EVOLVE IP
THE CLOUD SERVICES COMPANY™

OSSmosis: Call Recording

User Guide

Contents

1. <u>Overview</u>

Evolve IP's OSSmosis portal allows customer administrators unprecedented access and control over their interactions with Evolve IP's systems and solutions. This guide will improve you knowledge of the OSSmosis application specific to the Call Recording tab for day to day management of your Call Recording services, such as creating recording profiles, managing supervisors and creating recording groups.

Throughout this year we will be gradually updating the OSSmosis Administrative Portal interface. Aside from the new look and feel, the updates will also provide you with greater speed and performance within the application.

The initial roll out was planned around Call Recording to help Administrators easily manage the new call recording features. Until the entire OSSmosis is updated to this new interface, a new tab will open in your browser when accessing Call Recording.

2. Accessing Call Recording within OSSmosis

For an end user can to access Call Recording they must be assigned an OSSmosis login along with Call Recording Supervisor access.

To launch the OSSmosis Administrative Portal:

https://evolveip.my-service-manager.com/ServicePortal/login.jsp
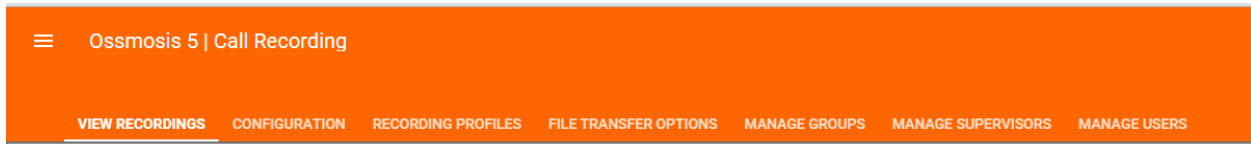
Enter your User ID and Password

Once you are logged in select the Call Recording tab at the top of the screen.

This will open a new tab within your browser with access to the Call Recording Portal and the additional Call Recording options. **This new tab can be accessed in any browser except for Internet Explorer.**


3. View Recordings

View Recordings gives you direct access to the Call Recording Portal. The Call Recording Portal allows you to listen and monitor Recorded Users Calls, export recordings, and run reports.

4. Configuration

The Configuration tab is greyed out and cannot be changed by customer Administrators.   The tab is setup by your Project Manager during the Implementation Process and can only be updated by contacting your Client Technology Advisor.

Shown in the Configuration tab is the recording package you purchased and if applicable the Retention Policy associated with the recording package.
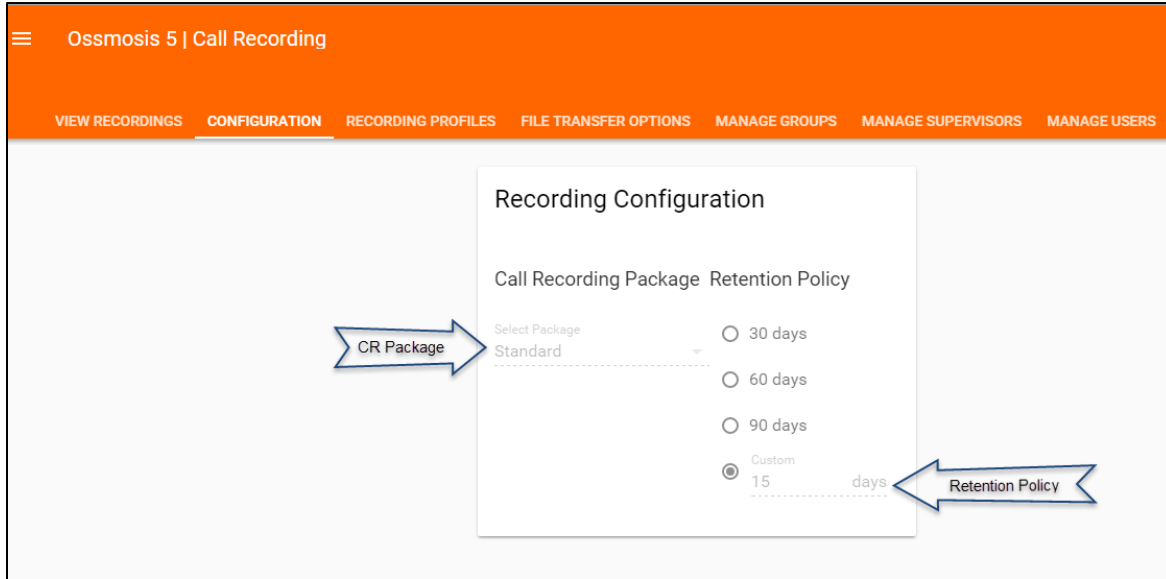
5. File Transfer Options

All information regarding File Transfer Options should have been provided to your Project Manager during the initial implementation process.

Customers are responsible for providing the following information and can be manually changed if necessary:

> *Protocol*
> *Hostname*
> *Port*
> *Operating System*
> *Username/Password*

6. Creating Recording Profiles

Recording profiles must be created in order to assign each user a recording frequency and recording features. Once profiles are created you will be able to assign them individually or mass assign them to recorded users. **Users can only be assigned to one recording profile at a time and cannot be added to a recording group or Supervisor until one is applied.** If a user is not assigned a recording profile there calls will not be recorded until one is given to them.

Once a Recording Profile has been created and saved, no adjustments can be made to it. This feature will be implemented in our Phase 2 upgrade of the OSSmosis Call Recording Portal.

6.1 Creating a Recording Profile

1. Select the Recording Profile Tab.
2. From the Profile dropdown menu, select Create New Profile.
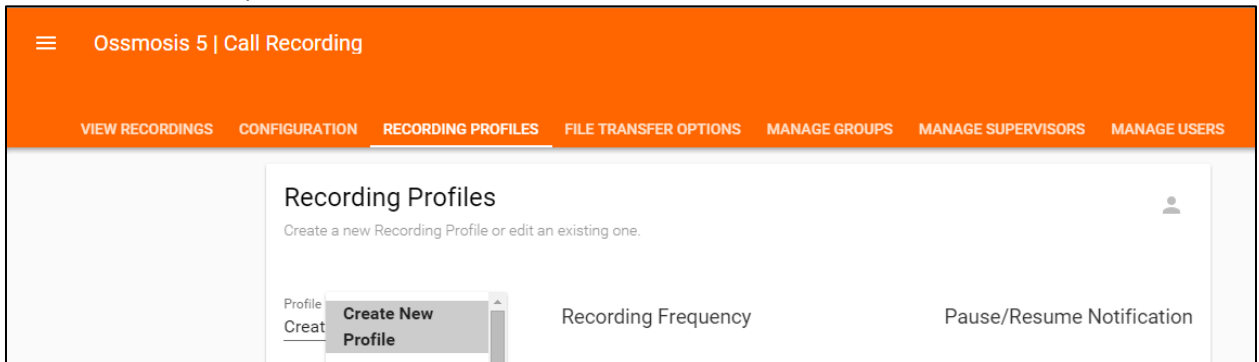
3. Enter a name for new the Recording Profile.

4. Select the Recording Frequency.

6.1.1 Call Recording Options:

Always – All calls are recorded

Always with Pause/Resume – All calls are recorded and the recorded user will have the ability to Pause and Resume the recording.

On Demand - Initiate a recording at any point during a call and the recording will capture the entire length of the call. This will also allow for the end user to pause and resume a call once the recording has been initiated.

On Demand with User Initiated Start - Initiate a recording at any point during a call and will only record the call from the point in which the recording was initiated. This will also allow for the end user to pause and resume a call once the recording has been initiated and end the recording before the calls end.

Never – No calls are recorded.

5. Select the Additional Options that should be assigned to the recording profile. The Additional Options that are available are based on the Recording Frequency selected.

