Poltys Inc.

Unified Communications Solutions

CCRecord Professional SIP-IPPT Extensions Recording

Application Notes

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Contents

OVERVIEW **5**
INTRODUCTION 5
TARGET CUSTOMERS 5
BENEFITS 5
INSTALLING AND CONFIGURING CCRECORD PRO **8**
INSTALLING SIP RECORD APPLICATION 8
CONFIGURING PORT MIRRORING 13
Network Diagram *14*
Configure port mirroring function on the switch *15*
EXTENSION RECORDING SETTINGS 16
Agents Settings *16*
Recording Procedure for CCView *18*
Recorded Conversations Playback *19*
Recorded Conversations Export for CCView *22*
PRODUCT SUPPORT **24**

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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 does not properly work on either IPPT or SIP extensions that carry out transfer operations: the call recording stops after the transfer was completed.

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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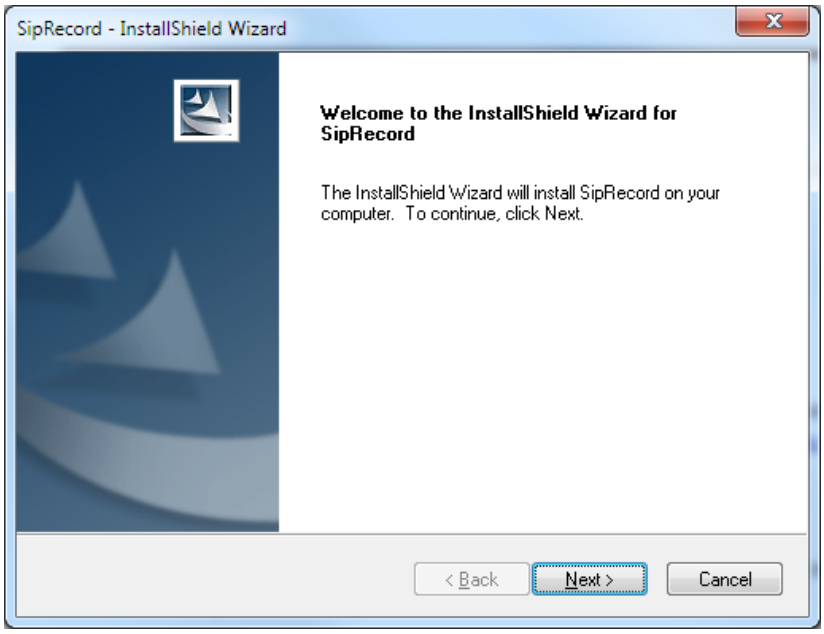
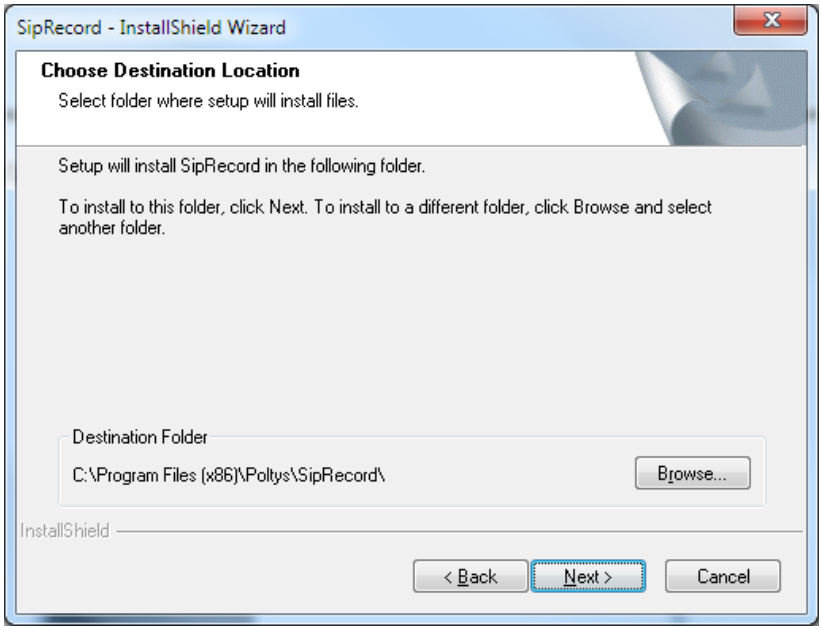
Installing and Configuring CCRecord Pro

Installing SIP Record Application

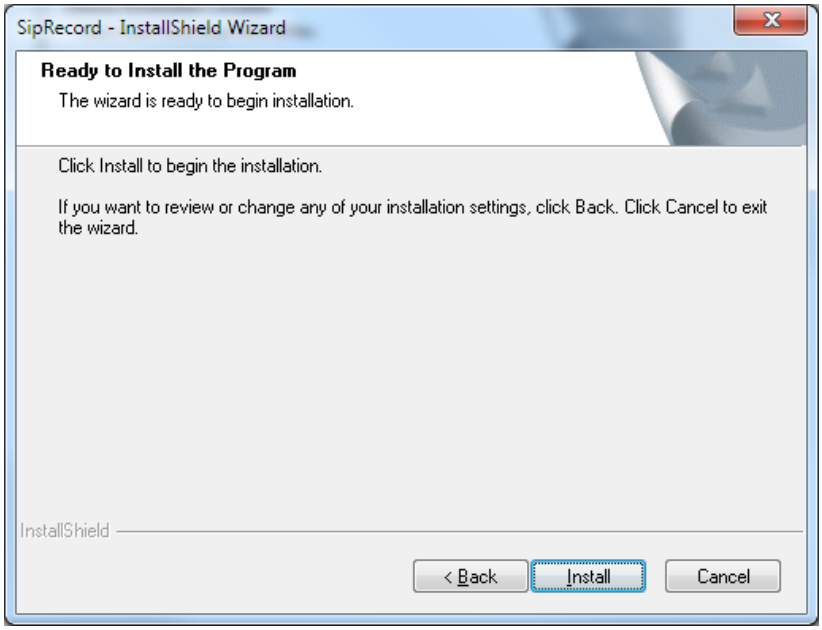
1. Double-click on *SIPRecord.exe* install kit provided by Poltys. The installation wizard starts.



