

# 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 CCPro, CCView, and CCView 2012 products.

#### **Target Customers**

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

#### **Benefits**

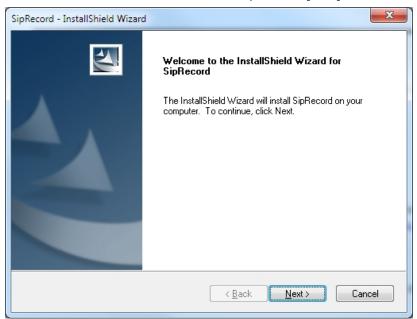
- Increase Customer confidence, maximizing productivity and dramatically improving employee performance
- Improve call quality control through Agent answering time, customer hold time and lost calls number
- Help evaluate and analyze agent-customer interactions
- Accurate record of what was said, by 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**

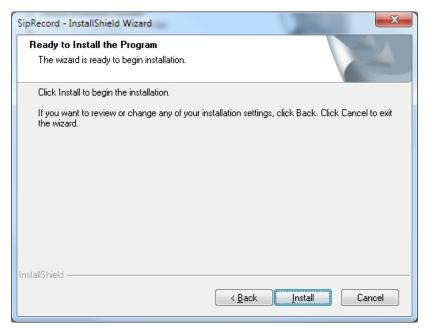
1. Double-click on SIPRecord exe install kit provided by Poltys. The installation wizard starts.



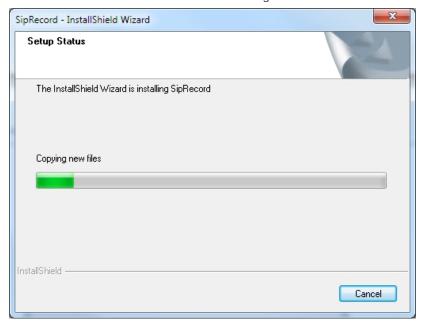
2. Click on Next > button. Choose the destination location.



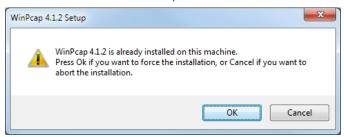
3. Click on Next > button. The installer is ready.



4. Click on Install button. The installation begins.



5. The wizard installs WinPCap tool.



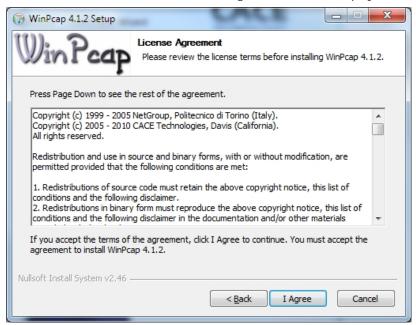
6. Click on OK button. The WinPCap installer starts.



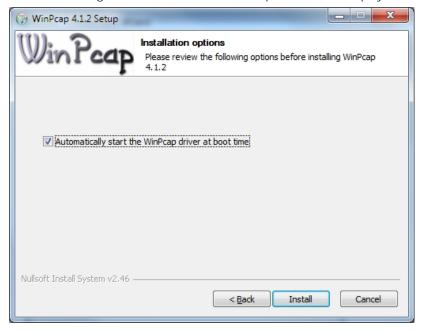
7. Click on Next > button. The welcome window displays.



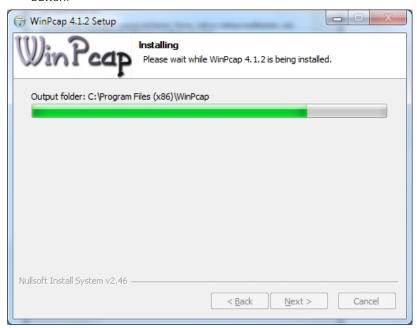
8. Click on Next > button. The License Agreement window displays.



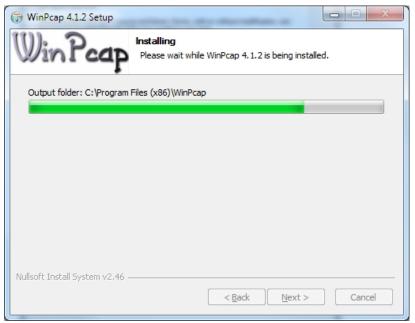
9. Click on I Agree button. The Installation Options window displays.



