

CCRecord Professional Extension Recording

Application Notes

Poltys, Inc. 3300 N. Main Street, Suite D, Anderson, SC 29621-4128 +1 (864) 642-6103 www.poltys.com

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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

The CCRecord Pro program is ideal for:

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

Key Features

- Real-time conversations recording
- Easy saving and playing
- Scalable from 4 to 120 analog channels and 8 to 120 digital channels per server
- Digital and analog station-side recording
- · Supervisor right to record specific extensions
- Manual/ Automatic Recording
- Custom selection of the type of calls to be recorded: CO ACD, CO Non ACD, CO Outgoing and Intercom
- Stamp recording with caller ID, ANI and Agent information

- CO/Intercom Call Log comprehensive information for recorded calls: Date, Time, Customer Name,
 Caller ID and so on
- Export Voice Records
- · No time limit for recording
- · Variable number of simultaneously recorded calls with the number of installed tapping boards
- Expandable anytime by adding extra tapping boards
- Compatible with Panasonic KX-TDA/ TDE/ NCP/ NS IP-PBX systems

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

Installing Synway Voice Boards

Introduction

Synway specializes in designing hardware/software building blocks for use in Computer Telephony Integration (CTI) applications, such as IVR, Call Center, Recording, Unified Messaging and Value-Added Service (VAS) in both PSTN and IP environments. Our products feature rich media processing resources including Fax, conferencing, Codecs, echo cancellation and call control with an array of signaling capability for SIP, SS7 packets, ISDN and CAS in worldwide IP/T1/E1/Analog networks.

Poltys *CCRecord Pro Extension Recording* software solution uses Synway analog and digital tapping boards for real-time conversation recording for Panasonic KX-TDA/TDE/NCP IP-PBX systems.

Synway Boards Supported

The *CCRecord Trunk Recording* product is compatible with various Synway analog and digital boards, as follows:

Digital PRI23/ PRI30

- DST-24B/PCI
- SHR-24DA-CT/PCI
- SHR-16DA-CT/PCI

Analog

- SHT-2(4)B/USB
- SHT-4A/PCI 2.0
- SHT-8A/PCI 2.0
- SHT-8B/PCI
- SHT-16B-CT/PCI
- SHT-16B-CT/PCI/MP3

Driver Installation

Getting Ready

Before installing the Synway voice board driver, take in consideration the following:

• No matter what type of Synway voice board is used, SHT or DST, the Synway driver you have to install is the same for the all boards. For more details, please see the New Installation section.

• Each version of the driver has two installation packages: one for PCI boards and the other for cPCI boards. PCI indicates the installation package is applicable to the board with PCI bus and cPCI indicates the installation package is applicable to the board with cPCI bus.

Below is a list of driver installation packages for different voice boards from Synway, classified on bus type:

Bus Type	Driver Installation Package	Notes
PCI	Synway_PCI_xxxx.exe	
CPCI	Synway_cPCI_xxxx.exe	
USB	Synway_PCI_xxxx.exe	Using the USB voice box on a PCI PC
	Synway_cPCI_xxxx.exe	Using the USB voice box on a cPCI PC

NOTE: Using a wrong installation package may cause improper running of the voice board. Make sure that the driver version to be used matches your computer type (PCI computer or cPCI computer).

- The driver supports Windows98, Windows 2000, Windows 2003, Windows XP and Windows NT.
- Check if all hardware devices have been properly installed according to the hardware manual for the installed voice board. Remove any fault or error before you turn on the computer for the safety of your PC and other devices.
- After the computer is booted up, the operating system will search for new hardware automatically.

 Once the *Found New Hardware* dialog box appears, click on the **Cancel** button to close it.

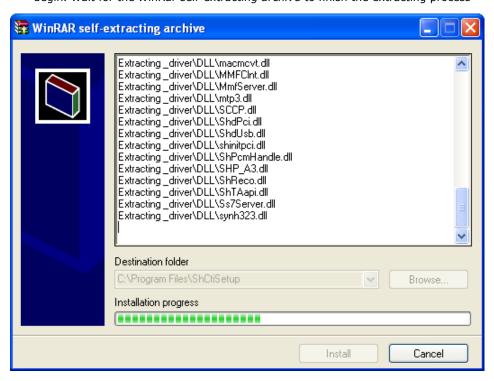
Now, you can step forward to its installation. Follow one of the three procedures described below, according to your needs:

- New Installation
- <u>Upgrade/Reinstallation</u>
- Add/Replace Board or Change Slot.

