

Call Recording Service Description Document

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INTERNAL ONLY

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1.0 Overview

Evolve IP will provide solutions to record calls that take place on its hosted PBX (Evolved Office) supported collaboration and contact center platforms, and transfer recordings to either cloud-based or dedicated hosted recording storage platforms to be retained and accessed in accordance with Client's requirements. This service includes cloud-hosted recording, dedicated call recording, recording transcription and other add-on services detailed throughout.

For this Service Description to apply, the Client must subscribe to a valid Sales Order (SO) along with a signed solution summary for the services contemplated herein. Delivery of services is subject to the terms and conditions of the Master Service Agreement (MSA). Evolve IP reserves the right to modify this Service Description from time to time in accordance with the MSA.

1.1 Cloud Hosted Recording

Evolve IP will provide recording, leveraging the session recording protocol (SIPREC) and transmitting recorded audio to highly available recorders located within public cloud infrastructure. This includes recording across multiple platforms consisting of Evolve IP's hosted PBX (Evolved Office), Microsoft Teams, Cisco Webex and Evolve IP's contact center platforms. Recordings will be transmitted to and stored with appropriate metadata and made accessible to Clients via a Cloud-based portal integrated with Evolve IP's single sign on platform as well as an open REST based application programming interface (API).

1.2 Dedicated Call Recording

Evolve IP will provide recording leveraging the session recording protocol (SIPREC) and transmitting recorded audio to dedicated recording servers located within Evolve IP's data centers. This includes recording only on Evolve IP's hosted PBX (Evolved Office) and contact center platforms. Recordings will be transmitted to and stored with appropriate metadata on resources dedicated to the Client and made accessible to the Client through Evolve IP's Unified Collaboration as a Service (UCaaS) management interface (OSSMosis) ~~–are we phasing out OSSMosis?~~. For additional fees, services such as screen recording, and quality management can be added to Dedicated Call Recording solutions.

1.3 Recording Transcription

Where Cloud Hosted recording is being leveraged, for additional fees Evolve IP can have recordings transcribed into a variety of native languages for the purposes of searching recorded audio, identifying sentiments during conversations, and triggering alerts/events based on identified keywords.

2.0 Design Assumptions

2.1 Recording Transmission

By applying a SIPREC license to a user within Evolve IP's hosted PBX, the user is configured to stream audio to the designated recording platform leveraging either single streams or dual media streams for redundancy/quality purposes. Based on user configuration, recording is either always on or initiated on demand by the user leveraging their soft phone or key sequences on their handset. Recordings are securely transmitted over a private dedicated network to the target leveraging secure network connections firewalled by a session border controller (SBC). Connections to recorders are redundant direct connections leveraging either BGP or DNS load balancing to manage failover between them.

Where Cloud Hosted Recording is deployed to capture calls on collaboration platforms, recordings are transmitted directly from the collaboration platform to the recording platform and do not traverse the Evolve IP network.

2.2 Recording Storage & Retention

Once transmitted to recording devices, audio files are stored either in logically isolated public cloud infrastructure storage buckets or on dedicated virtual servers hosted within the Evolve IP data center. By default, recordings are retained for thirty (30) days unless an extended retention period is specified in the Client contract. Cloud hosted recording services include unlimited storage for recordings within the defined retention period. Dedicated call recording solutions require that the Client contract, and separately pay for, the appropriate virtual server resources for the dedicated recording servers including the necessary CPU, memory, and storage which will vary in size based upon the number of users, concurrent calls expected to be recorded, type of users being recorded (call center users or standard users), and retention period of recordings. Recordings are stored in an encrypted format using AES-256-bit standards. For cloud hosted recording, every recording has a unique key which is also encrypted with a regularly rotated master key. For dedicated call recording, recordings are stored on disks encrypted at the SAN level.

2.2.1 Legal Hold

On Cloud Hosting recording services subscribing to unlimited retention, users will have the ability to flag a call for "Legal Hold." By doing so it will prevent the call from being deleted even if the user is removed or the retention period is exceeded.

2.3 Access to Recordings

Cloud hosted recording services can either be accessed via a web-based portal accessible to Clients through selecting the published application titled "Cloud Hosted Recording" in Evolve IP's single sign on system, or through properly formatted REST-based API requests to the recording platform.

2.3.1 Cloud Hosted Recording Roles

Regardless of how Client chooses to obtain their recordings and associated recording data, the following access roles shall determine the level of access authorized to the user.