6.1.2 Additional Options
1. Play Recording Announcement – An audible announcement will play to all parties indicating that the call is being recorded. This will play at the beginning of a call if the user is setup for Always or when the recording was initiated if a user is setup for On Demand recording.
2. Record Voice Messages – Records voice messages left for recorded users and voice messages left by recorded users.

Pause/Resume Notifications
1. None – No notification will be played if a recorded call is paused or resumed.
2. Beep – A beep will play to both the caller and recorded user indicating the recording has been paused or resumed.
3. Play Announcement – An announcement will play to the caller and recorded user indicating the recording has been paused or resumed.

Recording Notification
Allows for a warning tone to sound every (x) amount of seconds specified, reminding the caller and recorded user that the call is being recorded.

6.2 Adding Users to a Recording Profile

1. Select the Recording Profile Tab.
2. From the Profile dropdown menu select a Recording Profile.
3. To add users to the profile, click the User Icon at the top right hand corner of the profile.

4. Click the add icon to begin adding users to the profile.
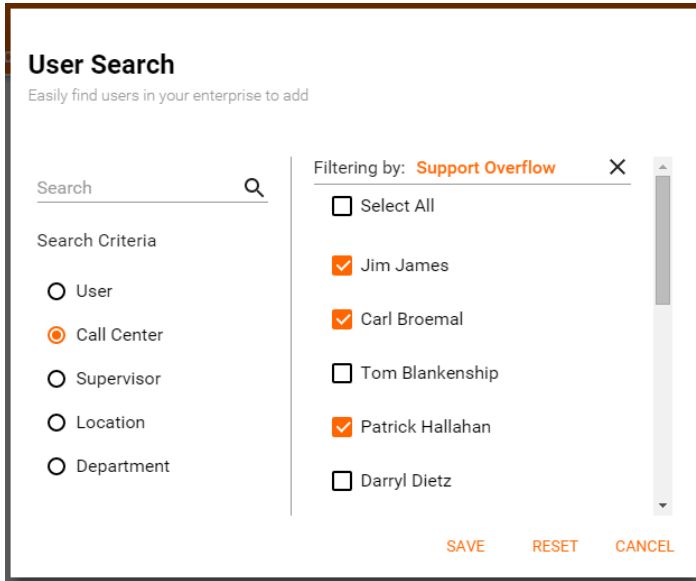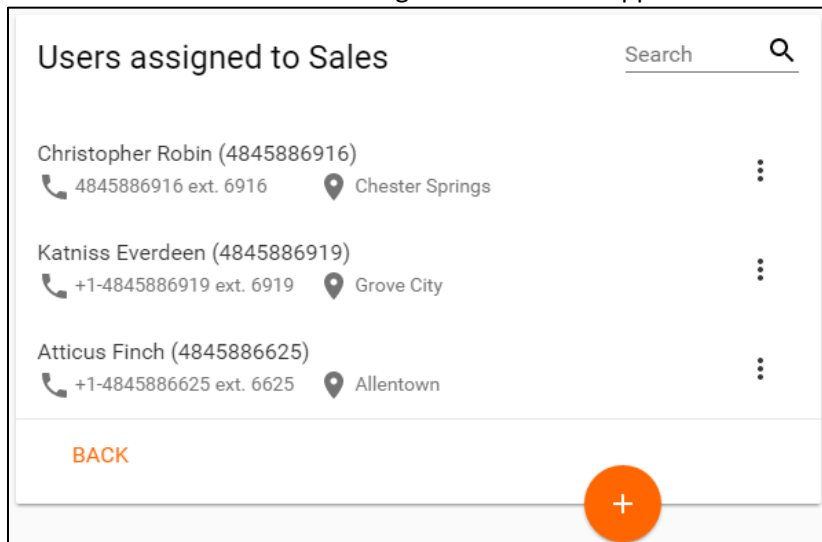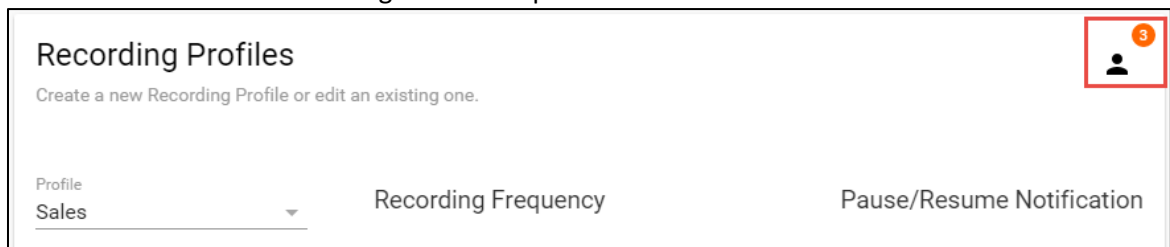

5. An advanced search window will appear. You will have the ability to filter and search for users based on the following criteria:
   a. Users
   b. Call Centers
   c. Supervisors
   d. Location
   e. Department
6. Select your Search Criteria and your users, either individually or Select All.

EVOLVE IP

User Search
Easily find users in your enterprise to add

Search 🔍

Search Criteria

- ○ User
- ◉ Call Center
- ○ Supervisor
- ○ Location
- ○ Department

Filtering by: **Support Overflow** ✕

- ☐ Select All
- ☑ Jim James
- ☑ Carl Broemal
- ☐ Tom Blankenship
- ☑ Patrick Hallahan
- ☐ Darryl Dietz

SAVE   RESET   CANCEL

7. Save your changes.
8. The Users added to the Recording Profile will now appear in the window.

Users assigned to Sales
Search 🔍

Christopher Robin (4845886916)
📞 4845886916 ext. 6916   📍 Chester Springs   ⋮

Katniss Everdeen (4845886919)
📞 +1-4845886919 ext. 6919   📍 Grove City   ⋮

Atticus Finch (4845886625)
📞 +1-4845886625 ext. 6625   📍 Allentown   ⋮

BACK

➕

9. When you navigate back to the Recording Profiles main page the User icon at the top now shows the number of users assigned to that profile.

Recording Profiles
Create a new Recording Profile or edit an existing one.