New Installation

You will now install for the first time the SynCTI driver in your system. Please follow the procedure below in order for Synway Analog Voice Board to be installed:

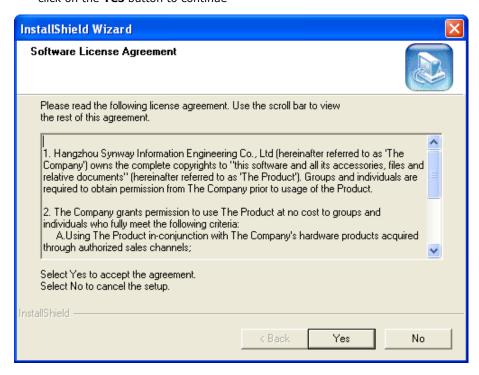
1. Double-click on the **Synway_PCI_xxxx.exe** from the board's CD in order for the installation to begin. Wait for the *WinRar self-extracting archive* to finish the extracting process



2. The Choose Setup Language window is displayed. Choose the language and click on the **OK** button



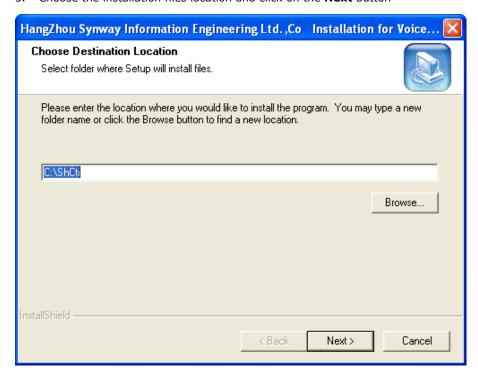
3. Read the license agreement shown in the *Software License Agreement* window and if you agree click on the **Yes** button to continue



4. Follow the prompt given by the *InstallShield Wizard* and close the other active applications. Then, click on the **Next** button



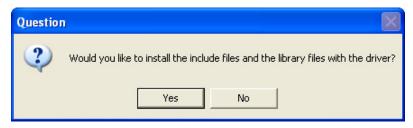
5. Choose the installation files location and click on the **Next** button



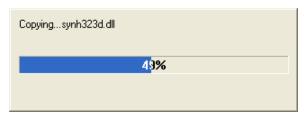
6. If the folder you have selected doesn't exist, confirm the new created folder and click on the **Yes** button



7. If it is necessary for you to install the API header and the library files, click on the **Yes** button



8. The installation process begins



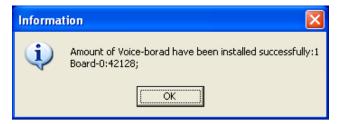
9. The board driver is installed



10. If the warning message presented below is displayed, click on the **Continue Anyway** button to continue

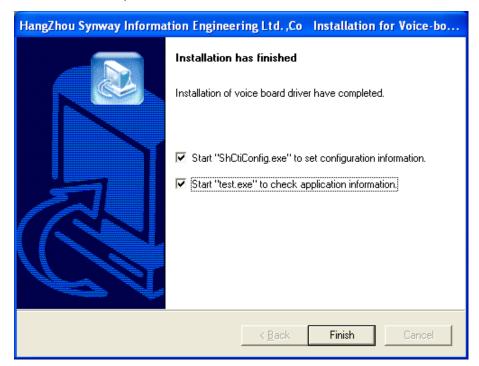


11. The board is now installed. Click on the **OK** button



12. The configuration of the board proceeds





13. The installation process is finished. Click on the Finish button to exit the InstallShield Wizard.

NOTE: If you want ShCtiConfig.exe to run automatically after the installation is complete, check the first option on the dialog box from above.

Upgrade/Reinstallation

If you wish to upgrade or reinstall the Synway voice driver, take into consideration that the installation program will not uninstall the old driver version detected but replace it with the new one.

NOTE: We recommend you to uninstall the driver before attempting to reinstall it. After the Uninstall process, go to the New Installation section.

Add/Replace Board or Change Slot

When you are adding or replacing a board, there are two situations as shown below, depending on the board model and the operating system.

- 1. The driver is automatically installed for the newly inserted board and the user only needs to run ShCtiConfig.exe to configure the board, not having to run the driver installation package.
- The driver is not automatically installed for the newly inserted board. This way, the user is required
 to run the driver installation package to install the driver. For more details, please go to the <u>New</u>
 <u>Installation</u> section.

Synway Voice Boards Configuration

For each supported Synway voice board, different settings must be done in order for the *CCRecord Pro Extension Recording* to proper function.

