



## **User Guide**

# **Call Recorder Enterprise**



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## Introduction

The Xarios Call Recorder has been designed by Xarios CTi Software of the UK ([www.xarios.com](http://www.xarios.com)) exclusively for the Inter-Tel range of IP PBX telephone systems.

Call Recorder is a bulk telephone call recording server and can connect to ISDN30 circuits fitted to the telephone system.

Call recordings are saved in compressed .WAV format and can be archived onto DVD or a Network Storage Device.

The software uses Inter-Tel's powerful Open Architecture Interface (OAI) to track information about the call such as the Agent ID and account number in addition to the usual date/time/caller ID.

Organisations use Xarios Call Recorder for various applications:

- Compliance with government regulations
- Dispute resolution with contractual commitments
- Staff training and coaching

Xarios delivers Xarios Call Recorder using resilient PC server hardware. Specifically HP Compaq ML370 or equivalent grade with RAID hard drives, dual power supplies and Integrated Lights Out remote access.

Xarios also produces a range of software applications that further enhances the features of the Inter-Tel system. See [www.xarios.com](http://www.xarios.com)

This document focuses on Xarios Call Recorder and the unique features that make the product stand apart from "off the shelf" call recorders.

# Logon

Xarios Call Recorder is accessed locally through your network by using a web page. To gain access to Xarios Call Recorder please see your IT department with regards to an account being set up and also the web address required to logon.



The screenshot shows the Xarios Call Recorder web interface. At the top left is the Xarios logo with the tagline 'cti software'. To the right of the logo are links for 'Logon' and 'Forgotten Password'. Below the logo is a navigation menu with buttons for 'Home', 'Admin', 'Recordings', and 'My Settings'. The main content area is titled 'Logon' and contains the instruction: 'Please supply your logon credentials using the form below in order to access the secure area of this website.' Below this instruction is a form with the following fields: 'LOGON' (a sub-header), 'Username:' with an input field, 'Password:' with an input field, and a 'logon' button. At the bottom of the page, there is a copyright notice: 'Copyright © 2006 Xarios Ltd. All rights reserved' and a link to 'site map'.

The Xarios Call Recorder homepage allows users to login to the Xarios Call Recorder and gain access to the recordings. The Xarios Call Recorder homepage is shown above.

## Logon

Please supply your logon credentials using the form below in order to access the secure area of this website.

**LOGON**

Username:

Password:

To logon to the Xarios Call Recorder enter your assigned username in the 'Username' field and enter the associated password into the 'Password' field.

If you have forgotten your password select 'Forgotten password' from the top right hand corner on the homepage, and enter your username. Your password will then be sent to the email address that was registered with the account.

When your logon credentials have been validated the 'Recordings' page will be displayed.

## Server Status

If you are set up as an Admin user when you log into the Xarios Call Recorder you are presented with the 'Server Status view'. If you are not set up as an admin user you will be directed to the Recordings page.

The 'Server Status view' shows the status of the Call Recorder server and displays the following status information:

- Hard Disk size and available space
- DVD drives status, disk volume number and disk usage
- Call Recorder application service status with option to stop/start
- Archive application service status with option to stop/start
- Network Storage Device size and available space (if used)

SERVICES		
SERVICE NAME	STATUS	ACTION
Call Recorder	Running	<a href="#">stop</a>
Call Recorder Archiver	Running	<a href="#">stop</a>

LOCAL DRIVES		
HARD DRIVES:		
DISK NAME	SIZE (MB)	FREE SPACE (MB)
C:	18,001	3,143
D:	120,914	66,338

DVD DRIVES:			
DISK NAME	VOLUME	SIZE (MB)	FREE SPACE (MB)
E:	53	4,367	2,134
F:	54	4,368	3,067
G:	-	-	-

## Navigating Around Xarios Call Recorder

Navigating around Xarios Call Recorder is achieved by the task bar at the top of the web page, as shown below.



- **Home** - By selecting the 'Home' button you will be directed to the homepage of Xarios Call Recorder or to the 'Server Status' page if you are an admin user.
- **Admin** - By selecting the 'Admin' button you will be directed to the 'Admin' page (only applicable if your account is an Admin account).
- **Recordings** - By selecting the 'Recordings' button you will be directed to the 'Recordings' page.
- **My Settings** - By selecting the 'My settings' button you will be directed to the 'My Settings' page.
- **Logout** - By selecting the 'Logout' button you will be logged out of Xarios Call Recorder.

# Recordings

The recordings page shows a list of the calls that are available for playback. The list of calls that are shown are dependent on the user profile that has been assigned.