👤 ③

Profile
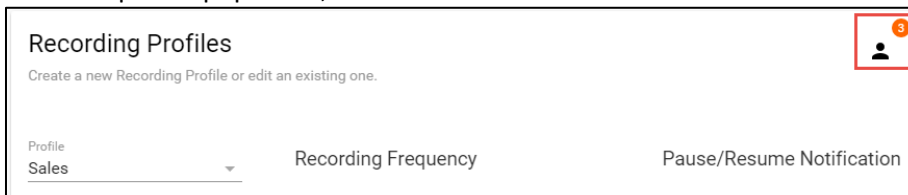Sales ▾

Recording Frequency

Pause/Resume Notification

6.3 Removing Users from a Recording Profile
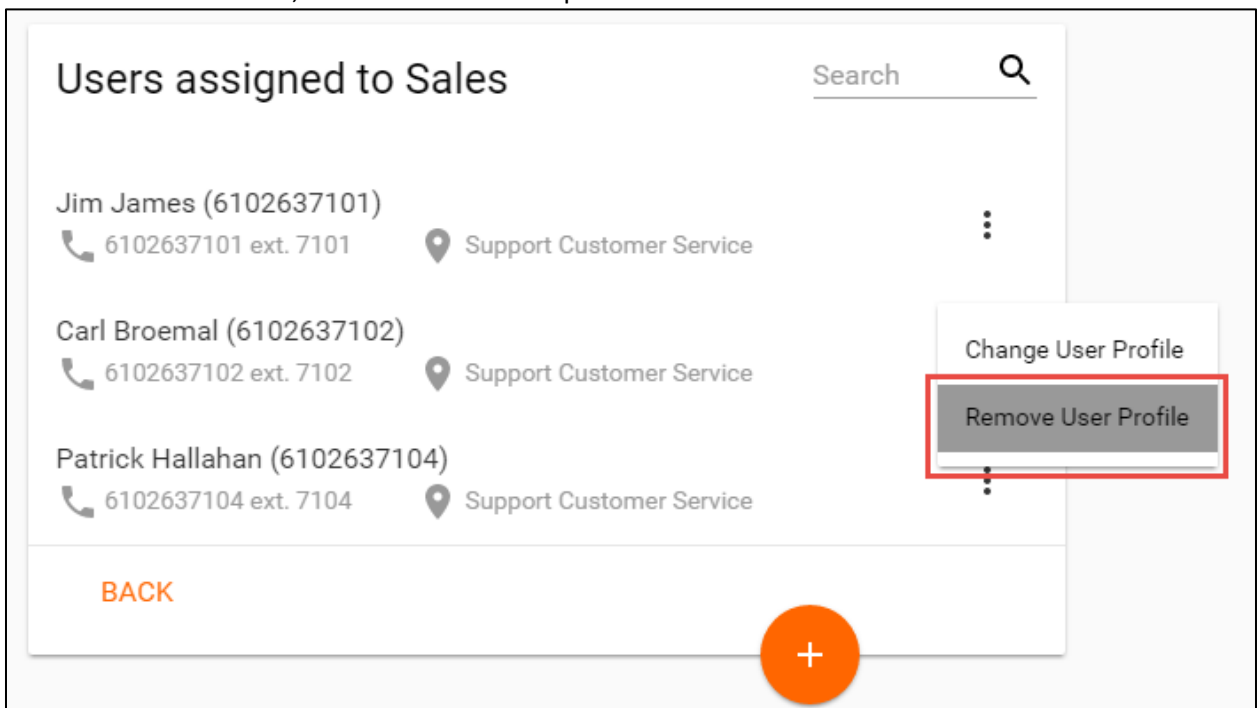
Please note that this will not remove the Call Recording Service from the user. *The User will not have any calls recorded until a new Recording Profile has been assigned to them and will be removed from all Recording Groups and Supervisors they are currently assigned.*

As a best practice, it is recommended that a **"Never" Recorded Profile** is created and assigned to the user, rather than removing a recording profile from a user. This will ensure the user is not removed from the correct Groups or Supervisors they are currently assigned and their calls are not recorded.
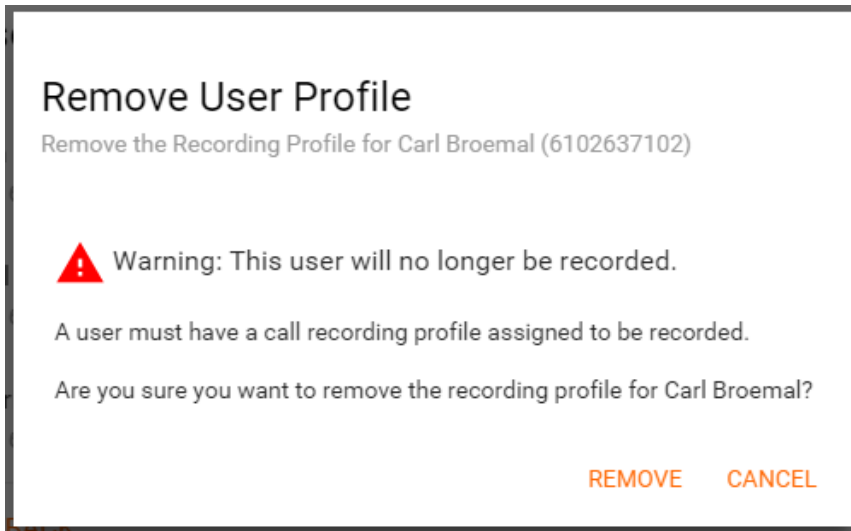
1. Select the Recording Profile you wish to remove the users from under the Recording Profiles Tab.
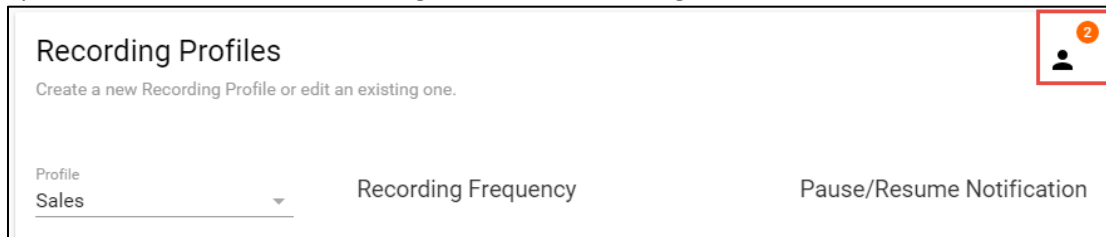2. Once the profile populates, click the User Icon.

Recording Profiles
Create a new Recording Profile or edit an existing one.

Profile
Sales   Recording Frequency   Pause/Resume Notification

3. Next to the User's name, select the three dot options icon and click Remove User Profile.

Users assigned to Sales   Search

Jim James (6102637101)
📞 6102637101 ext. 7101   📍 Support Customer Service   ⋮

Carl Broemal (6102637102)
📞 6102637102 ext. 7102   📍 Support Customer Service

Change User Profile

Remove User Profile

Patrick Hallahan (6102637104)
📞 6102637104 ext. 7104   📍 Support Customer Service   ⋮

BACK   +

4. A warning will appear asking you to confirm that you want to remove the Recording Profile from the User. Please note that this will not remove the Call Recording Service from the user. *The User will not have any calls recorded until a new Recording Profile has been assigned to them and will be removed from all Recording Groups and Supervisors they are currently assigned.*

Remove User Profile

Remove the Recording Profile for Carl Broemal (6102637102)

⚠ Warning: This user will no longer be recorded.

A user must have a call recording profile assigned to be recorded.

Are you sure you want to remove the recording profile for Carl Broemal?

REMOVE   CANCEL

5. Select Remove
6. When you navigate back to the Recording Profiles main page the User icon at the top shows the updated number of users that assigned to that Recording Profile.

Recording Profiles

Create a new Recording Profile or edit an existing one.

Profile
Sales

Recording Frequency

Pause/Resume Notification

7. Manage Groups

The Manage Groups tab allows Administrators to create custom Recording Groups within the Call Recording portal. After a group has been created Users and Supervisors can be assigned to the group. The assigned Supervisors will be able to monitor and export call recordings for the Users within the Group.

Recorded Users and Supervisors can be assigned to more than one group.
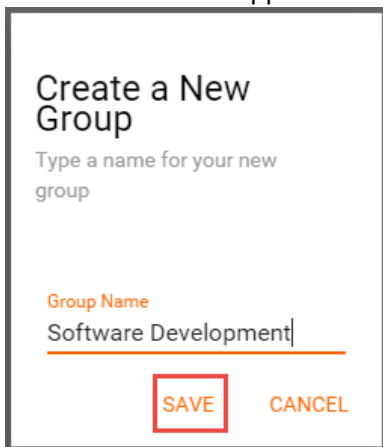
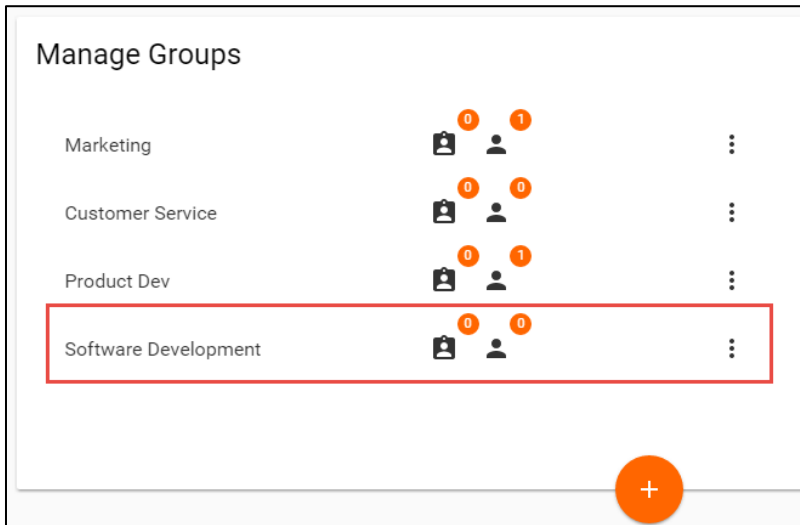## 7.1 Creating a Recording Group

