SIP Print Call Recording

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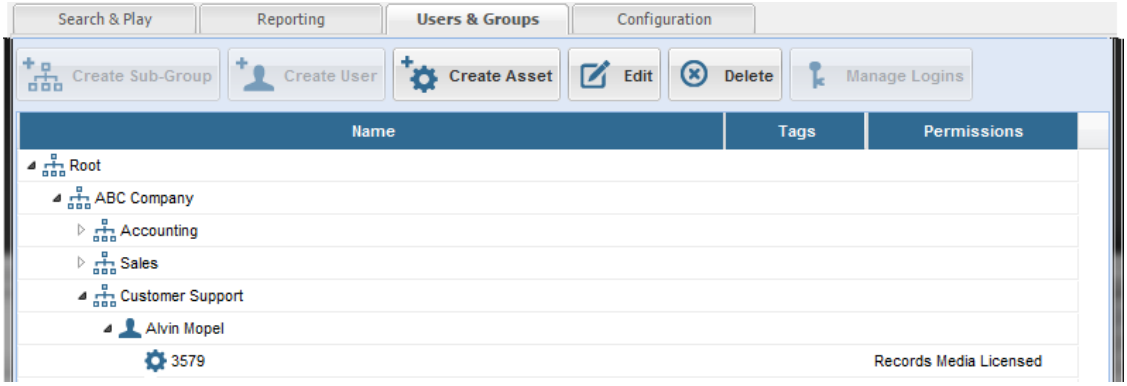
User Management

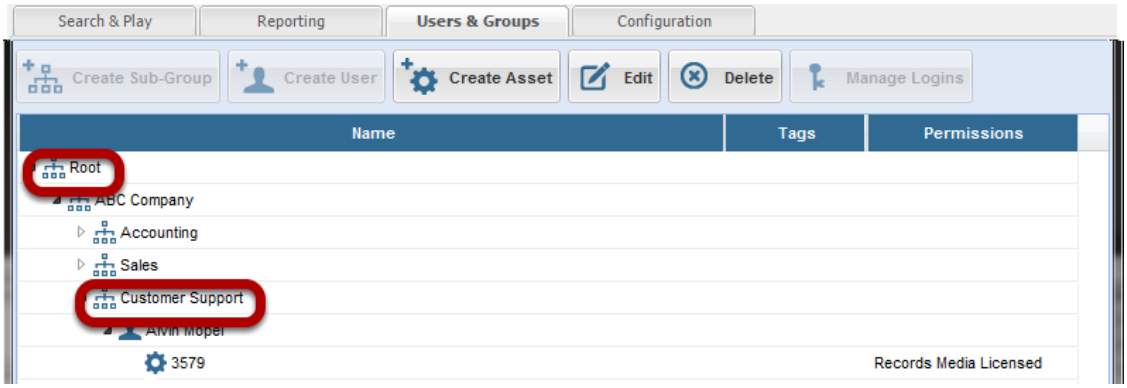
How does the Resource Tree Work?

Overview



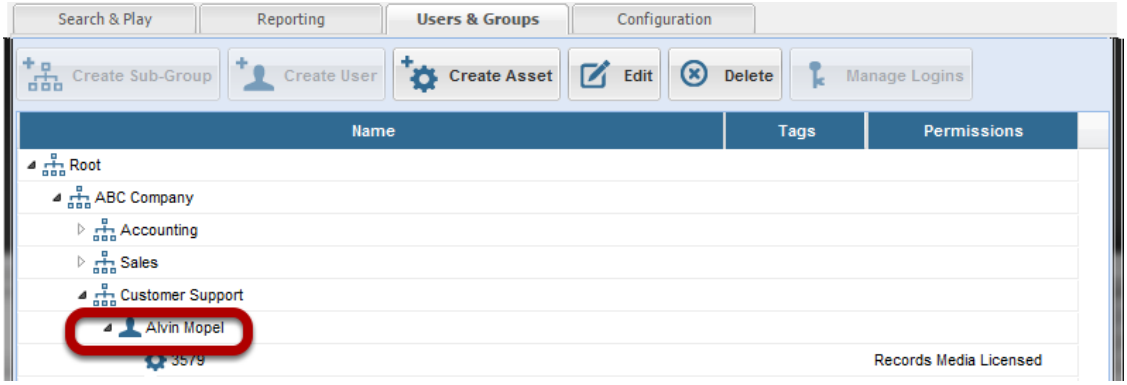
The Resource tree is designed to help organize and "map" people and assets so that the raw calls can be searched and reported on efficiently.

Resource Groups



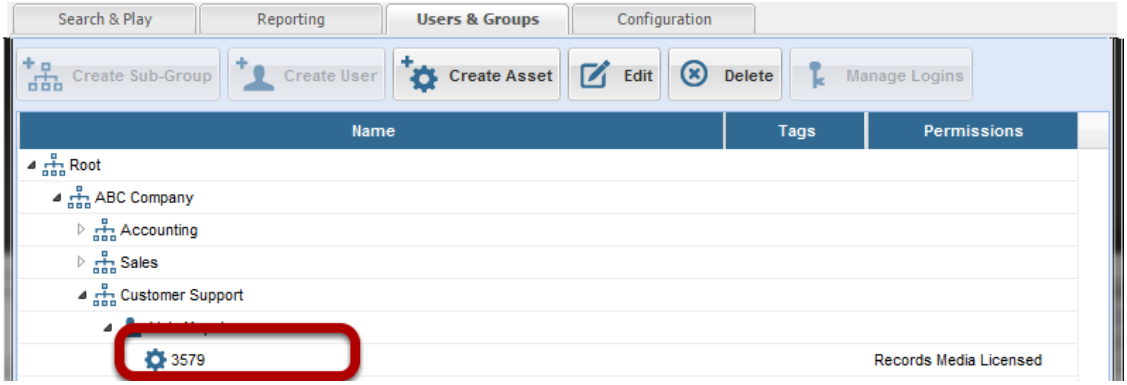
Resource Groups are simply containers for you to organize your records. Groups are hierarchial in nature so feel free to setup as many tiers as you would like

Resource Users



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

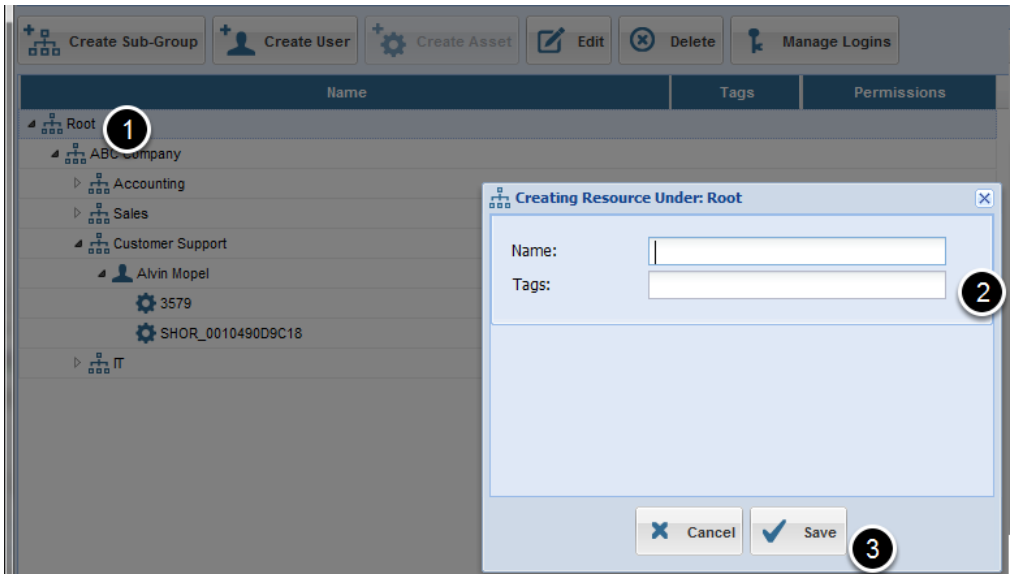
Resource Assets



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.

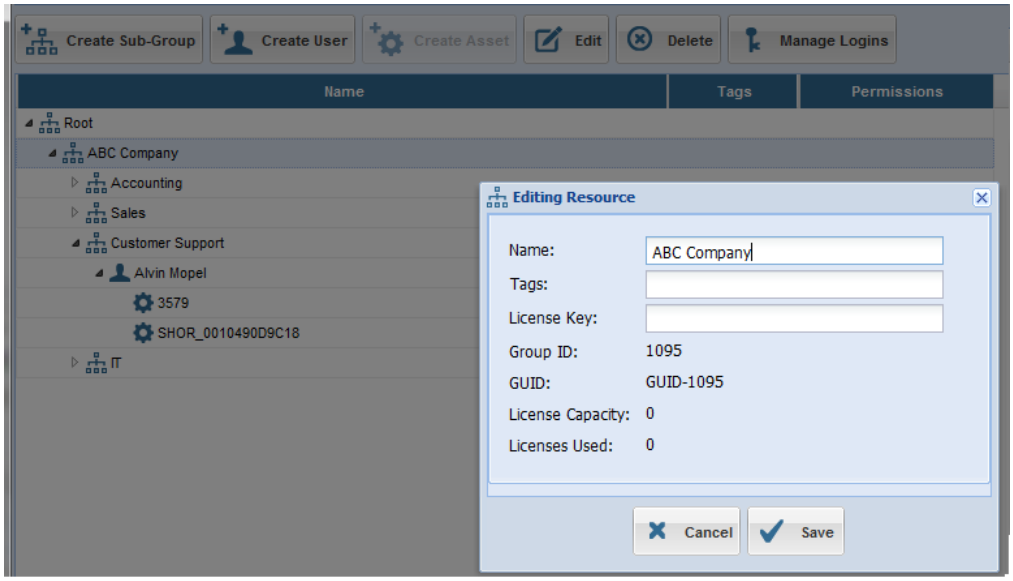
How do I create or edit a Resource Group?

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

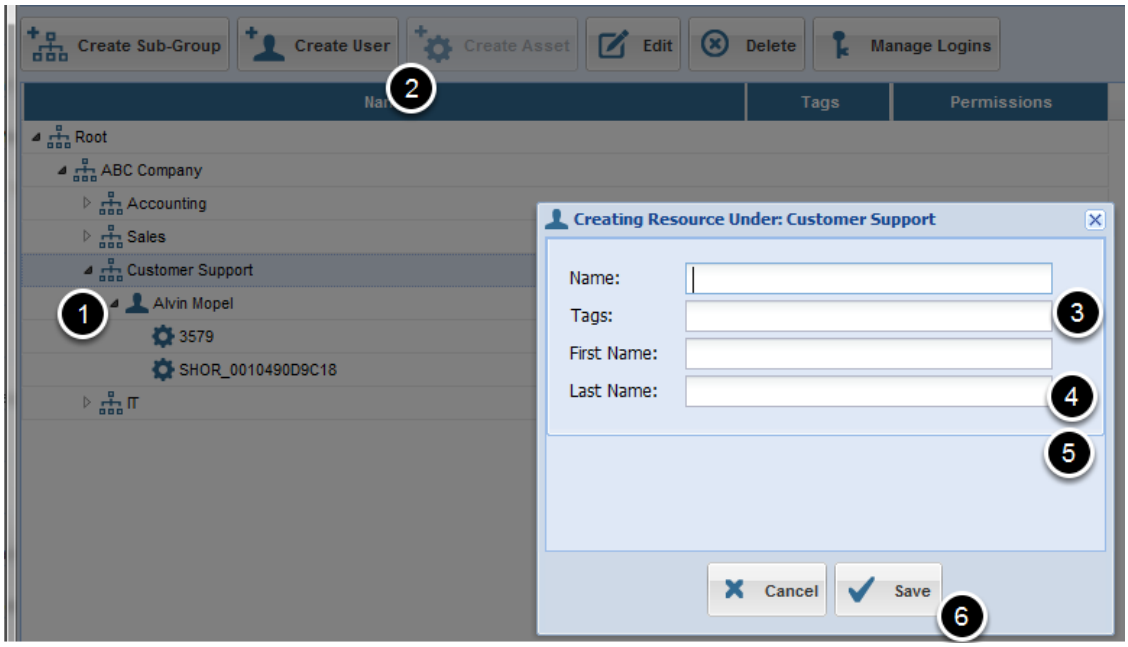


1) Select the Resource Group you would like to Edit
2) Update the name and tags (optional)
3) Update the License Key

4) Click Save

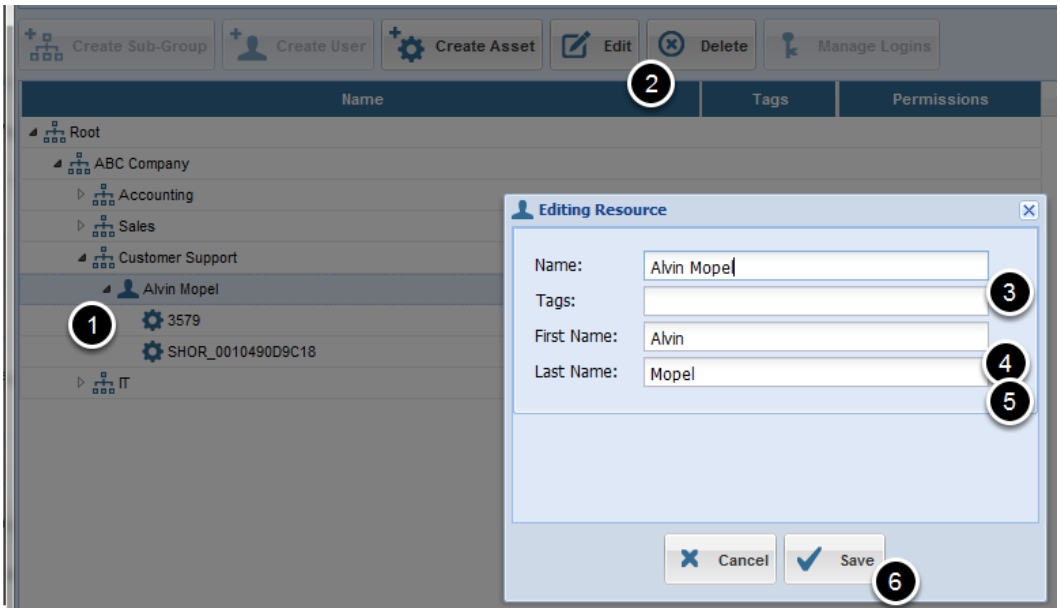
How do I create or edit a Resource User?