The screenshot shows the Xarios web interface. At the top left is the Xarios logo with the tagline 'cti software'. At the top right, it says 'logged in as Xarios User of Xarios' and has a 'Logoff' link. Below the logo is a navigation bar with buttons for 'Home', 'Admin', 'Recordings', and 'My Settings'. The main content area is titled 'Recordings' and contains a paragraph explaining that the page shows a list of calls available for playback, with a note that calls not matching the user profile will not appear. Below this is a table of recordings. The table has columns for 'OUTSIDE NUMBER', 'EXT', 'AGENT', 'STARTED', 'DURATION', 'DIRECTION', 'FLAGS', 'PLAY', 'SAVE', and 'EMAIL'. There are 11 rows of data. At the bottom of the table, there are navigation controls including a 'page 1 of 2' indicator, a '10' dropdown menu, and a '10 sec refresh' button with a 'pause' link.

OUTSIDE NUMBER	EXT	AGENT	STARTED	DURATION	DIRECTION	FLAGS	PLAY	SAVE	EMAIL
0161	1223	1004	09/03/2007 10:33	00:00:36	inbound	0			
0789	1227		09/03/2007 10:31	00:01:32	outbound	0			
0172	1201	1003	09/03/2007 10:29	00:00:18	outbound	0			
0129	1201	1003	09/03/2007 10:27	00:01:08	outbound	0			
0797	1208	1039	09/03/2007 10:23	00:03:09	inbound	0			
0124	1201	1003	09/03/2007 10:22	00:00:56	inbound	0			
0845	1598		09/03/2007 10:21	00:00:20	outbound	0			
0207	1203	1038	09/03/2007 10:19	00:05:17	outbound	0			
0800	1202	1033	09/03/2007 10:18	00:02:16	outbound	0			
0207	1208	1039	09/03/2007 10:16	00:00:48	outbound	0			

Figure 1

The recordings page shows a number of fields in default:

**Outside Number** - This is the number either dialled or the CLI received from an outside caller calling in.

**Ext** - This is the extension number that either answered the call or made the call.

**Agent** - If agent ID's are being used this is the agent ID that either answered the call or made the call.


**Started** - This is the time and date of the call at when it was either answered or when the call was placed.


**Duration** - This show the duration of the call that was recorded.

**Direction** - This field shows whether the call was an inbound or outbound call.

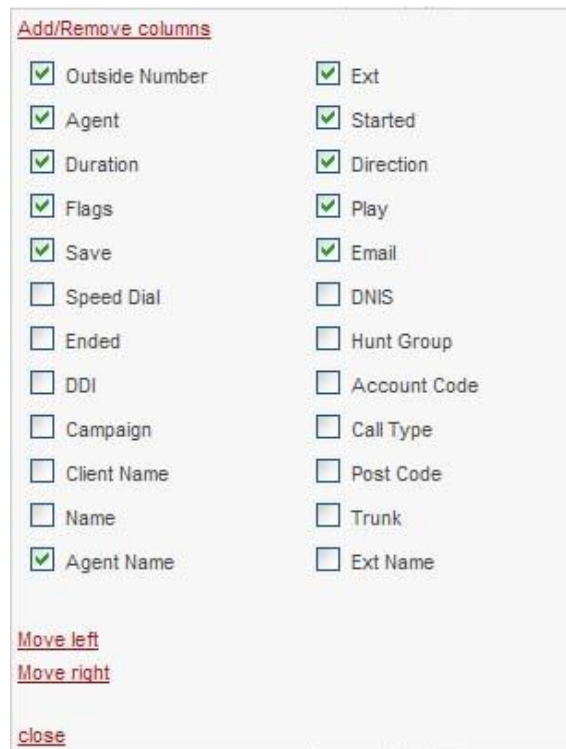
**Flags** - During playback you can flag a call. The number of flags that are applied to a call are recorded in this field.

**Play** - To playback the call click on the play icon. 

**Save** - To save the call click on the save icon. 

**Email** - To email the call click on the email icon. 

Additional Fields can be added to the recordings page by right clicking on one of the titles currently on the recordings page and selecting 'Add/Remove columns'. To add a column to the recordings page enable the checkbox from the list. To remove a column, uncheck the checkbox in the list.



The screenshot shows a dialog box titled "Add/Remove columns" with a list of fields and their corresponding checkboxes. The fields are arranged in two columns. The first column contains: Outside Number (checked), Agent (checked), Duration (checked), Flags (checked), Save (checked), Speed Dial (unchecked), Ended (unchecked), DDI (unchecked), Campaign (unchecked), Client Name (unchecked), Name (unchecked), and Agent Name (checked). The second column contains: Ext (checked), Started (checked), Direction (checked), Play (checked), Email (checked), DNIS (unchecked), Hunt Group (unchecked), Account Code (unchecked), Call Type (unchecked), Post Code (unchecked), Trunk (unchecked), and Ext Name (unchecked). At the bottom of the dialog, there are three links: "Move left", "Move right", and "close".

The additional fields that can be added include:

**Speed Dial** – If the CLI is listed in the phone systems speed dial list the name associated with that number will be shown in this field.

**DNIS** - (Dialled Number Identification Service) is a telephone service that identifies for the receiver of a call the number that the caller dialled. If this service is available the number will be displayed in this field.

