

CCRecord Professional SIP Trunk Recording

Application Notes

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Overview

Introduction

CCRecord Pro is a powerful end-user call management tool that provides:

- Non-intrusive voice recording
- Historical voice streams management and playback
- Call signaling and voice archiving
- Playback via default Windows Media Player

The recorded conversations are useful in improving call quality, Customer relationship management, Agent training, and evaluation or to preserve important information & questions from Customers. Each recorded conversation is saved in a .wav format and playable by your computers default media player.

NOTE:

CCRecord Pro can be integrated with the CCView product.

The voice recording use cases include transfer CO to CO and multi-party conference scenarios.

Target Customers

- Government Institutions
- Insurance and financial services
- Call Centers and Customer Services
- Attorney Offices
- Law Enforcement Force
- Medical Centers

Benefits

- Increase Customer confidence, maximizing productivity and dramatically improving employee performance
- Improve call quality control through Agent answering time, customer hold time and lost calls number
- Help evaluate and analyze agent-customer interactions
- Accurate record of what was said, by whom and when. It avoids the need for repetition or speaking slowly

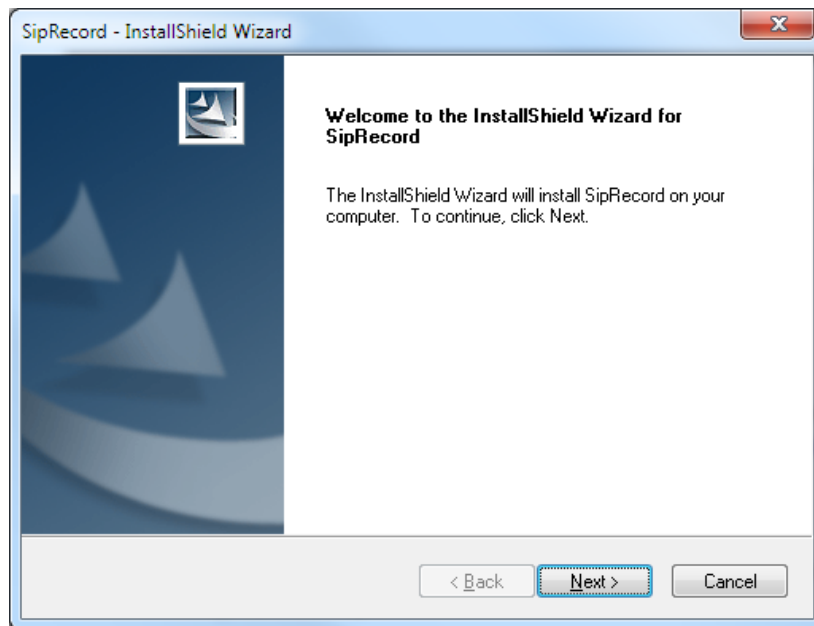
- Focus and improve customer service level and information management, offering reliable data necessary to refine call-handling processes
- Perfect aid to Agent training
- Minimize technology expenditure

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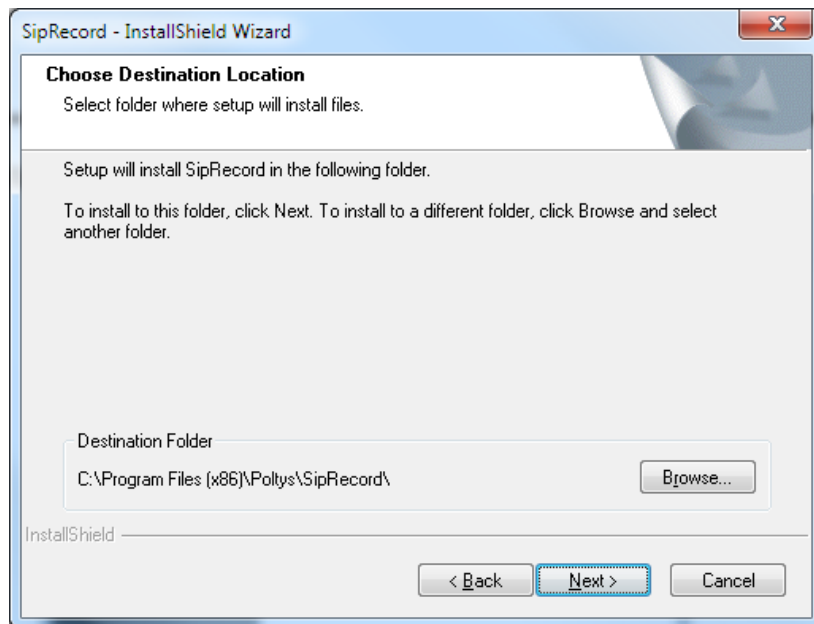
Installing and Configuring CCRecord Pro

Installing SIP Record Application

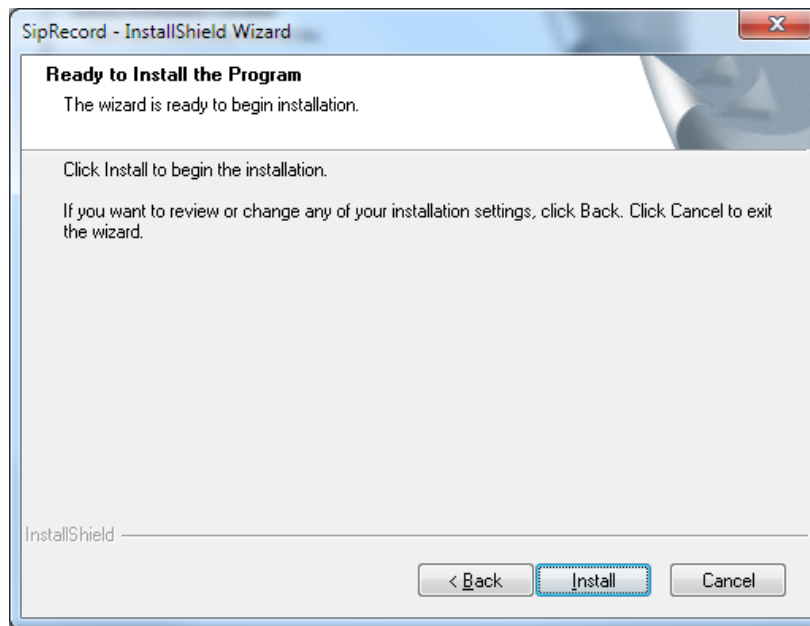
1. Double-click on *SIPRecord.exe* install kit provided by Poltys. The installation wizard starts.



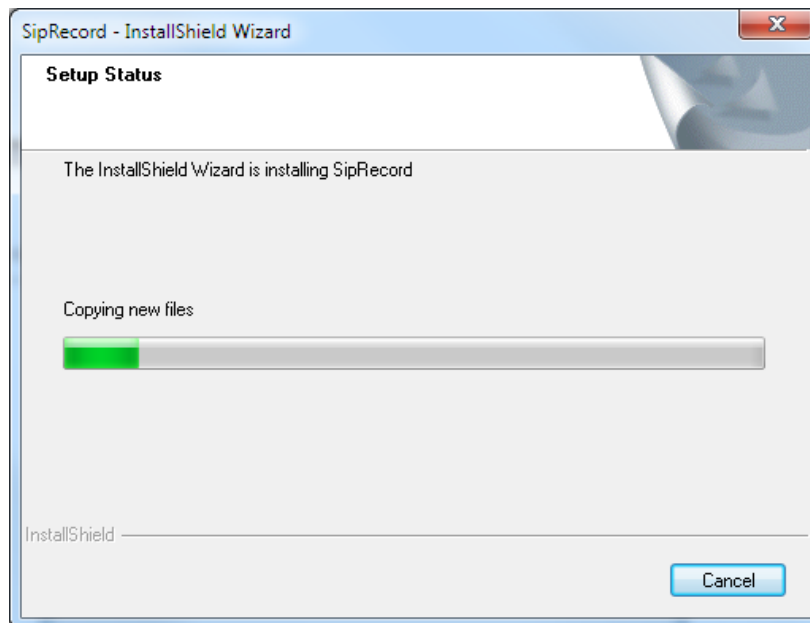
2. Click on **Next >** button. Choose the destination location.



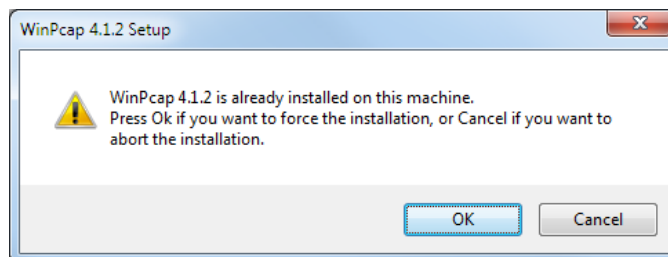
3. Click on **Next >** button. The installer is ready.



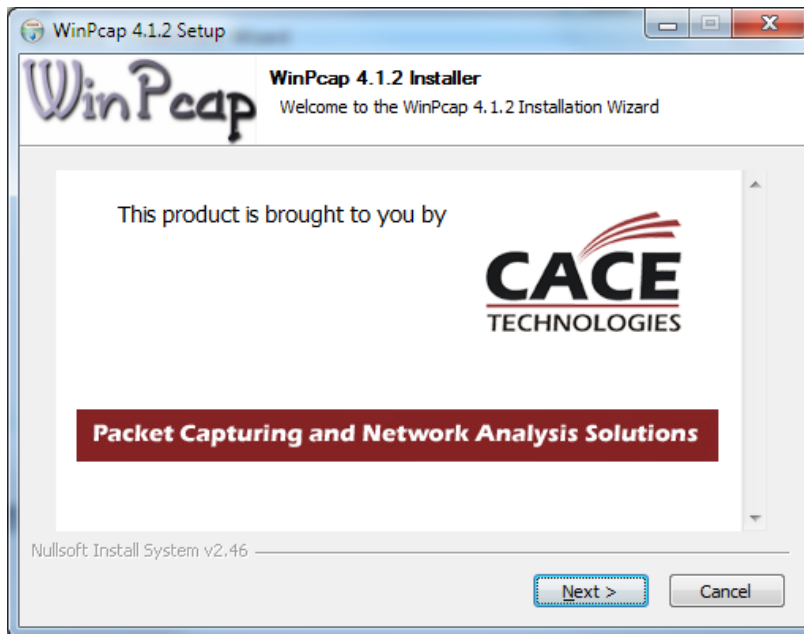
4. Click on **Install** button. The installation begins.