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

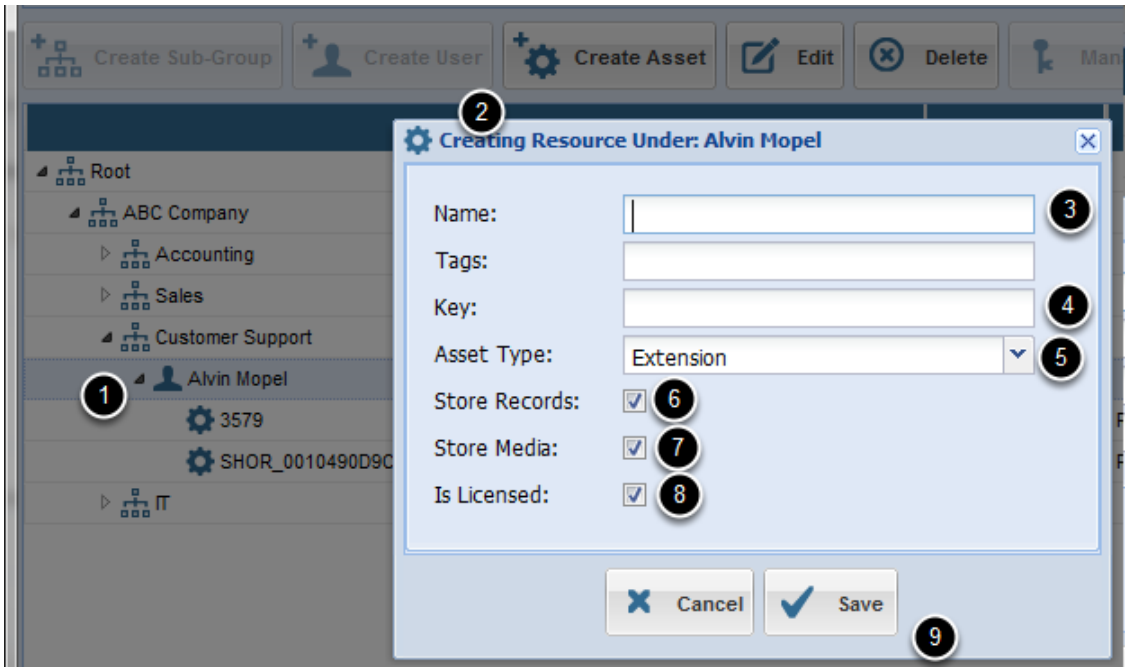
Editing a Resource User



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

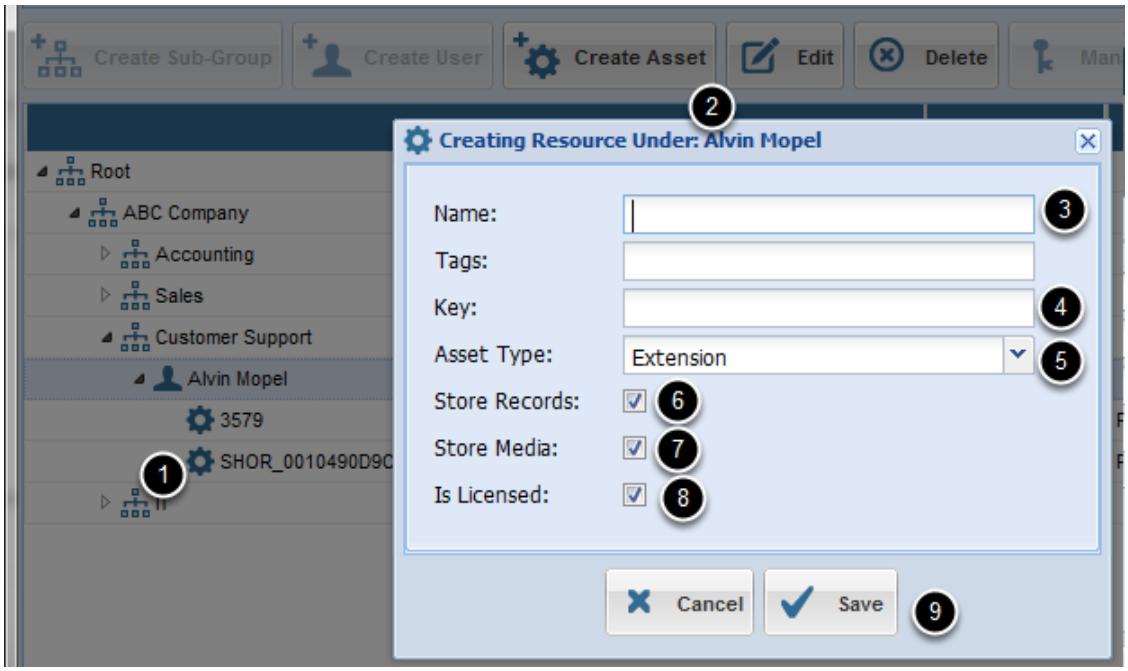
How do I create or edit a Resource Asset?

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.

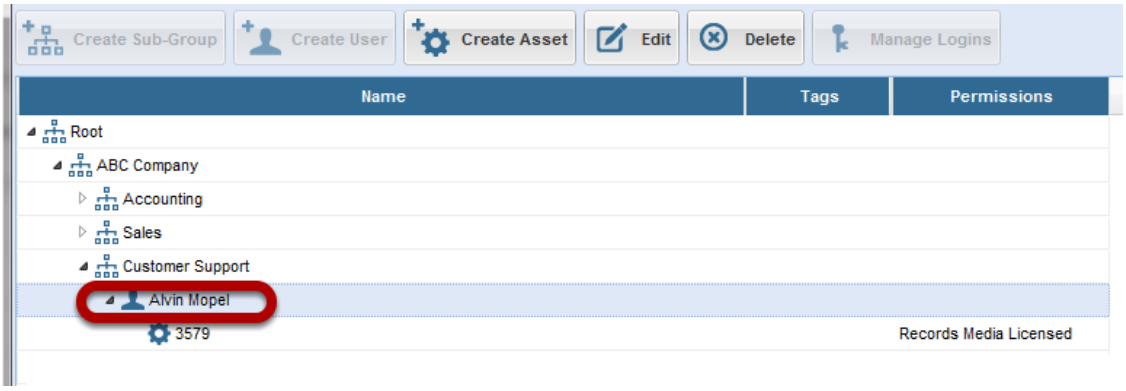
Update a Resource Asset



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?

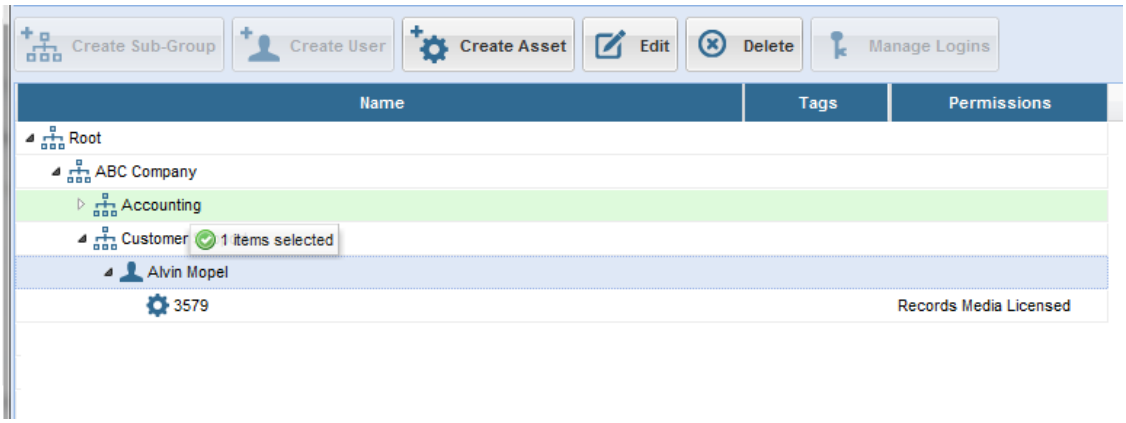
Drag and Drop: Select "Source" resource



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



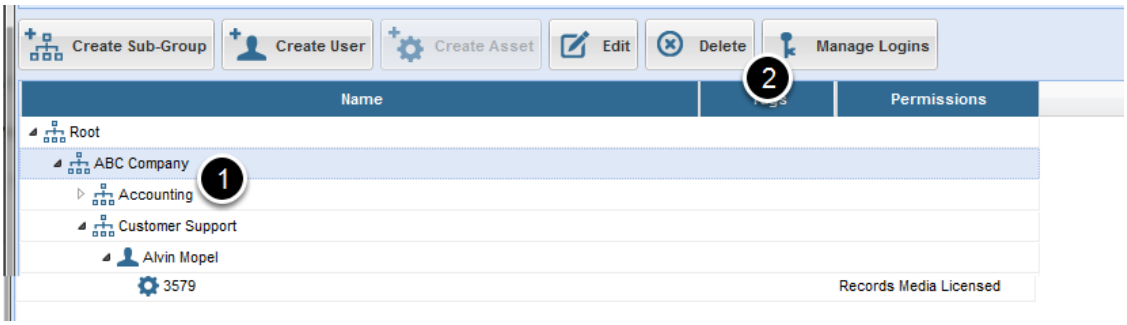
In this case Alvin Mopel will now belong to the Resource Group: "Accounting"

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 reassing 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

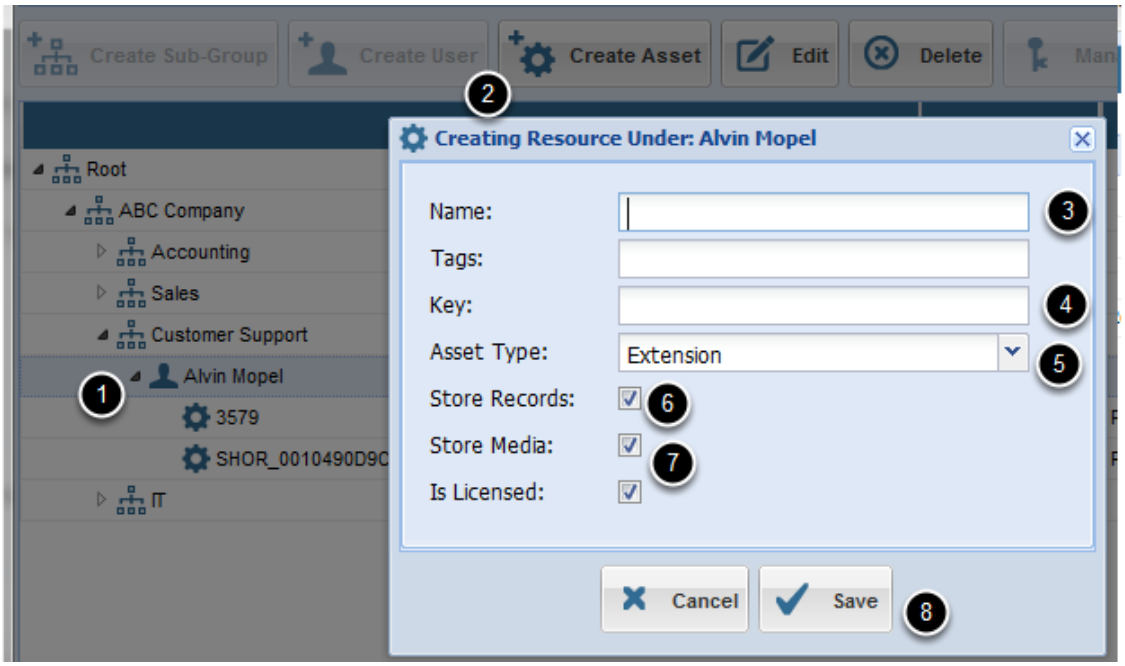


1) Find any Resource Group, Resource User or Resource Asset
2) Click Delete
3) Confirm that you want to delete it.

