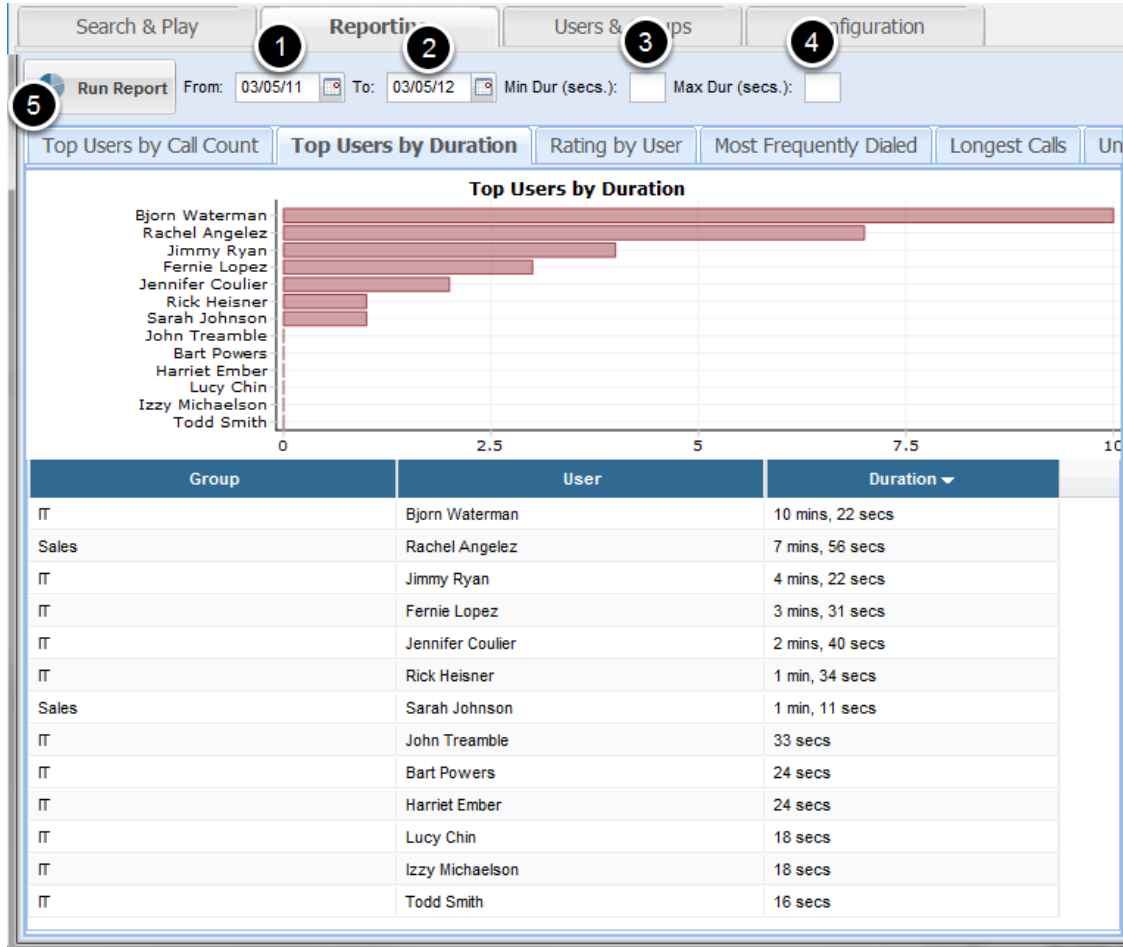
### Report Setup



- 1) Change From Date
- 2) Change To Date
- 3) Change Min Duration.
- 4) Change Max. Duration.
- 5) Click Run Report