Mainly, the settings reside in configuring the A-law/U-law properties for your board. According to your location, two options are available:

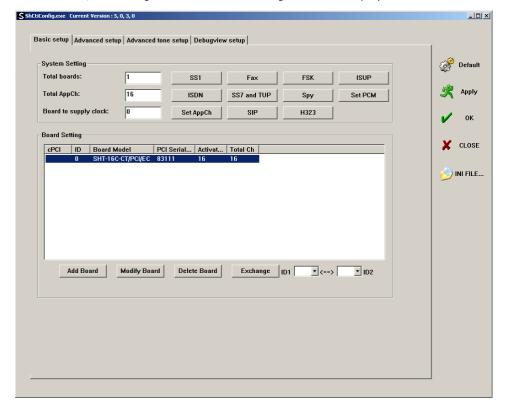
- A-Law Recording Europe CODEC format assign the value 6 when required
- **U-Law Recording** *US CODEC format* assign the value 7 when required

In the next sections, you can find the appropriated settings for your Synway voice board.

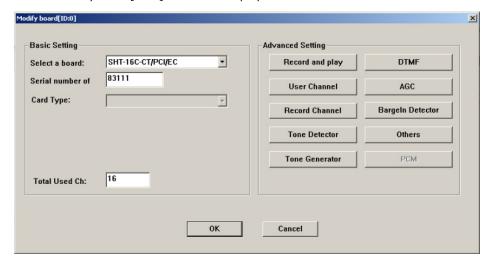
SHT Boards

Please find more information on how to make the proper A-law/U-law settings for your SHT board in the following section:

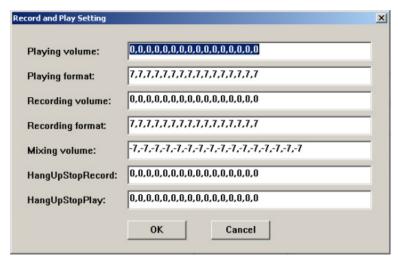
1. Go to C:\ShCtiConfig.exe and the ShCtiConfig window is displayed



- 2. Select the SHT board and click on the Modify Board button
- 3. The Modify board[ID:0] window is displayed



- 4. Modify the **Playing format** and the **Recording format** according to the A-law/U-law CODEC format utilized. The following operations are required:
 - Inside the *Modify Board* window, click the **Record and play** button from the *Advanced Setting* section and the *Record and Play Setting* window is displayed like below:



- Edit the Playing format and the Recording format values according to the A-law/U-law CODEC format utilized.
- Click **OK** and return to the *Modify Board* window.
- 5. All settings are now done. Inside the Modify Board window, click the **OK** button
- 6. Under the ShCtiConfig.exe window, hit the Apply button to save all modifications performed.

NOTE: If you are using more than one Synway SHT voice board with the CCRecord Pro Extension Recording, apply the settings presented above to all Synway SHT voice boards in use.

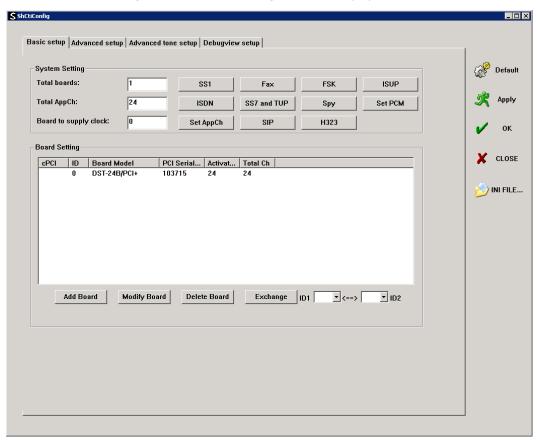
DST Boards

The *CCRecord Pro Extension Recording* Synway DSP supported boards are the DST and the SHR boards. Please find more information on how each board is configured in the following sections.

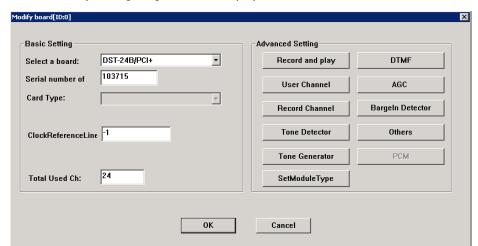
Setting the DST Board

In order to make the proper A-law/U-law settings for your DST board, follow the steps presented below:

1. Go to C:\ShCtiConfig.exe and the ShCtiConfig window is displayed

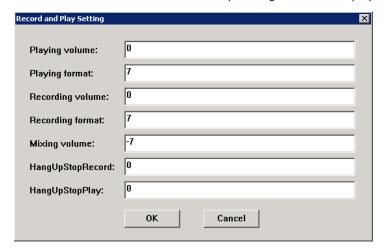


2. Select the DST board and click on the **Modify Board** button



3. The Modify board[ID:0] window is displayed

- 4. Modify the **Playing format** and the **Recording format** according to the A-law/U-law CODEC format utilized. The following operations are required:
 - Inside the *Modify Board* window, click the **Record and play** button from the *Advanced Setting* section and the *Record and Play Setting* window is displayed like below:

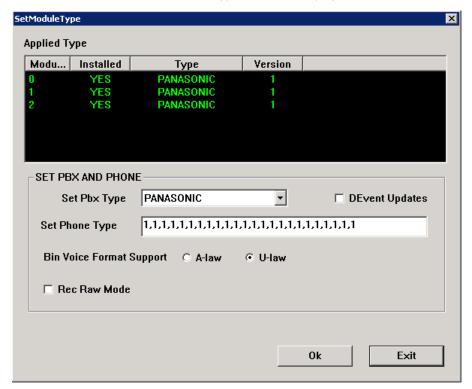


- Edit the *Playing format* and the *Recording format* values according to the A-law/U-law CODEC format utilized.
- Click **OK** and return to the *Modify Board* window.
- 5. Edit the **Module Type** according to the A-law/U-law CODEC format utilized. The following operations are required:
 - Inside the Modify Board window, click the SetModule Type button from the Advanced Setting section

A note is displayed to detail the procedure



Click **OK** and the SetModule Type window is displayed like below:



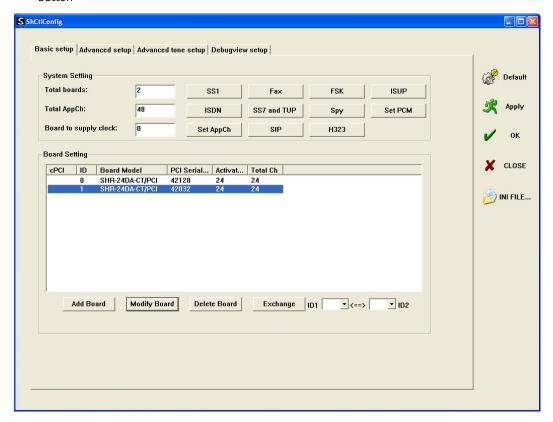
- **Set PBX Type** by choosing one of the supported PBX types (e.g.: Panasonic)
- Set Phone Type by replacing the "0" sequence with a "1" sequence with the same length
- Select the Bin Voice Format Support as A-law or U-law
- Click **OK** and return to the *Modify Board* window.
- 6. All settings are now done. Inside the Modify Board window, click the OK button
- 7. Under the ShCtiConfig.exe window, hit the **Apply** button to save all modifications performed.

NOTE: If you are using more than one Synway DST voice board with the CCRecord Pro Extension Recording, apply the settings presented above to all Synway DST voice boards in use.

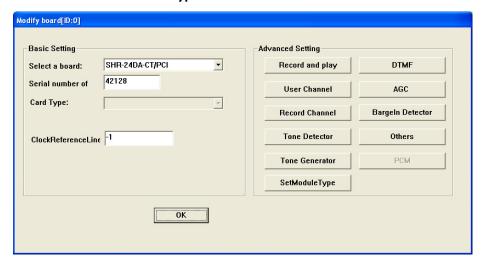
Setting the SHR Board

In order to make the proper A-law/U-law settings for your SHR board, follow the steps presented below:

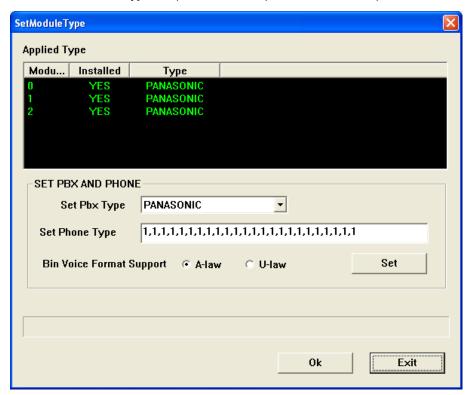
1. Go to *C:\ShCtiConfig.exe* and the *ShCtiConfig* window is displayed. Click on the **Modify Board** button



2. Click on the **SetModule Type** button



- 3. The SetModule Type window is displayed. Here, you can set the following:
 - **Set PBX Type** choose one of the supported PBX types (Panasonic)
 - **Set Phone Type** replace the "0" sequence with a "1" sequence with the same length