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?

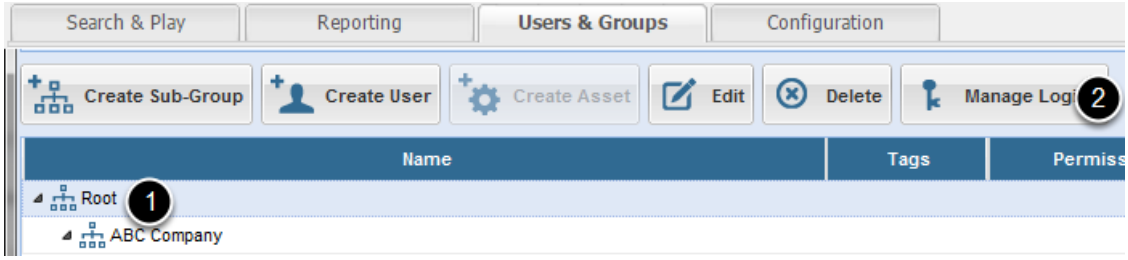
Create a Resource Asset



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.

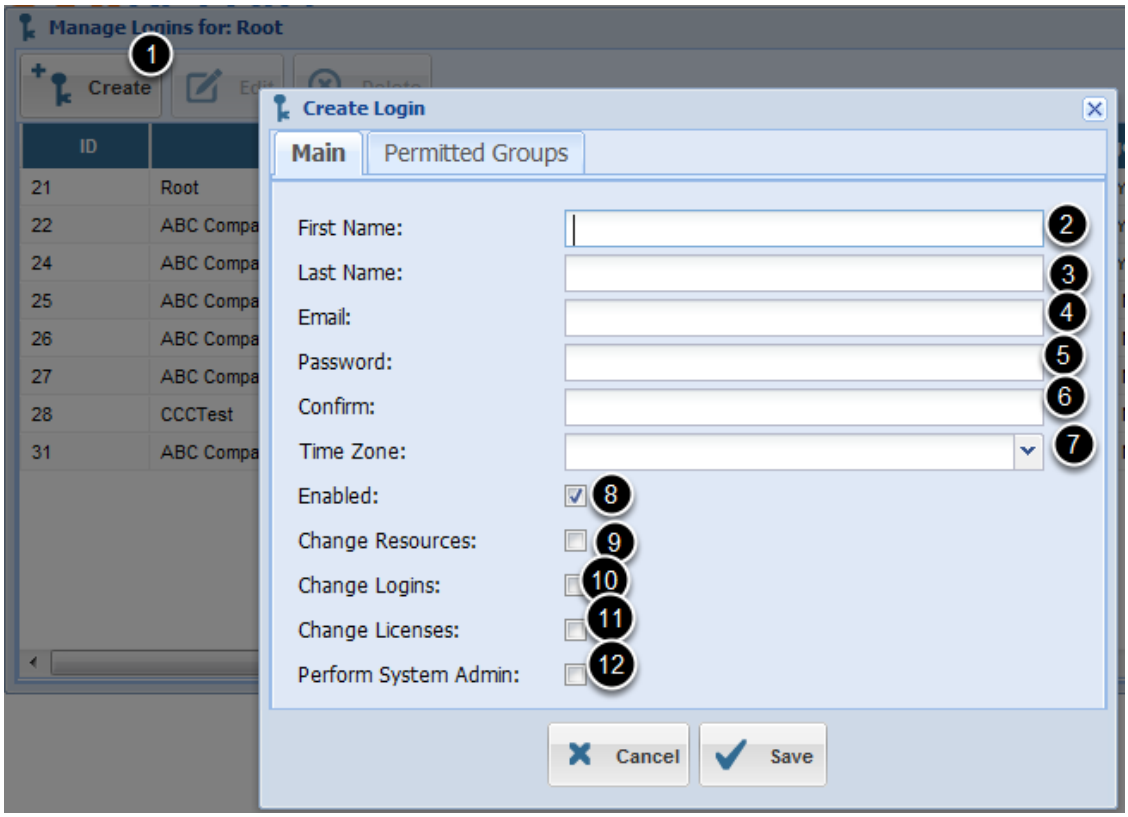
How do I allow other people to login?

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

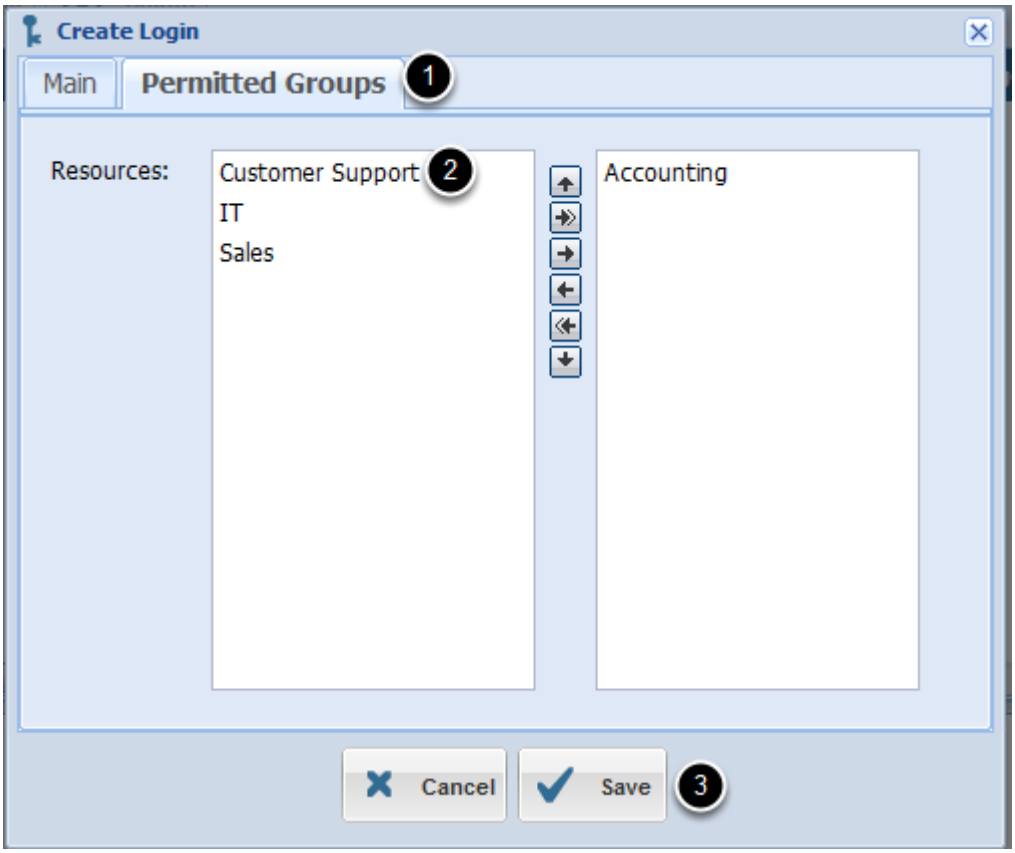
Create a Login



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 licnense keys as well as add, and remove licensed Resource Assets
12) Perform System Admin: checked means they can see the global Administration tab.

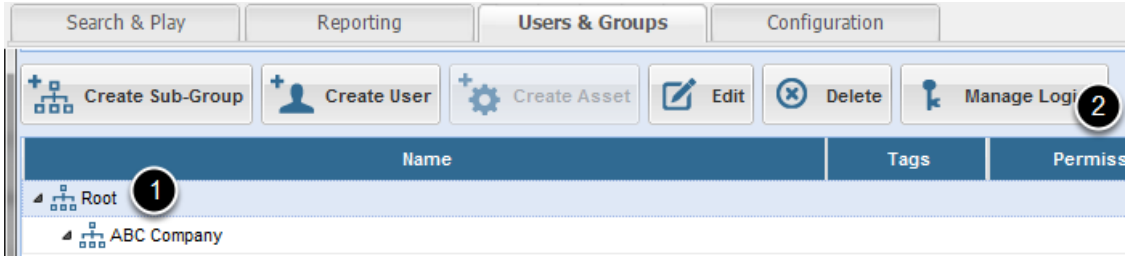
Assign Peer Groups



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

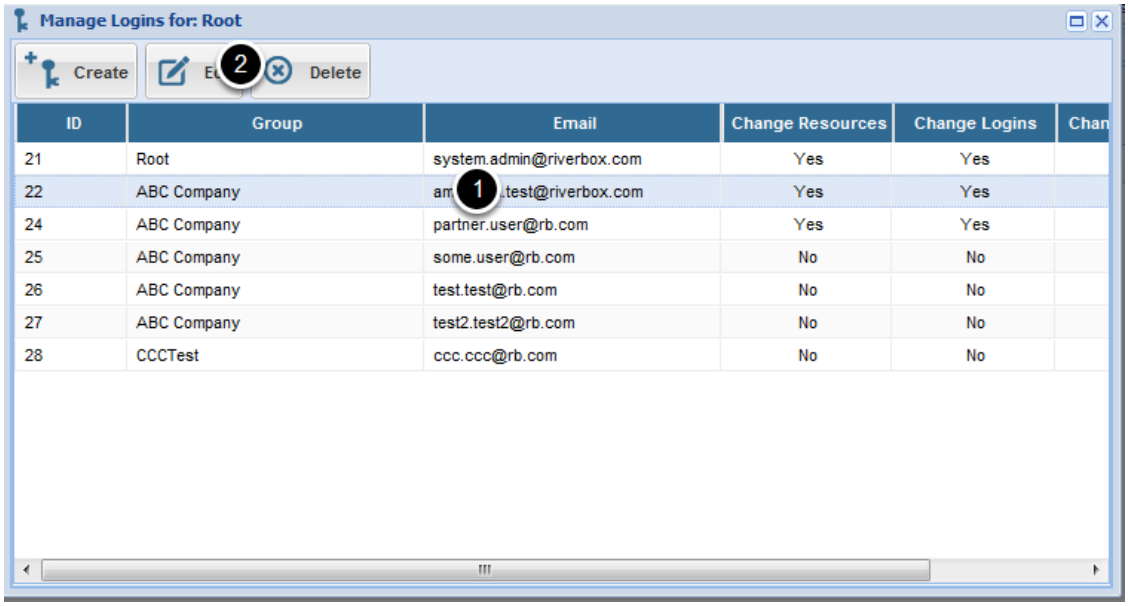
How do I edit existing logins?