Administrators shall have the following capabilities:

- Listen to recordings for the entire account
- Share Recordings
- Delete Recordings
- Download/Export Recordings
- Tag Recordings
- Create account users
- Modify account users
- Delete account users
- Create Teams
- Modify Teams
- Delete Teams
- Enable Transcription per User (where contracted for)

Standard Users shall have the following capabilities:

- Listen to their own recordings

- Share Recordings
- Tag Recordings
- Review Transcriptions where AI (Artificial Intelligence) is Enabled

Cloud Hosted Recording solutions also allow more granular access to recordings by forming teams whereby a “Team Listener” role can be assigned to any user that will allow them to listen and share recordings for any teams for which they have been granted that role. Client will have full access to create and assign users to teams and delegate team listener roles.

2.3.2 Dedicated Call Recording Roles

Supervisors shall have the following capabilities:

- Play/Read Group Recordings
- Edit Users
- View Groups
- View Scorecards and Create, Update, Delete Evaluations (with Quality Management)
- Export Recordings
- View Statistics/Audit Trail
- Administer Group

Standard Users shall have the following capabilities:

- Play/Read Own Recordings
- Create, Update and Remove Tags
- View Audit Trail
- Administer Own User

2.4 Quality Management

Quality Management can be accomplished on both Dedicated Call Recording solutions and Cloud hosted recording solutions. Quality Management provides a mechanism to formally track and measure the caller and agent experience on each interaction that is recorded.

On Dedicated Call Recording solutions, a separate license is needed to provide quality management. All users as part of the solution must be licensed. These solutions use score cards, created by the Client and imported into the call recording server by Evolve IP, that are presented to supervisors for when they review the call. The supervisor answers the questions predefined by the scorecard through either “yes” or “no” options or other multiple choices offered and can add comments. Based on the weights assigned to each question/answer a score is calculated and stored for the user which can be reported separately.

On Cloud Hosted recording solutions, quality management can be accomplished through calls manually tagged by a Team Listener/Administrator or through AI insights which require transcription services. When a user is set for transcription, an administrator can create alerts based upon the sentiment of a call (positive or negative), the tone of a call (joy, anger, sadness, etc.,) specific keywords mentioned during the call and/or specific metadata related to the call (originating phone #, recorded user, etc.)

2.5 Screen Recording

Screen recording can be accomplished with Dedicated Call Recording solutions and for recording on supported collaboration solutions through Cloud Hosted Recording.

On Dedicated Call Recording solutions, a separate license is required to allow for screen recording. This solution also requires that Client deploy a server on their own premises where workstations reside to capture recorded screens and transmit data back to Evolve IP over a secure VPN network connection. User workstations must be registered on and able to communicate with the local recording server via virtual network computing (VNC) protocols and associated with a valid call recording user. Workstations that are to have screens captured must be configured to support VNC protocols and configured with a standard VNC user and secure password which must be shared with Evolve IP for configuration.

On Cloud hosted recording solutions, screens can be captured through collaboration tools such as Microsoft Teams. This requires that screen sharing /recording is enabled for the Microsoft Teams application and appropriate configuration of recording points through Microsoft Teams on the Cloud hosted recording platform.

2.6 Call Recording on Non-BroadSoft Platforms

Call Recording that takes place on collaboration platforms outside of the Evolved Office HPBX (i.e., Microsoft Teams) requires additional configuration within those tools for integration with Cloud hosted recording and explicit authorization for the collaboration platform to transmit data to recorders.

Call Recording that is overlaid upon Contact Center offerings that do not reside on Evolve IP’s HPBX are stored on a separate platform and either made available to users via FTP on either a daily or 15-minute interval or stored directly within the Contact Center platform and made available via web interface within the Contact Center application.

2.7 Data Sovereignty

By default, all recording data will be transmitted to a region local to where the phone call was terminated within Evolve IP's voice platform (i.e., calls recorded on the US (United States) platform will be transmitted to a cloud-based platform inside of the US, calls recorded on the EU (European Union) platform will be transmitted to a cloud-based platform inside of the EU, etc.) Neither the location of the user, nor the remote destination of the call, will have any bearing on where the recording is transmitted to and stored.

2.8 Reporting & Notifications

As part of all recording services Evolve IP will make certain reports available to Clients that provide the following information:

- Recording Statistics (Count, Duration, etc.)
- Recordings by User
- Recordings by Date/Time Range
- Audit Access to Recordings

Where contracted for additional transcription and artificial intelligence services Evolve IP will also allow customers to configure notifications with the following information:

- Recording Sentiment (Positive and Negative Calls)
- Recordings Containing Specific Keywords
- Recordings from Specific External Phone Numbers

2.9 Application Programming Interface (API) Integration

For Cloud Hosted Recording solutions, all recordings and related data can be accessed via API for the purposes of integrating data into third party systems and tools. Accessing the API requires that the Client register with the Cloud provider and obtain an API key for the administrative user related to their account. Interactive documentation for all API methods can be found at <https://developer.dubber.net/io-docs>.