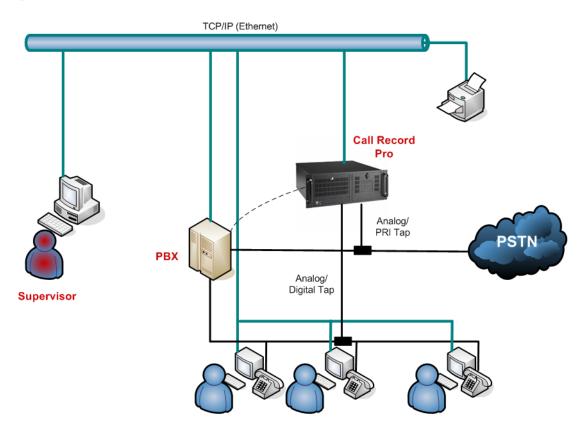
- 4. Click the **Set** button to save the settings made in the *SetModule Type* window
- 5. Click the **Ok** button and close the application.

NOTE: If you use more than one Synway SHR voice board, the settings presented above can be applied to all Synway SHR voice boards.

Using Extension Recording

This chapter serves as a guide for installers in order for them to understand the product configuration, the system requirements, and the main settings needed to be done.

Configuration



System Requirements

Panasonic IP-PBXs supported

- KX-TDA 30/50/100/200/600
- KX-TDE 100/200
- KX-NCP 500 /1000
- KX-NS 1000

The minimum requirements for CC Server Windows host:

Operating Systems

1. Microsoft Windows XP Professional (Service Pack 3)

- Microsoft Win2003 Server (Service Pack 1 and Service Pack 2) Domain Controller and Workgroup
- CPU Pentium IV at 2 GHz
- RAM 1 GB
- **HDD** 2 GB free disk space
- Network card 100BaseT

The recommended requirements for CC Server Windows host:

- Operating System
 - 1. Microsoft Windows XP Professional (Service Pack 3)
 - Microsoft Win2003 Server (Service Pack 1 and Service Pack 2) Domain Controller and Workgroup
- CPU Pentium IV at 2.5 GHz
- RAM 2 GB
- HDD 10 GB free disk space
- Network card 100BaseT

In the table below, you can see the PBXs and the telephones compatible with CCRecord Pro Extension Recording:

РВХ	Telephone
KX-TDE100/200	KXT-7230/7625/7630/7665/7433
KX-TDA200/600	KXT-7625/7630/7665
KX-TDA50/100	KX-T7431/7433/7453/7630/7665

Known Issues and Limitations

- PSs (Portable Stations) are not supported
- PS XDP & DXPD features are not supported
- Executive Busy Override affects Voice Recording
- · Conference is not supported

Voice Recording Format

The recorded calls are saved in a *wav* format and are playable through Winamp or Windows Media Player 9 (or higher) applications installed on the host computer.

The wav files CCRecord Pro works with hold the following properties:

- Bit Rate 64 kbps
- Audio Sample Size 8 bit
- Channel 1 (mono)

- Audio sample rate 8 kHz
- Audio format CCITT A-Law/U-Law

NOTES:

The disk space required for one minute of conversation is 480 KB. If 36 hours of conversation are recorded, 1 GB storage space is required.

Prerequisites

The following prerequisites are **mandatory** before creating the configuring and using the CCRecord Pro Extension Recording software solution:

- 1. Stop the *CCServer Service* if it is already installed and running. Refer to <u>Start/ Stop the CCServer</u> Service section for details.
- 2. Physically install the Synway Board in the local PC
- 3. Install the Synway Board driver
- 4. Configure the Synway Board driver according to Synway board type
 - SHT Boards
 - DST Boards
 - DST Boards
 - SHR Boards
- 5. Install the Poltys software (if not installed already)

NOTE: For more information, please refer to the CCServer Getting Started Manual.

- 6. The CCRecord Pro uses the Synway driver .ini files in order to proper function. Follow the path <install dir>\ShCti and copy all the .ini files from that location to the <install dir>\CC Server folder.
- 7. Perform the actions described within the **Extension Recording Settings** section.
- 8. Start the CCServer Service. Refer to Start/Stop the CCServer Service section for details.

Extension Recording Settings

NOTES:

The Extension Recording feature is available only with the CCRecord Pro Extension Recording solution.