**Ended** – The date and time that the call ended will be shown in this field.

**Hunt Group** – If the call has come into a hunt group the hunt group number will be shown in this field.

**DDI** – On inbound calls the number that was dialled by the customer will be displayed in this field.

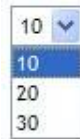
**Account Code** - If an account code has been entered on a call this will be displayed in this field.

**Trunk** – The trunk number that the call was made or received on is displayed in this field.

**Agent Name** – If an agent made or received the call the name associated with that agent ID will be displayed in this field.

**Ext Name** – If a name is associated with an extension the name will appear in this field.

The recordings page shows 10 calls per page in default, this can be increased by using the drop down menu.



From the drop down you can then select the number of calls to display per page, from 10, 20 or 30.

It is possible to navigate to more pages of calls by using the navigation buttons at the bottom of the recordings listing.

To go to the first page click on the **K** icon.

To navigate to the last page of calls click on the **»** icon.

To move a page of calls forward select the **»** icon.

To move a page of calls backward select the **«** icon.

The recordings page will automatically refresh, in default this is set to a 10 second refresh rate. So every 10 seconds the recordings page will automatically be updated with the latest recordings.



10 sec refresh | [pause](#)

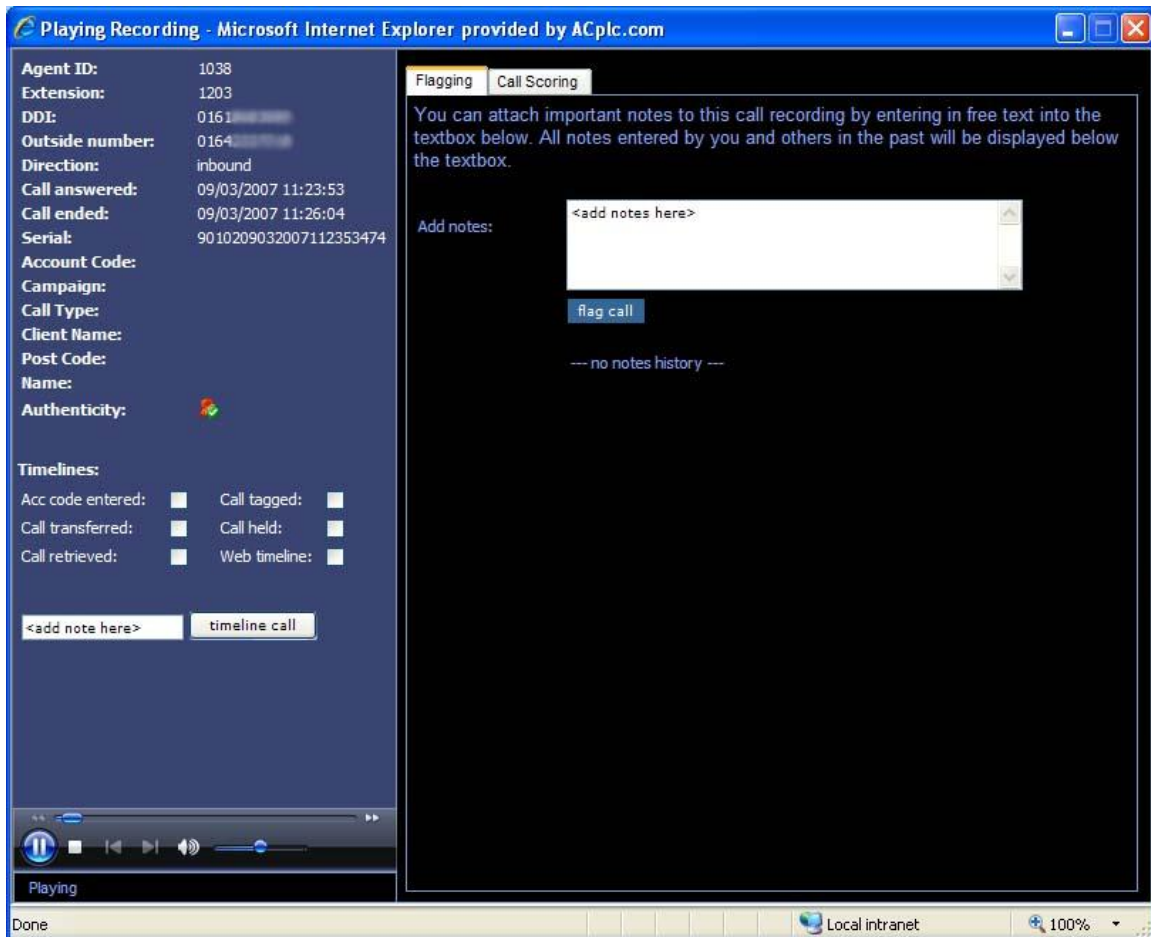
This refresh rate can be paused so that the page is not automatically refreshed by selecting the pause button as shown above.

To resume the automatic refreshing of the recordings page the resume button can be selected.

## Play Recording

To play a recording from the 'Recordings' page click on the play icon. 