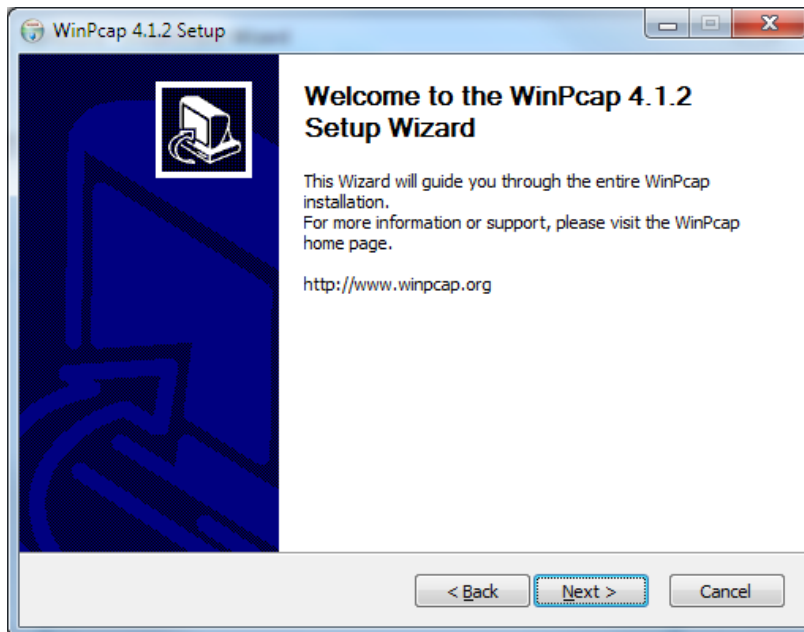
5. The wizard installs WinPCap tool.



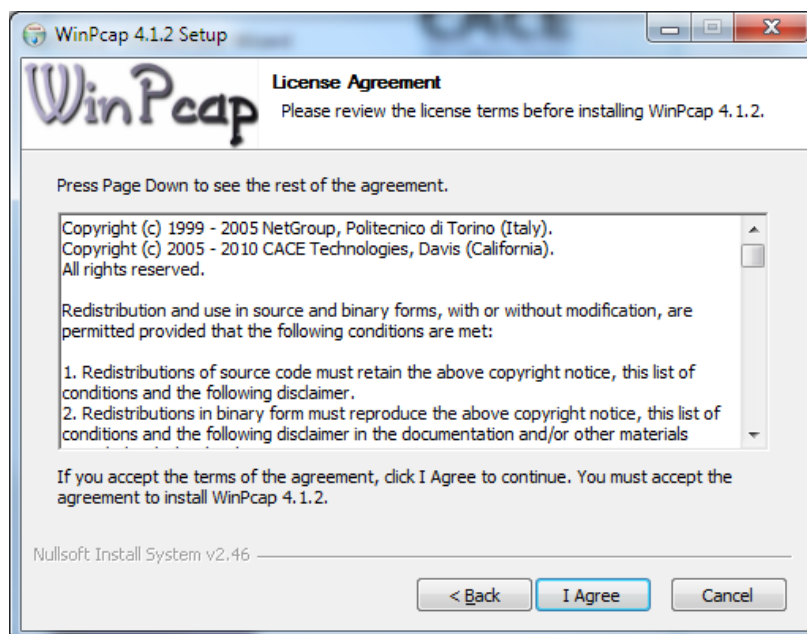
6. Click on **OK** button. The WinPcap installer starts.



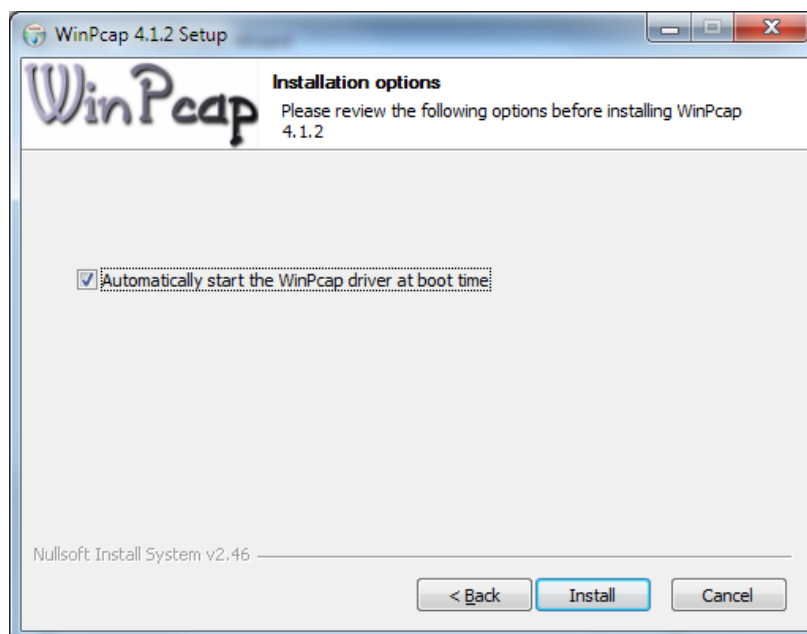
7. Click on **Next >** button. The welcome window displays.



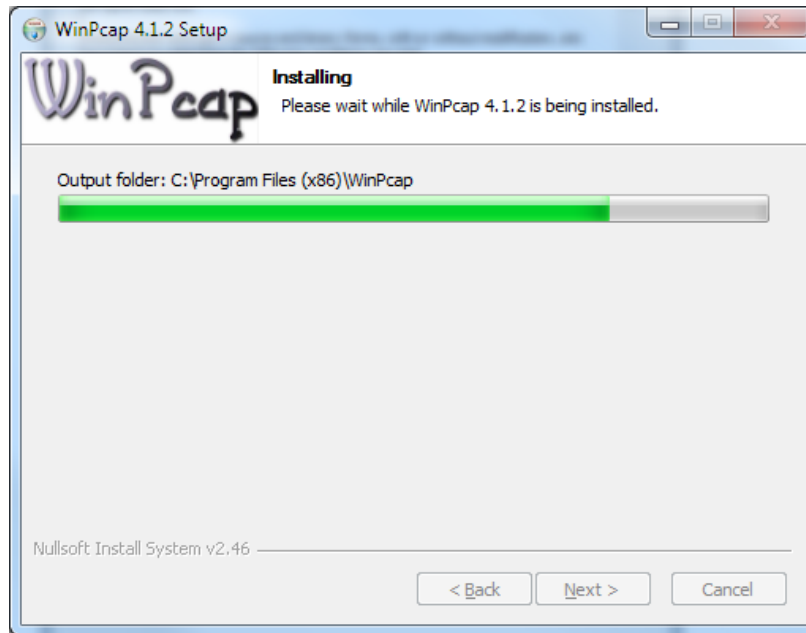
8. Click on **Next >** button. The License Agreement window displays.



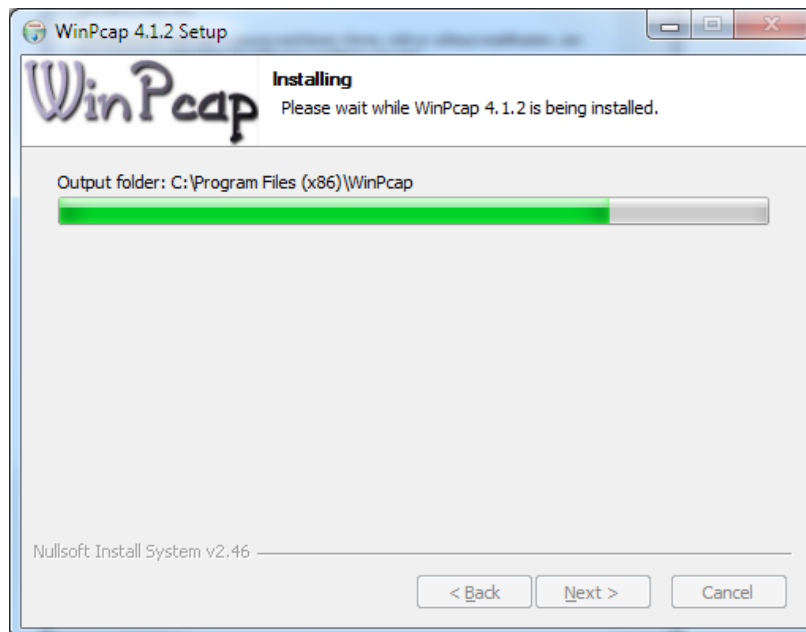
9. Click on **I Agree** button. The Installation Options window displays.



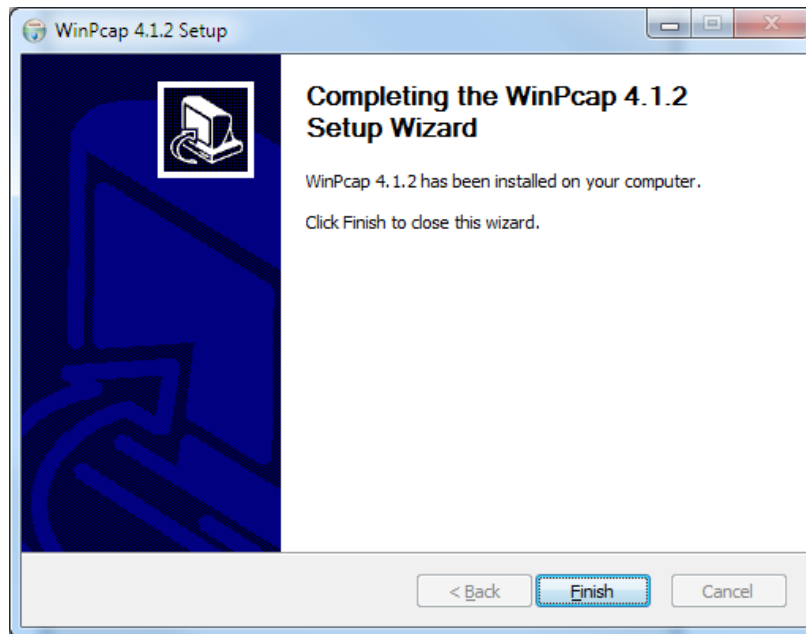
10. Make sure that *Automatically start WinPcap driver at boot time* option is selected. Click on *Install* button.