1. Select the Manage Groups tab.

2. Select the Add icon to add a new group.
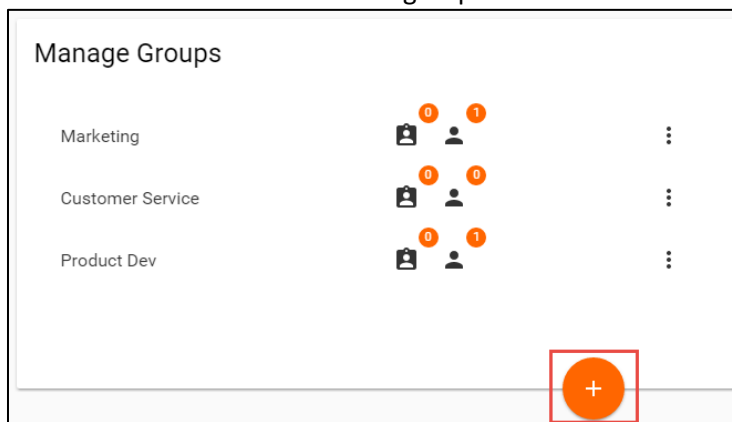
3. A new window will appear. Enter in the name of the Group and select save.

4. The new Group will now appear on the main page of the Manage Groups tab.

5. The following icons indicate how many Supervisors and Recorded Users are assigned to the group:
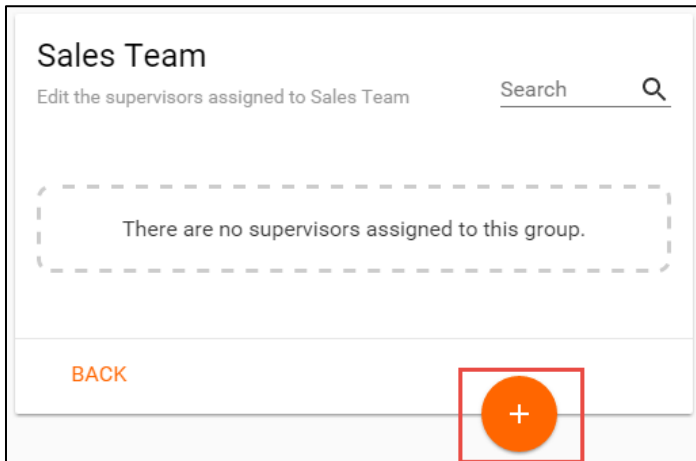
    a. Supervisor -

    b. Users -

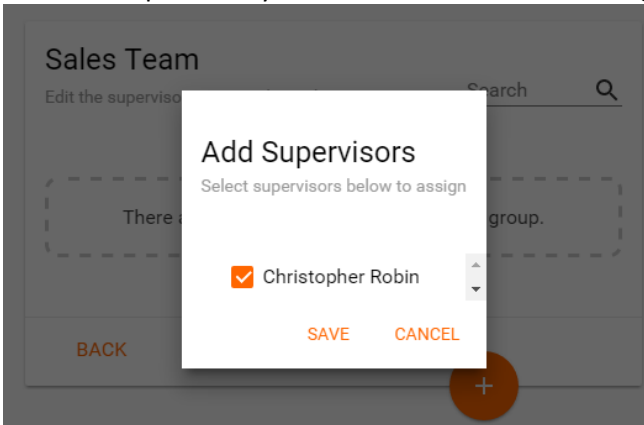## 7.2 Adding Supervisors to a Recording Group.

1. Next to the group you wish to edit select the three dot options icon.
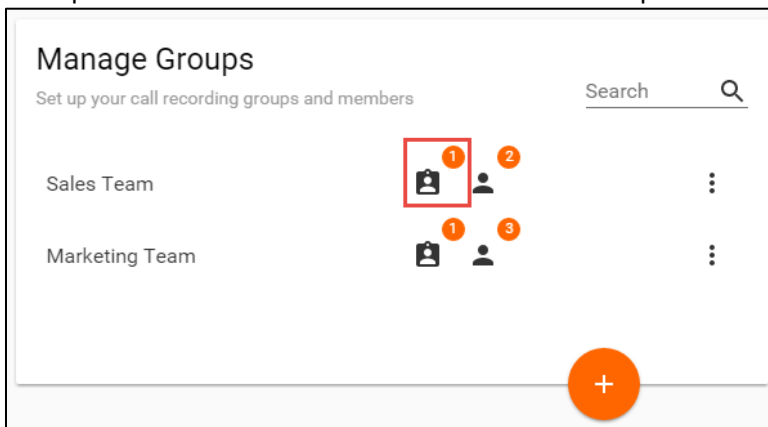2. Select Edit Supervisors.
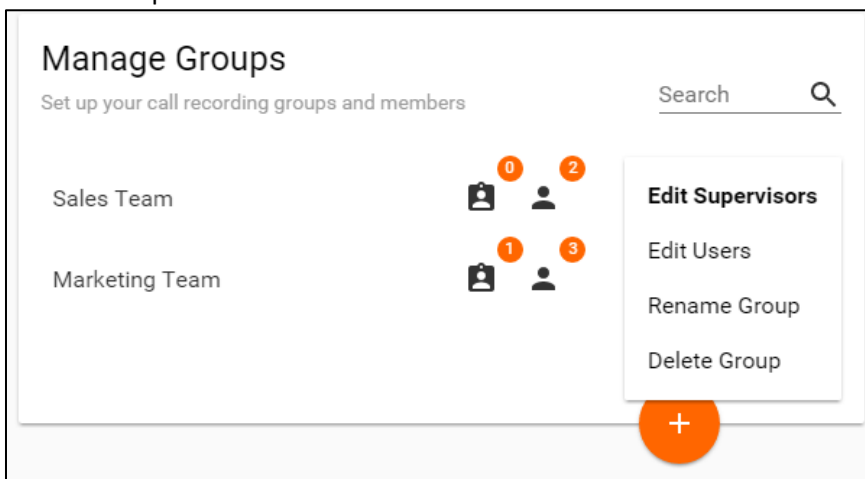
3. Select the Add icon.

4. The available Supervisors to add to the Recording Group will appear in a separate window.
5. Select the Supervisors you wish to add to the Recording Group and save your selection.