When you click on this icon a Windows Media Player pop-up box will appear that will show the recording as shown below.



The playing window will show the same information that has been displayed on the recordings window that relates to the recording that is currently being played.

The playing window will also show some additional information that was not visible on the recordings page. It shows the time the call was answered, the time the call was ended and a serial number for the recording. The serial number has the convention of trunk/date/time to make a clear understanding of the file contents.

The authenticity of the recording is to verify that the recording file has not be tampered with, and is the original recording of the telephone conversation.

In addition to the recording information there are four other categories that show additional information about the call that has been recorded, these are, Tag info, Timeline, Flagging and Call Scoring (if available on your site). For more information on these options please see the [Advanced Playback topic](#).

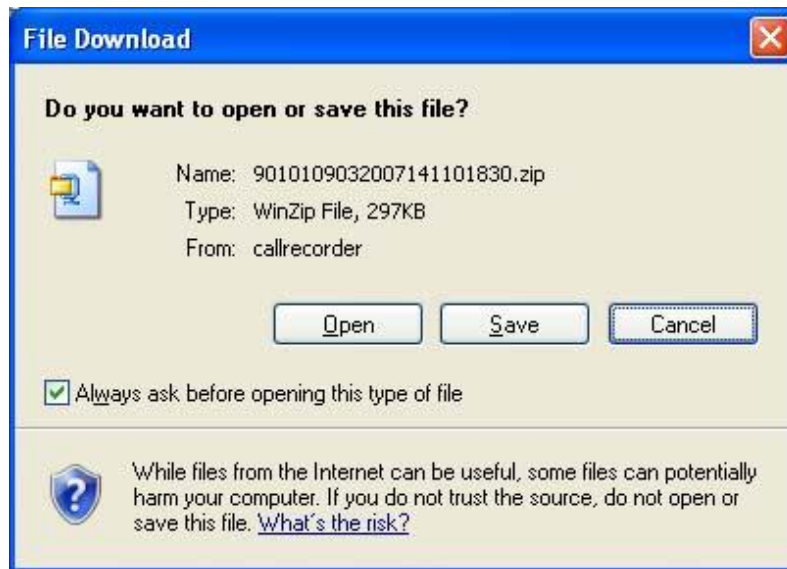
If you are unfamiliar with Windows Media Player please read the topic on [Windows Media Player controls](#).

## Save Recordings

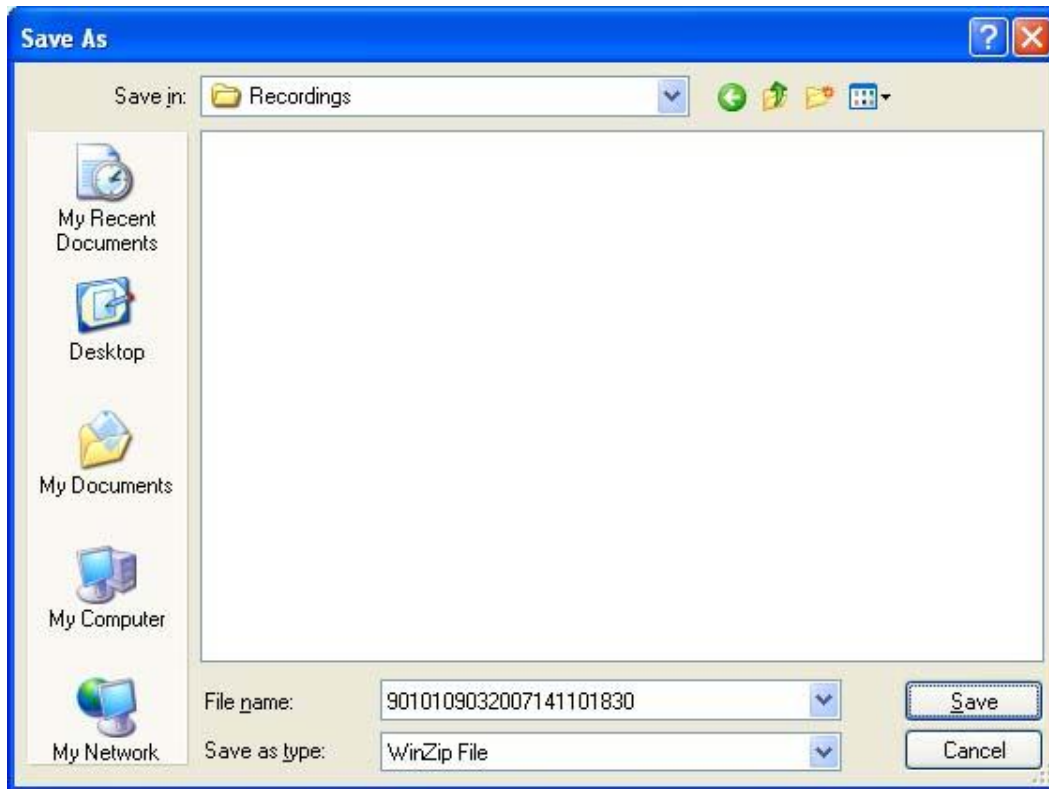
Call recordings can be saved to a drive that is available to the workstation PC used by the supervisor. Xarios Call Recorder will automatically compress the file further into a .ZIP format to save disk space. The file naming convention makes for a clear understanding of the file contents by using trunk/date/time within the filename.