Find the Login



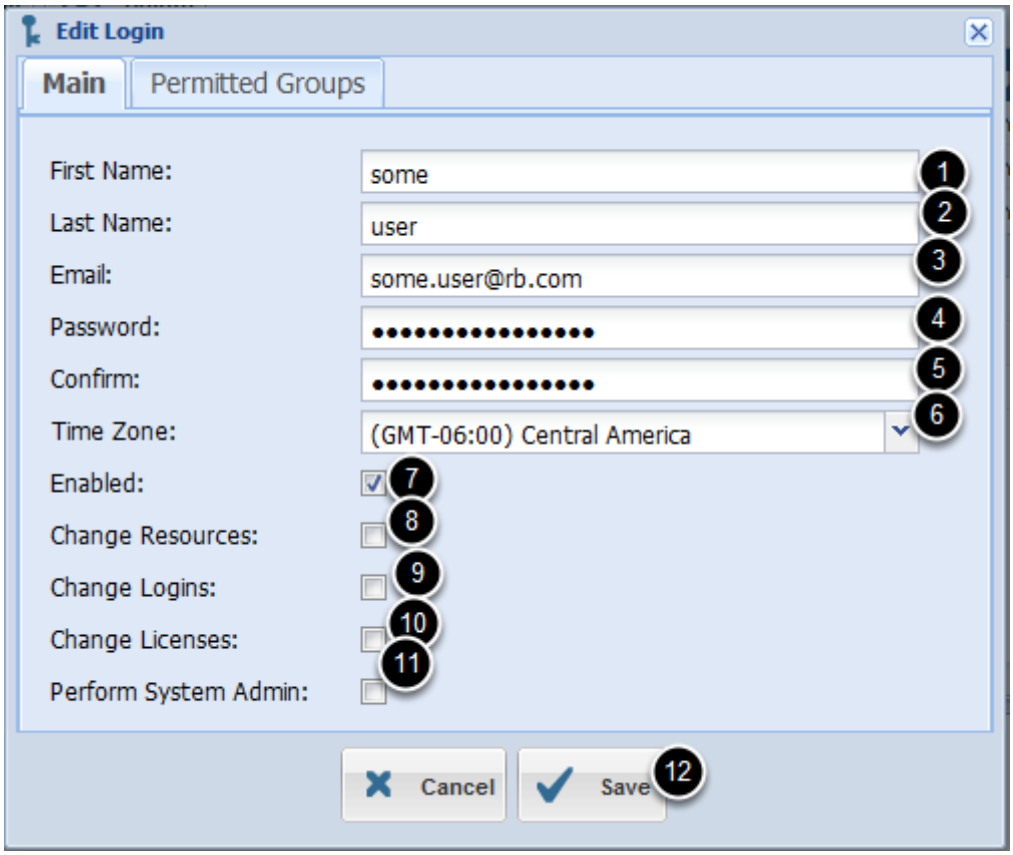
1) Select the highest level Resource Group
2) Click Manage Logins

Select the Login

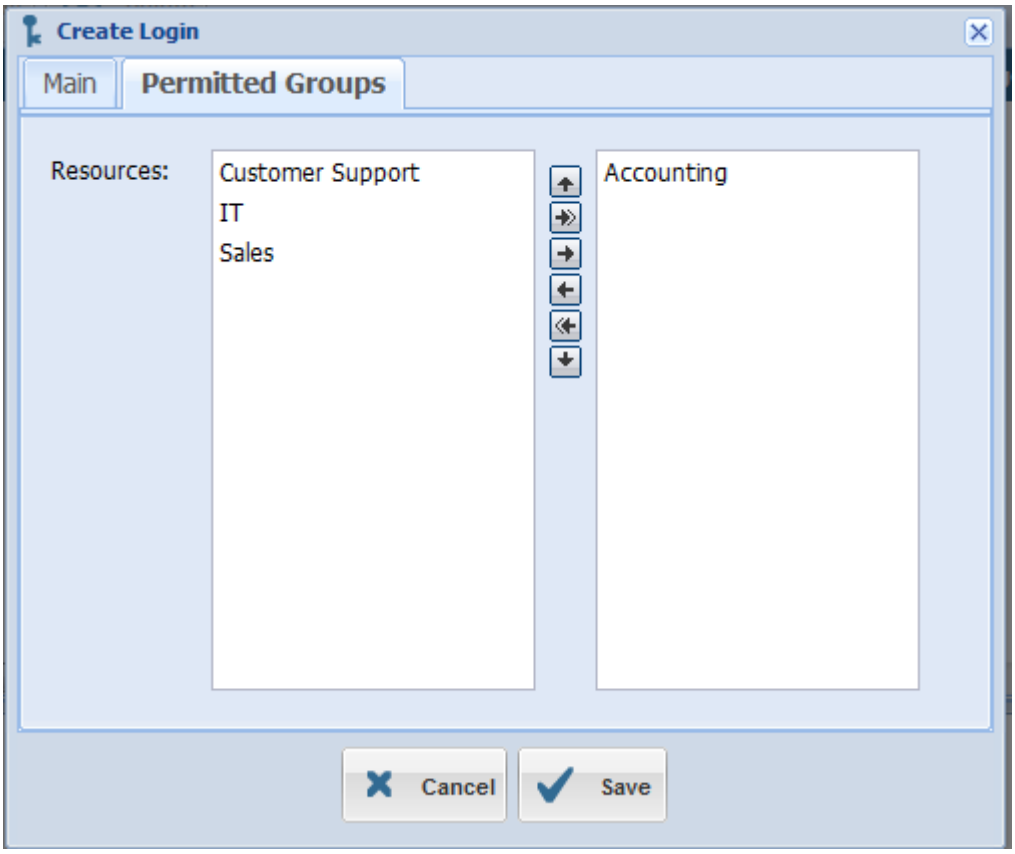


1) Select a Login
2) Click Edit

Edit Login



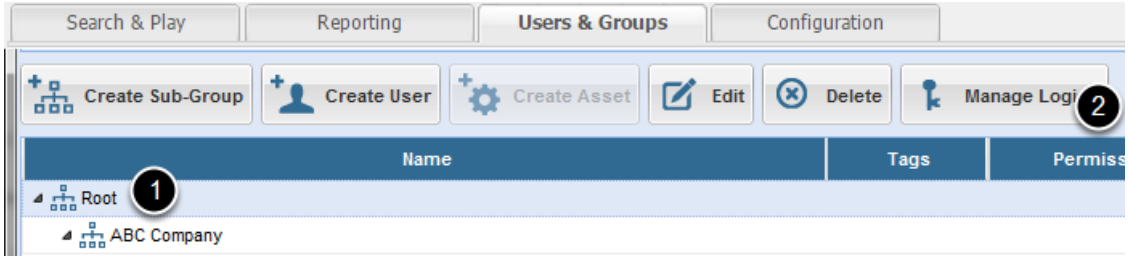
1) Edit the First Name
2) Edit the Last Name
3) Edit the Email (This is the unique identifier they will use to login)
4) Edit their password
5) Confirm the password
6) Select their time zone
7) Enabled: checked means they are allowed to login
8) Change Resources: checked means they are allowed to create, 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 licnense 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

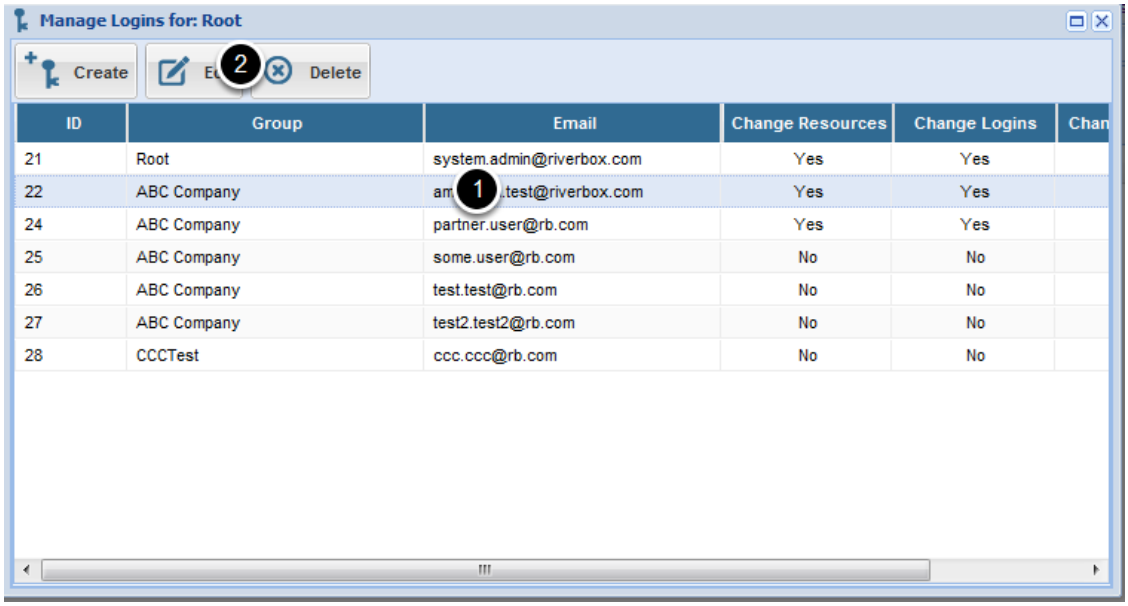
How do I create a "read-only" login?

Find the Login



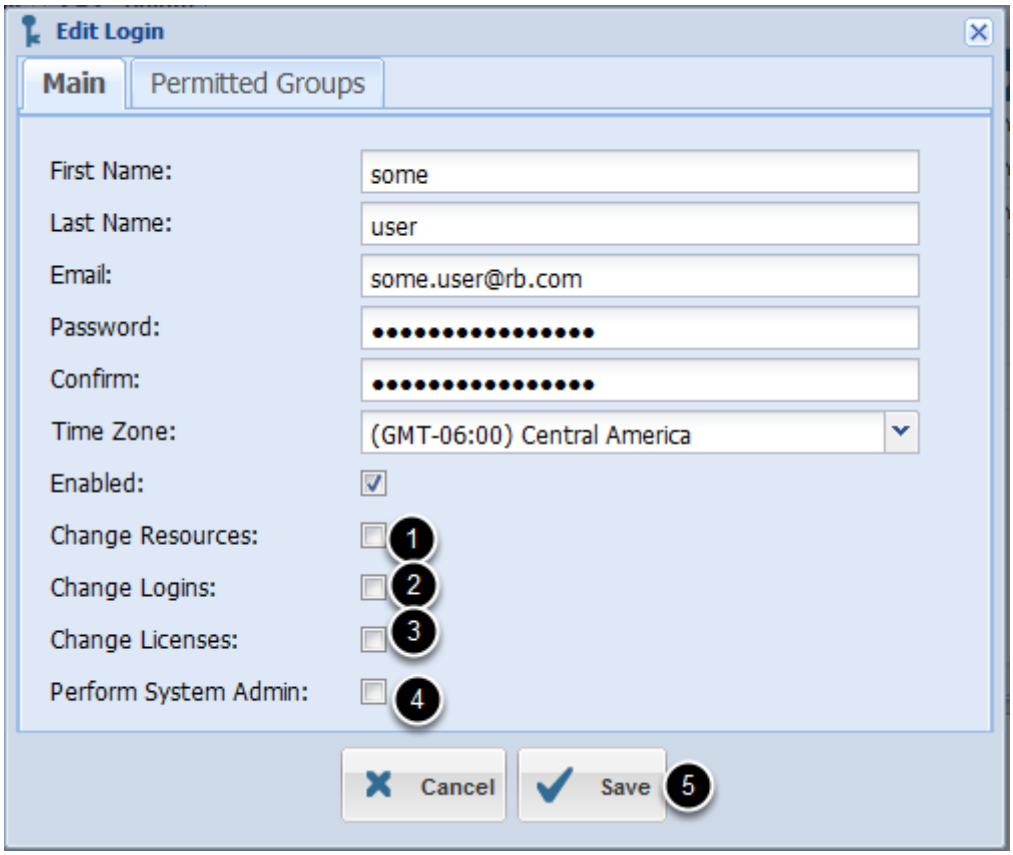
1) Select the highest level Resource Group
2) Click Manage Logins