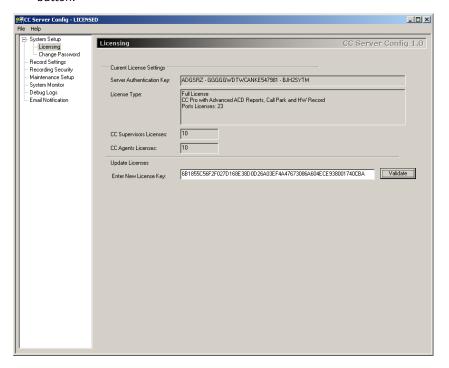
Before making the following settings, please make sure the Synway Board and the Synway Board driver are already installed and configured on the local PC.

Software Licensing

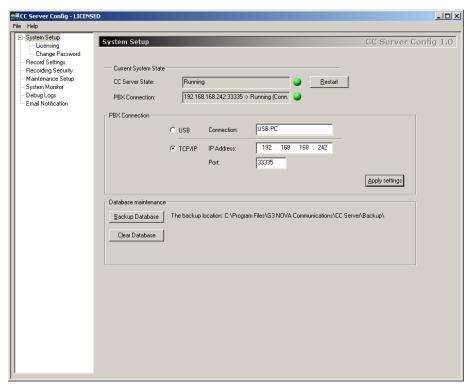
If the product is not licensed yet, please follow the steps:

- 1. Start the CCServer Config application and go to the Licensing section.
- 2. Copy and send us the **Server Authentication Key** by email at support@poltys.com.
- 3. We will send you the **License Key**.

4. Copy/paste the received **License Key** in the *Enter New License Key* field and click on the **Validate** button.



- 5. Go to the System Setup section, set the PBX Connection and click on the **Apply Settings** button.
- 6. Hit the **Restart** button in order for the CCServer to start. When the server is connected, all the lights turn green.



Backup Procedure

We recommend a periodically *Backup Database* operation to protect all the information stored in the system.

Inside the *System Setup* section from the *CCServer* application, click on the **Backup Database** button in order to create duplicates for the current CCDatabase and also for the voice recordings existing in the system.

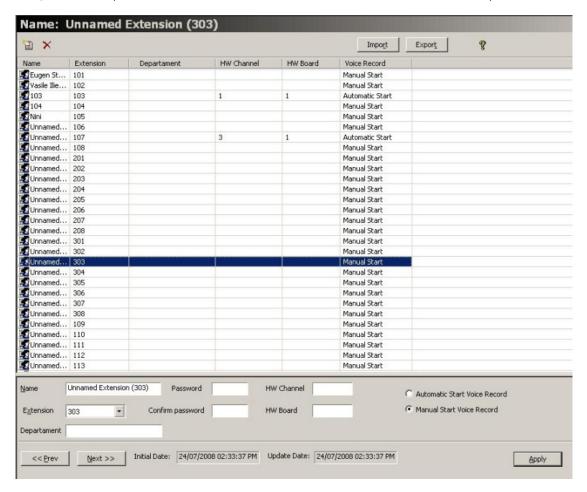
If necessary, you can restore the CCDatabase including the voice recordings any time by overwriting them with the previous backup files.

NOTE: The location for the backup files is

C:\Program Files\G3 Nova Communications\CC Server\Backup. Here, you can find the backup database, the Intercom Call Log voice records in the IntVoiceRecords folder and the CO Call Log voice records in the VoiceRecords folder.

Agents Settings for CCView and CCPro

The Agents settings can be performed from the *CCSupervisor* application. Under *Configuration>Agent*Data, fill in the required information for the recorded extension 303. Please refer to the picture below.



For extension 303, configure the following.

HW Channel: 1

• HW Board: 1

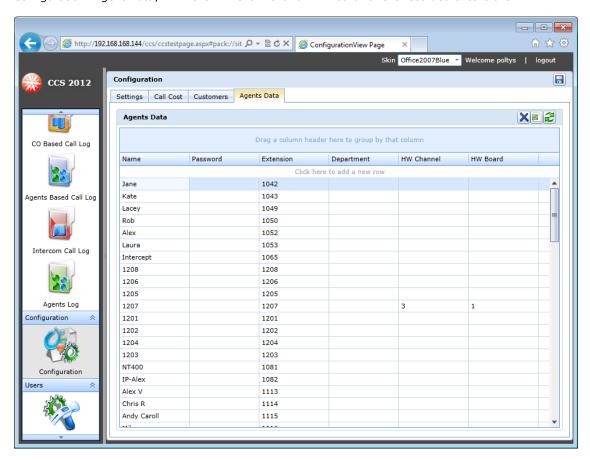
NOTES:

The above settings must be entered for all Agents or extensions that are to be recorded. The HW Channels are unique for each Agent.

Please remember that the counting HW Channel starts from 0 (zero), which corresponds to physical PatchPanel Port 1.