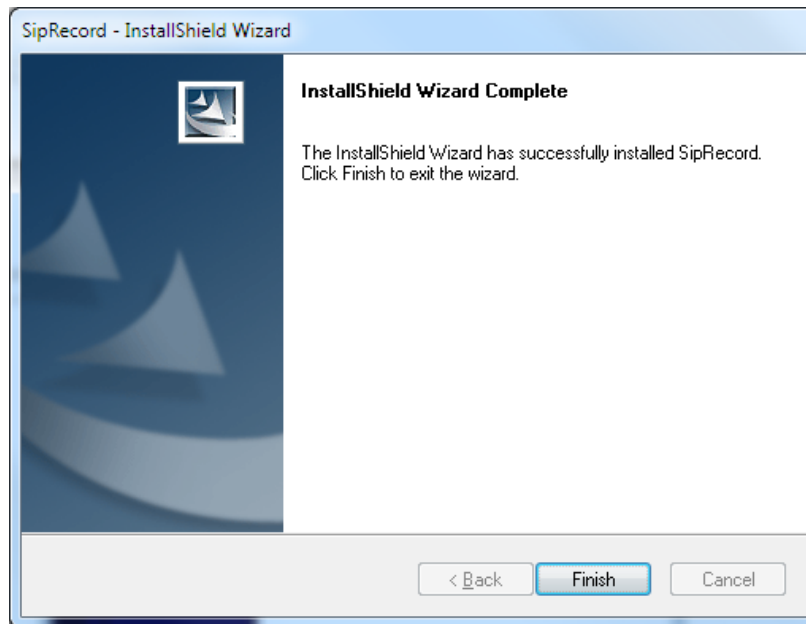
11. Wait for installation process to complete.



12. The WinPcap tool installation is completed.



13. Click on **Finish** button. The SIP Record installation is completed.



14. Click on **Finish** button.

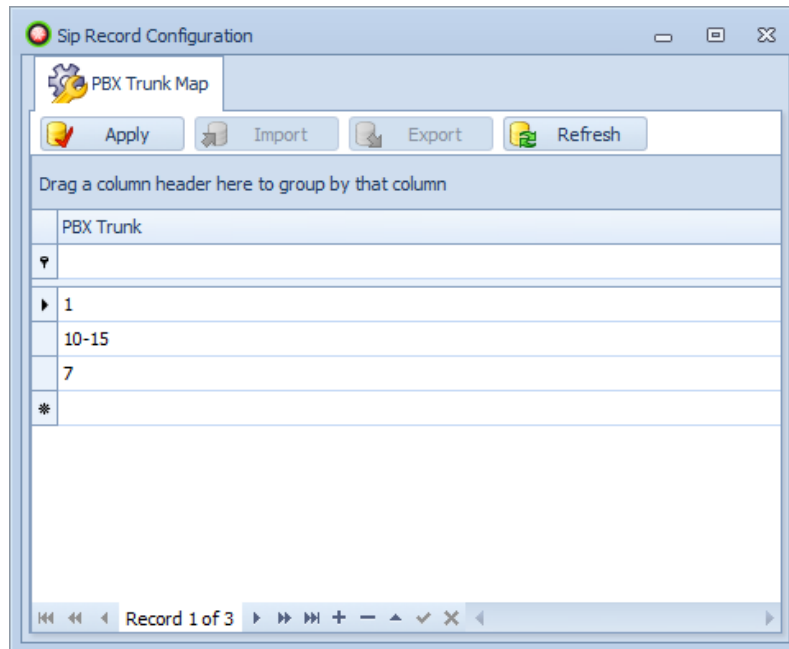
Configuring the Trunks to be Recorded

This sections presents the following procedures:

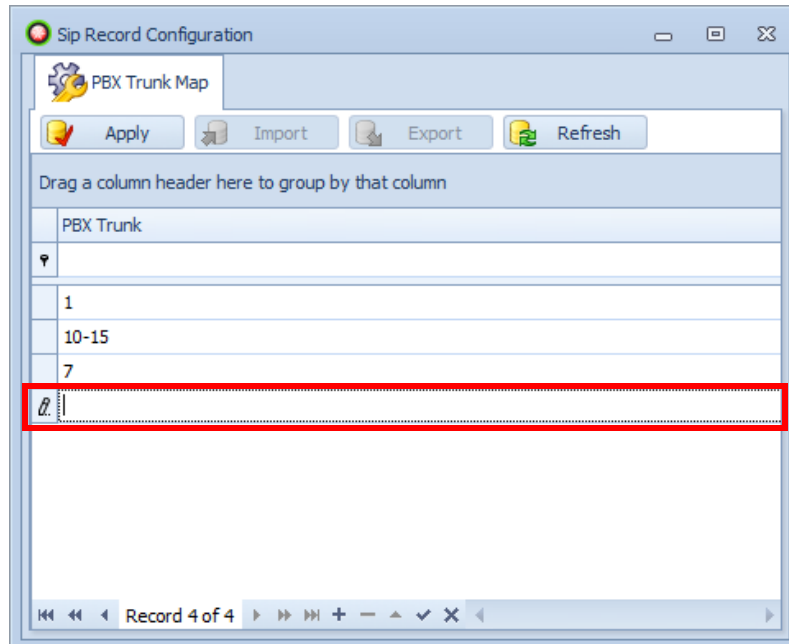
- [Adding Trunks](#)
- [Modifying Trunks](#)
- [Removing Trunks](#)

To add trunks

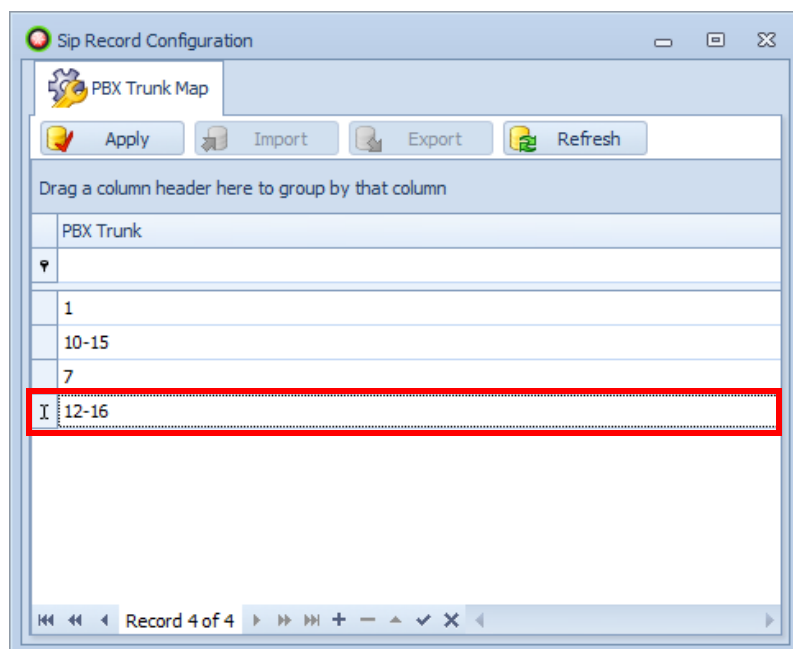
1. Click on *Start | All Programs | Poltys | Sip Record | Sip Config*. The *SIP Record Configuration* main window displays.



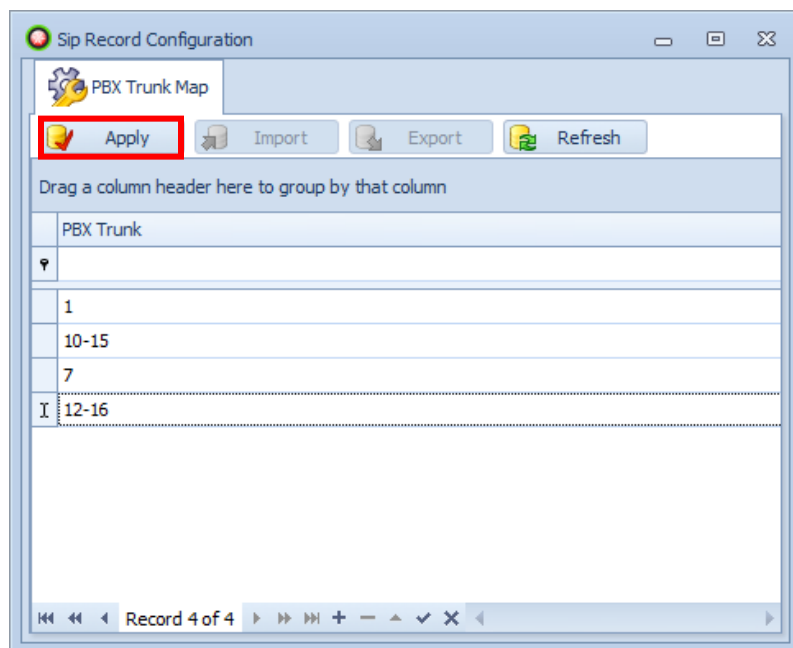
2. You can add one trunk or trunk range per row. To add a new item to the list, click on the empty bottom row.