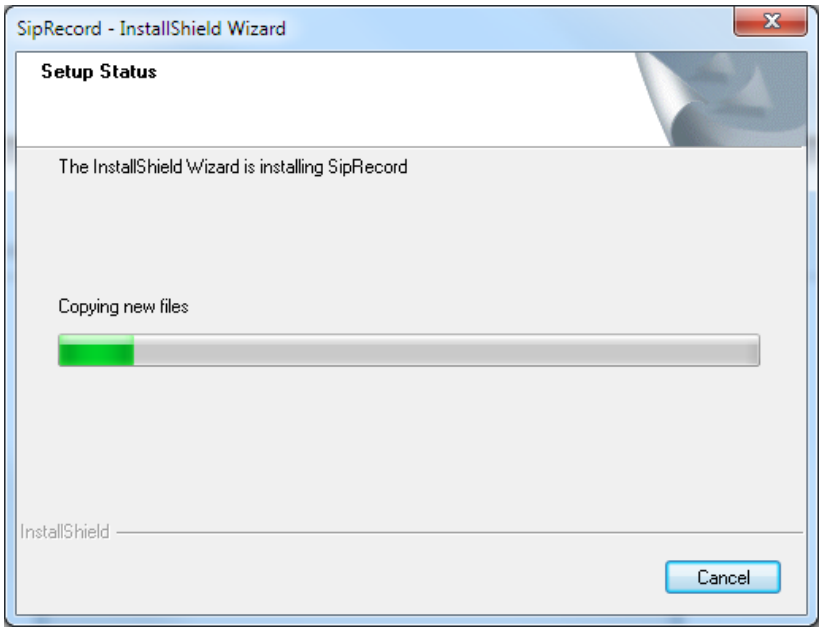
2. Click on **Next >** button. Choose the destination location.



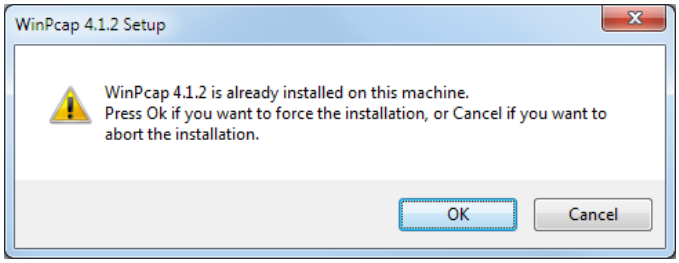
3. Click on **Next >** button. The installer is ready.



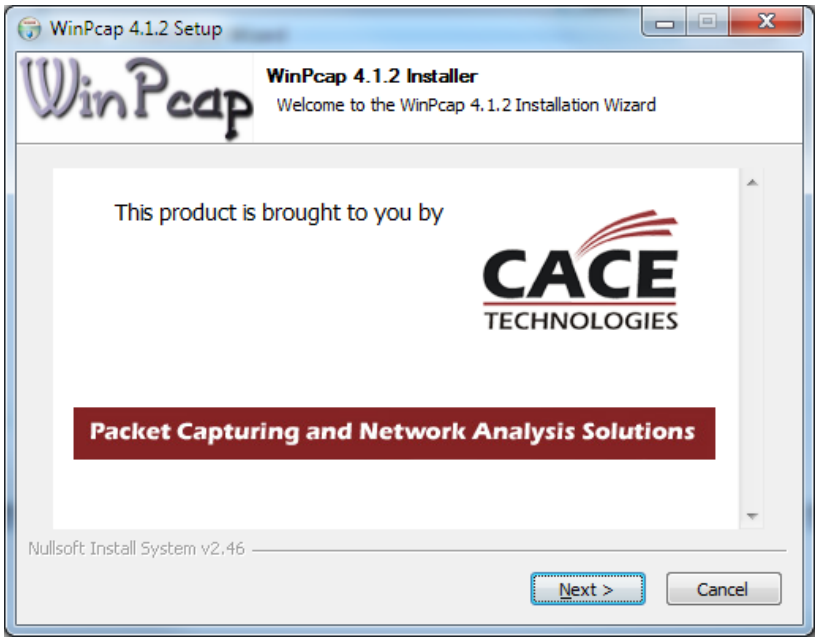
4. Click on **Install** button. The installation begins.



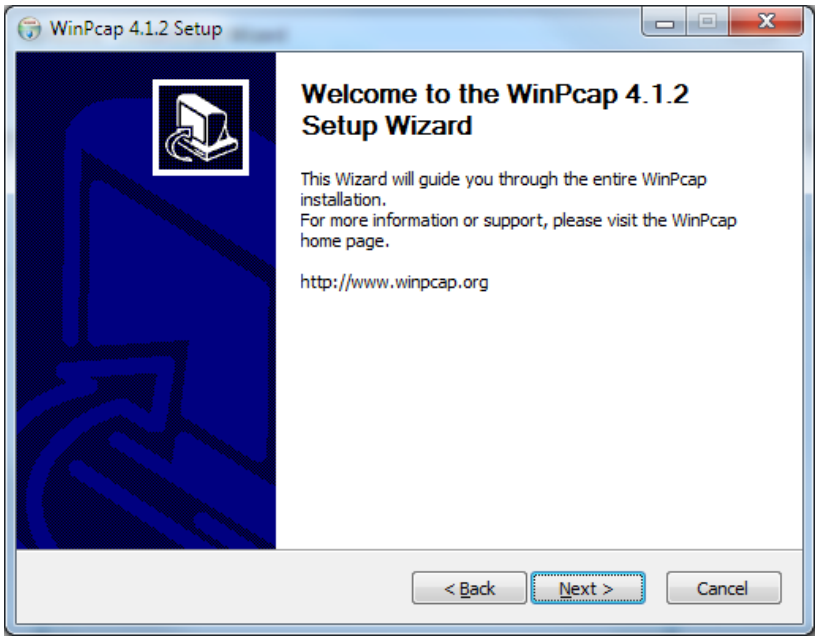
5. The wizard installs WinPCap tool.