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



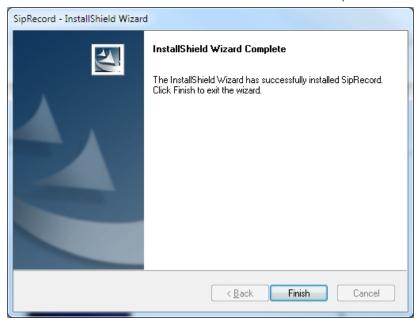
11. Wait for installation process to complete.



12. The WinPCap tool installation is completed.



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



14. Click on Finish button.

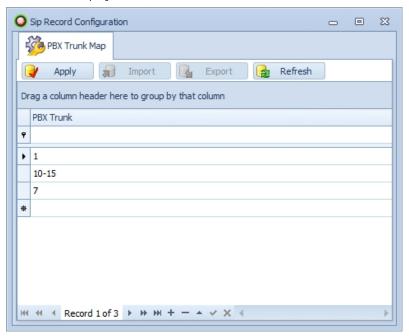
## Configuring the Trunks to be Recorded

This sections presents the following procedures:

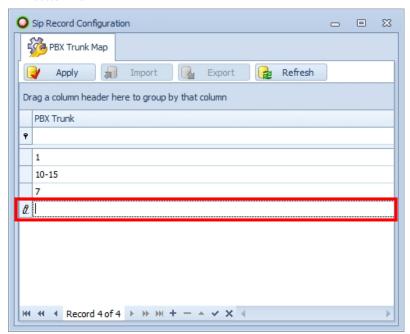
- Adding Trunks
- <u>Modifying Trunks</u>
- Removing Trunks

#### To add trunks

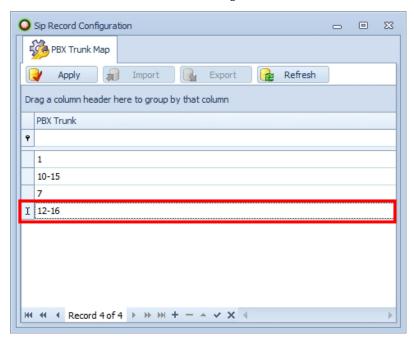
1. Click on Start | All Programs | Poltys | Sip Record | Sip Config. The SIP Record Configuration main window displays.



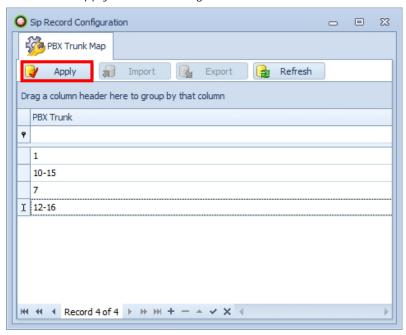
2. You can add one trunk or trunk range per row. To add a new item to the list, click on the empty bottom row.



3. Enter the trunk number or trunk range.

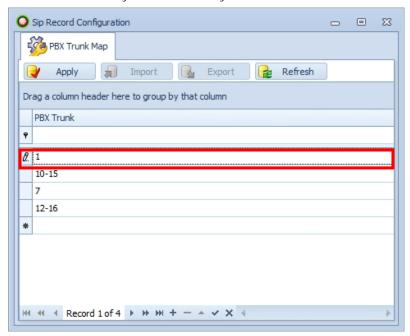


4. Click on Apply button for changes to take effect.

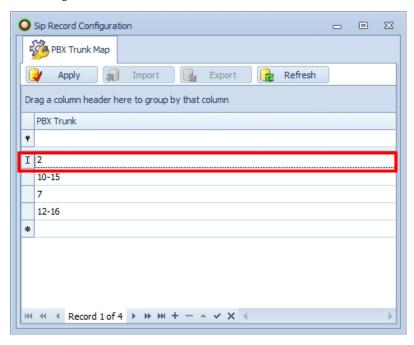


#### To modify trunks

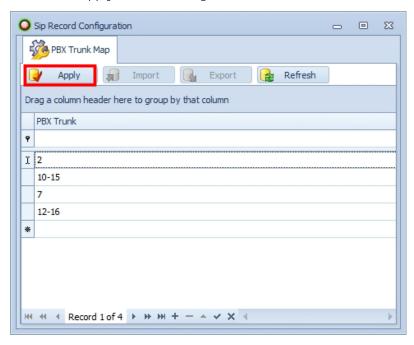
1. Click on the row you want to modify.