3. Enter the trunk number or trunk range.

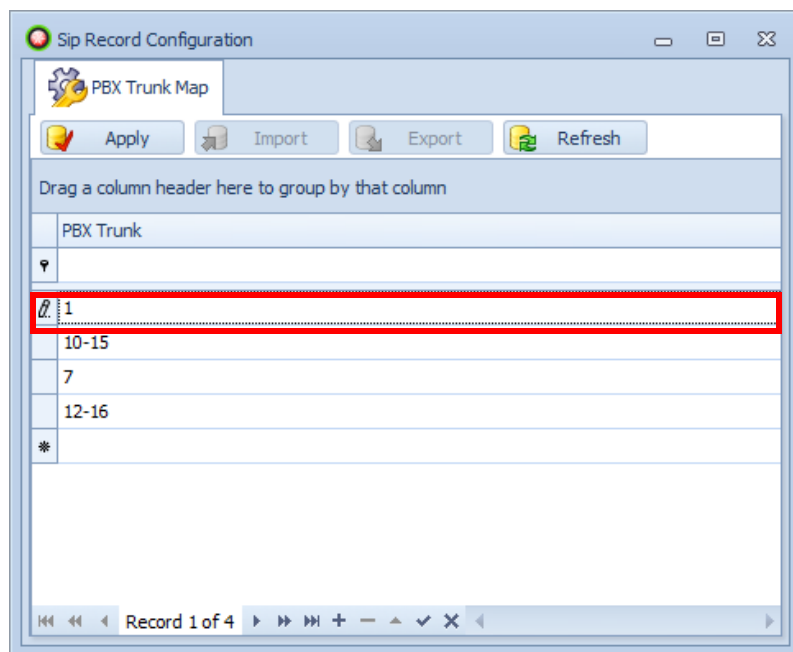


4. Click on **Apply** button for changes to take effect.

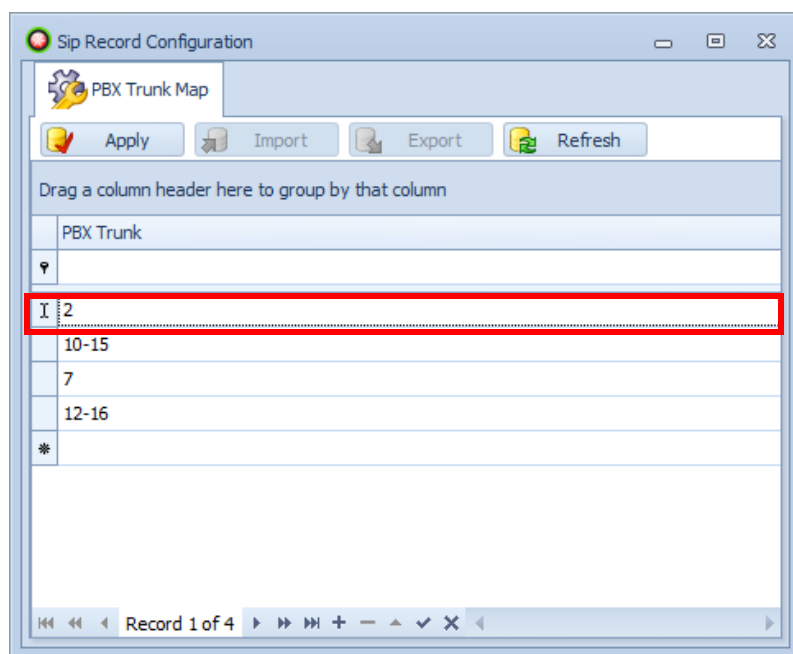


To modify trunks

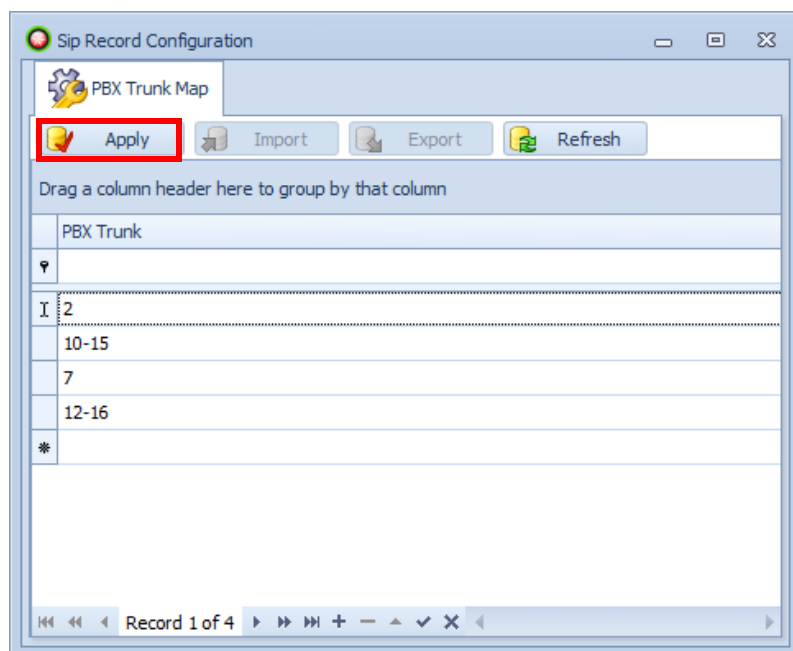
1. Click on the row you want to modify.



2. Change the information.

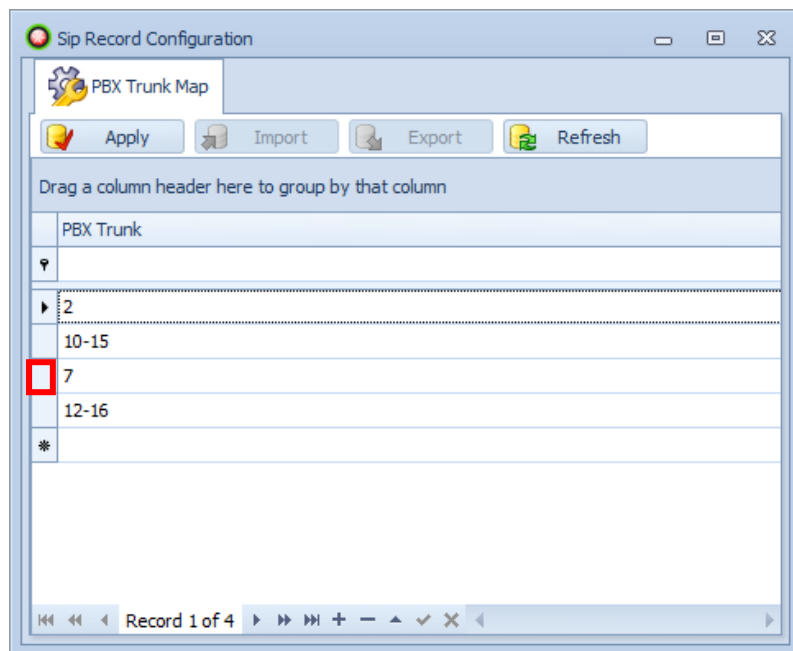


3. Click on **Apply** button for changes to take effect.

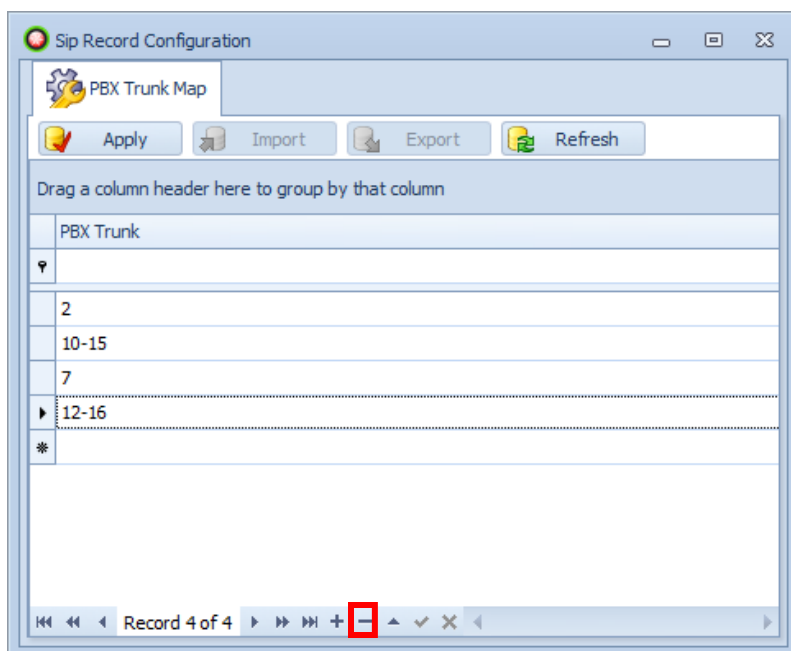


To remove trunks

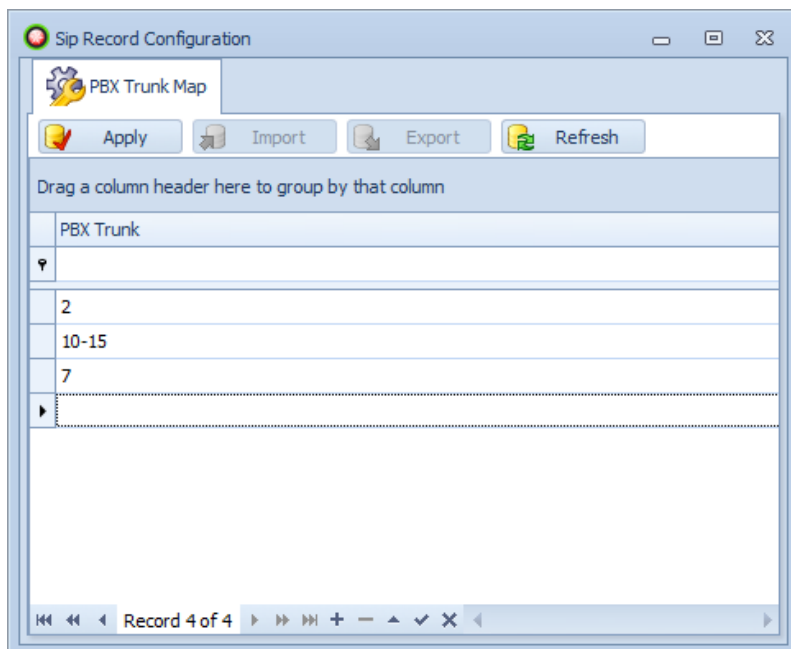
1. Click on the left side of the row which you want to remove.