Agents Settings for CCView 2012

The Agents settings can be performed from the *CCSupervisor* web application for CCView 2012. Under *Configuration*>*Agent Data*, fill in the HW Channel and HW Board for the recorded extensions.



For example, configure the following for extension 1207:

- HW Channel: 3
- HW Board: 1

NOTES:

The above settings must be entered for all Agents or extensions that are to be recorded. The HW Channels are unique for each Agent.

Please remember that the counting HW Channel starts from 0 (zero), which corresponds to physical Patch Panel Port 1.

Recording Procedure for CCView and CCPro

Using the *CCSupervisor* and the *CCAgent* applications, both the Supervisor and the Agent are allowed to record calls.

CCSupervisor Recording

The *CCSupervisor* application allows the user to start/ stop the Voice Recording anytime for any available Agent.

To automatically start Voice Recording on an Agent, follow the steps below:

- 1. Go to the Agents Data section under the Configuration pane
- 2. Select an Agent from the list
- 3. Check the Automatic Start Voice Record checkbox
- 4. Hit the **Apply** button to save the setting
- 5. The selected Agent's conversations are now permanently recorded until the *Automatic Start Voice Record* option is disabled.

To disable the automatic voice recording option for an Agent, follow the steps:

- 1. Go to the Agents Data section under the Configuration pane
- 2. Select the Agent from the list
- 3. Check the Manual Start Voice Record checkbox
- 4. Hit the **Apply** button to save the setting
- 5. The selected Agent's conversations can be manually recorded whenever the Supervisor considers necessary.

To manually start/stop Voice Recording on an Agent, follow the steps below:

- 1. Go to the System Monitor section under the Monitor pane
- 2. Select an Agent from the ACD Tree
- 3. Right click on the selected Agent
- 4. Select the Start/Stop Voice Recording menu option

NOTE: The Voice Recording operation will start/stop with the first new call connected that occurs after the option was enabled.

CCAgent Recording

The *CCAgent* application also provides you with the *Voice Recording* feature, and allows recording for both incoming and outgoing calls.

If an Agent wants to record a certain call in order to save particular information, he can use the

Start Voice Rec button from the Logged-In CC Agent main window.

In order to stop the recording process, the Agent presses the same button again.

NOTE: The Voice Recording operation will start/stop with the first new call connected that occurs after the option was enabled.

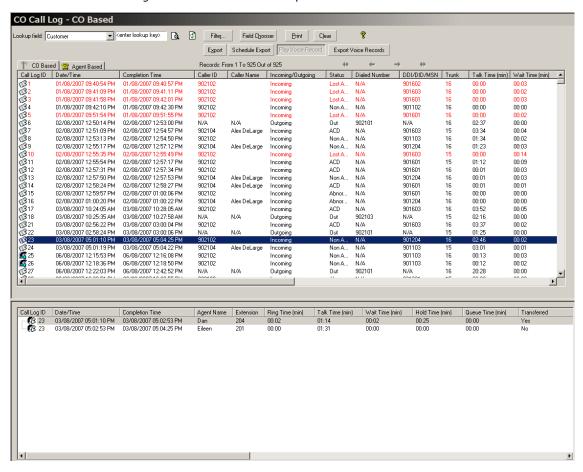
Recorded Conversations Playback for CCView and CCPro

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.

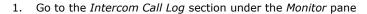
To listen to all recorded calls except the internal ones, please follow the procedure:

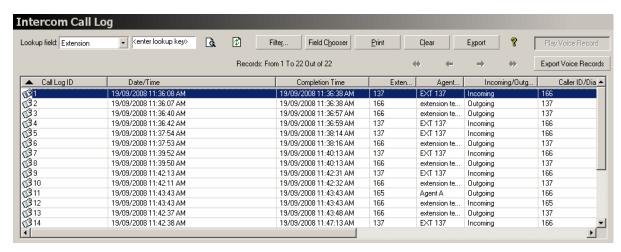
1. Go to the CO Call Log section under the Monitor pane



- 2. Inside the CO Call Log CO Based and Agent Based, you can identify the recorded calls by their distinctive icons:
 - Recorded call
 - Not recorded call
- 3. 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.
- 4. The default media player starts playing the recorded conversation.