3.0 Operational Parameters

For all Call Recording services, Client can define the following properties:

- Users with Call Recording Enabled
- Groups or Teams that User(s) Should be a Part of
- Platform(s) for Recorded Calls to be Captured On: HPBX, Teams, Contact Center
- Retention Period for Recordings: 30 Days, 1 Year, 5 Years or 7 years
- Recording Status: Always On, Always On with Pause/Resume, On-Demand or User Initiated On-Demand
- Recording and/or Pause and Resume Notifications and Warning Tones
- Whether or not Voicemails are to be Recorded

For Call Recording services where Client has added transcription services, Client can also define the following properties:

- Which users' recordings should be transcribed
- Default Language recordings are transcribed into
- Keyword/Sentiment Alerts

For Dedicated Call Recording services where Client has added quality management, Client can also configure multiple scorecards containing the following properties:

- Question(s)
 - Answer(s)
 - Weights(s)

For Dedicated Call Recording services where Client has added screen recording, Client can also define the following properties:

- Workstations associated with each User
- Port/Protocol used for VNC connections
- Username/Password used for VNC connections

4.0 Limitations

4.1 Live Listening

Recordings can only be listened to once a call has been completed. Listening to a call while it is still taking place can be accomplished through "barge-in" functions on supported phone models and Contact Center platforms.

4.2 Downloading and Deleting Recordings

For the purposes of data integrity and security, Cloud hosted recordings can only be downloaded and deleted by administrative users on an account. Standard users can "share" recordings through a secure e-mail link that automatically expires in 24 hours that will track to whom the call has been shared and when/if the linked is clicked and recording is accessed.

With dedicated call recording solutions, Supervisors can download recordings and share recordings via email. However since this sharing mechanism attaches the audio file to the email in a WAV file format, longer recordings may not be able to be sent due to email attachment size limitations.

4.3 Transcription Languages

The following languages can be used for transcription through Cloud Hosted Recording with the limitations indicated below for sentiment and tone based upon the transcription engine.

	Standard Transcription Engine		
Language	Transcribe	Sentiment	Tone
Chinese, Mandarin	Yes	No	No
Dutch (Netherlands)	Yes	No	No
English (Australia)	UK English	Yes	Yes
English (Canada)	US English	Yes	Yes
English (New Zealand)	UK English	Yes	Yes
English (Singapore)	US English	Yes	Yes
English (United Kingdom)	Yes	Yes	Yes
English (United States)	Yes	Yes	Yes
French (France)	Yes	Yes	Yes
German (Germany)	Yes	Yes	No
Portuguese (Brazil)	Yes	Yes	No
Spanish (Spain)	Yes	Yes	No

*Where requirements dictate alternate transcription engines may be used

4.4 Pause/Resume on Collaboration Platforms

Where an HPBX call is being recorded through the Microsoft Teams collaboration platform, the softkey sequences that can pause and resume call recording cannot be used. This limitation can be overcome either by leveraging a Call Center Agent Client for dedicated call recording or by subscribing to Collaboration platform options with Cloud hosted recording.

4.5 API Support and 3rd Party Custom Applications

While Evolve IP will provide all documentation related to the API offered with Cloud Hosted Recording and respond to support requests related to accessibility of the API, Evolve IP will NOT assist Clients with formulating API requests or any programming code. All 3rd party custom applications built leveraging the API shall be the sole responsibility of the Client.

5.0 Roles and Responsibilities

Call Recording is a service that has certain roles and responsibilities defined as part of this Service Description. Client failure to fulfill its responsibilities may delay or prevent Evolve IP from providing the service.

5.1 Client Responsibilities

1. Client must subscribe to the service by signing a Statement of work (SOW) that includes at least one (1) instances of Call Recording.
2. Prior to provisioning, Client must complete and return to the Project Manager the required Implementation Workbook which details the specifics for call recording user configuration including information relevant to any contracted add-on features.
3. Following initial setup, Client must maintain teams and user team roles where applicable in Cloud hosted recording solutions to ensure appropriate access restrictions to recordings.
4. Client must provide appropriate training to its recorded users regarding compliance with applicable laws and regulations pertaining to informing callers when they are being recorded and properly securing private information that may be shared during recorded calls.
5. Where Dedicated Call Recording services have been selected, Client must also subscribe to sufficient virtual machine resources to support dedicated call recording servers on the applicable scope of work.
6. Where Screen Recording services have been added to a call recording solution:
 - a. Client must configure either the appropriate VNC users and/or collaboration application to support screen recording.