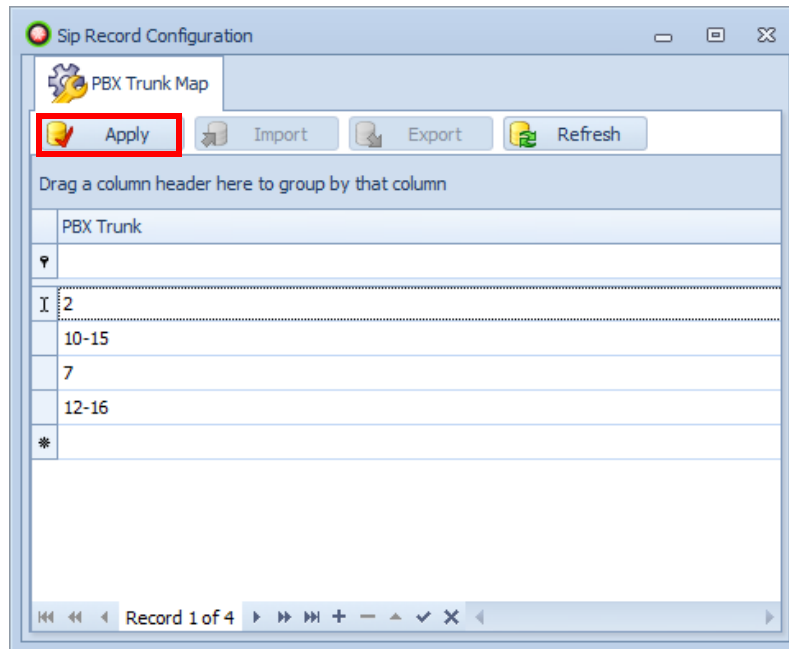
2. Click on **Delete** button.



3. The item was removed from the trunk list.



- Click on **Apply** button for changes to take effect.



Configuring Port Mirroring

You need a supplementary managed switch that can do **port mirroring** in order to set up the recording configuration.

There are two types of managed switches depending on how the mirroring destination port works:

- **CASE A** - Destination Port **works normally** plus **receives the mirrored traffic**, for example *Dualcomm DCSW-105PT/DCSW-1005* (http://www.dual-comm.com/port-mirroring-LAN_switch.htm).
- **CASE B** - Destination Port receives the **mirrored traffic only**, for example *Cisco Catalyst 2960* (<http://www.cisco.com/en/US/products/ps6406/index.html>)

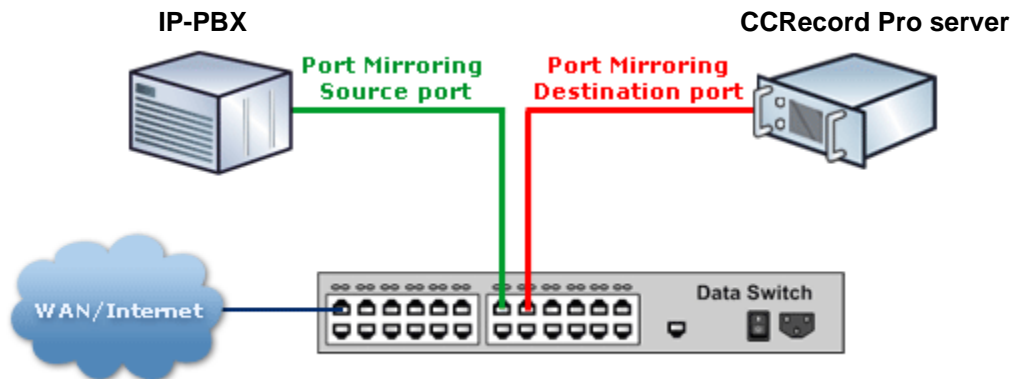
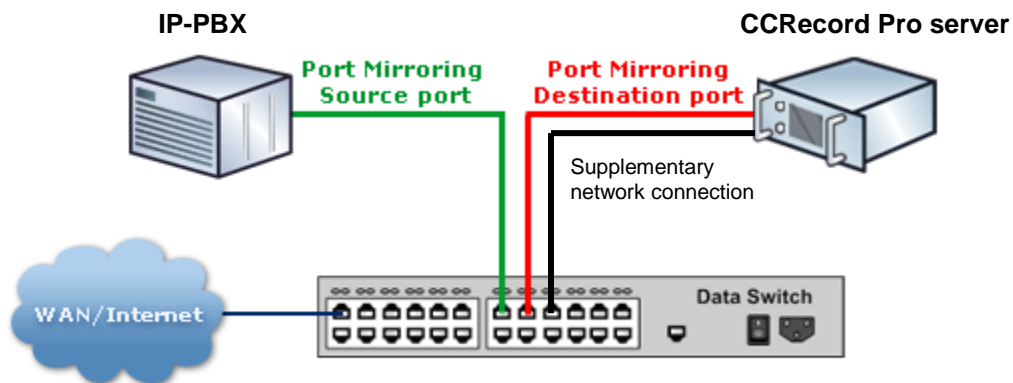
NOTE: For the later case, you need to install the second NIC in the CCRRecord server for normal connectivity with the IP-PBX and the rest of the network.

This section presents the following topics:

- [Network Diagram](#)
- [Configuring port mirroring function on the switch](#)

Network Diagram

Connect both the IP-PBX and the CCRRecord Pro server to the managed switch that can do port mirroring, like in the diagrams below.

CASE A - Destination Port works normally plus receives the mirrored traffic**CASE B - Destination Port receives the mirrored traffic only****Configure port mirroring function on the switch**

Let's assume that the managed switch is Cisco Catalyst 2960.

Also, CCRRecord Pro server is connected to **port 3**. On the network diagram it is shown in a red color (Destination port).

Also, **port 5** is used for connecting to IP-PBX. On the network diagram it is shown in green color (Source port).

In this case you need to execute following commands on the switch:

1. Enter configuration mode:

```
C2960# configure terminal
```

2. Create monitoring session and configure interface Fast Ethernet 0/5 as source port for that session:

```
C2960(config)# monitor session 1 source interface fastethernet 0/5
```

3. Configure interface Fast Ethernet 0/3 as destination port for session 1:

```
C2960(config)# monitor session 1 destination interface fastethernet 0/3
```

4. Check if everything is configured correctly:

```
C2960# show monitor session 1
```

```
Session 1
```

```
-----
```

```
Source Ports:
```

```
  RX Only:      None
```

```
  TX Only:      None
```

```
  Both:         Fa0/5
```

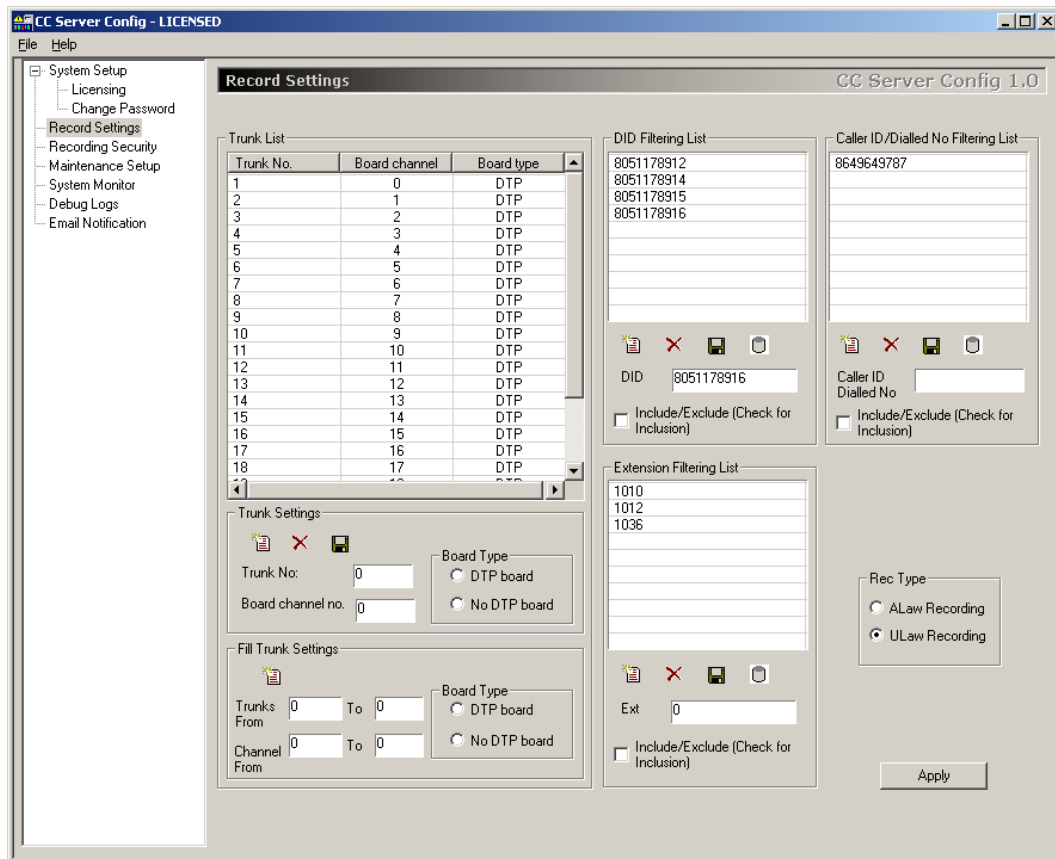
```
Destination Ports: Fa0/3
```

Now the configuration is completed and you should be able to record SIP calls on the IP-PBX trunks using CCRRecord Pro.