## How do I run a Top Users by Duration report?

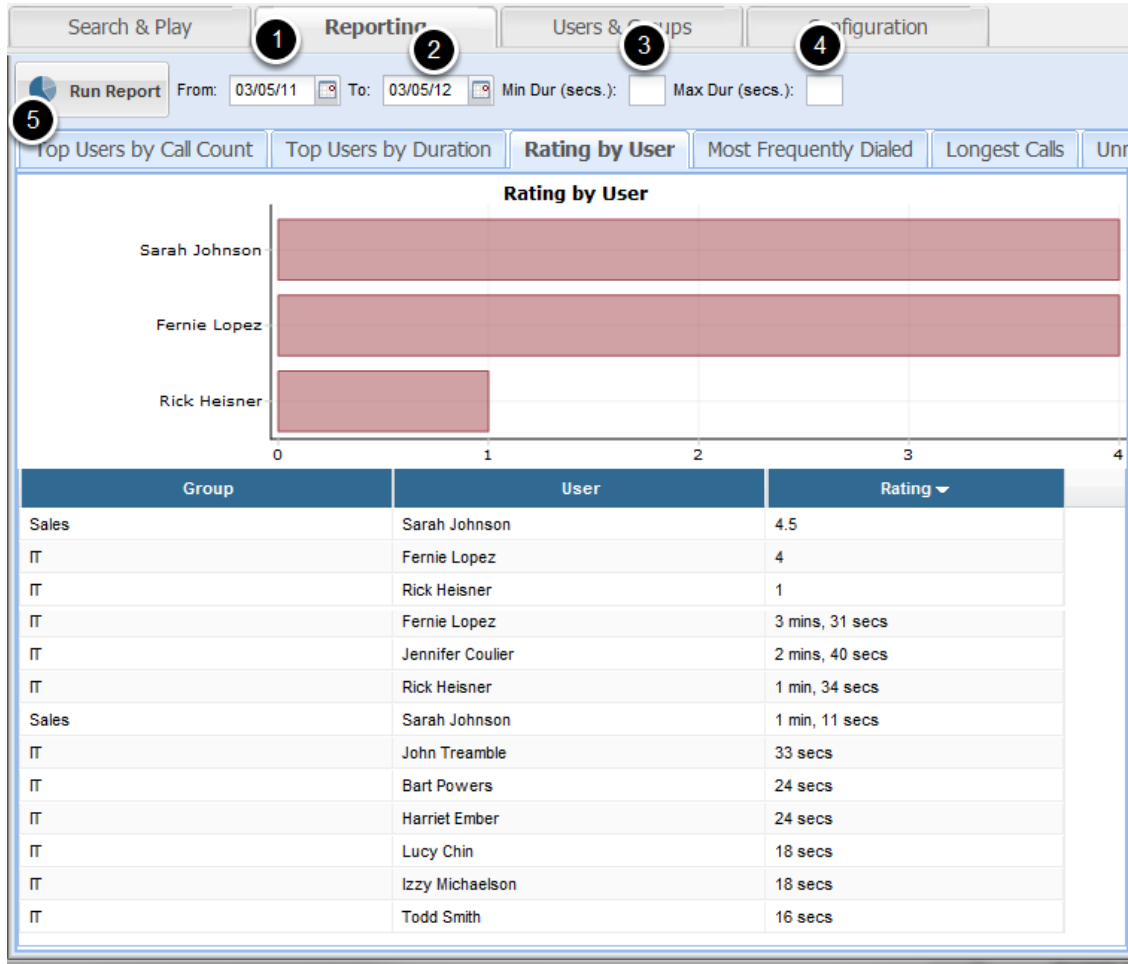
### Report Setup



- 1) Change From Date
- 2) Change To Date
- 3) Change Min Duration.
- 4) Change Max. Duration.
- 5) Click Run Report