Select the Login

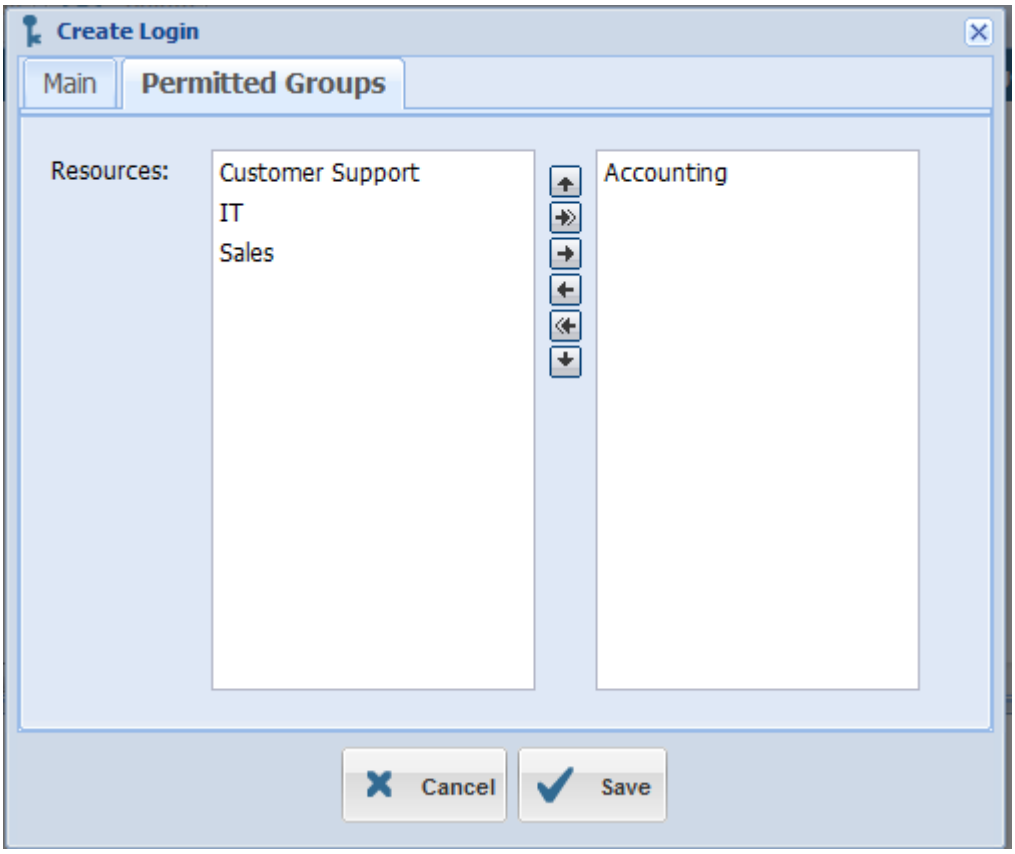


1) Select a Login
2) Click Edit

Edit Login



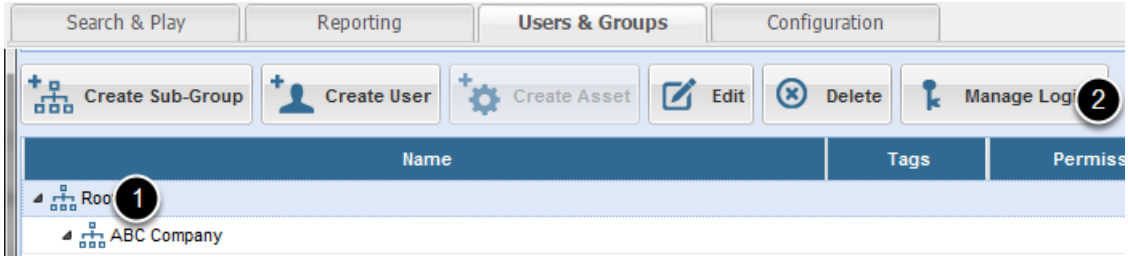
1) Change Resources: uncheck
2) Change Logins: uncheck
3) Change Licenses: uncheck
4) Perform System Admin: uncheck
5) Click Save



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

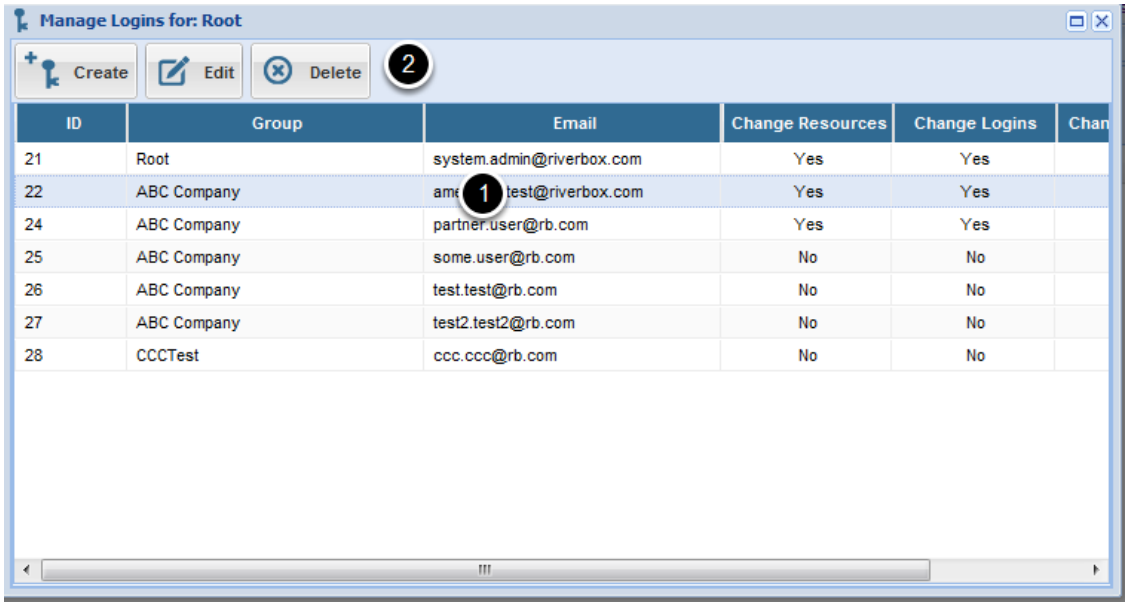
How do I delete a login?

Find Login



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

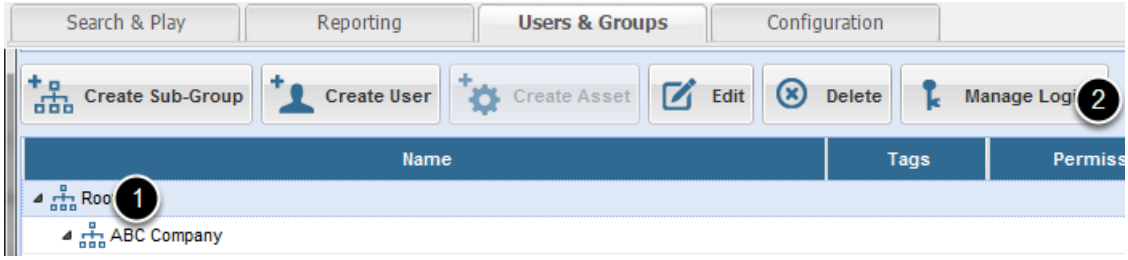
Delete Login



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

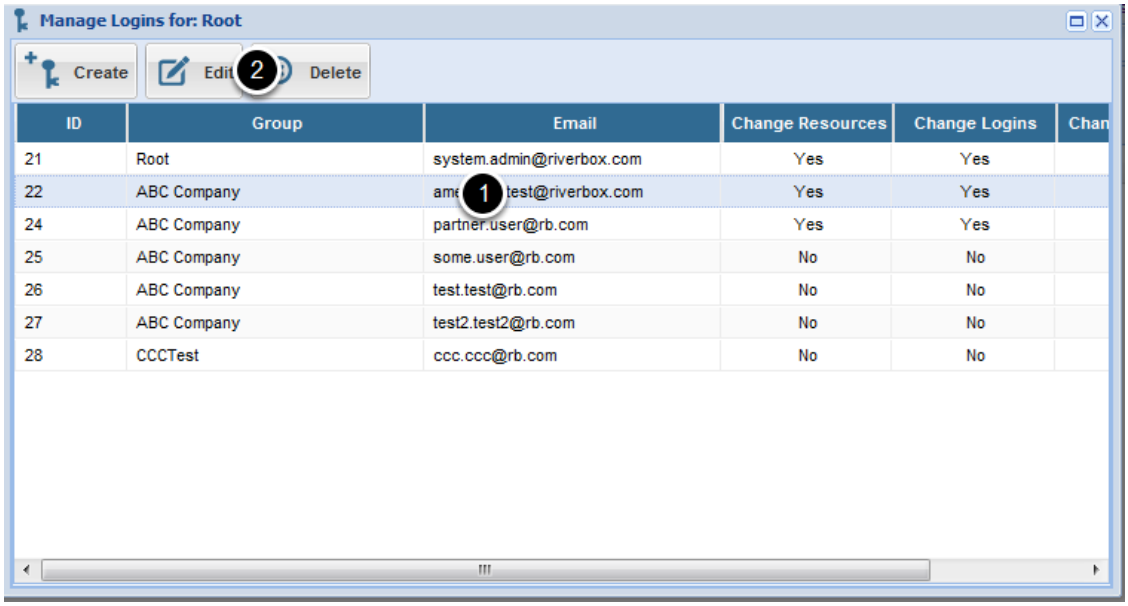
How do I disable a Login?

Find Login



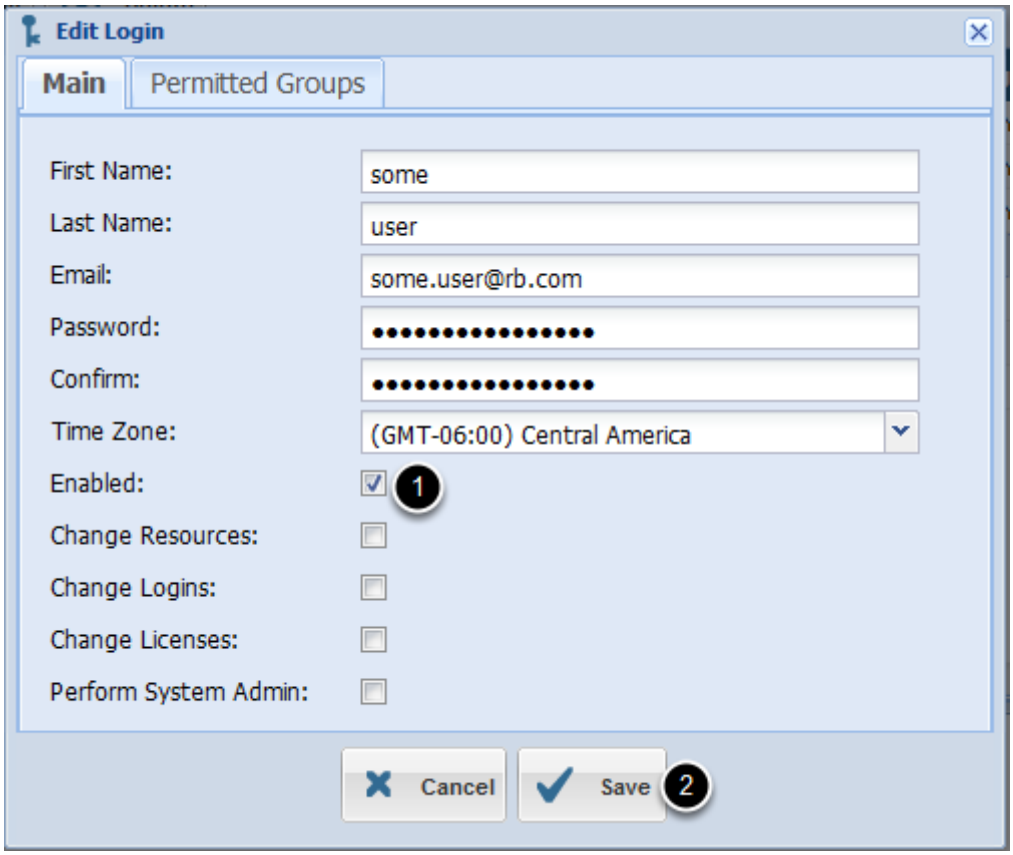
1) Click the highest level Resource Group
2) Click Manage Logins

Edit Login



1) Select the Login
2) Click Edit

Disable Login

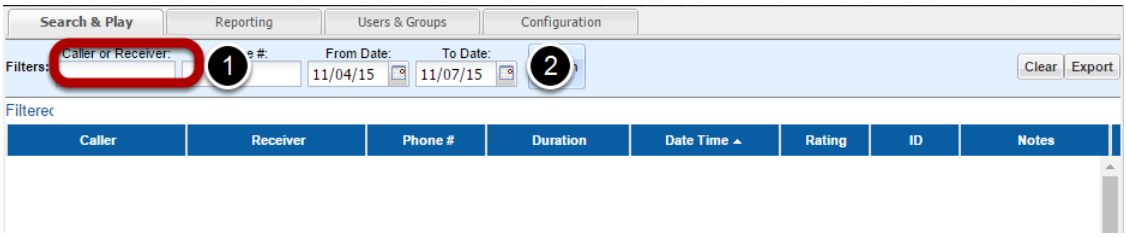


1) Uncheck the Enabled field.
2) Click Save

Searching & Reporting

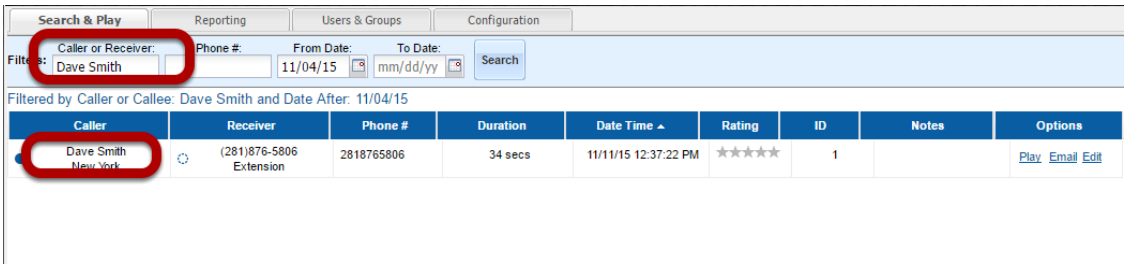
How do I search for a call?