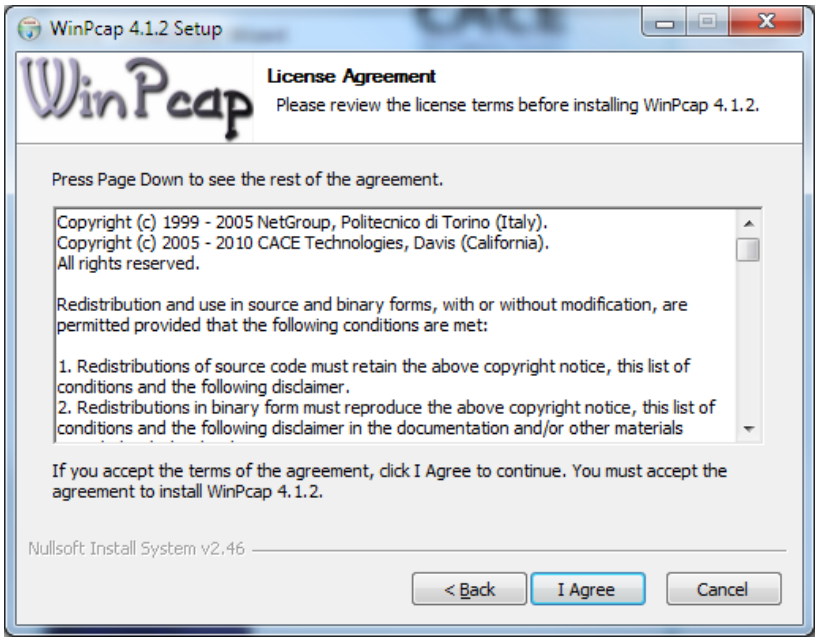
6. Click on **OK** button. The WinPCap installer starts.



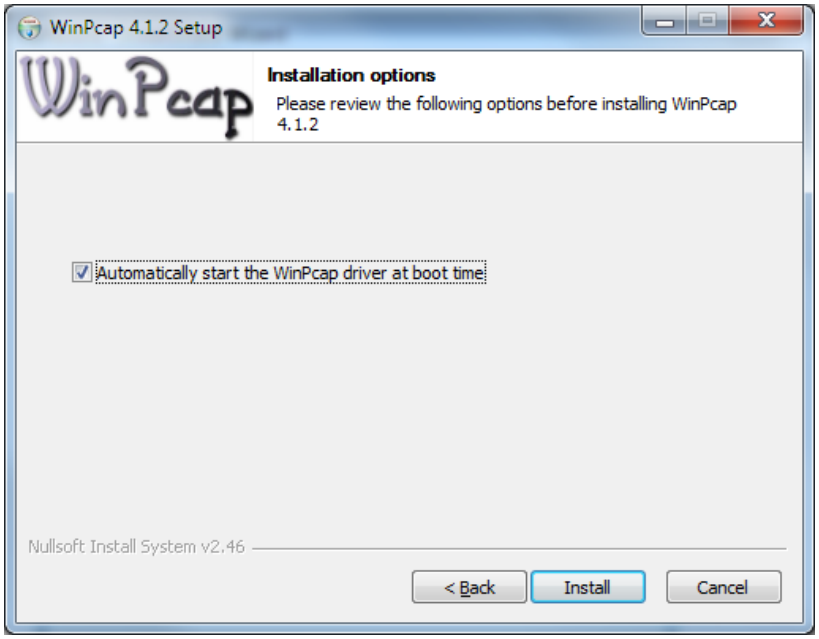
7. Click on **Next >** button. The welcome window displays.



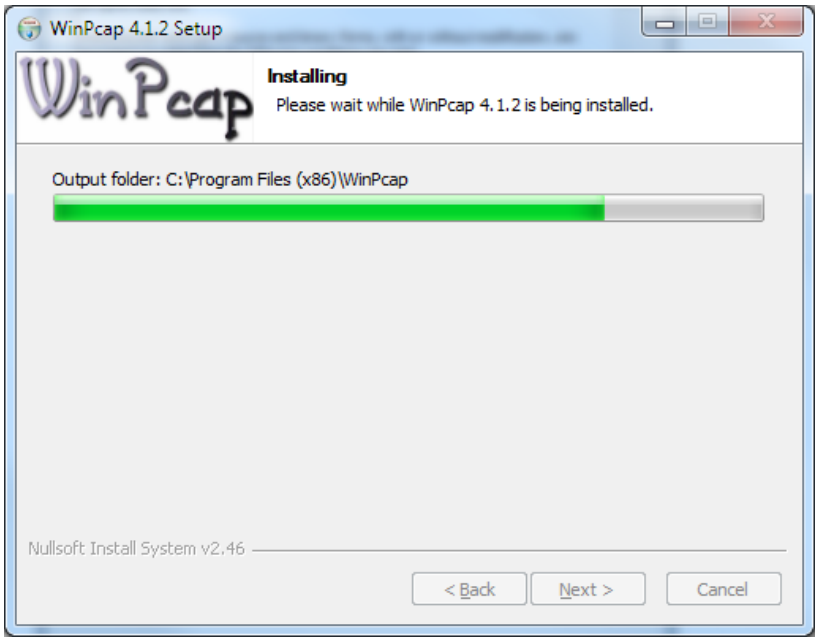
8. Click on **Next >** button. The License Agreement window displays.