To save a recording from the 'Recordings' page click on the save icon. 

A dialogue box will then appear requiring confirmation from the user that the file is to be saved. To save the recording to the workstation PC select the 'Save' button as shown below.



The Xarios Call Recorder will then display a directory listing as to where the file should be saved to.



Select the directory and folder to save the recording to, as shown above and then select 'Save'. The recording will then be saved to this location in a .ZIP file which can then be opened using an application such as WinZip to listen to the recording.

## Email Recording

With Xarios Call Recorder it is possible to email a copy of a recording to any internal email address. Xarios Call Recorder automatically zips and names the call recording and attaches this recording to an email which can then be sent.

To email a recording from the 'Recordings' page click on the email icon. 

The email pop-up box looks like any other email client, you simply enter the email address that you want to send the email to in the 'To' field. There is also a 'Cc' field to 'carbon copy' in other email address and a 'Bcc' to blind copy email address in. There is a subject line which can be edited from the default subject of 'Conversation recording' and also a body text box where the text of the email can be written.



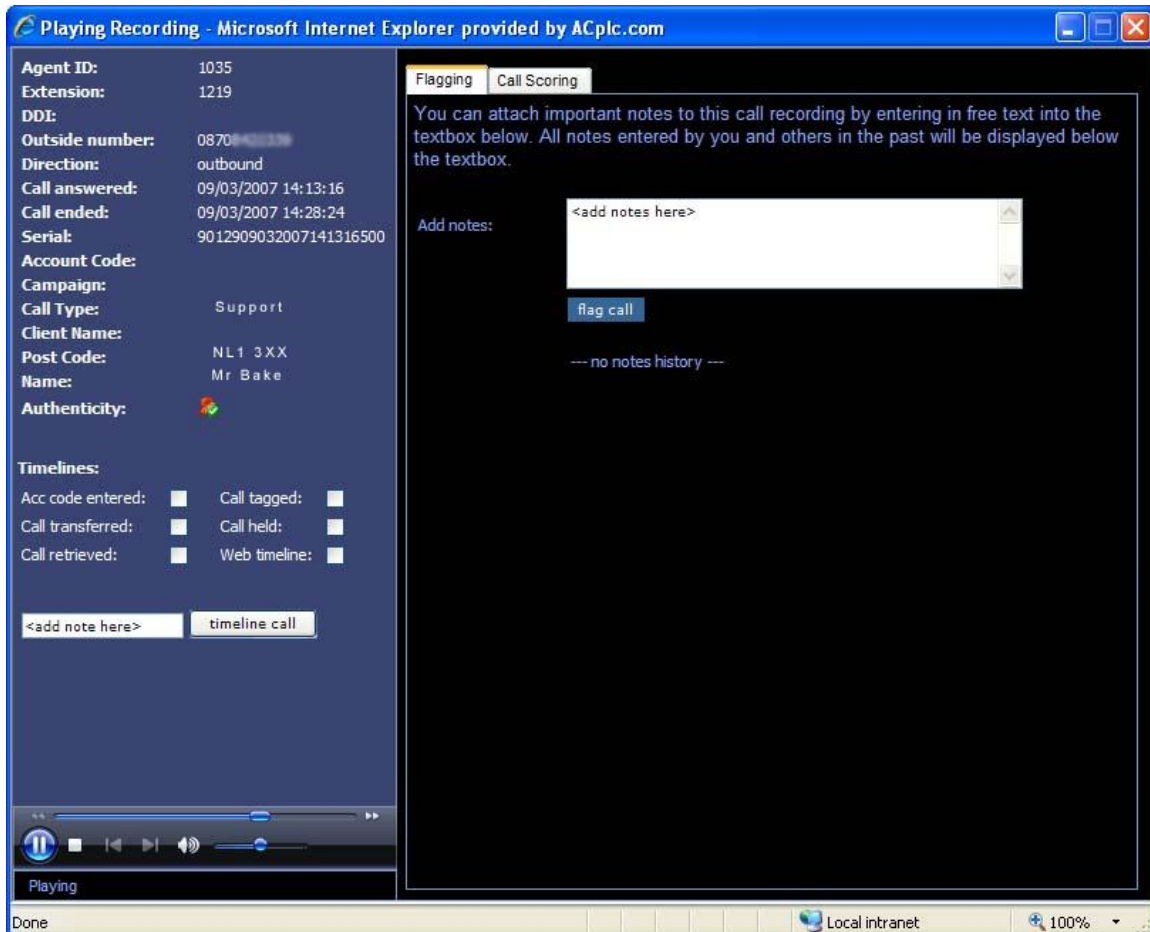
To send the email click on the 'Send' button.