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





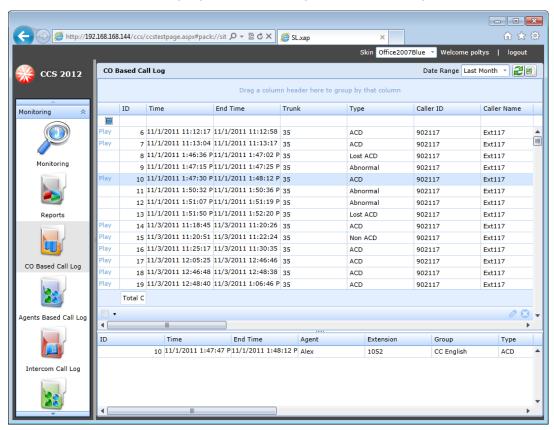
- 2. You can identify the recorded calls by their distinctive icons:
 - 🛂 Recorded call
 - Ø Not recorded call
- 3. Select a call from the *Intercom Call Log* and click the **Play Voice Record** button to listen to the recorded conversation.
- 4. The default media player starts playing the recorded conversation.

Recorded Conversations Playback for 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, Agents Based Call Log, or Intercom Call Log section.



- 2. 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

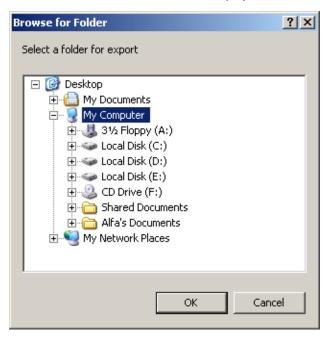
In both CCSupervisor sections, *CO Call Log* and *Intercom Call Log*, you have the option to **Export Voice Records** using the button with the same name:

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 Browse for Folder window is displayed:



- 4. Choose the location for the selected voice record(s).
- 5. Click on the **OK** button to finalize the operation.

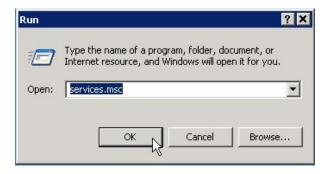
Start/ Stop the CCServer Service

The CCServer runs as a Windows Service, called Mapservice. To close the CCServer you have to stop the Mapservice.

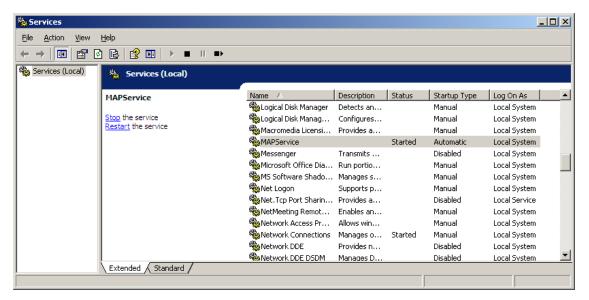
You can do this in two ways, either by opening the Services or from the command line.

Open the Services window

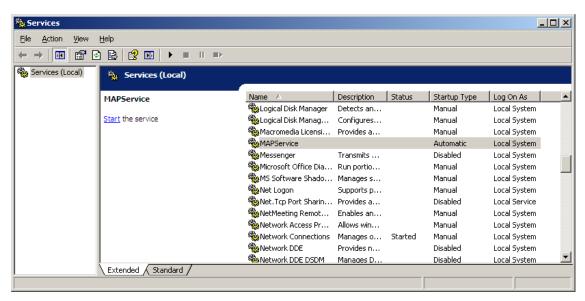
5. From Start menu select Run and type services.msc.



6. Look for MapService in the *Services* list. Click the **Stop** button.

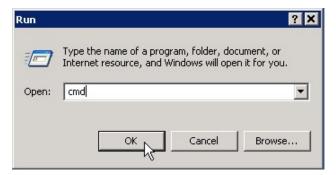


7. To start the service, just click the **Start** button.



Using command line

1. From Start menu select Run... and type cmd to open the Command Prompt session.



2. To stop the service type the following command: net stop mapservice



3. Wait for the service to stop. You should see a conformation message that the service was stopped successfully.

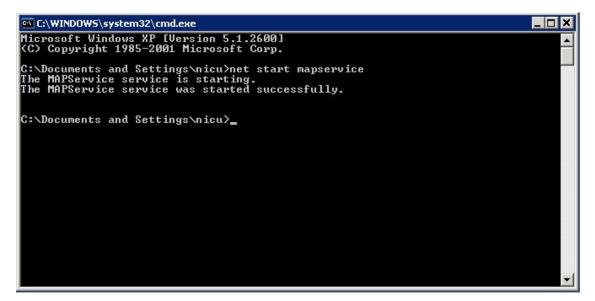


4. To start the service type the following command: net start mapservice

```
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

C:\Documents and Settings\nicu\net start mapservice_
```

5. Wait for the service to start. You should see a conformation message that the service was started successfully.



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