Trunk Recording Settings

Record Settings

Inside the *CCServer* application, find the *Record Settings* section that contains relevant data regarding the trunk-board channel recording mapping, the DIDs and the extensions not to be recorded, and also the recording type to be used.



This section presents the following topics:

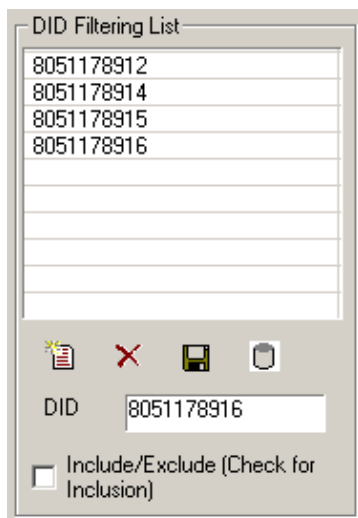
- [Filtering Rules for Recording Operation](#)
- [Recording Type](#)
- [Saving Changes on Server](#)

Filtering Rules for Recording Operation

NOTE: When all settings are performed inside the *Record Settings* window, please remember to save the changes on server. Find more information inside the [Saving Changes on Server](#) section.

A **DID** (Direct Inward Dialing) represents a service of a local phone company that provides a block of phone numbers for calling into your company's PBX. Using DID, your company offer your customers individual phone numbers for each person or workstation within the company without requiring a physical line into the PBX for each possible connection.

You can define filtering rules to either include or exclude a set of predefined DIDs for the recording operation.

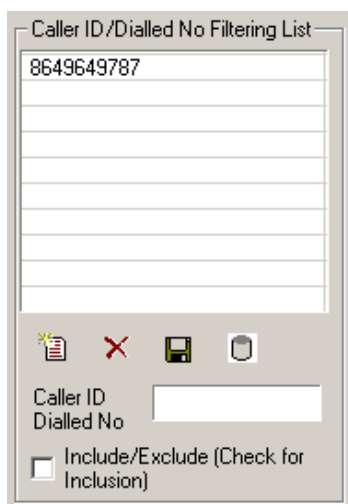


The screenshot shows a dialog box titled "DID Filtering List". It contains a list box with the following entries: 8051178912, 8051178914, 8051178915, and 8051178916. Below the list box are four icons: a document with a star, a red X, a floppy disk, and a trash can. Below the icons is a text field labeled "DID" containing the value "8051178916". At the bottom is a checkbox labeled "Include/Exclude (Check for Inclusion)".

NOTE:

Remember that DID values may be changed during TDA Processing of the incoming calls, depending on the settings in the numbering plan, Remove Digit, Additional Dial and others.

You can also define filtering rules for the incoming/ outgoing calls based on either **Caller IDs** or **Dialed phone numbers** for the recording operation.







The screenshot shows a dialog box titled "Caller ID/Dialed No Filtering List". It contains a list box with the following entry: 8649649787. Below the list box are four icons: a document with a star, a red X, a floppy disk, and a trash can. Below the icons are two text fields: "Caller ID" and "Dialed No". At the bottom is a checkbox labeled "Include/Exclude (Check for Inclusion)".

Each Agent from your Call Center uses a PBX **extension** and a telephone set. You can define filtering rules to either include or exclude a set of predefined extensions for the recording operation.


You can toggle anytime any of the **Include/Exclude** options for the lists above in order to customize the recording rules according to your needs, as follows:

- **Include/Exclude** option is selected – None of the DID/ Caller ID or Dialed No/ Extension are recorded except of the items in the corresponding list
- **Include/Exclude** option is not selected – All of the DID/ Caller ID or Dialed No/ Extension are recorded except of the items in the corresponding list


In the table below, you can see the main operations you can perform on DID/Caller ID or Dialed extension restriction information:

Item	Description
The  Add DID/Caller ID or Dialed No/ Extension button	Add a new filtering rule in the corresponding list based on DID/Caller ID or Dialed No/Extension.
The  Delete DID/Caller ID or Dialed No/ Extension button	Delete the selected rule from the corresponding list.
The  Update DID/Caller ID or Dialed No/ Extension button	Update the rule in the corresponding list.
The  Import DID/Caller ID or Dialed No/ Extension button	Import a set of predefined items provided in a text file. The items imported are appended to the existing list.


To add a new filtering rule:

1. Type the DID/Caller ID or Dialed No/ Extension to be added in the corresponding list
2. Click  **Add** button to add the new item


To delete a filtering rule:

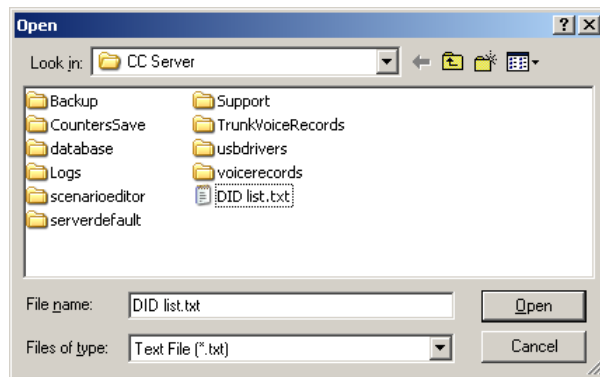
1. Select the DID/Caller ID or Dialed No/ Extension to be removed from the corresponding list
2. Click  **Delete** button to remove the selected item

To update an existing filtering rule:

1. Select the DID/Caller ID or Dialed No/ Extension to be updated in the corresponding list
2. Modify the number from the corresponding field
3. Click the  **Update** button to update the number in the corresponding list.

To import items from predefined text files:

1. Click  **Import** button to add new items from text files
2. Browse for the text file and click on **Open** button

**Recording Type**

NOTE: When all settings are performed inside the *Record Settings* window, please remember to save the changes on server. Find more information inside the [Saving Changes on Server](#) section.

Inside the *Recording Type* section, choose the type of PRI23 recording you prefer:



- **ALaw Recording** – Europe CODEC format
- **ULaw Recording** – US CODEC format

To set a recording type, choose the *Rec Type* between *ALaw Recording* and *ULaw Recording* options.


Saving Changes on Server

To save changes on server when all settings are performed inside the *Record Settings* window:

1. Click the  **Apply** button to save the changes on the server

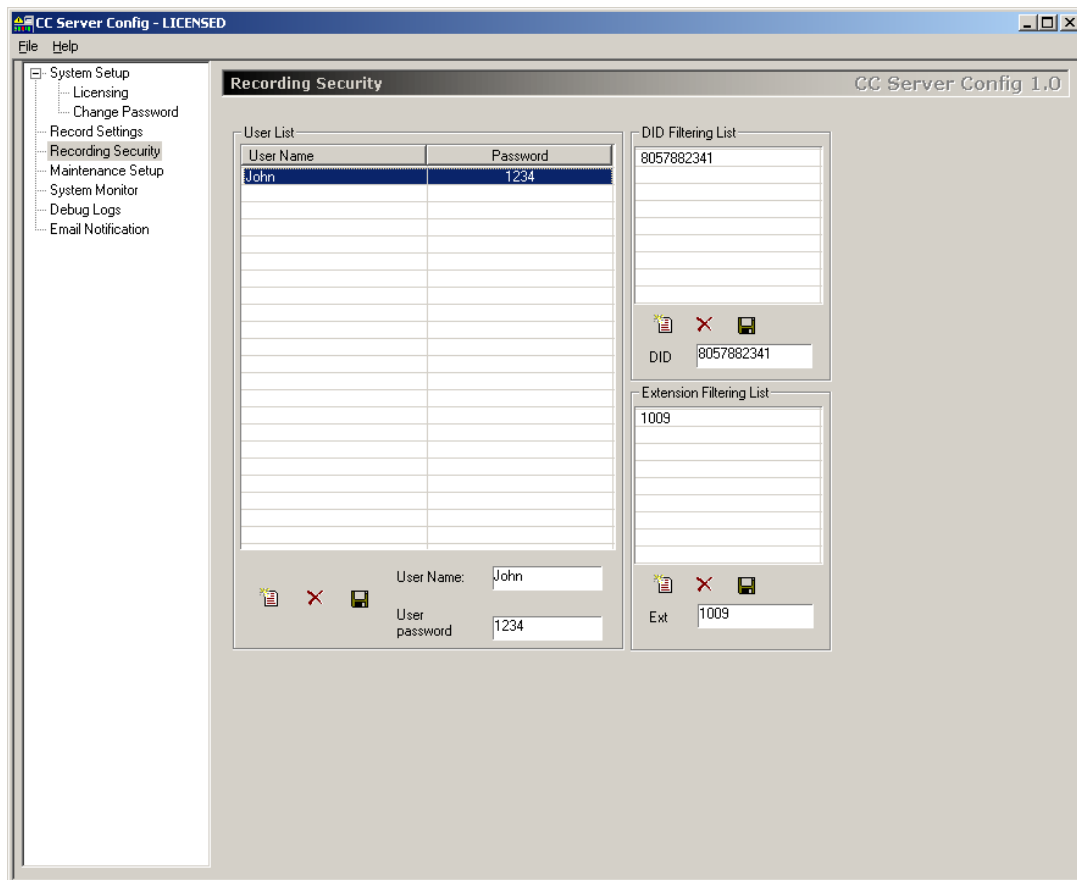
2. A warning message is displayed informing you to restart the CCServer in order for the modifications to be saved:



3. Click the **OK** button to accept the warning message
4. After all modifications are performed, restart the CCServer application by going to the *System Setup* pane and clicking the  **Restart** button.
5. The CCServer is reconnected within a few moments.

Recording User Restrictions

Inside the CCServer application, find the *Recording Security* section that allows you to add, delete and/or update the users' rights to access the recorded conversations from the *CCSupervisor>CO Call Log* and *Intercom Call Log* sections.