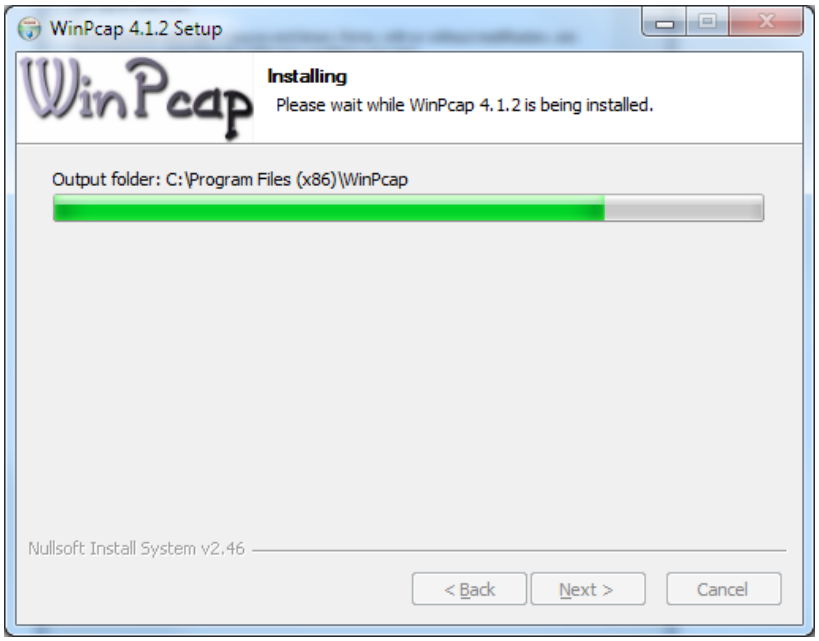
9. Click on **I Agree** button. The Installation Options window displays.



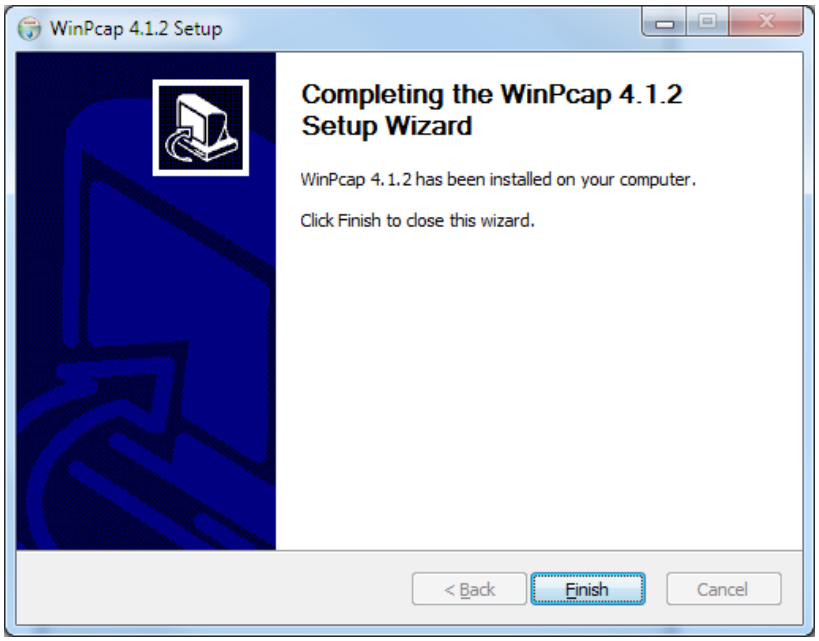
10. Make sure that *Automatically start WinPCap driver at boot time* option is selected. Click on *Install* button.



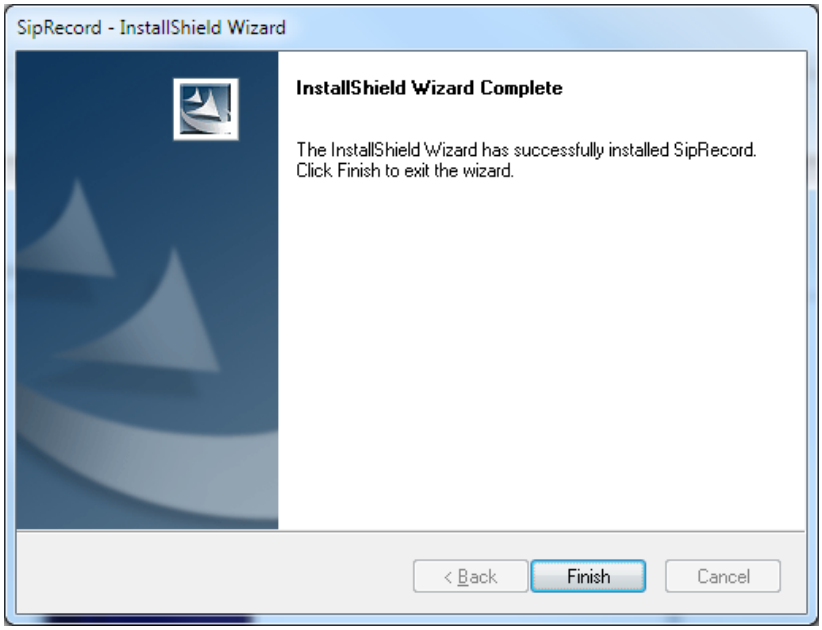
11. Wait for installation process to complete.



12. The WinPCap tool installation is completed.



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



14. Click on **Finish** button.

Configuring 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 CCRecord server for normal connectivity with the IP-PBX and the rest of the network.