Enter a Search Term



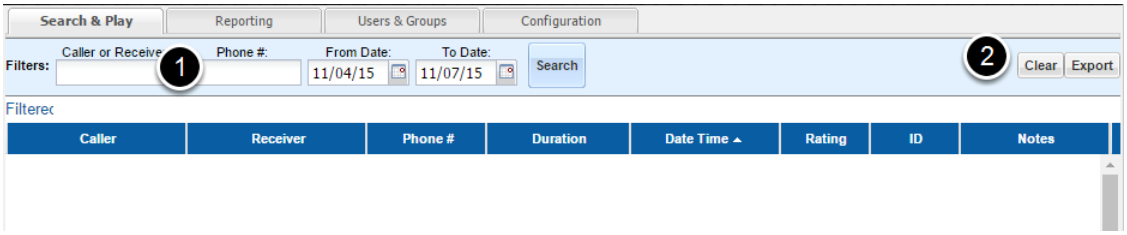
1) Search by any part of the Resource User's name. The system will make a case insensitive, wildcard search on both the left and right hand side.
2) Hit Enter or Click Search

Review Search Results



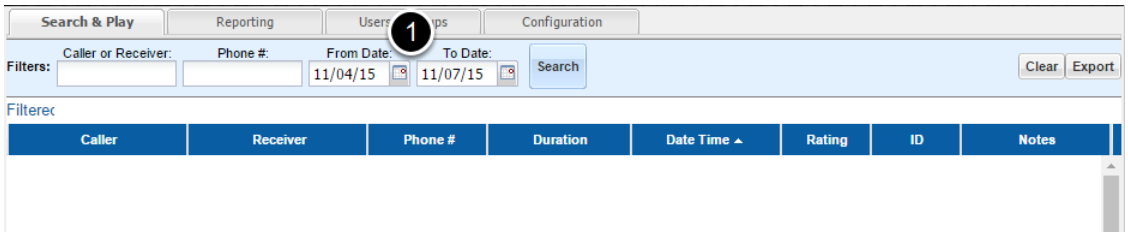
The system will find calls either made by or directed to any Resource User that mathces your search term

Remove or Change Search Terms



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

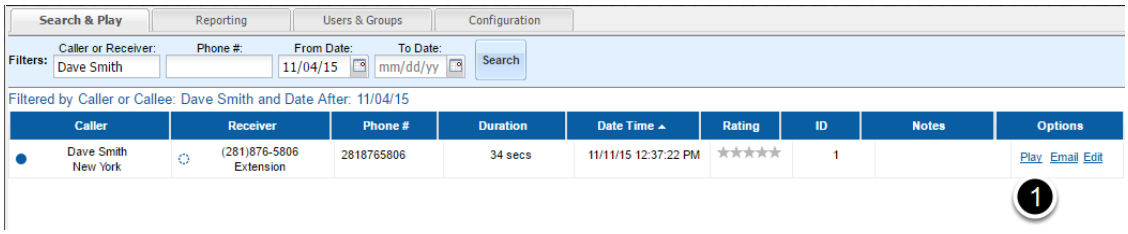
Filter the Search Results by Date



1) Use the Calendar Icons to change the Date range

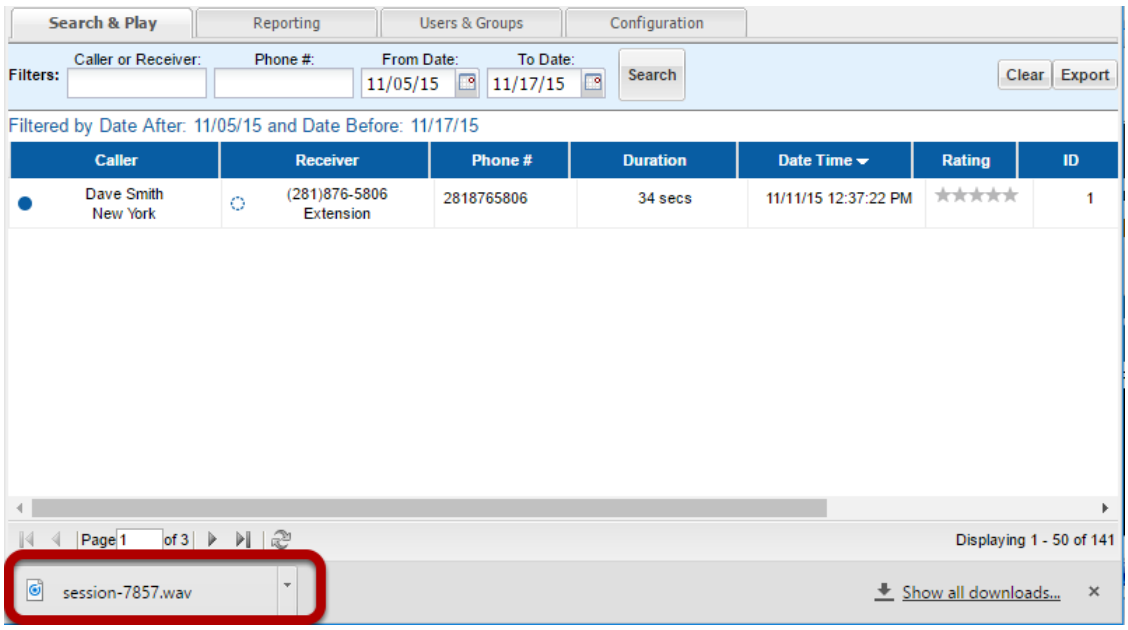
How do I play a call?

Find a Call



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

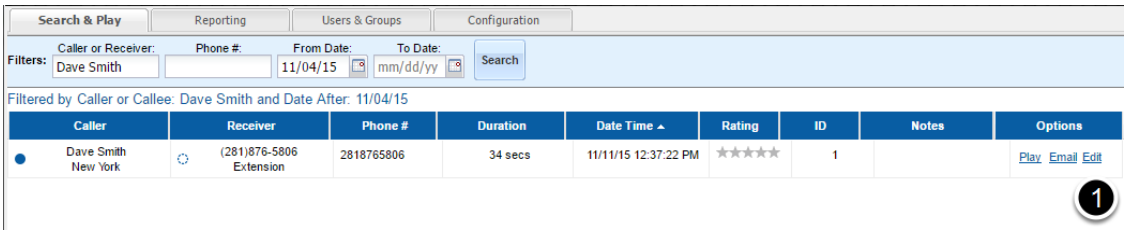
Default Audio Player



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

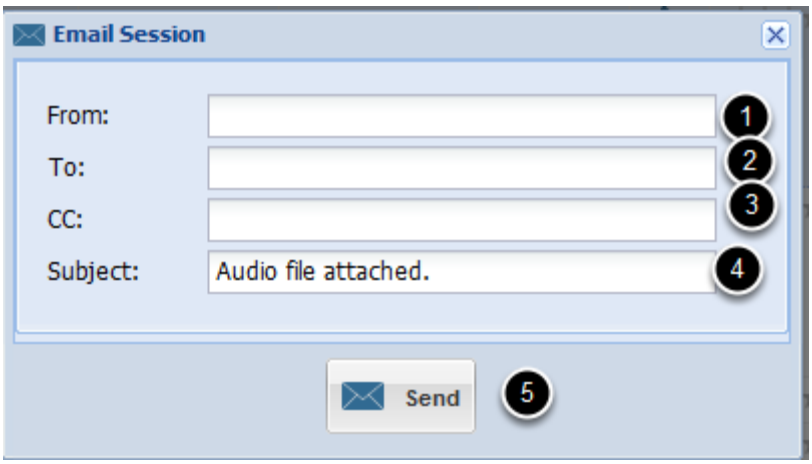
How do I email a recorded call?

Find a Call



1) Click the Email link

Enter Fields and Send

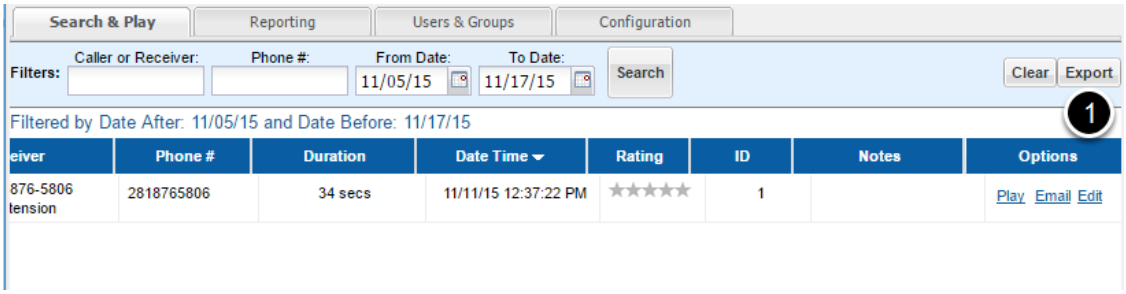


1) Enter the From email address
2) Enter the To email address (comma delimited)
3) Optional CC email address
4) Change the subject as appropriate
5) Click Send

The email will be sent by the Appserver service.
Warning: Administration Mail Settings must be configured properly to enable this feature

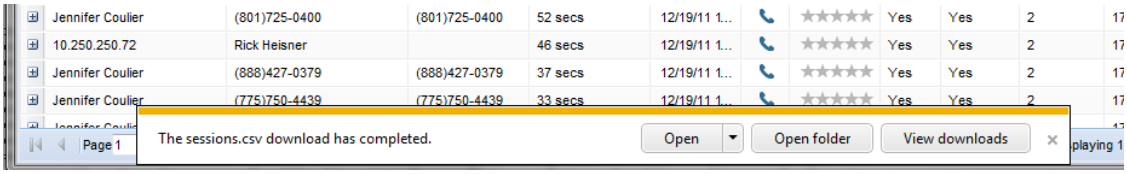
How can I export the search results?

Click Export Button



1) Click Export button

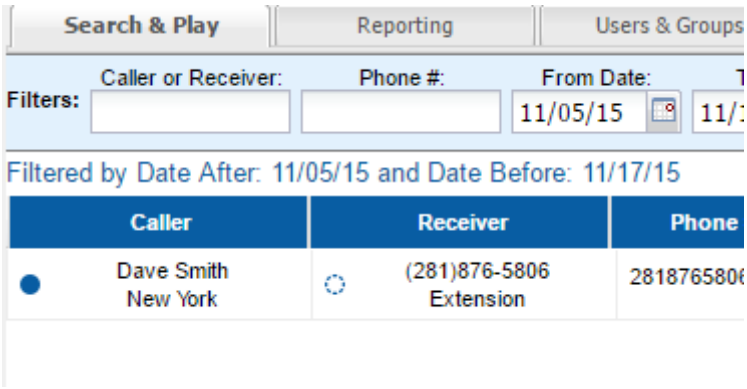
Save File



1) Save file as directed by your browser

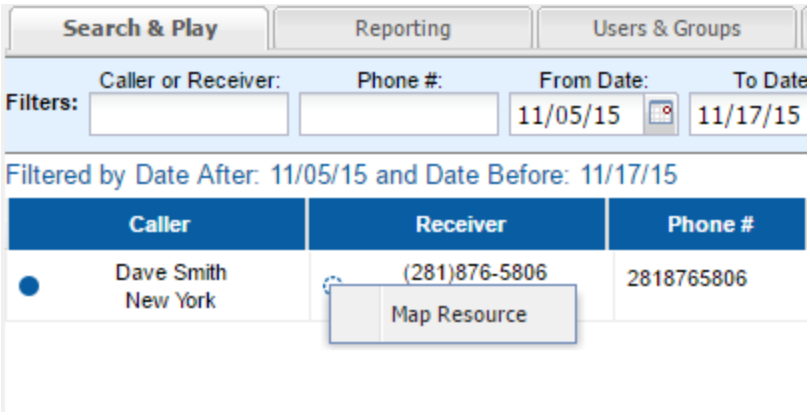
What do the little blue people icons mean?

Blue Icons



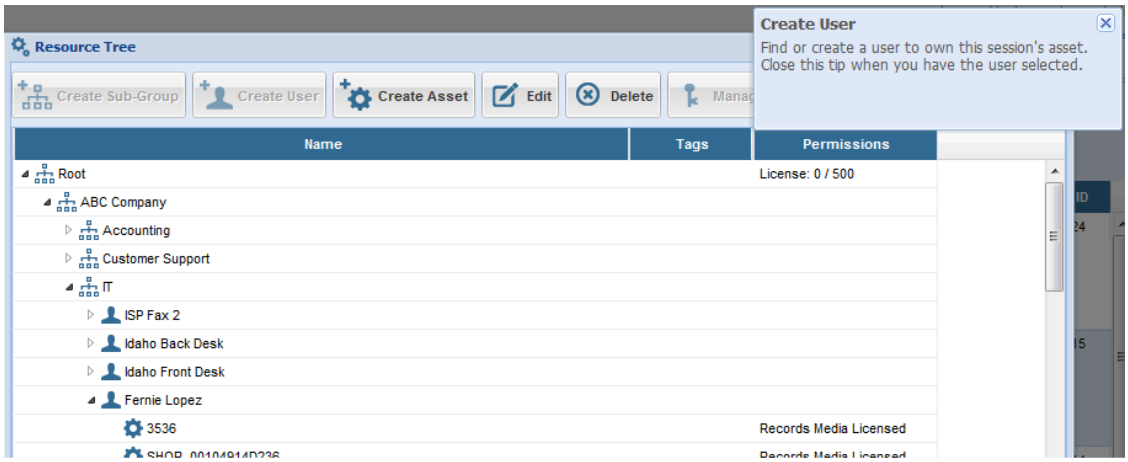
The full blue icon tells you that the Resource Asset was correctly mapped in the Resource Tree. The empty blue icon tells you that the Resource Asset was not mapped because it was not found in the Resource Tree.