- b. For Dedicated Call Recording, Client must also build, configure, and maintain a server with appropriate resources in the same location as the workstations whose screens will be recorded and provide Evolve IP with administrative access to the server for the purposes of installing the appropriate software.
 - c. For Dedicated Call Recording, Client must also configure and maintain a secure virtual private network (VPN) connection from their premises to the Evolve IP network for the purposes of transmitting recorded screen data to the hosted recording platform.
 - d. For Dedicated Call Recording, Client must also provide all relevant details on end user workstations including call recording users they are assigned to.
7. Where Quality Management services have been added to a call recording solution, Client must configure their own scorecards and/or establish their own tagging system for the purposes of tracking the quality of end user call handling.
8. Where Client is also recording calls on a collaboration platform under Client's enterprise agreement, Client must run appropriate configuration scripts against their tenant and explicitly authorize the transmission of data to the Cloud hosted recording platform.
9. Where Client has contracted for recording on a Contact Center platform not hosted on Evolve IP, HBPX Client must provide an FTP server location and user credentials for the purposes of delivering recordings to Client provided infrastructure.
10. Where Client chooses to leverage the API to interface with recording services, Client must develop and maintain their own programming code and ensure it adheres to documentation provided by Evolve IP.
11. Client should whitelist dubbberportal.Evolveip.net AND dubber.net to ensure connectivity to the Dubber portal.

5.2 Evolve IP Responsibilities

1. Evolve IP will setup and configure the service including application of SIPREC licenses and initial setup of users in relevant Call Recording software.
2. Evolve IP will monitor, manage and maintain the connections from the platform on which calls are being recorded to the platform on which recordings are being stored.
3. Evolve IP and any applicable partners will monitor, manage and maintain recording devices and ensure recordings are being retained for the period in the applicable Client contract.
4. Evolve IP and any applicable partners will monitor, manage, and maintain web-based portals and application programming interfaces (APIs) for the purpose of allowing Client access to their recordings.
5. Evolve IP will provide Client with reports regarding their use of the recording services upon Client request.
6. Where Dedicated Call Recording services have been selected, Evolve IP will install, license configure, monitor, manage and maintain dedicated recording servers within the Evolve IP data center with the resources detailed in the applicable Client **SO -----is this Service Order or Statement Of Work?**
7. Where Quality Management services have been added, Evolve IP will upload Client provided scorecards no more than twice per month.
8. Where Screen Recording services have been added, Evolve IP will install screen recording software on Client's local server and monitor connection to it from the Evolve IP network.
9. Where Recording of Collaboration platforms under a client enterprise agreement has been subscribed, Evolve IP and any applicable partners will provide necessary details related to configuration that Client must perform against their collaboration tenant.
10. Evolve IP will respond to any Client reported incidents or requests in accordance with the objectives listed in Section 6 of this document.

6.0 Support Expectations

This section outlines the support expectations, including a general description of incident types, a matrix of common tasks, and an explanation of how to submit support requests.

6.1 Incident Types

Incident types are classified prioritized in four ways: Critical, Major, Minor and Request. Only Critical incidents are actively worked outside of business hours unless otherwise scheduled in advance. Client is required to call the Help Center and speak with a member of the team to open a Critical incident.

- **Critical** – Incident or failure in which all recording portals are down, generally not available, users are experiencing major loss of system functionality, or the existing subscribed service has been rendered unusable for its intended purpose. Clients must also call and speak with a member of the Evolve IP Help Center staff as part of a Critical incident ticket.
- **Major** – Incident or failure in which a production system is generally available, but the issue needs attention in a short time frame. For example:
 - Call Recording Missing from Portal
- **Minor** – Request for which a system is generally available, and the service is still usable for its intended purpose, but some users may be inconvenienced.
- **Request** - Configuration change for which no end users are adversely impacted, and resolution can occur as time permits. This incident type is also used to add new users or for general informational requests about the platform (logs, configuration, etc.).

6.2 Task Matrix

The tasks listed in the following matrix are examples of typical support requests that may be submitted related to Service Name services. The list is not meant to be all-inclusive, but rather to provide a framework for understanding the response typically given to support tasks. It is Client's responsibility to classify the support request appropriately and include pertinent details that explain the impact that the request has on their business/service under the guidelines detailed below.