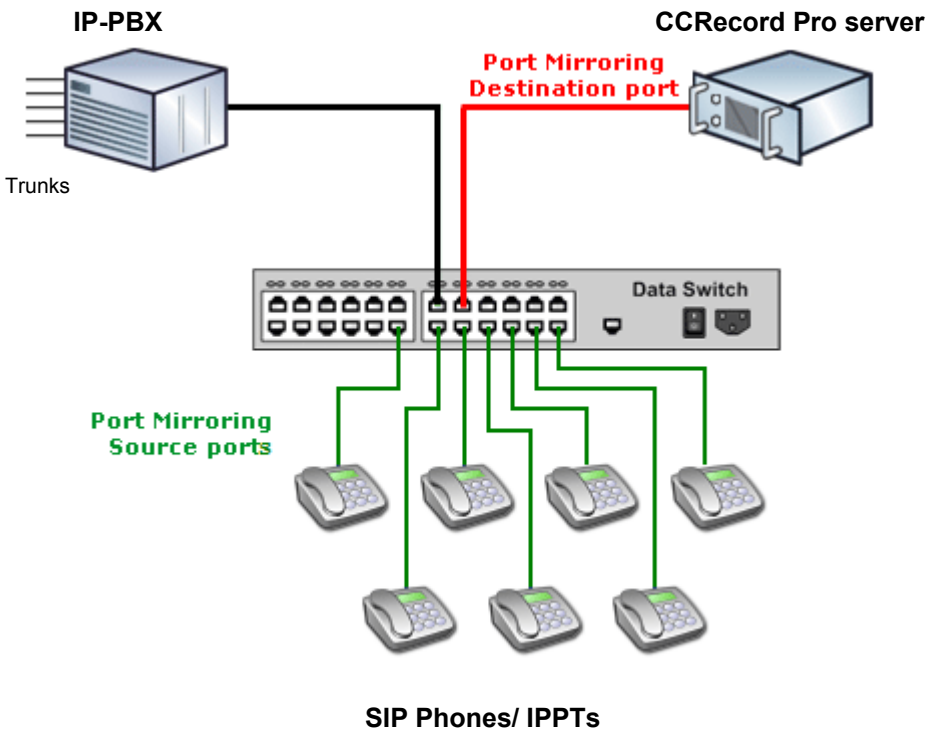
This section presents the following topics:

- Network Diagram
- Configuring port mirroring function on the switch

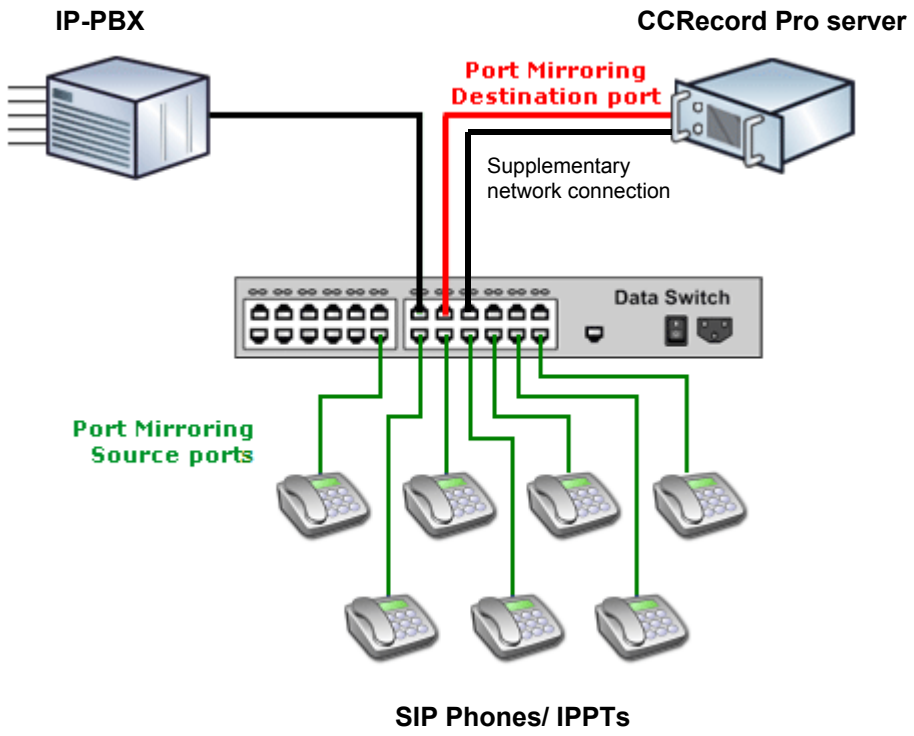
Network Diagram

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 6, 7, 8, 9, and 10** are used for connecting to SIP Phones. On the network diagram it is shown in green color (Source ports).

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

15. Enter configuration mode:

```
C2960# configure terminal
```

16. Every phone port should be set as a Source Port. Create monitoring session and configure every phone interface as source port for that session:

```
C2960(config)# monitor session 1 source interface fastethernet 0/6
C2960(config)# monitor session 1 source interface fastethernet 0/7
C2960(config)# monitor session 1 source interface fastethernet 0/8
C2960(config)# monitor session 1 source interface fastethernet 0/9
C2960(config)# monitor session 1 source interface fastethernet 0/10
```

That assumes you have 5 IP Phones and they are connected to the ports 6, 7, 8, 9 and 10 of the switch.