If you no longer want to send the email click on the 'Cancel' button.

## Advanced Playback

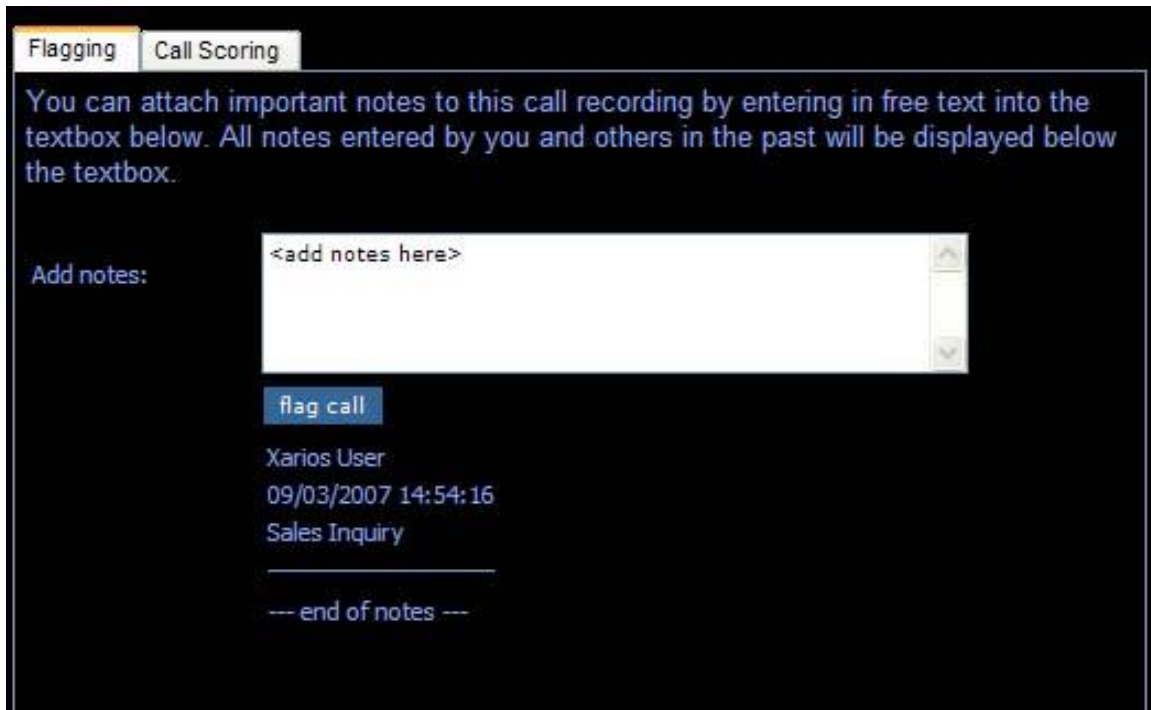
In addition to the Recording information that is given whilst playing a recording there are a number of additional features that can be shown while playing a recording. These are 'Timeline', 'Flagging' and 'Call Scoring'.

**Tag info** - The tagging option is used in conjunction with an OCX control CTI component that allows customers to integrate their Customer Relationship Management (CRM) database to the Xarios Call Recorder server. The OCX control will allow the customer to store an additional five "Tag" fields to a call for various applications.



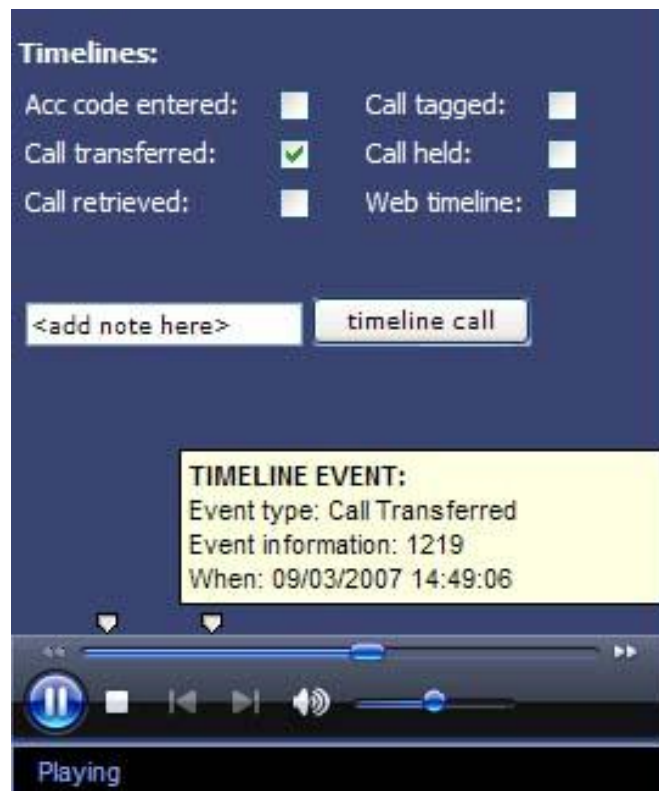
**Flagging info** – This is shown on the right hand side of the playing recording window and can be used to 'Flag' a call, which can later be used to filter calls upon.