A **user**, referred within this section as *User*, represents a CCSupervisor user. The **user access rights** refer to listening and exporting actions. For example, with the appropriated user rights, you can listen to a recorded call by *trunk* – the entire recorded call – and by *extension* – the segment of the recorded call handled by a specific extension.

Each Agent from your Call Center uses a PBX **extension** and a telephone set. An **extension restriction**, referred within this section as *Extension*, represents an extension that is not recorded.

NOTE: If no user is defined inside the *Recording Security* section, no recorded calls can be accessed by the CCSupervisor under the *CCSupervisor>CO Call Log* and the *Intercom Call Log* sections.


- Users List
- User Restrictions

The *User List* table contains user related information such as name and password.

In the table below, you can see the main operations you can perform on the User information:

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Item	Description
The  Update User button	Update the selected user information by modifying the name and/or password


To add new user:

1. Inside the *User* section, edit the following fields:
 - **User Name** – enter a name for the new user
 - **User password** – enter a password for the user


NOTE: Please take in consideration that the username and password strings are case sensitive.

2. Click the  **Add User** button to add the new created user in the *User List* table

To delete an existing user:

1. Inside the *User List* table, select the user you want to delete
2. Click the  **Delete User** button and the selected user is deleted.

To update the information for an existing user:

1. Select the user from the *User List* table
2. Modify the user's name and/or password
3. Click the  **Update User** button to modify the user information.







User Restrictions

A **user restriction**, referred within this section as *User Settings*, represents the DID and extension restrictions assigned to the selected user. For example: with a DID restriction defined, a user cannot access the recording corresponding to that DID. For more information on DID and extension restrictions, please return to the beginning of the [Recording Security](#) section.

For each user, you can add, delete and/or update the DID/Extension restrictions, like presented in the figure below:


NOTE: Please note that DID value may be changed during TDA Processing of the incoming calls, depending on the settings in the numbering plan, Remove Digit, Additional Dial and others.

In the table below, you can see the main operations you can perform on user DID/extension restriction information:


Item	Description
The  Add DID button	Add a new user DID restriction in the <i>DID</i> table
The  Delete DID button	Delete the selected user DID restriction from the <i>DID</i> table
The  Update DID button	Update the DID number for the selected user DID restriction from the <i>DID</i> table
The  Add Ext button	Add a new user extension restriction inside the <i>Extension</i> table
The  Delete Ext button	Delete the selected user extension restriction from the <i>Extension</i> table
The  Update Ext button	Update the extension number for the selected user extension restriction inside the <i>Extension</i> table

To create a new user DID/Extension restriction for a user:


1. Inside the *User List* table, select the user you want to create a restriction for
2. Type the DID/extension not to be accessed by the selected user inside the *DID/Ext* field

3. Click the  **Add DID / Extension** button to add the user DID/extension restriction in the *DID/Extension* list.

To delete an existing DID/Extension restriction for a user:

1. Inside the *User List* table, select the user you want to delete a restriction from
2. Select the DID/extension restriction to be deleted
3. Click the  **Delete DID / Extension** button to delete the user DID/extension restriction inside the *DID/Extension* list.

To update an existing DID/Extension restriction for a user:

1. Inside the *User List* table, select the user you want to update the restriction for
2. Select the DID/extension restriction to be modified
3. Change the number for the DID/extension inside the *DID/Ext* field
4. Click the  **Update DID / Extension** button to update the user DID/extension restriction inside the *DID/Extension* list.

Recorded Conversations Playback

This section presents the following topics:

- [CCView and CCPro](#)
- [CCView 2012](#)

CCView and CCPro





Using the **CCSupervisor** application, you can listen to all recorded calls, including the internal calls, and also export the records to your chosen location.

To listen to the recorded conversations, Winamp or Windows Media Player 9 (or higher) must be installed in the host computer.

To listen to all recorded calls except the internal ones, please follow the procedure:

1. Go to the *CO Call Log* section under the *Monitor* pane

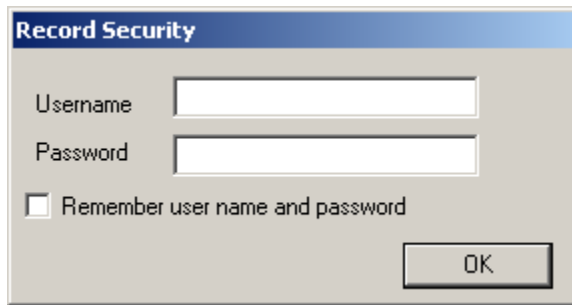
The screenshot displays the 'CO Call Log - CO Based' window. At the top, there is a navigation bar with buttons: Filter, Field Chooser, Print, Clear, Export, Schedule Export, Play Voice Record, and Export Voice Records. Below this, a table lists call records. The table has columns: Call Log ID, Date/Time, Completion Time, Caller ID, Caller Name, Incoming/Outgoing, Status, Dialed Number, DDI/DID/MSN, Trunk, Talk Time (min), and Wait Time (min). The records are filtered by 'CO Based' and show a list of calls with various statuses like 'Lost A...', 'Non A...', 'Incoming', and 'Outgoing'. Below the main table, there is a summary table with columns: Call Log ID, Date/Time, Completion Time, Agent Name, Extension, Ring Time (min), Talk Time (min), Wait Time (min), Hold Time (min), Queue Time (min), and Transferred.

2. The window is composed of two subsections:
 - *CO Based* – contains the call information from the CO perspective. Using this subsection, you can listen to the entire recorded call from the moment it was first answered until it was at last ended – *by trunk*.
 - *Agent Based* – contains the call information from the Agent perspective. Using this subsection, you can listen to the recorded conversation fragmented according to each Agent that handled the call – *by extension*.
3. Inside the *CO Call Log CO Based*, you can identify the recorded calls by their distinctive icons:
 -  - Recorded call
 -  - Not recorded call
4. Inside the *CO Call Log Agent Based*, both  and  are used for identifying the recorded calls for each extension.

NOTE: The  icon represents a recorded call **ONLY** if the corresponding *CO Based* entry has assigned a recorded call – identified through the  icon.

5. Select a call from the *CO Call Log CO Based* or *Agent Based* and click the **Play Voice Record** button to listen to the recorded conversation.

6. The *Record Security* window is displayed:



The **Record Security** dialog box contains the following elements:

- Username**: A text input field.
- Password**: A text input field.
- ☐ **Remember user name and password**: A checkbox.
- OK**: A button at the bottom right.

7. Enter your user credentials – the username and the password – in the corresponding fields and click the **OK** button.

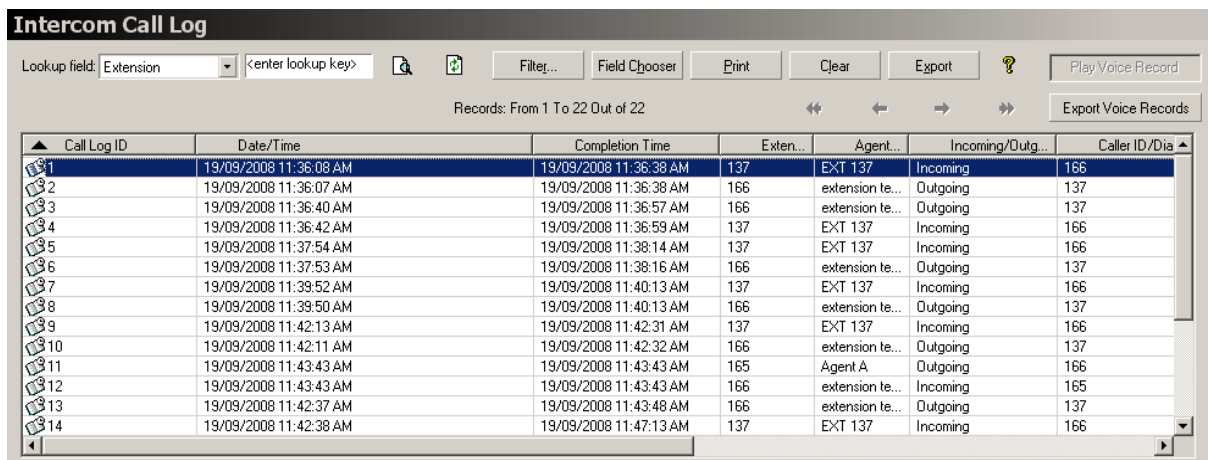
NOTE: For more information on Record Security, please refer to the [Recording User Restrictions](#) section.

8. If needed, check the *Remember user name and password* option to save to credentials for later use.

9. The default media player starts playing the recorded conversation.

To listen to the internal recorded calls, please follow the procedure:



10. Go to the *Intercom Call Log* section under the *Monitor* pane



The **Intercom Call Log** window displays a table of recorded calls. The table has the following columns: Call Log ID, Date/Time, Completion Time, Exten..., Agent..., Incoming/Outg..., and Caller ID/Dia... The table contains 14 rows of data. Above the table, there are controls for filtering and exporting records.