## How do I run a Rating by User report?

### Report Setup

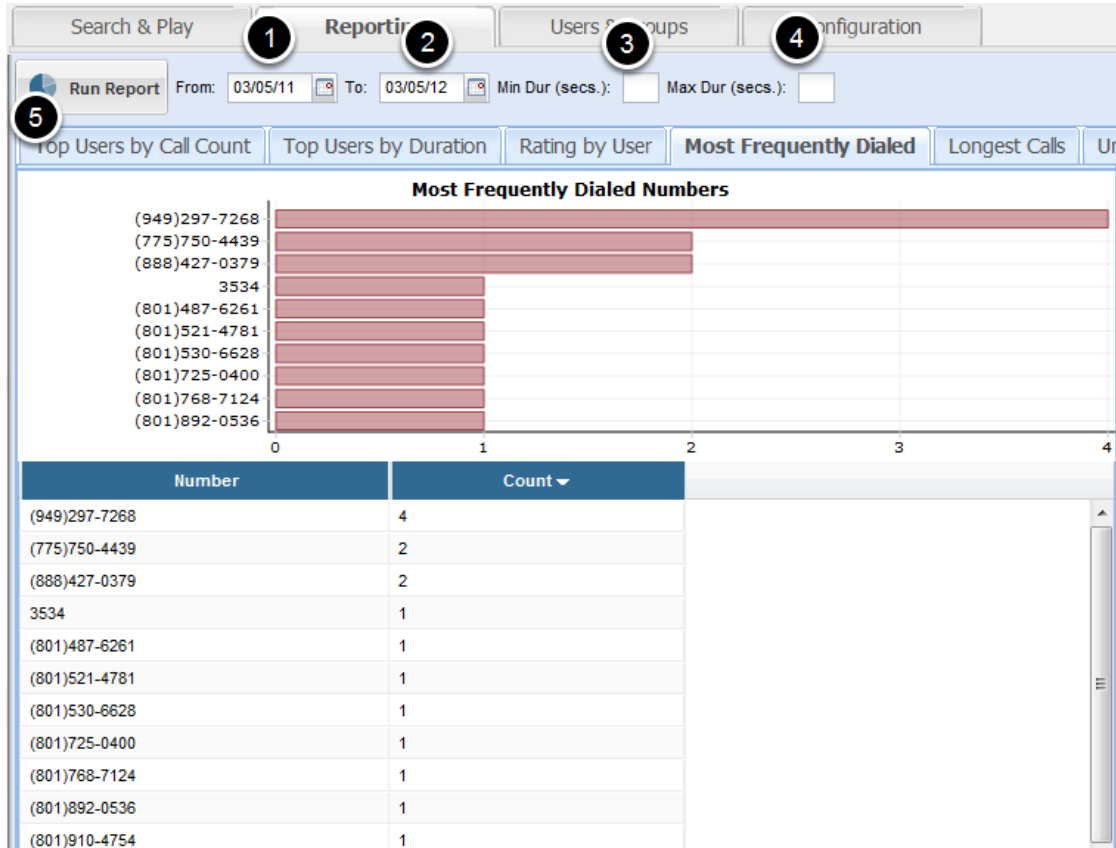


- 1) Change From Date
- 2) Change To Date
- 3) Change Min Duration.
- 4) Change Max. Duration.
- 5) Click Run Report



## How do I run a Most Frequently Dialed report?

### Report Setup



- 1) Change From Date
- 2) Change To Date
- 3) Change Min Duration.
- 4) Change Max. Duration.
- 5) Click Run Report

## How do I run a Longest Call report?

### Report Setup

The screenshot shows the 'Reporting' tab in a software interface. At the top, there are four tabs: 'Search & Play', 'Reporting' (selected), 'Users & Groups', and 'Configuration'. Below these, there is a 'Run Report' button (callout 5) and a date range selector (callout 1) with 'From: 03/05/11' and 'To: 03/05/12'. To the right of the date range are two input fields for 'Min Dur (secs.):' (callout 3) and 'Max Dur (secs.):' (callout 4). Below the date range, there are five tabs: 'Top Users by Call Count', 'Top Users by Duration', 'Rating by User', 'Most Frequently Dialed', and 'Longest Calls' (selected). Below these tabs is a table with the following data:

From	To	Number Dialed	Duration	Date Time
Rachel Angeles	(801)530-6628	(801)530-6628	7 mins, 56 secs	12/19/11 11:24:03 AM
(949)297-7268	Bjorn Waterman	(949)297-7268	7 mins, 12 secs	12/19/11 11:19:45 AM
Jimmy Ryan	(801)768-7124	(801)768-7124	4 mins, 22 secs	12/19/11 11:21:26 AM
(949)297-7268	Bjorn Waterman	(949)297-7268	3 mins, 10 secs	12/19/11 11:30:04 AM
Fernie Lopez	(801)892-0536	(801)892-0536	3 mins, 3 secs	12/19/11 11:37:47 AM
Sarah Johnson	(801)487-6261	(801)487-6261	1 min, 1 sec	12/19/11 11:21:45 AM
Jennifer Coulier	(801)725-0400	(801)725-0400	52 secs	12/19/11 11:29:16 AM
10.250.250.72	Rick Heisner		46 secs	12/19/11 11:20:58 AM

- 1) Change From Date
- 2) Change To Date
- 3) Change Min Duration.
- 4) Change Max. Duration.
- 5) Click Run Report

## How do I run an Unmapped Calls Report?

### Report Setup

The screenshot shows the 'Reporting' tab in a software interface. At the top, there are tabs for 'Search & Play', 'Reporting', 'Users & Groups', and 'Configuration'. Below these, there is a 'Run Report' button (callout 5) and a date range selector with 'From' (03/05/11, callout 1) and 'To' (03/05/12, callout 2) fields. To the right of the date fields are 'Min Dur (secs.):' (callout 3) and 'Max Dur (secs.):' (callout 4) input fields. Below the date and duration fields, there are several report type buttons: 'Call Count', 'Top Users by Duration', 'Rating by User', 'Most Frequently Dialed', 'Longest Calls', and 'Unmapped Calls' (which is highlighted). Below the buttons is a table with the following data:

From	To	Duration	Date Time	ID
10.250.251.195	10.250.250.72	8 secs	12/19/11 11:43:58 AM	1741
10.250.251.174	10.250.250.72	1 min, 23 secs	12/19/11 11:42:31 AM	1740
10.250.250.70	10.250.250.72	2 secs	12/19/11 11:42:28 AM	1739
10.250.250.76	10.250.250.72	17 secs	12/19/11 11:37:29 AM	1733
10.250.250.70	10.250.251.230	23 secs	12/19/11 11:37:23 AM	1732
10.250.250.72	10.250.251.143	4 mins, 28 secs	12/19/11 11:32:21 AM	1731
10.250.250.73	10.250.250.72	38 secs	12/19/11 11:31:22 AM	1725

- 1) Change From Date
- 2) Change To Date
- 3) Change Min Duration.
- 4) Change Max. Duration.
- 5) Click Run Report