The supervisor can enter a comment about the 'Flag' that they are assigning to the call. This comment will then appear against the call whenever any other supervisor looks at this call. Please note more than one flag can be put next to a recording.



**Timeline** - The Xarios Call Recorder allows certain events to be shown about a call quickly by identifying sections of the recording so that supervisors can quickly and easily hear the part of the recording they are most interested in.

In the below example the timeline event that is enabled is 'Call transferred'. This will now show every time that the call was transferred. The supervisor can hover their mouse cursor over the 'markers', as shown in white on the media player slide bar, and the recorder will show what event took place, information about the event and when the event took place. Multiple timeline events can be applied to the same recording at the same time.



A custom timeline event can be added by the supervisor by entering text into the box which contains '<add note here>' and then by selecting the 'timeline call' button. Please note that the recording has to be being played when this is done. This timeline event will be shown as a 'Web timeline' in the timelines.

**Call Scoring** - The Xarios Call Recorder allows agents to be scored by a supervisor. This can be achieved when call scoring sheets have been set up, please see the Call Scoring documentation available for Xarios Call Recorder on how to set up scripts.

Flagging Call Scoring

Please select a scoresheet from the dropdown box below:

Sales Scoring GO

**ENGLISH**

How was the agent's pronunciation? Very good

**MANNERS**

How cheerful was the agent? Good

How polite was the agent? Average

score agent

When a scoring sheet has been selected the available questions will be shown, as can be seen in the above example.


Comments can be added to the score by selecting the speech bubble icon and entering the required comment.


A help icon is used to give people scoring the calls criteria on how to score the call.

When the scores have been entered the supervisor can select the 'Score agent' button to apply the score to the recording.


## Windows Media Player Controls

Windows Media Player is used to playback the recordings on the Xarios Call Recorder this topic gives a brief overview of the control used.

To play the current recording press the play button. 


While a recording is being played you can pause the recording by pressing the pause button. 

To stop the current recording press the stop button. 


To return the current recording to the start of the recording press the previous button. 

To rewind the current recording press the rewind button. 

To fast forward the current recording press the fast forward button. 

To move to the end of the current recording press the next button. 

To mute the current recording press the mute button. 

To adjust the volume of the current recording move the slide bar either up to increase the volume or down to decrease the volume. 



## Filter

The filter at the bottom of the recordings page can be used to help search for recorded calls by narrowing down the number of recordings shown.

The filter can be used to search for call recordings by the following parameters:

- Date
- Time
- Outside Number
- DDI
- Call Length
- Call Direction
- Agent ID
- Extension Number
- Supervisor Flagged Calls
- Five TAG fields via CTI OCX Control
- Trunk
- Scored / Unscored calls
- Completed calls / Calls in progress
- Hunt Groups

Once the information has been entered into the filter click on the 'Filter' button to apply the changes to the recordings screen. If you need to clear the filter press the 'Clear Filter' button.

**Agent ID/Extension Number** - To select a filter on Agents or Extensions you can type the Agent ID or Extension number into the appropriate field or you can select the Agent ID icon  or the extension number icon  and a drop down box will appear from which you can select the appropriate Agent ID or Extension number.

The drop down will list all Agent IDs on the phone system. You can then select agents by clicking on the relevant name or ID. When an Agent ID is selected a green tick will appear next to the Agents ID. You can unselect an Agent by clicking on the Agent ID again and the green tick will be removed. Below are some example expressions which can be used to filter data on the recordings page.

## Example Agent/Extension Range

## Outcome

1000	Only the agent / extension 1000 is returned
1000,1004	Agents / extension 1000 and 1004 are returned
1000-1004	Agents / extensions 1000,1001,1002,1003 and 1004 are returned
1000-1002,1005	Agents / extensions 1000,1001,1002 and 1005 are returned
!1050	All agents / extensions are returned except agent / extension 1050

**FILTER DETAILS**

Agent ids:	<input type="text"/>	Extension ids:	<input type="text"/>
	<small>click <a href="#">here</a> for examples</small>		<small>click <a href="#">here</a> for examples</small>
Agent name:	<input type="text"/>	Extension name:	<input type="text"/>
Outside number:	<input type="text"/>	DDI:	<input type="text"/>
Call start range:	09-03-2007 <input type="text"/> 15 : 00 09-03-2007 <input type="text"/> 23 : 59	Call length range:	HH : MM : SS HH : MM : SS
Call direction:	inbound and outbound <input type="button" value="v"/>	Flagged calls:	flags n/a <input type="button" value="v"/>
Trunk:	<input type="text"/>	Hunt group:	<input type="text"/>
Scoring:	scoring n/a <input type="button" value="v"/>	Call status:	completed calls <input type="button" value="v"/>
Account Code:	<input type="text"/>	Campaign:	<input type="text"/>
Call Type:	<input type="text"/>	Client Name:	<input type="text"/>
Post Code:	<input type="text"/>	Name:	<input type="text"/>