2. Change the information.

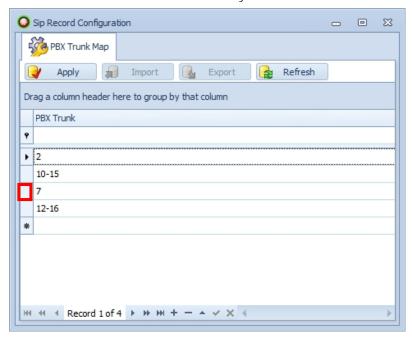


3. Click on Apply button for changes to take effect.

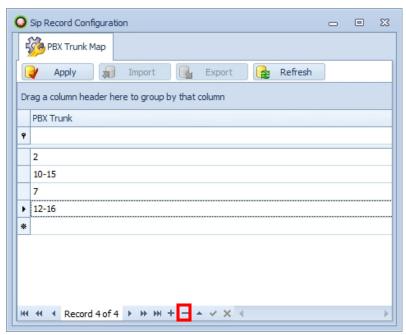


#### To remove trunks

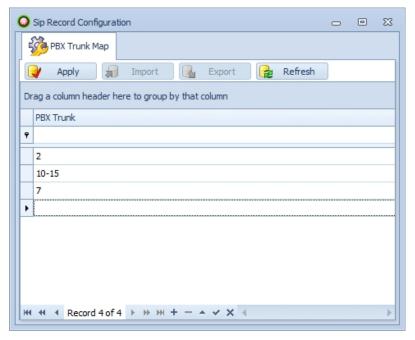
1. Click on the left side of the row which you want to remove.



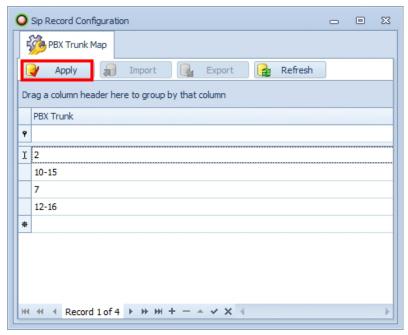
2. Click on Delete button.



3. The item was removed from the trunk list.



4. 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 (<a href="http://www.dual-comm.com/port-mirroring-LAN\_switch.htm">http://www.dual-comm.com/port-mirroring-LAN\_switch.htm</a>).
- CASE B Destination Port receives the mirrored traffic only, for example Cisco Catalyst 2960 (<a href="http://www.cisco.com/en/US/products/ps6406/index.html">http://www.cisco.com/en/US/products/ps6406/index.html</a>)

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

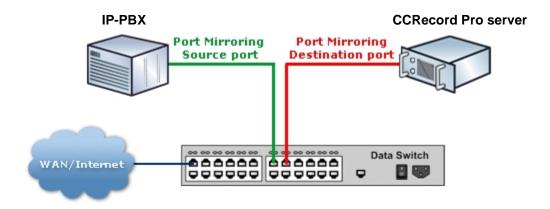
This section presents the following topics:

- Network Diagram
- Configuring port mirroring function on the switch

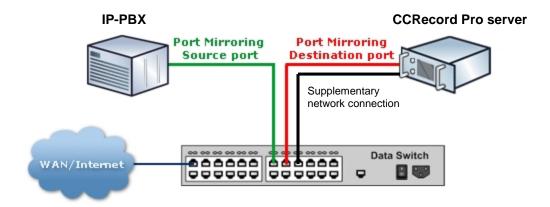
#### Network Diagram

Connect both the IP-PBX and the CCRecord 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, CCRecord 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

