

Call Recorder – Administrators

QUICK REFERENCE GUIDE



Admin - Users:

If you have administrative permissions you'll be able to select the Admin option on the top next to Browse & Live. Administrators can modify users, disable and enable recordings for users, and create and edit tags for system use.

- 1. Click on the admin option
- 2. Users screen is the default screen
- 3. Scroll through the pages by clicking the arrows at the top

Rec	SSmosis	Browse	Live Admin						Account	Logout
	1	users gr	oups						Welcome Evo	lve IP Demo
≪ ∢ ●	🔹 🌔 🕪 Pag	e 1/4 37 Resu	ults PDF	Report			There are no selected users to display.			
Pic	k action	scion select page l clear page								
		Se	elect all Clear all							
	FIRSTNAME	LASTNAME	LOGIN STRINGS	USERID			SEARCH			
2	Mark	Soma	610.	2		view				
2	Evolve IP	Demo	evolvesales	394		view	Login string			
2	Howard	Hoffman	484. ,610	436		view	First name			
2	Jennifer	Piperato	484 ,610	438		view	Last name			
2	Martha	Gery	610.	440		view	Direct parent group	•		
2	Phil	West	610 pwest@evolveip.net	441		view	Recordable	Yes 💿 No 💿 Both 🖲		
2	Gerald	Gallagher	4845	442		view	Active	Yes 🔘 No 🔘 Both 🖲		
2	Bryan	Merritt	610	443		view			Search	Reset
2	James	Thompson	610	444		view				
2	Christopher	Hadjinian	6102	445		view				

📢 🜗 🕨 Page 1/4 36 Results

- 4. Select all will check all boxes
- 5. Clear all will clear all boxes
- 6. Select page will check all boxes on that page
- 7. Clear page will clear all boxes on that page

Select page | Clear page Select all | Clear all

- 8. Click on the box next to the user you'd like to edit or in the search field enter the login string (usually User ID. You can use the asterisk (*) symbol) or first name, or last name, or select direct parent group, or select recordable or select active, then press search.
- 9. If you use the search option you must click reset in order to use the select agent view.

SEARCH	
Login string	
First name	
Last name	
Direct parent group	•
Recordable	Yes 🔘 No 🔘 Both 🖲
Active	Yes 🔘 No 🔘 Both 🖲
	Search Reset



To Disable a user from being recorded (monitored):

- 1. Select the user that you'd like to disable by checking the box next to the user's name.
- 2. Go to pick action dropdown menu and select disable



- 3. In pop up select OK
- 4. You should see the user grayed out

To Enable a user to be recorded (monitored):

- 1. Select the user that you'd like to enable by checking the box next to the user's name.
- 2. Go to pick action dropdown menu and select enable



- 3. In pop up select OK
- 4. You should see the user is available to be recorded.

To Unlock a user:

- 1. Select the user that you'd like to unlock by checking the box next to the user's name.
- 2. Go to pick action dropdown menu and select Unlock



- 3. In pop up select OK
- 4. The agent will now be unlocked

Add a user to a group:

- 1. Select the user that you'd like to add to a specific group by checking the box next to the user's name.
- 2. Go to pick action dropdown menu and select Add To Group



3. Select group in new screen by selecting the radio button next to the group name.



5 Results	
Select page Clea	ır all
GROUP NAME	
SECURITY GROUP	
🐕 Users	\bigcirc
🐕 Group Administrators	\bigcirc
🐕 Supervisors	\bigcirc
🐕 Download Users	\bigcirc
NSOC	\bigcirc
su	bmit

- 4. Click Submit
- 5. Click View on User
- 6. The new group will be located in the direct group section.