Map It



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

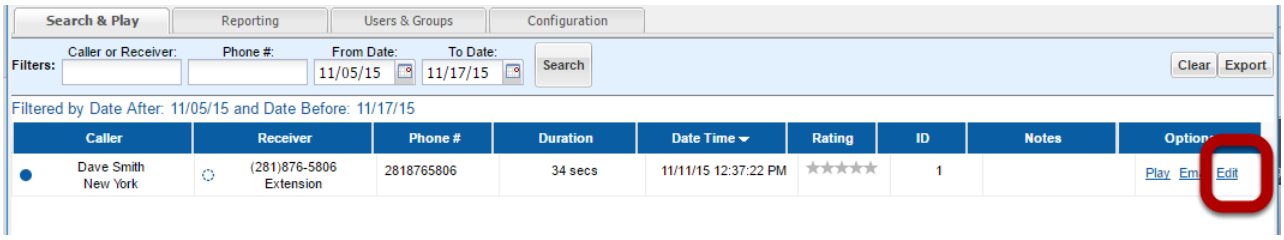
Map it to a Resource User



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

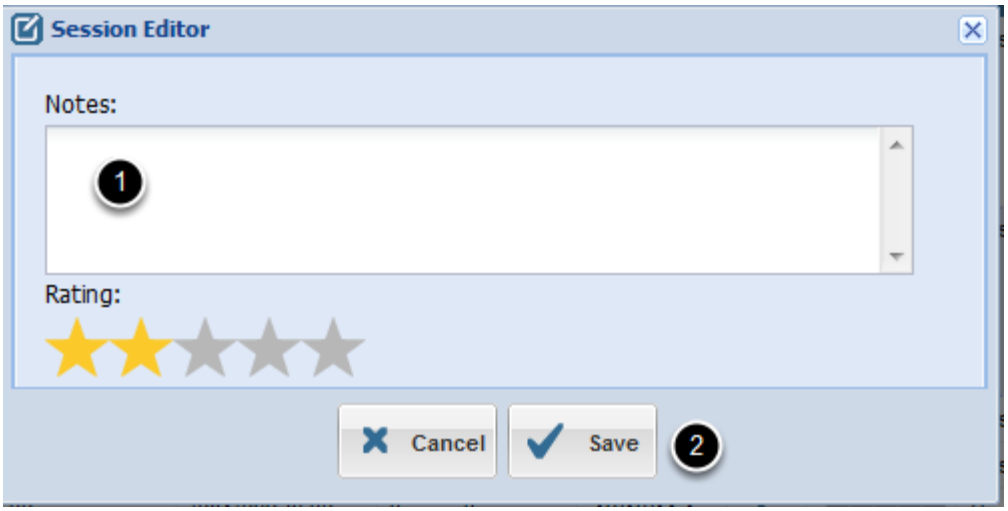
How can I add notes to a call?

Find a Call



1) Click big Edit link

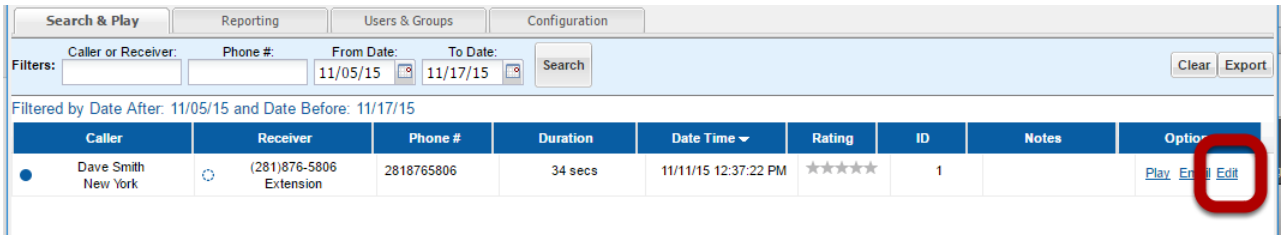
Add Notes



1) Add or edit Notes
2) Click Save

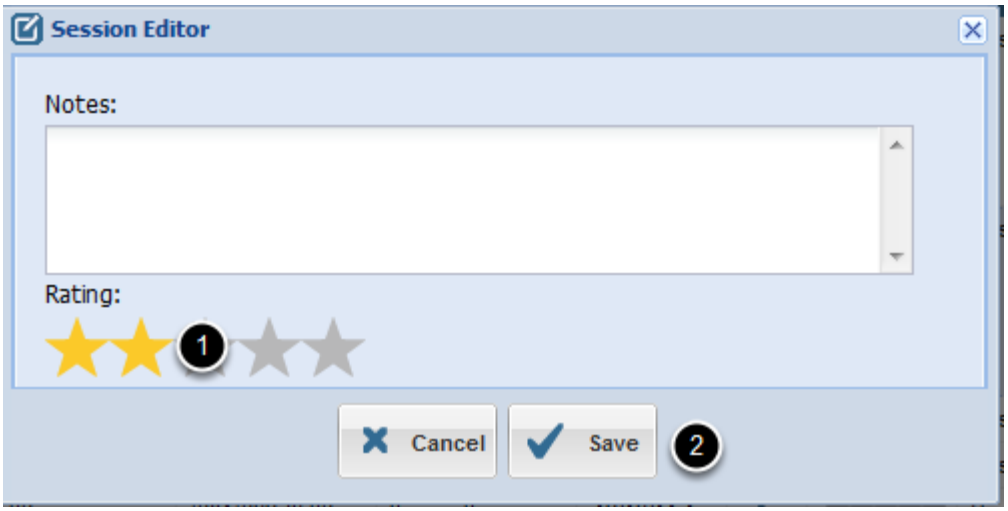
How do I rate a call?

Find a Call



1) Click Edit link

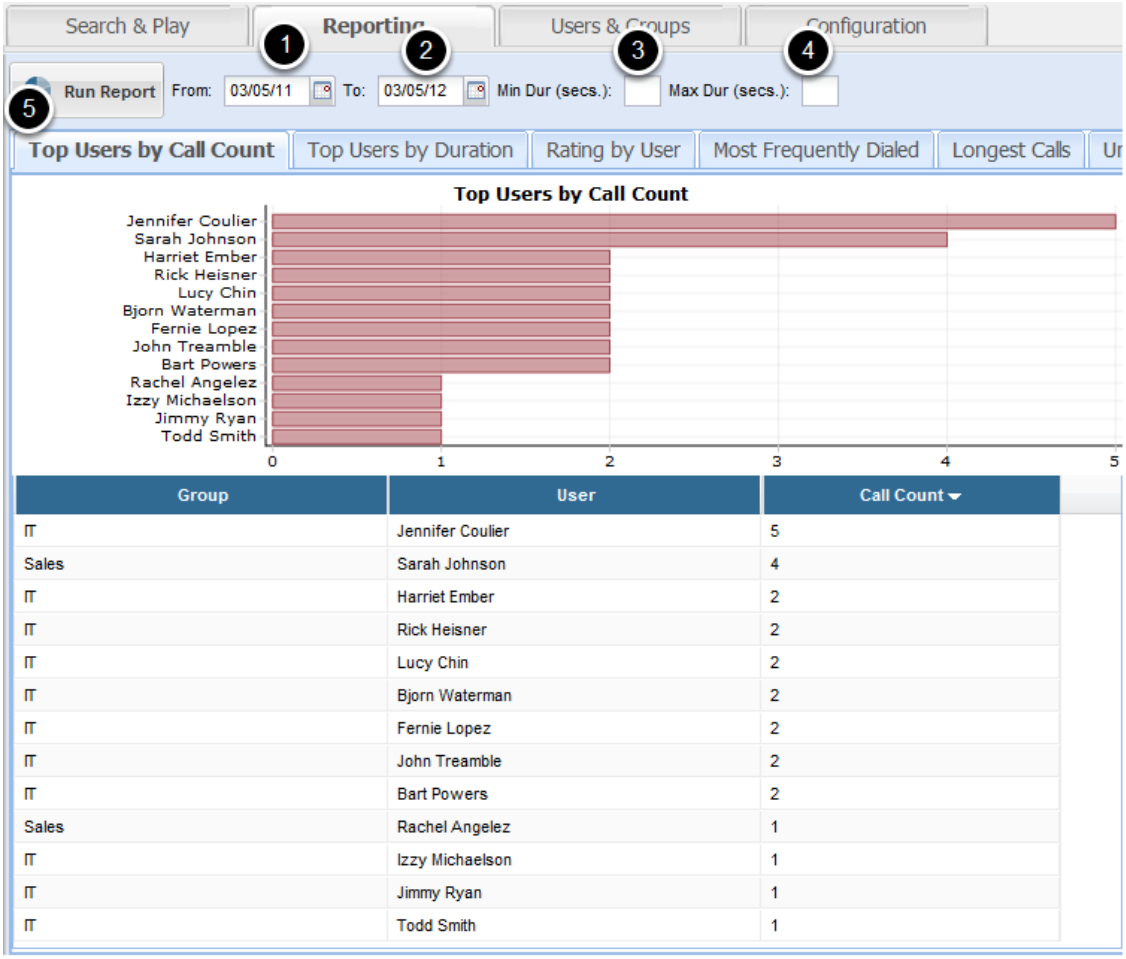
Add Notes



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

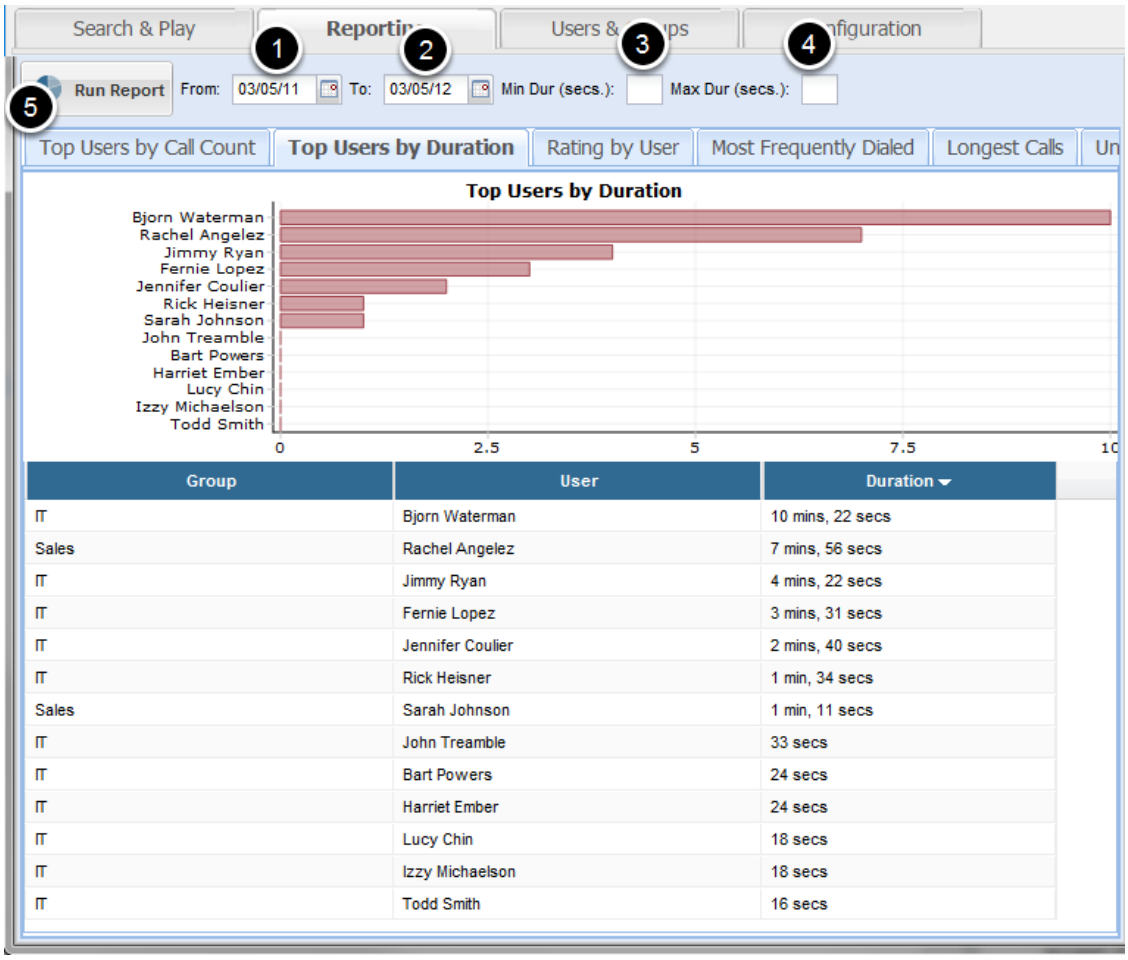


Group	User	Call Count
IT	Jennifer Coulier	5
Sales	Sarah Johnson	4
IT	Harriet Ember	2
IT	Rick Heisner	2
IT	Lucy Chin	2
IT	Bjorn Waterman	2
IT	Fernie Lopez	2
IT	John Treamble	2
IT	Bart Powers	2
Sales	Rachel Angelez	1
IT	Izzy Michaelson	1
IT	Jimmy Ryan	1
IT	Todd Smith	1