6. Select Back.

7. The Supervisor Icon now reflect the new number of Supervisors assigned to the Recording Group.
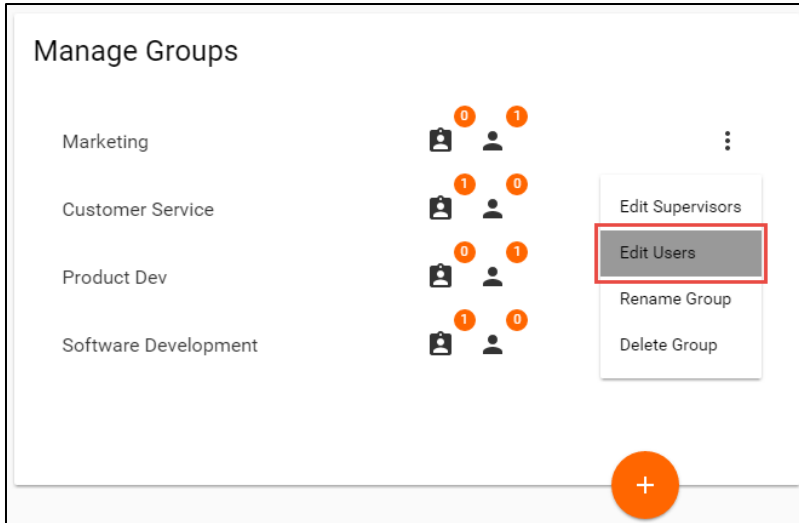

8. Supervisors now have the ability to listen to and export recording for the Recording Users assigned to this Recording Group.
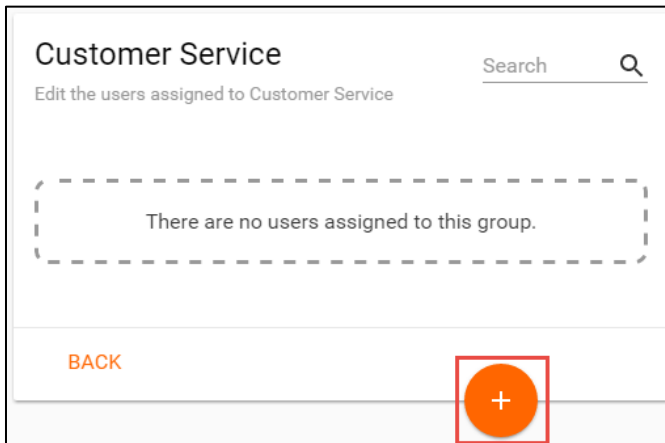
7.3 Adding Users to a Recording Group

Users must first be assigned a Recording Profile before they can be added to a Recording Group.

1. Next to the group you wish to edit select the three dot options icon.
2. Select Edit Users.

3. Select the Add icon.

4. An advanced search window will appear. You will have the ability to filter and search for users based on the following criteria:
    a. Users
    b. Call Centers
    c. Supervisors
    d. Location
    e. Department
5. Select your search criteria and select your users, either individually or select all and save.
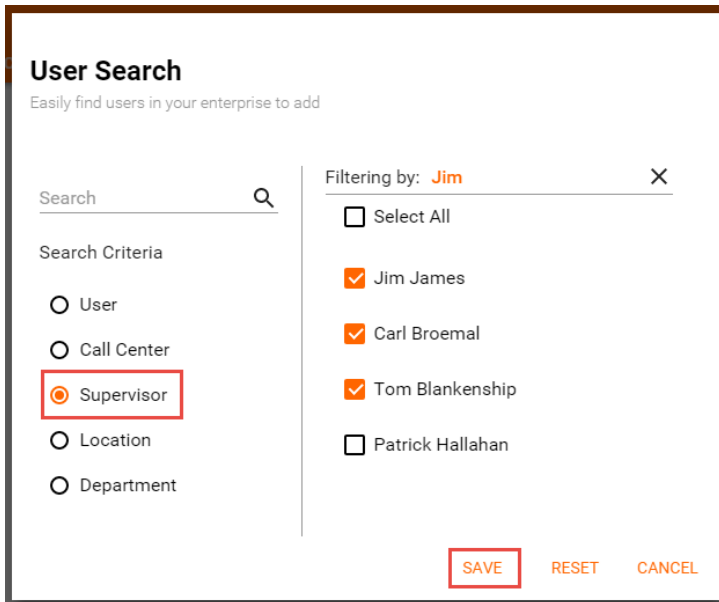
6. When you navigate back to the Manage Groups main page the User icon next to the Recording Group name now shows the number of users assigned to that group.


7.4 Deleting a Recording Group

Deleting a recording group will remove the group from the Call Recording Portal. **In order to delete a Recorded group, Recorded Users and Supervisors must first be removed from the group.** Delete Group will be unavailable until users are removed. Supervisors will no longer have access to those Recording.
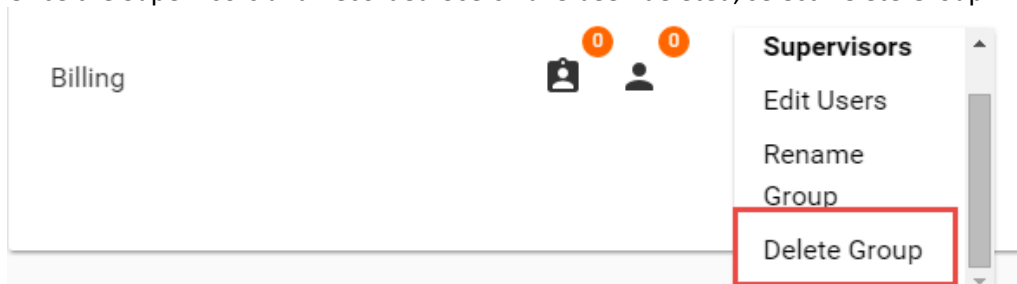
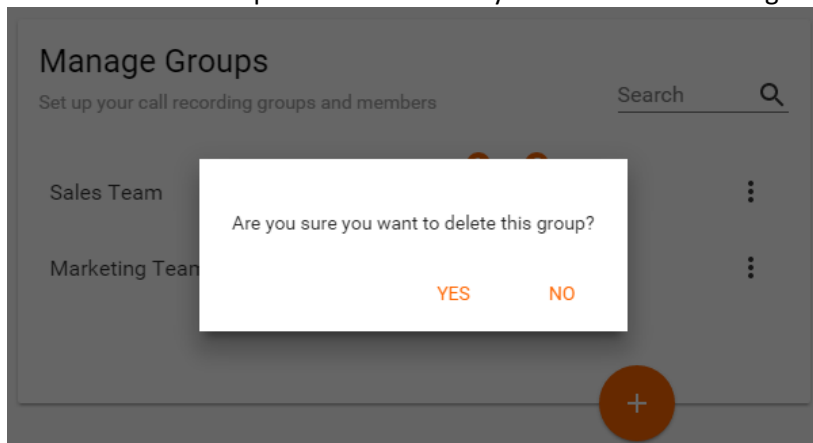1. To remove Recorded Users/Supervisors from a group, Select Edit Users or Edit Supervisors.
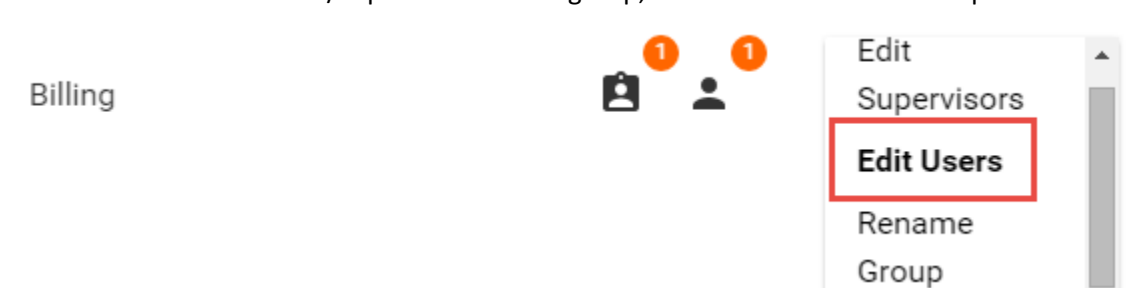
2. Next to each Recorded Users or Supervisors name, select the delete icon.
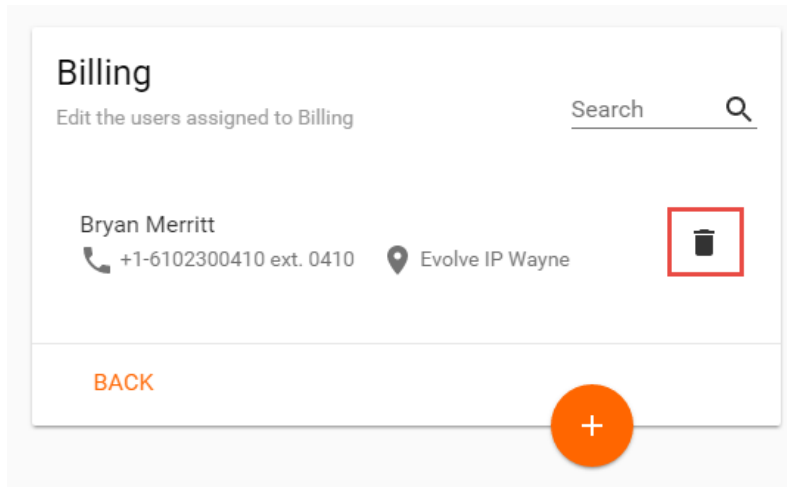
3. This will delete each Recorded User or Supervisor from the group.
4. Once the Supervisors and Recorded Users have been deleted, select Delete Group.