The time frames reflected in the matrix are typical times to respond to the request. Time frames are expressed in Minutes (M), Hours (H), or Business Days (D), the latter defined as Monday through Friday, excluding holidays. Some tasks may require additional validation or information to commence work and/or an update to the SOW in order to be processed. Some tasks may also require an implementation workbook to be completed by Client and returned to their Project Manager, detailing how the options for the service are to be configured. For these tasks, the time frame described begins once a signed sales order, solution summary and completed implementation workbook is received by Evolve IP.

Task	Task Description
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Priority Level		Response Time	New SOW Required	
Critical	Call Recording Portal Unavailable	15M	N	Respond to reports that Call Recording portal cannot be accessed by multiple end users.
Major	Recording Missing from Call Recording Portal	2H	N	Respond to report by Client that Call(s) have not been transmitted to the Call Recording portal.
	Call Recording API Unavailable	2H	N	Respond to reports that Call Recording API interface is not available.
Minor	Individual User Unable to Access Call recording Portal	1D	N	Respond to report that an individual user cannot access the Call Recording portal.
Request	Update Call Recording Configuration	3D	N*	Respond to request to change configuration of call recording settings or users
	Obtain Call Recording Report	3D	N	Respond to request to supply a report on Call Recording statistics.

*Some requests to add, remove or modify services may require a Service Order if changes are more than \$250

6.3 Support Requests

Client submits incidents and requests to Evolve IP by either using the Evolve IP Help Center. If Client is experiencing a Critical incident, after submitting the incident Client must promptly call Support Services. Client may also reasonably set and escalate the service response for a request or incident at any time by calling Support Services. Support requests may require additional validation and/or information from Client before a task is initiated.

7.0 Billing

All Monthly Recurring Charges (MRC) and Non-Recurring Charges (NRC) will be detailed in the applicable sales order. MRC for Call Recording Solutions begins when the services detailed in the applicable sales order have been provisioned and made available for client use regardless of when Client commences using the service.

Failure to provide configuration for Call Recording services or responding to other reasonable requests in a reasonable time frame may result in billing commencing prior to delivery.

7.1 Monthly Recurring Charges

Evolve IP Cloud Hosted Call Recording is billed monthly as a service based upon the number of users for which calls are to be recorded and the time period for which recorded calls should be retained.

Evolve IP Dedicated Call Recording is billed based on server infrastructure and additional features.

Evolve IP Transcription Services are billed either based on minutes of calls that have been transcribed or number of users for which unlimited transcription has been subscribed.

7.2 Non-Recurring Charges

There may be an NRC for initial setup and configuration of Call Recording services. This will be detailed in the applicable sales order and solution summary. If applicable, any overage to original estimates for migration activities will be discussed with the Client and billed accordingly.

7.3 Usage / Overages Charges

For Clients who subscribe to transcription services and do not purchase an unlimited user license, Client will be billed per minute of call transcribed at the rate listed on the applicable Service Order. This usage will be billed in arrears for the previous calendar month. Total transcription minutes will be rounded up to the nearest full minute.

8.0 Service Levels

8.1 Implementations Timelines

Implementation timeframes for Evolve IP Call Recording services are generally 10 business days but will vary depending on the size and complexity of the implemented Client solutions, as well as factors purely under Client's control (such as, readiness of solution, loading of Evolve IP software, and enabling Evolve IP necessary access). Client participation in the implementation process is vital to ensure smooth delivery of the service. Client failure to provide required information or to be available for implementation related calls or meetings may delay the implementation of Client's Call Recording services.

8.2 Provisioning Intervals

The following table provides provisioning intervals by task type. Intervals commence once Client has provided Evolve IP with all necessary information needed to provision the service.

The time frames reflected in the matrix are typical times to complete the provisioning task. Time frames are expressed in Business Days (D), the latter defined as Monday through Friday, excluding holidays

Provisioning Task	Provisioning Interval	New SO Required	Task Description
Configure New Cloud Hosted Call Recording	10D	Y	Configure a new enterprise for recording of users hosted on an Evolve IP HPBX solution.
Configure User for Cloud Hosted Call Recording	3D	N*	Configure an additional user for recording on an existing enterprise.
Configure Recording on Collaboration Products	10D	Y	Configure a new enterprise for recording of users on an Evolve IP supported collaboration solution.
Install Dedicated Call Recording Server	15D	Y	Install and configure a new dedicated call recording solution.
Configure Screen Recording	15D	Y	License and configure screen recording after Client has provisioned a local server device and dedicated recording solution is already setup.
Configure Quality Management	15D	Y	License and configure quality management scorecard capabilities after a dedicated recording solution is already setup.

*Some requests to add, remove or modify services may require a Service Order if changes are more than \$250.