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

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

18. Check if everything is configured correctly:

```
C2960# show monitor session 1

Session 1
---------
Source Ports:
 RX Only:       None
 TX Only:       None
 Both:          Fa0/6, Fa0/7, Fa0/8, Fa0/9, Fa0/10
Destination Ports: Fa0/3
```

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

Extension Recording Settings

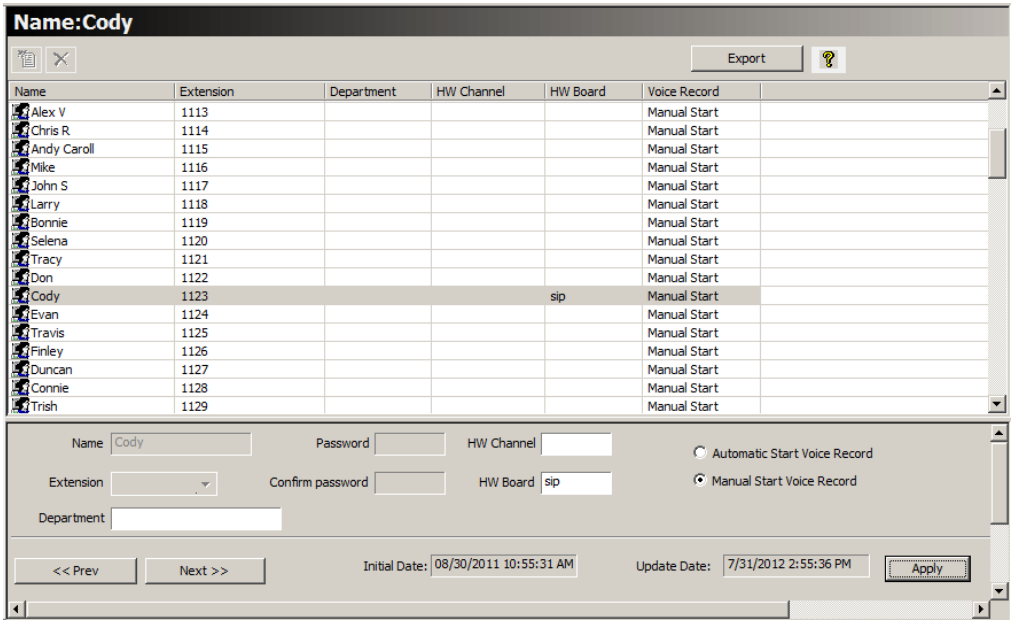
Agents Settings

This section presents the following topics:

- CCView
- CCView 2012

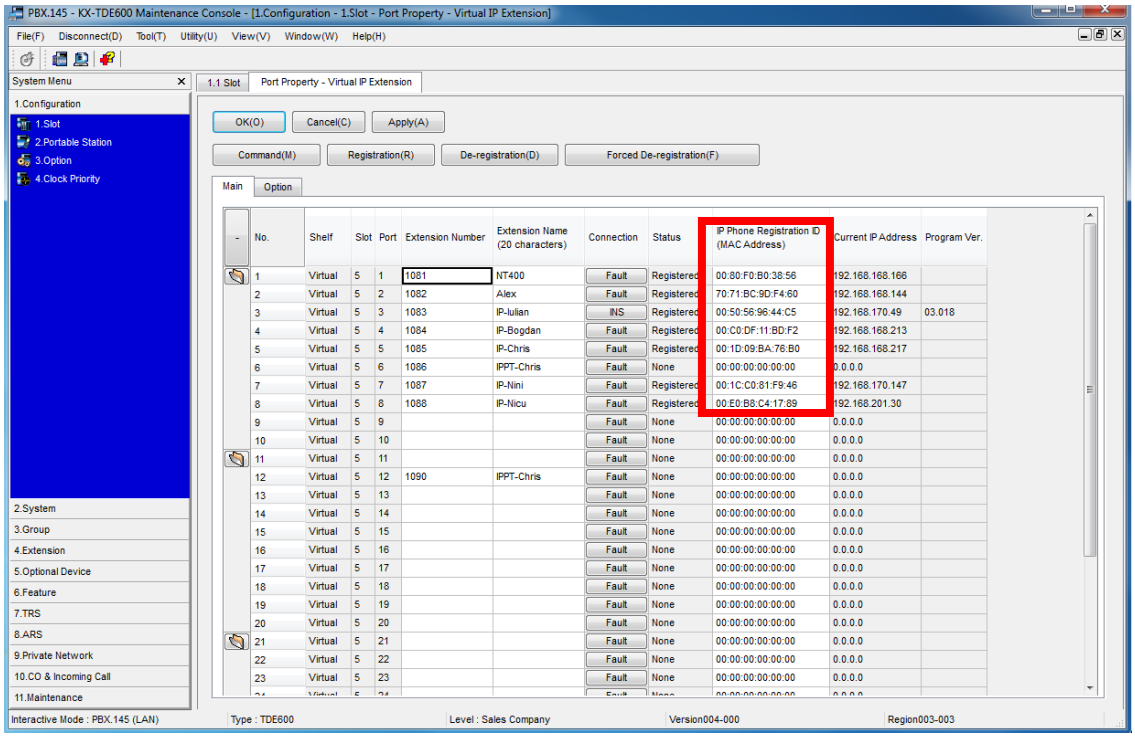
CCView

The Agents settings can be performed from the *CCSupervisor* application. Under *Configuration>Agent Data*, fill in the required information for the recorded extension 1123.



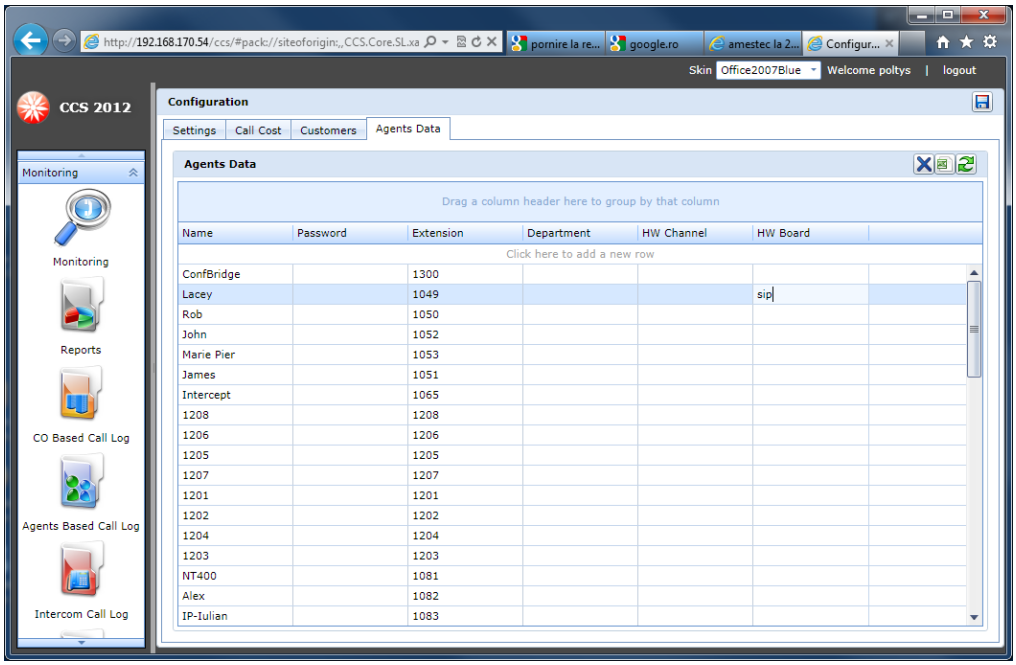
For extension 1123, configure the *HW Board* field with *sip* or *ip-pt* value and *HW Channel* with the MAC address of the IP-PT using lower case and without columns characters, e.g. *001ce9c2ab*.