**Date** - The date parameter can be changed so that calls are filtered for a longer or shorter time period.

**Time** - The time parameter can be changed so that calls are filtered for a longer or shorter time period.

**Outside Number** - Enter the Outside Number that is either being called or someone has dialled in on.

**DDI** - Enter the DDI that someone has dialled.

**Call Duration** - Enter the call length that you wish to use.

**Call Direction** - From the drop down box the options 'inbound calls' or 'outbound calls' can be selected, if this is left in its default state 'direction' both inbound and outbound calls are shown. If 'inbound calls' are selected and then the filter is applied only inbound call recordings will be shown. If 'outbound calls' are selected and then the filter is applied then only outbound call recordings will be shown.

**Flagged Calls** - From the drop down box the options 'flagged' or 'not flagged' can be selected, if this is left in its default state 'flags' both flagged and not flagged calls are shown. If 'flagged' are selected and then the filter is applied only flagged call recordings will be shown. If 'not flagged' are selected and then the filter is applied then only not flagged call recordings will be shown. For more information about flagged calls please see the [Advanced Playback topic](#).

**Customise Tags** - The Customise Tags will show different fields dependent on what has been set in the 'Admin' section of the Xarios Call Recorder.

Xarios's OCX control can provide the customer with search and playback functions that can be embedded inside the CRM database user interface. This means that individual staff members can search and playback call recordings on the fly without the need to request a supervisor to find the recording for them.

## My Settings

You can update your existing Xarios Call Recorder settings by using the 'My Settings' page.

The name that is displayed on the Xarios Call Recorder web pages can be updated as well as the password that is used to log onto the Xarios Call Recorder.

The email address that is associated with the Xarios Call Recorder account can also be updated.

General	Realtime Recordings	Dvd playback
First name:	<input type="text" value="Xarios"/>	
Last name:	<input type="text" value="User"/>	
Password:	<input type="password"/>	
New password:	<input type="password"/>	
Confirm:	<input type="password"/>	
Email:	<input type="text" value="support@xarios.com"/>	

On the 'Realtime Recordings' tab the refresh time and how the playback is delivered can be set.

The 'Refresh time' can be altered to either shorten or lengthen the automatic refresh rate on the Recordings page.

The ability to stream recordings straight from the Xarios Call Recorder website can be enabled or disabled by checking or unchecking the 'Streaming' option. Please note that if playing recordings over the internet 'Stream Playback' is required.

The screenshot shows a web form with three tabs: 'General', 'Realtime Recordings' (which is active), and 'Dvd playback'. Below the tabs, a light blue box contains the text: "The form fields below allow you to customise your recorded call playback experience".

Inside this box, there are three settings:

- Refresh time (secs):** A text input field containing the number "10" with a green help icon to its right.
- Playback delivery:** Two radio buttons. The first is labeled "website windows media player" and is selected (indicated by a green dot). The second is labeled "telephone" and is unselected.
- Stream playback:** A checkbox that is currently unchecked, with a green help icon to its right.

Below the light blue box, there are two buttons: "save" and "reset".

Please note that you are required to re-enter your existing password for security reasons on the general tab when saving these options.

On the 'DVD Playback' tab select either to use a local DVD drive or a DVD drive on the network to play back archived recordings.

When 'Local DVD drive' is selected please select the drive letter from the drop down list.

The screenshot shows the 'Dvd playback' configuration tab. At the top, there are three tabs: 'General', 'Realtime Recordings', and 'Dvd playback'. Below the tabs, a message reads: 'To play back an archived recording from a dvd, you will need to ensure the settings below are correct.' Under 'Playback delivery:', there are two radio buttons: 'local dvd drive' (which is selected) and 'dvd drive on network'. A green checkmark is visible next to the 'local dvd drive' option. Below this, 'Local dvd drive:' is followed by a dropdown menu showing 'E:'.

save reset

If using a network DVD drive select 'DVD Drive on Network' you will then be prompted to enter the computer name and the share for the DVD drive.

The screenshot shows the 'Dvd playback' configuration tab. At the top, there are three tabs: 'General', 'Realtime Recordings', and 'Dvd playback'. Below the tabs, a message reads: 'To play back an archived recording from a dvd, you will need to ensure the settings below are correct.' Under 'Playback delivery:', there are two radio buttons: 'local dvd drive' and 'dvd drive on network' (which is selected). A green checkmark is visible next to the 'dvd drive on network' option. Below this, 'Network dvd drive:' is followed by two text input fields. The first field contains '\\callrecorder' and the second field contains 'DVD'.

save reset

Please note that you are required to re-enter your existing password for security reasons on the general tab when saving these options.



[www.xarios.com](http://www.xarios.com)