To Edit a user:

1. Select the user that you'd like to edit by checking the box next to the user's name.

44 @	 ▲ ▶ ▶ ▶ ₽ ● ● ● 	age 2/4 36 R	tesults	PD	F Report			
Pic	ck action	• S	elect page Select all	Clear page Clear all				
	FIRSTNAME	LASTNAME	LOGIN STRINGS			USERID		
2	Jonathan	Beahr	610			446		view
2	Ryan	Disch	610			447		view
2	Ritzcel	Exconde	610			449		view
2	Bob	Bur	484			450		view
2	Victoria	Kleinman	610			451		view
2	Ryan	Corcoran	610			454	V	view
2	Test	Cisco 7975	610			455		view
2	Rich	Fox	610			456		view
2	Alana	Moran	610			457		view
2	Dana	Dempsey	302			458		view

- 2. Click on View
 - view
- 3. On the screen to the right click on Edit



- 4. You can edit the following fields:
 - a. First Name
 - b. Last Name
 - c. Login Strings (User ID=users & Email address=admins)
 - d. Password
 - e. Recordable (Yes or No)
 - f. Force password change (Yes or No)
- 5. Click on Submit



Admin – Groups:

Within the administrative permissions you have the ability to create groups to add agents to. You can create, delete, edit, and create a parent group with direct groups below (group tree).

- 1. Click on Admin option
- 2. Click on Groups next to user
- 3. Select page will check all boxes
- 4. Clear page will clear all boxes on the page

Select page | Clear page

Clear all

- 5. Select a group by checking the box next to the group name
- 6. Clear all will clear any selected group



Create New Group

1. Click on Create New on the right screen.

OL	SSmosis Browse	Live	Admin		
	users groups	5			
5 Results Pick action Clear all Create new					
	GROUP NAME	GROUPID			
2	Evolve IP - Sales [0001005437]	37	view		
2	Evolve IP [0001005473]	38	view		
\$	Evolve IP - Support [0001005437]	39	view		
2	Evolve IP - Engineering [0001005437]	40	view		
2	Evolve IP - Demo [0001005437]	41	view		

- 2. On the right enter the Group Name
- 3. If there is a maximum for the number of logins being recorded for this group you can check the box to the left of Recordable login string quota and then enter the number of logins for the group in the box to the right.
- 4. Click on Submit



Delete Group

- 1. In the group selection check off the group you'd like to delete
- 2. In the pick action dropdown menu select delete



3. Click ok in confirmation window

Are you sure you want to Delete the following 1 groups ?



Evolve IP - Demo [0001005437]

Edit Group

- 1. In the group select check off the group you'd like to edit
- 2. Click on view next to selection
- view 3.
- a. To Edit Group Name or recordable login string quota select edit in the new window to the right

Group ID		41		
Group name		Evolve IP - Demo [0001005437]	1	
Security group		No		
Recordable login string	quota	0		
Total login strings (direct o	children)	3		
SUBGROUPS				
There are no subgroups			-	
There are no subgroups.				
USERS				
DIRECT	ALL OTHERS	;		
Ryan Corcoran				
Test Cisco 7975				
Evolve IP Demo				
edit create new	remove m	nembers		
i. You can edit	the Gr	oup nam	ne or Login str	ing quota

Click on Submit ii.



b.	To re i.	move members Click on Rem	s from the group nove Members	
	ii.	edit	create new remove	members
	iii.	Put a check ı	next to the members you'd	like to remove
	iv.	Click on subr	nit	
		Group ID	41	
		Group name	Evolve IP - Demo [0001005437]	
		Please select the use	ers or groups that you want to remove f	rom this group.
		SUBGROUPS		
		There are no subgro	oups.	
		USERS		
		Ryan Corcoran		
		Test Cisco 7975		
		Evolve IP Demo		
		submit cancel		

- c. Create a subgroup under the existing group
 - i. Through view screen
 - ii. Select group that you'd like to create a subgroup for
 - iii. Click on View
 - iv. Select create new
 - v. Enter group name
 - vi. Click on submit

	edit	create new	remove members
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To add a group to an existing group

- 1. Select group you'd like to add to a parent group
- 2. From the pick action dropdown menu select add to group

5 Re	sults		
Pick Pick	action Select	tpage C	lear page Clear all
Dele Add	te IE to group	GROUPID	
8	Evolve IP - Sales [0001005437]	37	view
<mark>8</mark> 2	Evolve IP [0001005473]	38	view
<mark>9</mark> 9	Evolve IP - Support [0001005437]	39	view
<mark>8</mark> 9	Evolve IP - Engineering [0001005437]	40	view
<mark>8</mark> 9	Evolve IP - Demo [0001005437]	41	view

- 3. Select parent group to add group to
- 4. Click on submit