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

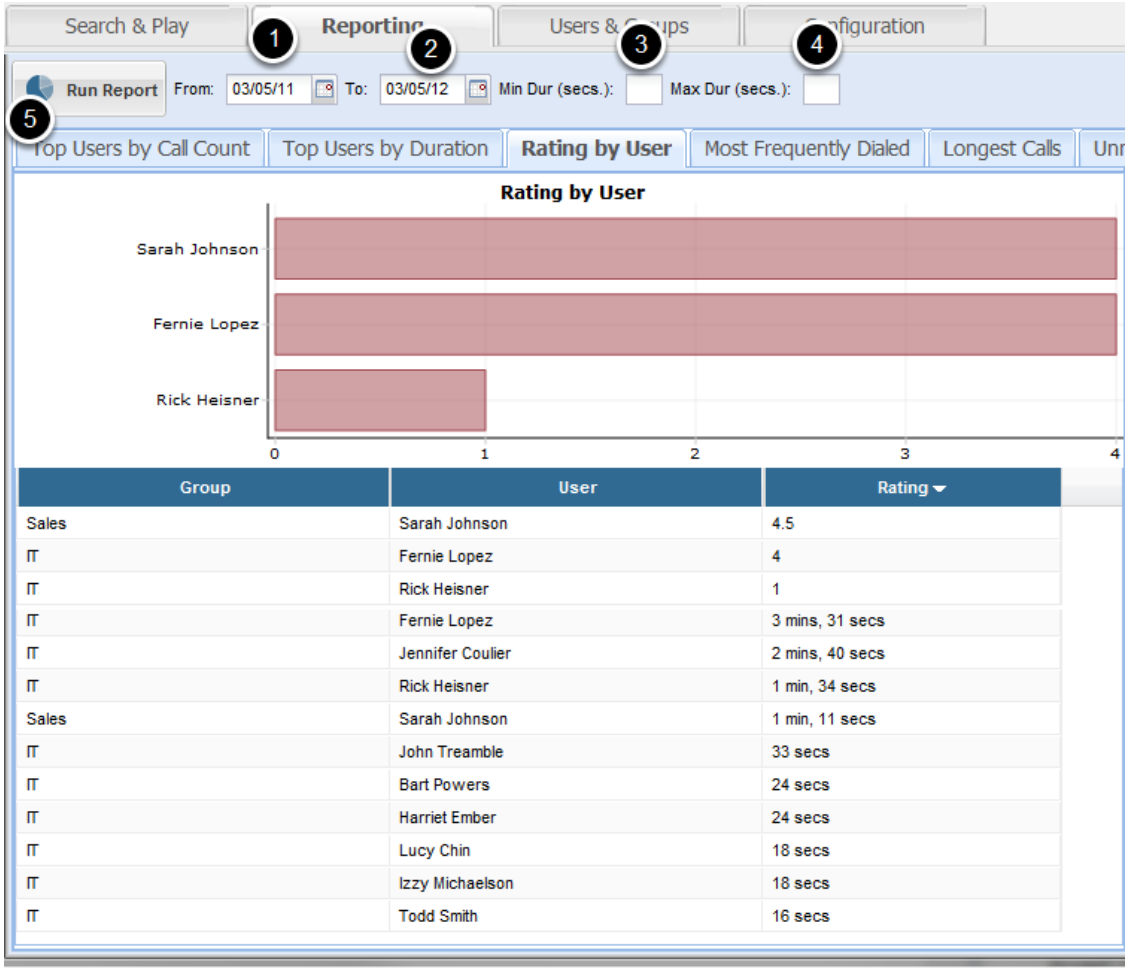


Group	User	Duration
IT	Bjorn Waterman	10 mins, 22 secs
Sales	Rachel Angelez	7 mins, 56 secs
IT	Jimmy Ryan	4 mins, 22 secs
IT	Fernie Lopez	3 mins, 31 secs
IT	Jennifer Coulier	2 mins, 40 secs
IT	Rick Heisner	1 min, 34 secs
Sales	Sarah Johnson	1 min, 11 secs
IT	John Treamble	33 secs
IT	Bart Powers	24 secs
IT	Harriet Ember	24 secs
IT	Lucy Chin	18 secs
IT	Izzy Michaelson	18 secs
IT	Todd Smith	16 secs

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

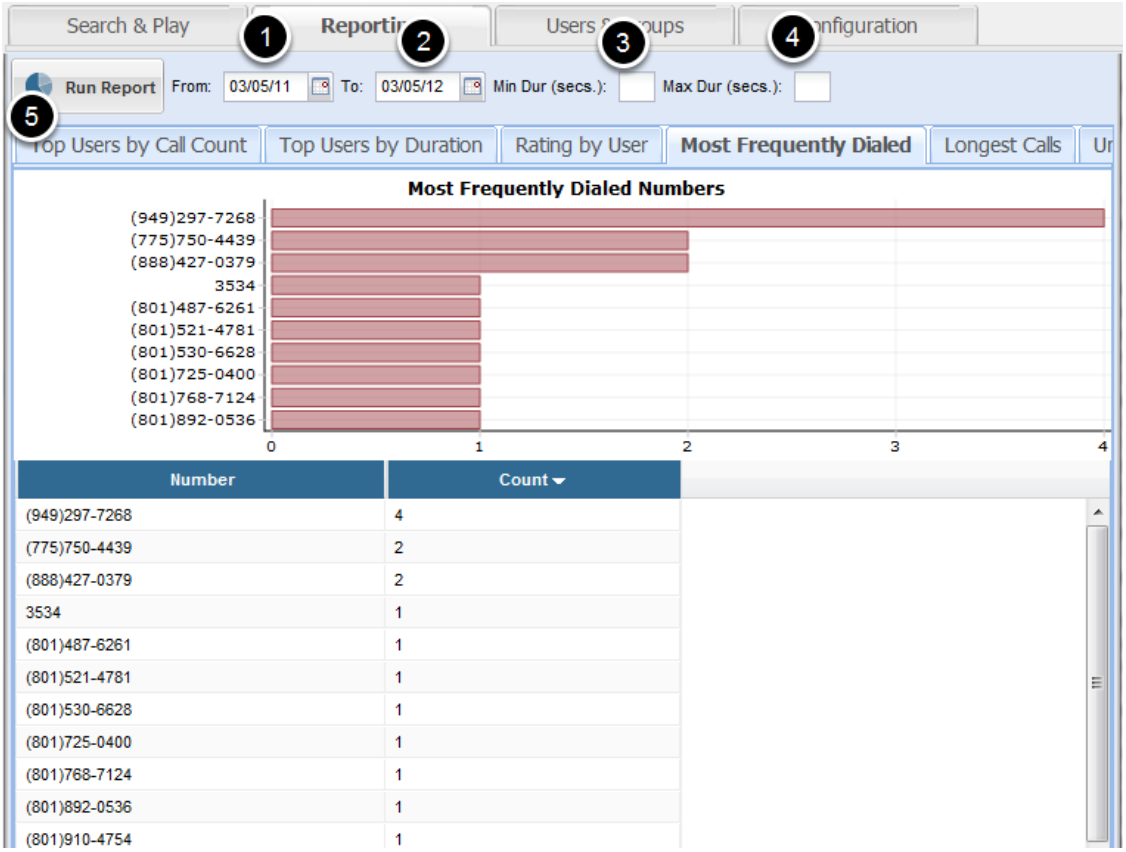


Group	User	Rating
Sales	Sarah Johnson	4.5
IT	Fernie Lopez	4
IT	Rick Heisner	1
IT	Fernie Lopez	3 mins, 31 secs
IT	Jennifer Coulier	2 mins, 40 secs
IT	Rick Heisner	1 min, 34 secs
Sales	Sarah Johnson	1 min, 11 secs
IT	John Treamble	33 secs
IT	Bart Powers	24 secs
IT	Harriet Ember	24 secs
IT	Lucy Chin	18 secs
IT	Izzy Michaelson	18 secs
IT	Todd Smith	16 secs

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?

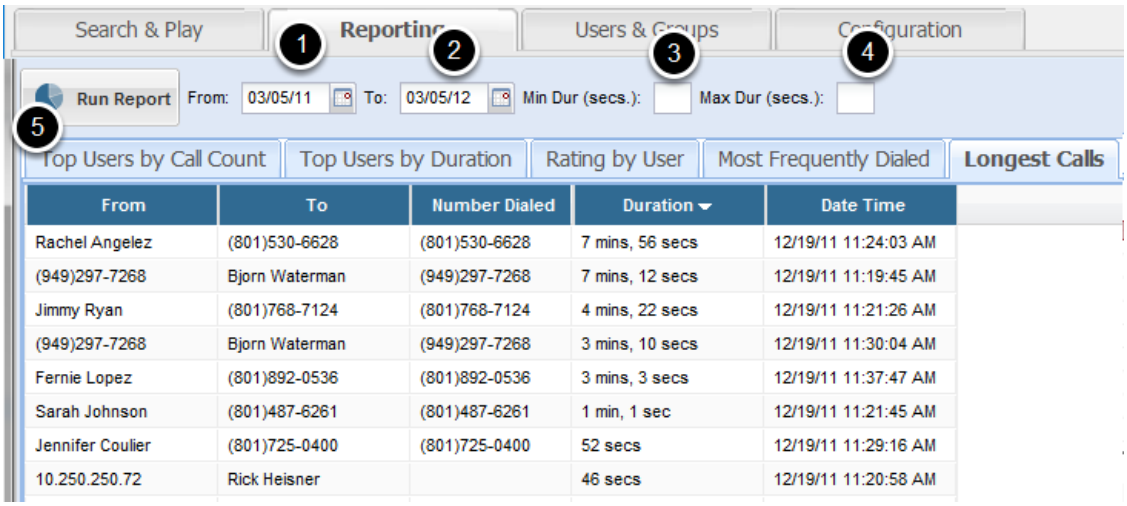
Report Setup



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?

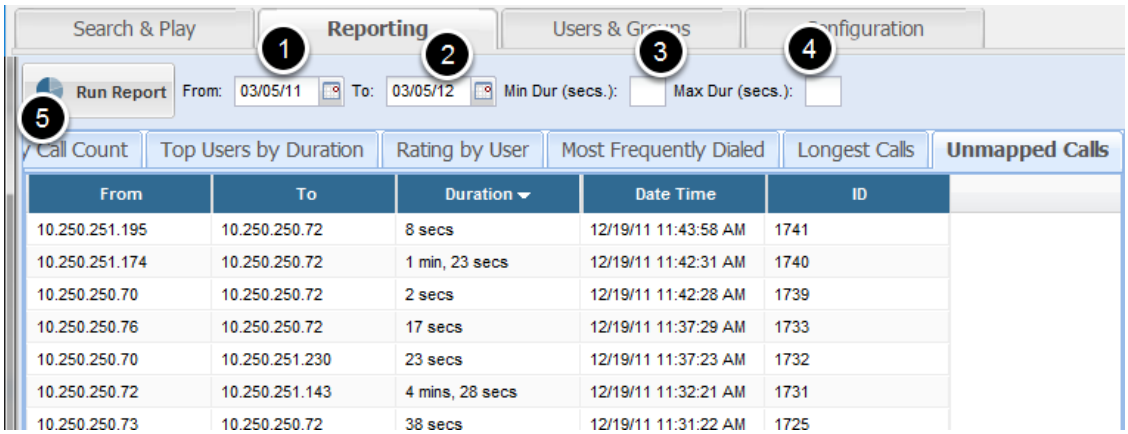
Report Setup



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



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