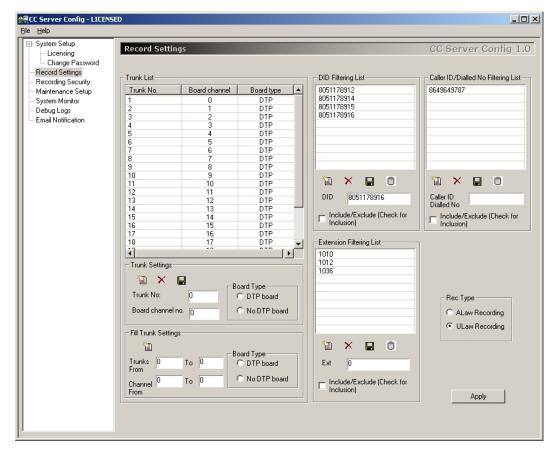
Session 1
-----Source Ports:
RX Only: None
TX Only: None
Both: Fa0/5
Destination Ports: Fa0/3

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

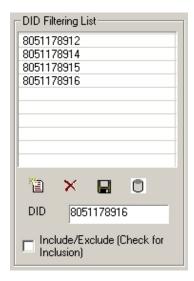
- Filtering Rules for Recording Operation
- Recording Type
- Saving Changes on Server

#### 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 <u>Saving</u> 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.



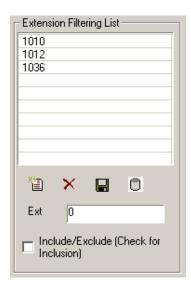
#### NOTE:

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.



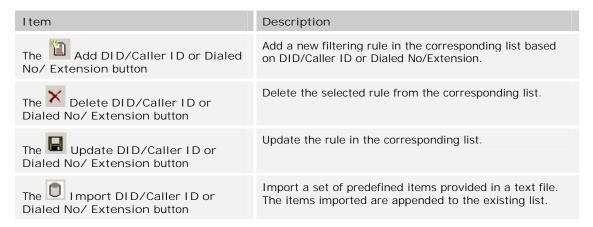
Each Agent from your Call Center uses a PBX extension and a telephone set. You can define filtering rules to either include or exclude a set of predefined extensions for the recording operation.



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:



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:

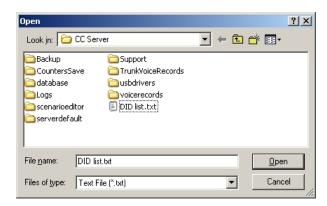
- 1. Select the DID/Caller ID or Dialed No/ Extension to be removed from the corresponding list
- 2. Click Delete button to remove the selected item

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 <u>Saving</u> 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

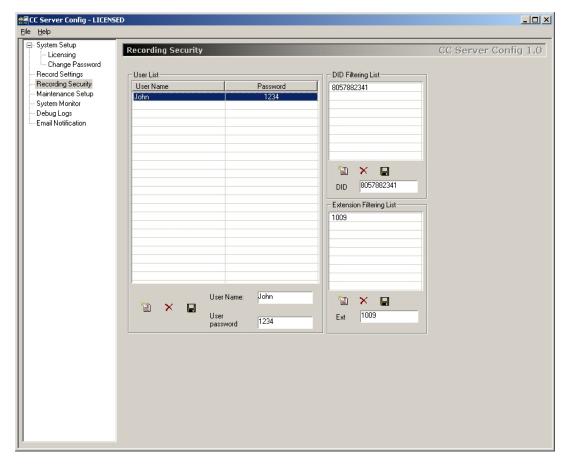
2. A warning message is displayed informing you to restart the CCServer in order for the modifications to be saved:



- 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.

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. A DID restriction, referred within this section as DID, represents a DID that is not recorded.

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.

For each user, you can assign a password, and various DID and Extension restrictions. Multiple users can be defined, as needed.

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.