5. A new window will open to confirm that you wish to delete the group.

6. Select Yes. The Recording Group has now been removed from the Call Recording Portal. No notification is sent out to the Supervisors and Recorded Users that the Recording Group has been deleted.

8. Manage Supervisors

The Manage Supervisors tab allows Administrators to edit the groups Supervisors are currently monitoring. Supervisors will be able to monitor all call recordings of users assigned to the recording groups the Supervisors are assigned to. **In the future Administrators will be able to add and create logins for new Supervisors.**

The main screen of the Manage Supervisors page allows you to search and filter for an individual Supervisor.

The group icon next to the Supervisors name shows the number of Recording Groups the Supervisors is currently assigned.
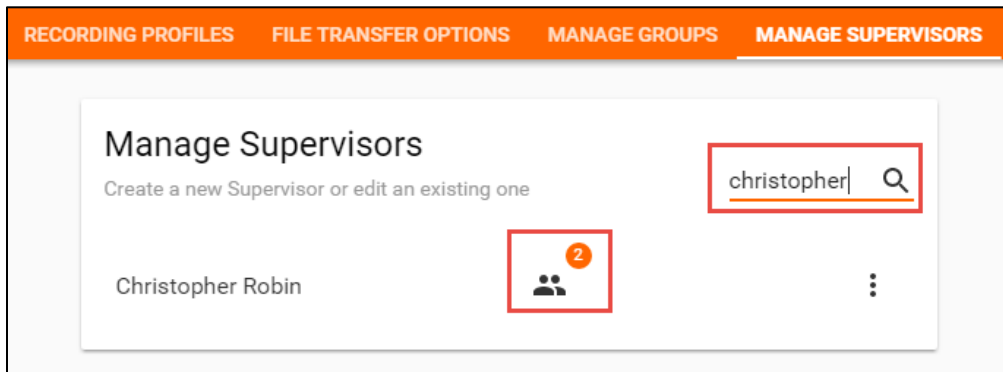
8.1 Editing a Supervisor

Editing a Supervisor allows the Administrator to view the Supervisors profile and manage the Recording Groups the Supervisor is assigned.

1. Next to the Supervisor select the three dot options icon.
2. Select Edit Supervisor.
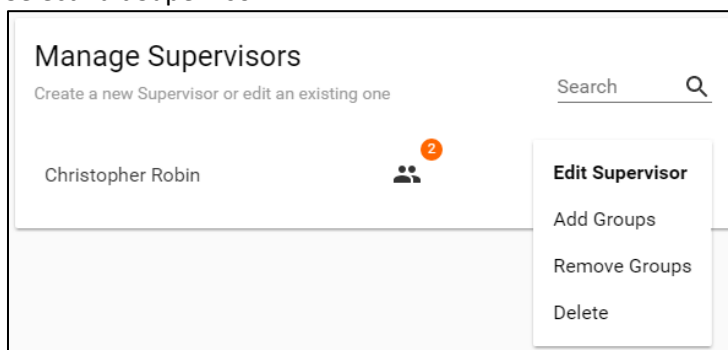
3. A new window will open displaying the Supervisors profile and groups they are currently assigned.
4. To remove the Supervisor from a Recording Group select the trash can icon next to the group.

5. Select Save.

6. To add a Supervisor to a Recording Group, select the add symbol.

7. A new window will open with the groups the Supervisor is able to be added to.
8. Select Add once you have chosen the appropriate groups.

9. Once the group appears in the Supervisors profile, Select Save.
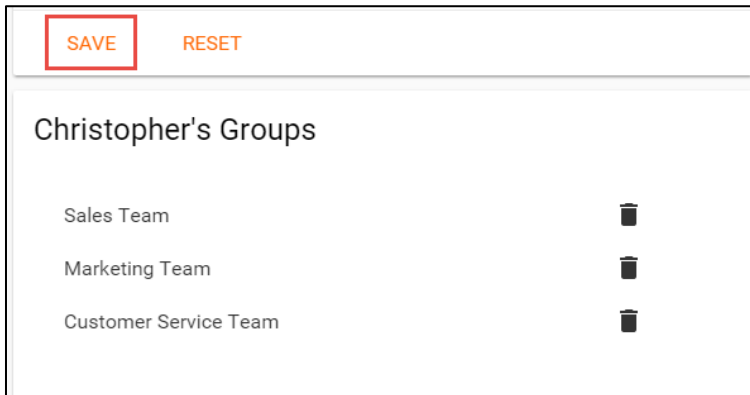
10. The Supervisor is now added to the Recording Group with access to recordings for Recorded Users assigned to this group.
11. The Supervisors group icon now reflects the new group they have been added to.
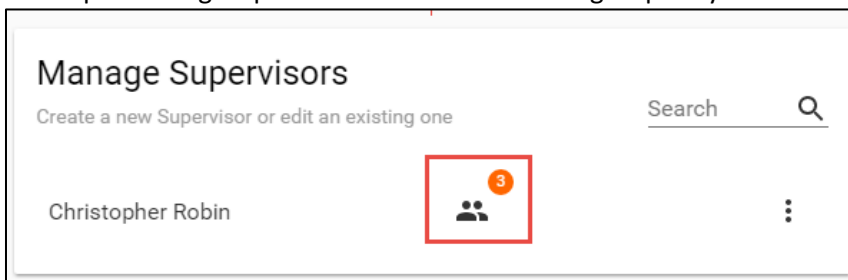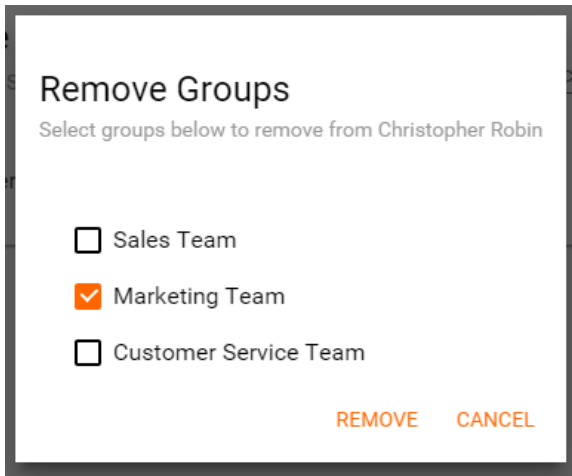