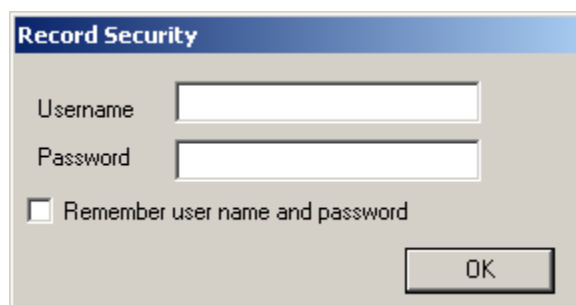
Call Log ID	Date/Time	Completion Time	Exten...	Agent...	Incoming/Outg...	Caller ID/Dia...
1	19/09/2008 11:36:08 AM	19/09/2008 11:36:38 AM	137	EXT 137	Incoming	166
2	19/09/2008 11:36:07 AM	19/09/2008 11:36:38 AM	166	extension te...	Outgoing	137
3	19/09/2008 11:36:40 AM	19/09/2008 11:36:57 AM	166	extension te...	Outgoing	137
4	19/09/2008 11:36:42 AM	19/09/2008 11:36:59 AM	137	EXT 137	Incoming	166
5	19/09/2008 11:37:54 AM	19/09/2008 11:38:14 AM	137	EXT 137	Incoming	166
6	19/09/2008 11:37:53 AM	19/09/2008 11:38:16 AM	166	extension te...	Outgoing	137
7	19/09/2008 11:39:52 AM	19/09/2008 11:40:13 AM	137	EXT 137	Incoming	166
8	19/09/2008 11:39:50 AM	19/09/2008 11:40:13 AM	166	extension te...	Outgoing	137
9	19/09/2008 11:42:13 AM	19/09/2008 11:42:31 AM	137	EXT 137	Incoming	166
10	19/09/2008 11:42:11 AM	19/09/2008 11:42:32 AM	166	extension te...	Outgoing	137
11	19/09/2008 11:43:43 AM	19/09/2008 11:43:43 AM	165	Agent A	Outgoing	166
12	19/09/2008 11:43:43 AM	19/09/2008 11:43:43 AM	166	extension te...	Incoming	165
13	19/09/2008 11:42:37 AM	19/09/2008 11:43:48 AM	166	extension te...	Outgoing	137
14	19/09/2008 11:42:38 AM	19/09/2008 11:47:13 AM	137	EXT 137	Incoming	166

11. You can identify the recorded calls by their distinctive icons:

-  - Recorded call
-  - Not recorded call

12. Select a call from the *Intercom Call Log* and click the **Play Voice Record** button to listen to the recorded conversation.

13. The *Record Security* window is displayed:



The **Record Security** dialog box contains the following fields and controls:

- Username:** A text input field.
- Password:** A text input field.
- Remember user name and password:** An unchecked checkbox.
- OK:** A button at the bottom right.

14. Enter your user credentials – the username and the password – in the corresponding fields and click the **OK** button.

NOTE: For more information on Record Security, please refer to the [Recording User Restrictions](#) section.

15. If needed, check the *Remember user name and password* option to save to credentials for later use.

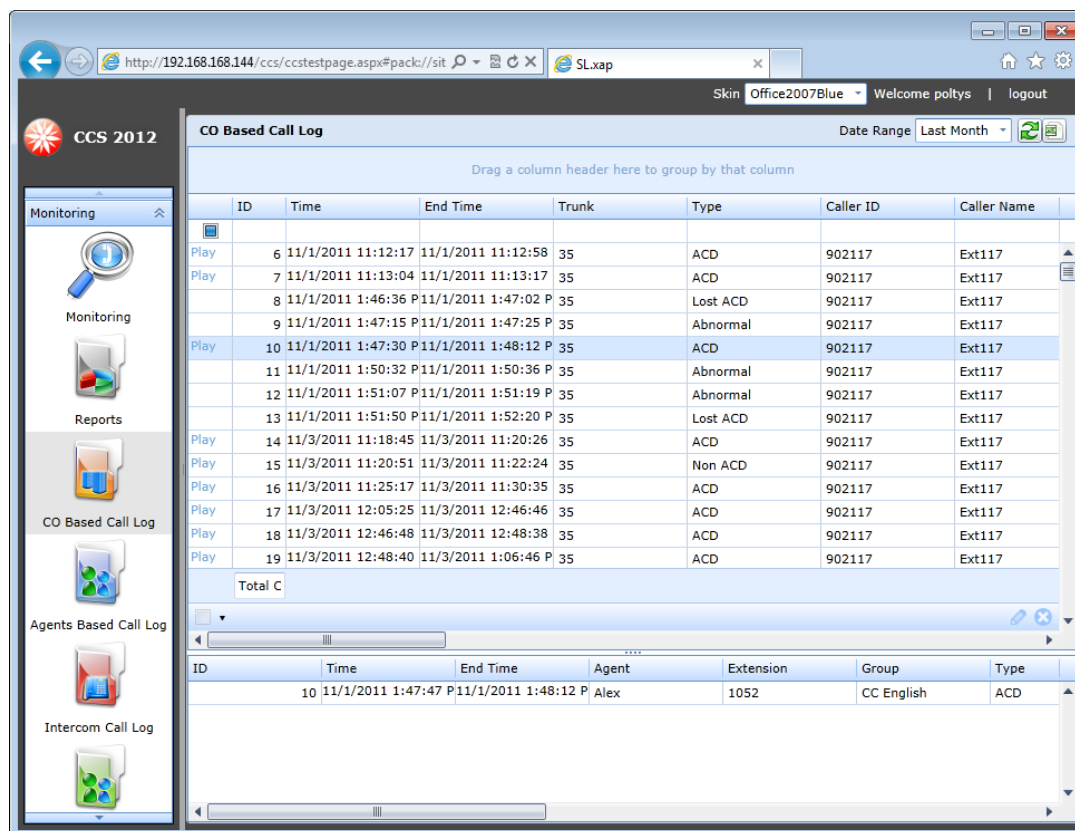
16. The default media player starts playing the recorded conversation.

CCView 2012

Using the **CCSupervisor** web application for CCView 2012, you can listen to any recorded calls.

To listen to recorded calls, please follow the procedure:

1. Go to the *CO Based Call Log* section.



The screenshot shows the CCS 2012 web application interface. The left sidebar contains navigation icons for Monitoring, Reports, CO Based Call Log (selected), Agents Based Call Log, and Intercom Call Log. The main content area displays the **CO Based Call Log** table. The table has columns: ID, Time, End Time, Trunk, Type, Caller ID, and Caller Name. Below the table is a 'Total C' row. At the bottom, there is a detailed view of a specific call record.

ID	Time	End Time	Trunk	Type	Caller ID	Caller Name
6	11/1/2011 11:12:17	11/1/2011 11:12:58	35	ACD	902117	Ext117
7	11/1/2011 11:13:04	11/1/2011 11:13:17	35	ACD	902117	Ext117
8	11/1/2011 1:46:36 P	11/1/2011 1:47:02 P	35	Lost ACD	902117	Ext117
9	11/1/2011 1:47:15 P	11/1/2011 1:47:25 P	35	Abnormal	902117	Ext117
10	11/1/2011 1:47:30 P	11/1/2011 1:48:12 P	35	ACD	902117	Ext117
11	11/1/2011 1:50:32 P	11/1/2011 1:50:36 P	35	Abnormal	902117	Ext117
12	11/1/2011 1:51:07 P	11/1/2011 1:51:19 P	35	Abnormal	902117	Ext117
13	11/1/2011 1:51:50 P	11/1/2011 1:52:20 P	35	Lost ACD	902117	Ext117
14	11/3/2011 11:18:45	11/3/2011 11:20:26	35	ACD	902117	Ext117
15	11/3/2011 11:20:51	11/3/2011 11:22:24	35	Non ACD	902117	Ext117
16	11/3/2011 11:25:17	11/3/2011 11:30:35	35	ACD	902117	Ext117
17	11/3/2011 12:05:25	11/3/2011 12:46:46	35	ACD	902117	Ext117
18	11/3/2011 12:46:48	11/3/2011 12:48:38	35	ACD	902117	Ext117
19	11/3/2011 12:48:40	11/3/2011 1:06:46 P	35	ACD	902117	Ext117
Total C						

ID	Time	End Time	Agent	Extension	Group	Type
10	11/1/2011 1:47:47 P	11/1/2011 1:48:12 P	Alex	1052	CC English	ACD

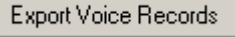
2. Inside the *CO Based Call Log*, you can identify the recorded calls by their distinctive marker *Play* in the related column.
3. For playback the conversation, click on the hyperlink *Play* of the corresponding item in list. A new web page is displayed containing links to the recorded wave files.
4. Click on the wave of your choice. The default media player starts playing the recorded conversation.

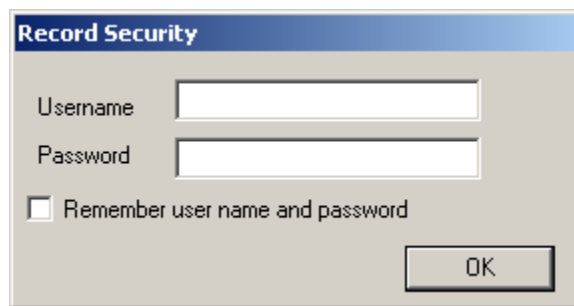
Recorded Conversations Export for CCView

In both CCSupervisor sections, *CO Call Log* and *Intercom Call Log*, you have the option to **Export Voice Records** using the button with the same name:

1. Select one or more recorded calls to be exported.

NOTE: Please remember that multiple records selection is supported only inside the *CO Call Log Agent Based* and *Intercom Call Log* sections.

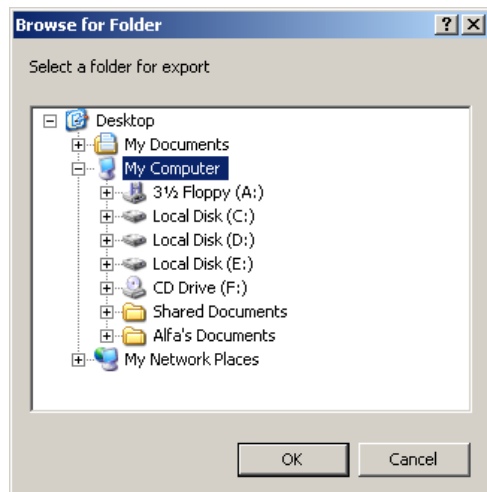
2. Click on the  **Export Voice Records** button.
3. The *Record Security* window is displayed:



4. Enter your user credentials – the username and the password – in the corresponding fields and click the **OK** button.

NOTE: For more information on Record Security, please refer to the [Recording User Restrictions](#) section.

5. If needed, check the *Remember user name and password* option to save credentials for later use.
6. The *Browse for Folder* window is displayed:



7. Choose the location for the selected voice record(s).
8. Click on the **OK** button to finalize the operation.

Product Support

Poltys tech support engineers are always available to answer your questions at:

- US Phone number: +1 864 642 6103
- Email: support@poltys.com