This section presents the following topics:

- Users List
- <u>User Restrictions</u>

#### **Users List**

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:

Item	Description
The Add User button	Add a new user in the User List table
The X Delete User button	Delete the selected user from the User List table

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**

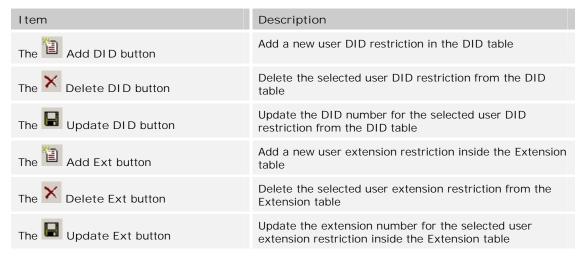
A user restriction, referred within this section as User Settings, represents the DID and extension restrictions assigned to the selected user. For example: with a DID restriction defined, a user cannot access the recording corresponding to that DID. For more information on DID and extension restrictions,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



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 DI D/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:

- <u>CCView and CCPro</u>
- CCView 2012

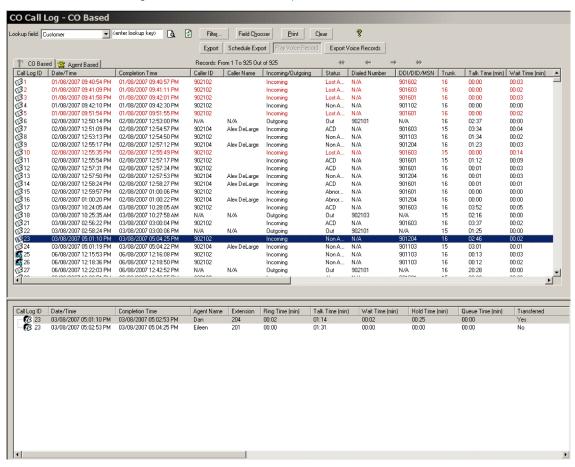
#### **CCView and CCPro**

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



- 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
  - Ø 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 <sup>©</sup> icon represents a recorded call ONLY if the corresponding CO Based entry has assigned a recorded call – identified through the <sup>©</sup> 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:



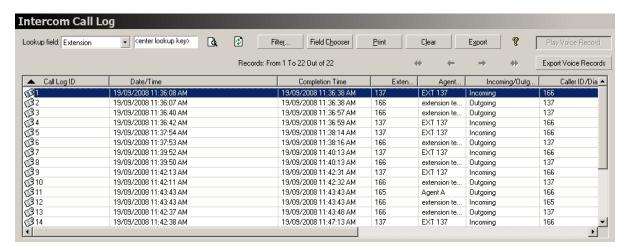
7. Enter your user credentials – the username and the password – in the corresponding fields and click the OK button

# NOTE: For more information on Record Security, please refer to the <u>Recording User Restrictions</u> section.

- 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



- 11. You can identify the recorded calls by their distinctive icons:
  - Recorded call
  - Ø 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:



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 <u>Recording User</u> <u>Restrictions</u> section.

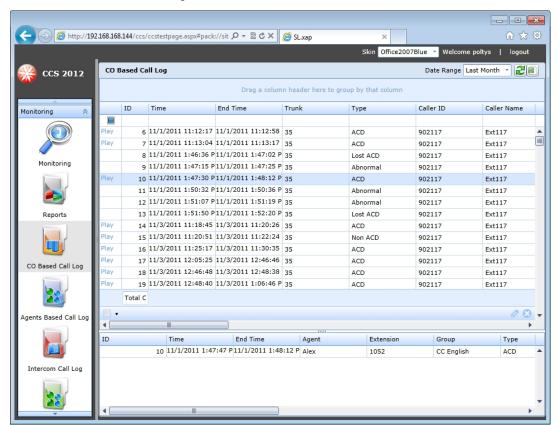
- 15. If needed, check the Remember user name and password option to save to credentials for later use.
- 16. The default media player starts playing the recorded conversation.

#### 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.



- 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 and CCPro

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 Export Voice Records button.
- 3. The Record Security window is displayed:



4. Enter you 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 <u>Recording User</u> Restrictions section.

- 5. If needed, check the Remember user name and password option to save to 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