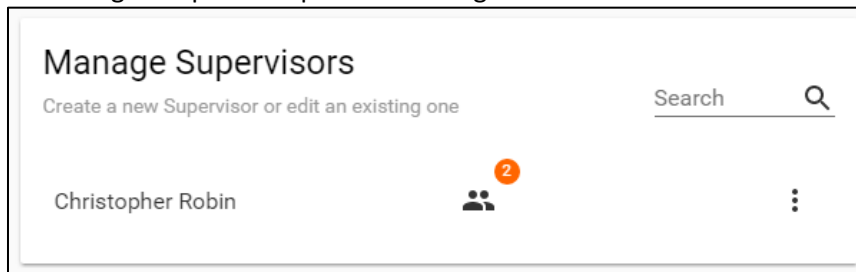## 8.2 Removing a Recording Group from a Supervisor

1. Select the three dot options icon and Remove Groups.
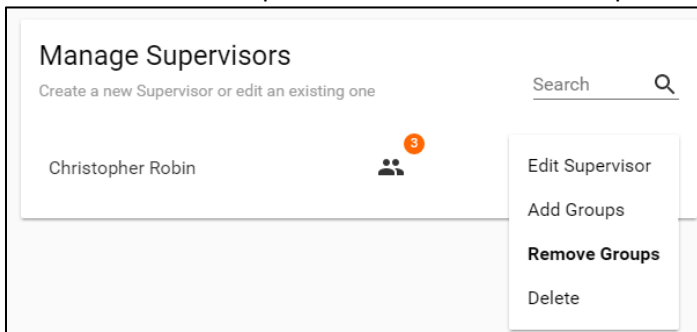
2. A new window will open with the list of groups the Supervisor is currently assigned.
3. Select the groups you wish to remove the Supervisor from.
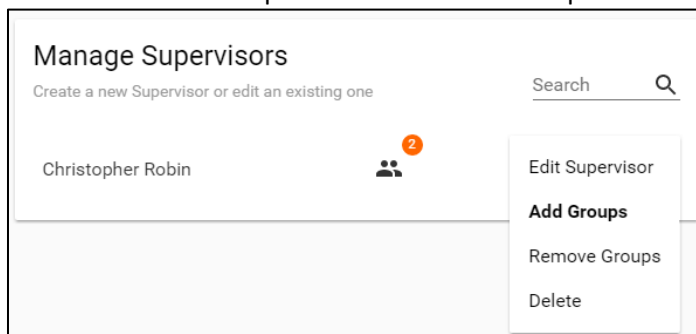4. Select Remove.

5. The Supervisor is removed and the group icon on the main page now reflects the number of Recording Groups the Supervisor is assigned.
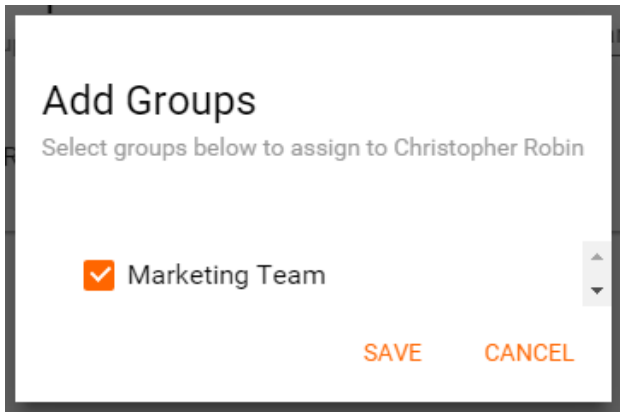

## 8.3 Adding a Supervisor to a Recording Group

1. Select the three dot options icon and Add Groups.

2. A new window will open with the list of Recording Groups available to add the Supervisor.
3. Select the groups you wish to add the Supervisor to.
4. Select Save.

5. The Supervisor will be added to that group(s) and the group icon on the main page now reflects the number of Recording Groups the Supervisor is monitoring.
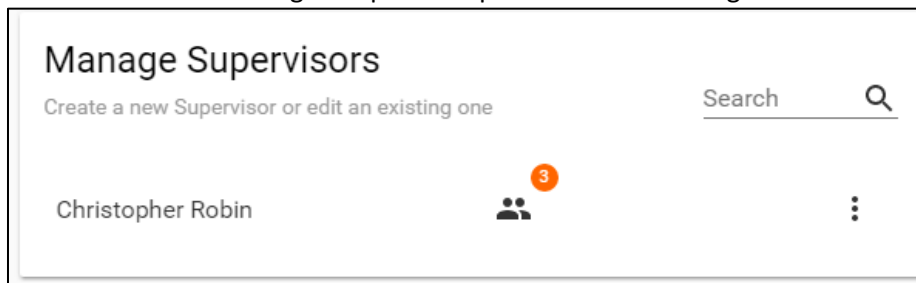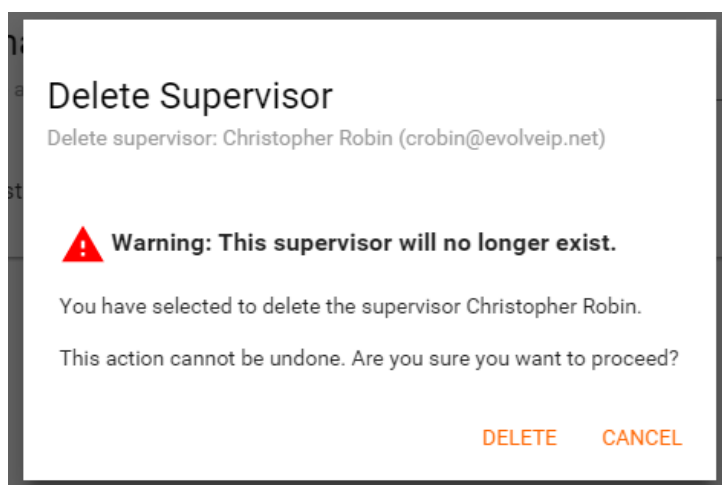

8.4 Deleting a Supervisor

Deleting the Supervisor will remove them as a Supervisor and they will no longer have access to listen and monitor calls in the Call Recording Portal.

1. To delete a supervisor select the three dot options icon and Delete.
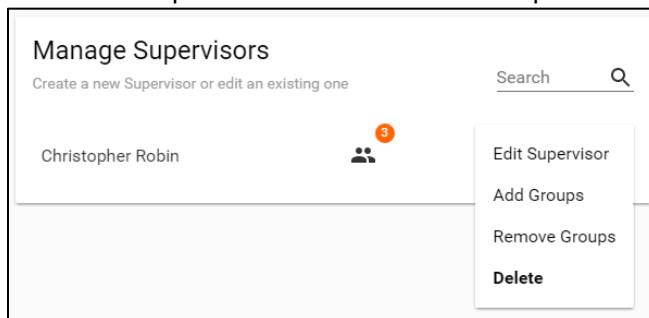
2. A warning window will open asking you to confirm your selection.
3. Select Delete to remove the Supervisor.

Delete Supervisor

Delete supervisor: Christopher Robin (crobin@evolveip.net)

⚠ **Warning: This supervisor will no longer exist.**

You have selected to delete the supervisor Christopher Robin.

This action cannot be undone. Are you sure you want to proceed?