The IP-PT MAC Address can be determined by using *Panasonic Communication Management Console*, like presented below.



CCView 2012

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



For example, configure the *HW Board* field with *sip* or *ip-pt* value and *HW Channel* with the MAC address of the IP-PT using lower case and without columns characters, e.g. *001ce9c2ab*. Click on **Save Settings** button for changes to take effect.

Recording Procedure for CCView

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

This section presents the following topics:

- CCSupervisor Recording
- CCAgent Recording

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

This section presents the following topics:

- CCView
- CCView 2012

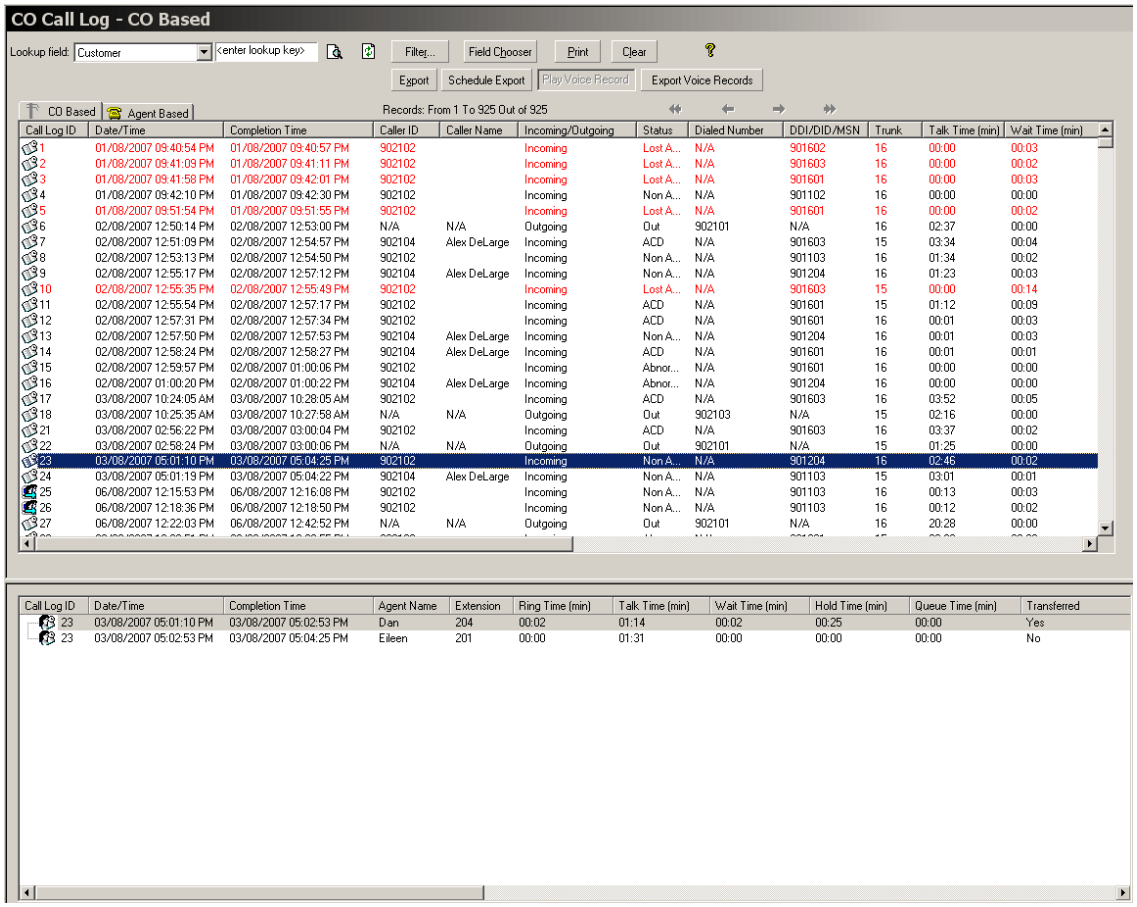
CCView

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:

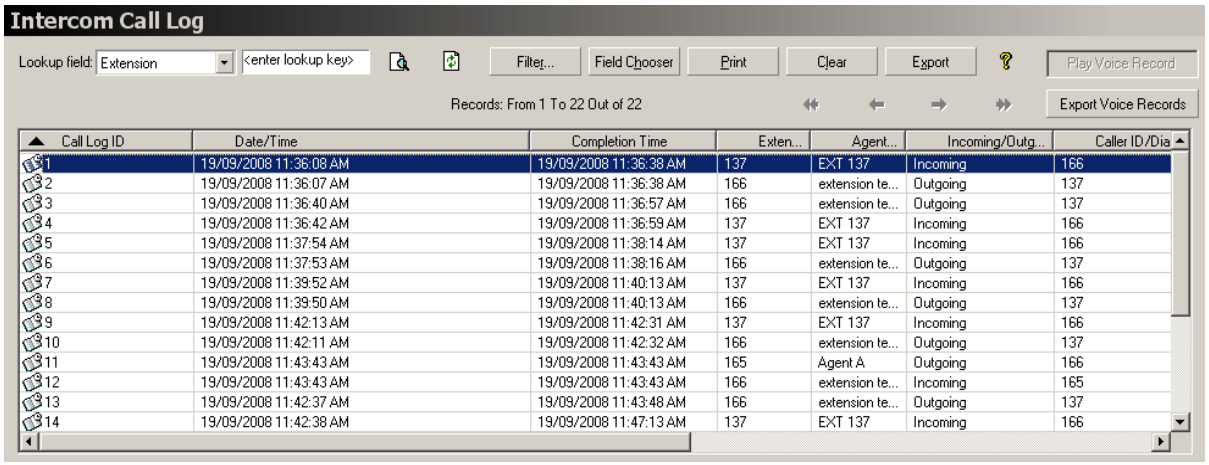
   - - Recorded call
   - - Not recorded call

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:

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



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

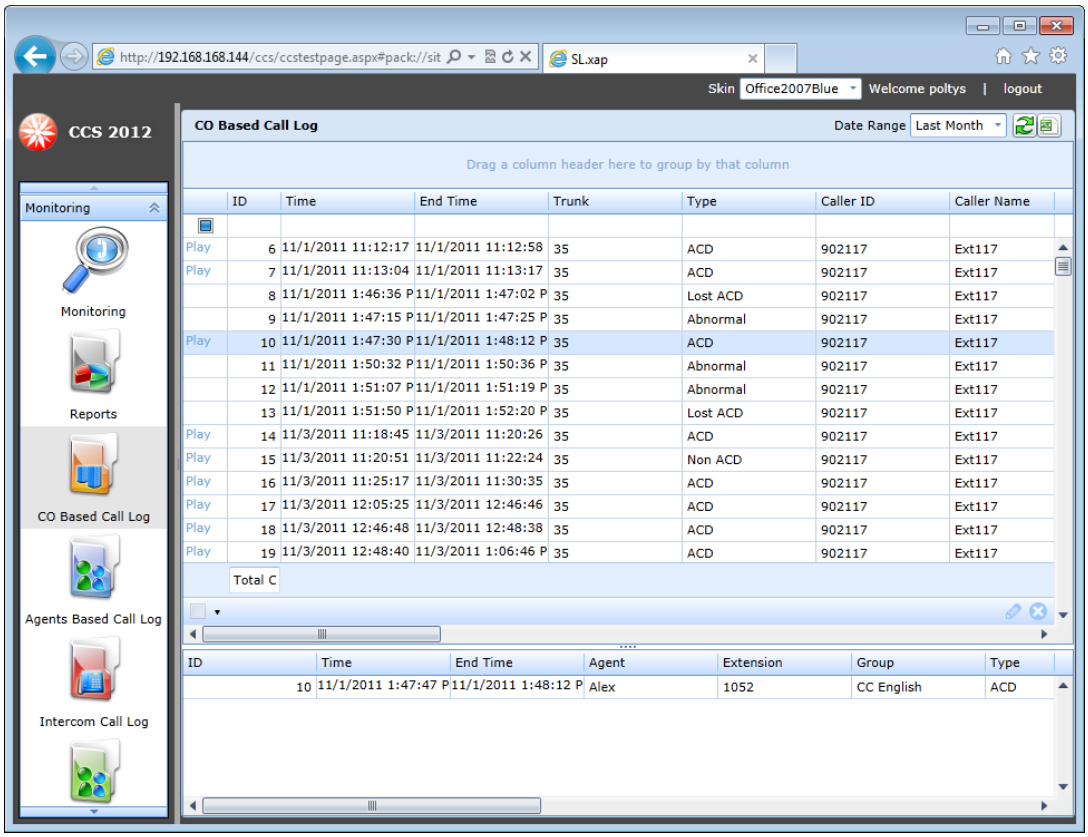
6. You can identify the recorded calls by their distinctive icons:
   - - Recorded call
   - - Not recorded call
7. Select a call from the *Intercom Call Log* and click the **Play Voice Record** button to listen to the recorded conversation.
8. The default media player starts playing the recorded conversation.

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, 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

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:

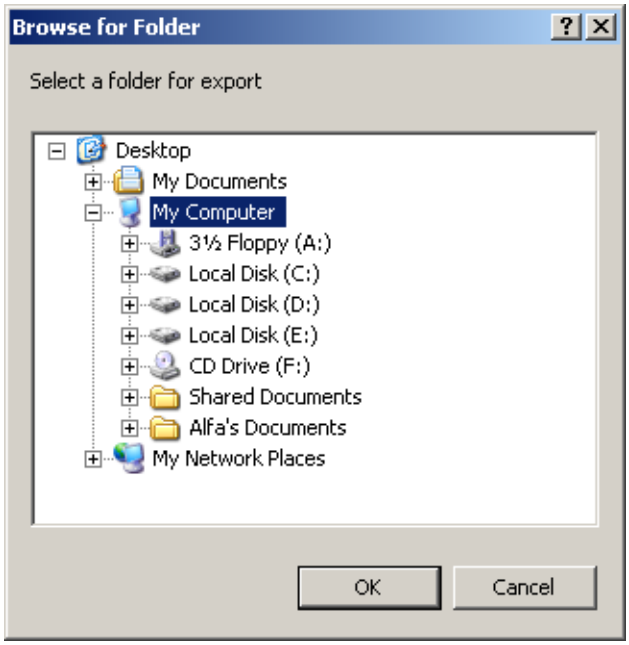
1. Select one or more recorded calls to be exported.

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 *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.

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