DELETE   CANCEL

4. Once selected Supervisor is removed and no longer has access to the Call Recording Portal.

9. Manage Users

The main page of the Manage Users tab gives you a list of all Recorded Users, the number of Recording Groups they are assigned as well as additional options. The main page also shows you which Recording Users have a Recording Profile assigned and which do not. Recorded Users cannot be assigned to a Recording Group or monitored by a Supervisor until a Recording Profile is assigned.
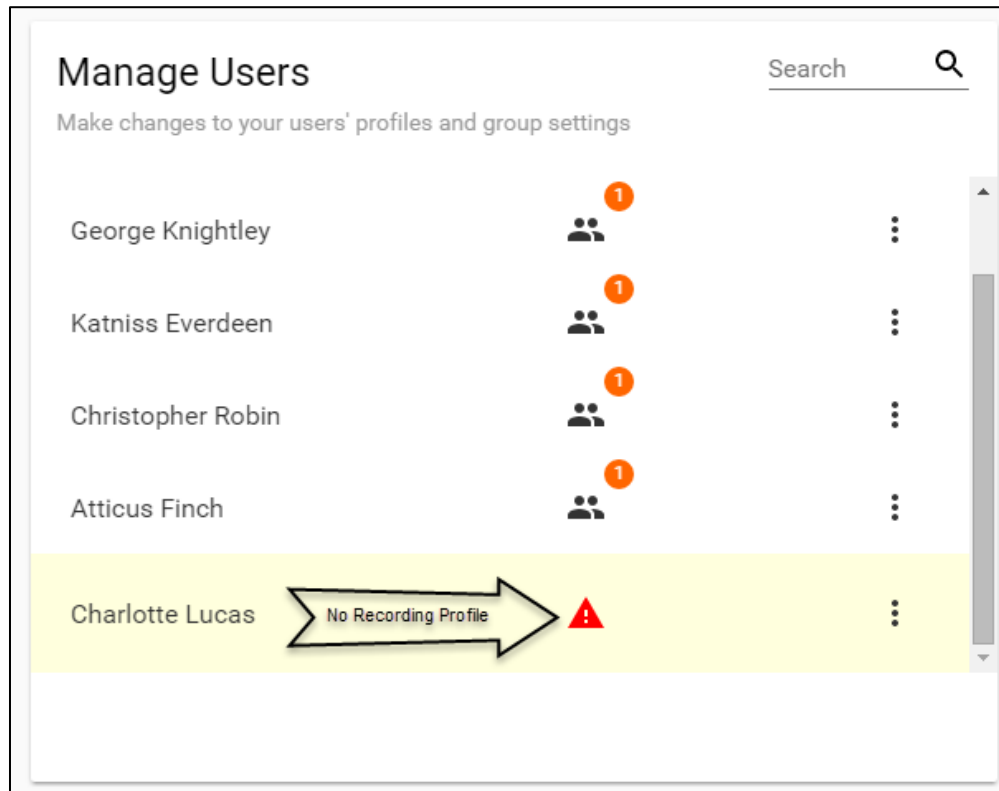
9.1 Editing a User without a Recording Profile

1. Select the three dots option icon and select Edit User.
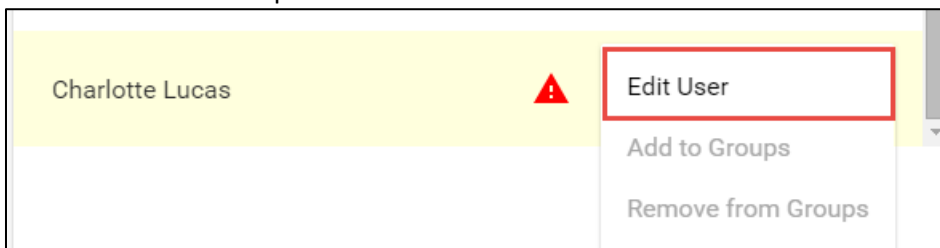
2. This will bring you to the User's main profile page. The profile option will be red and the Group section will be greyed out until a profile has been assigned.

3. From the profile drop down, select the Recording Profile you wish to assign to the User.

4. Save Profile.
5. Once a profile has been applied you will be able to add the User to Recording Groups.

9.2 Editing a User with a Recording Profile
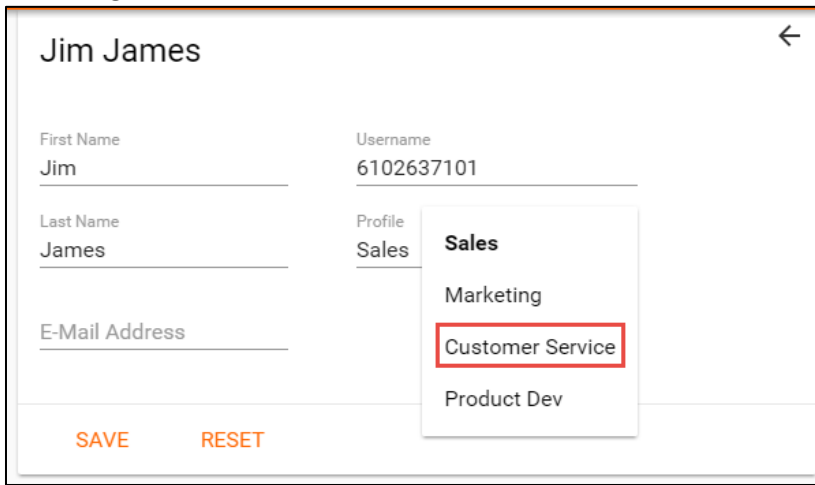
1. Select the three dots option icon and select Edit User.
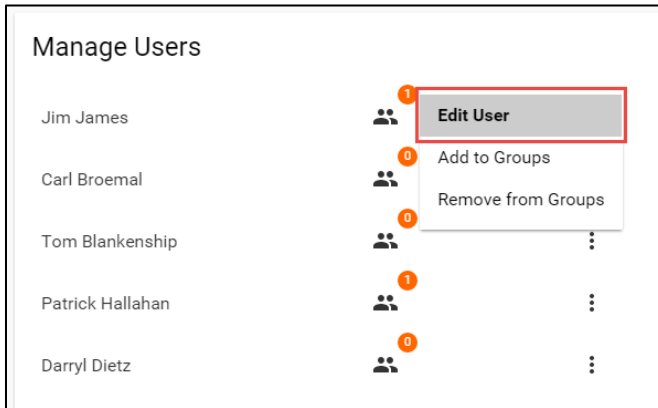
2. The following information can be found in the Recorded Users profile:
   a. First Name
   b. Last Name
   c. Email address (if applicable)
   d. Username -typically the User's phone number
   e. Profile – the Recording Profile that is currently assigned to the User
   f. Groups they are currently assigned to
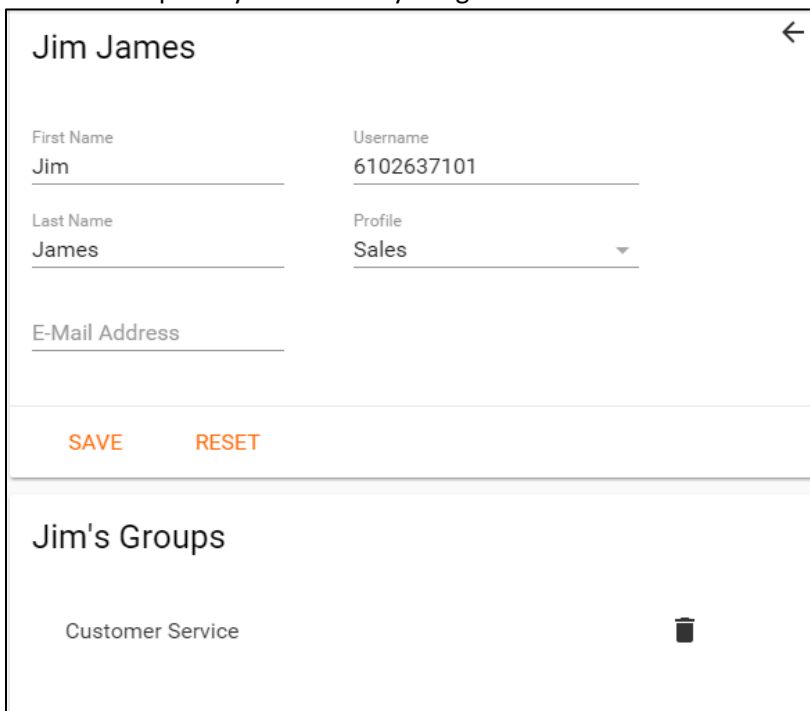
3. To change the profile assigned to the User, select the Profile drop-down menu and select a Recording Profile.
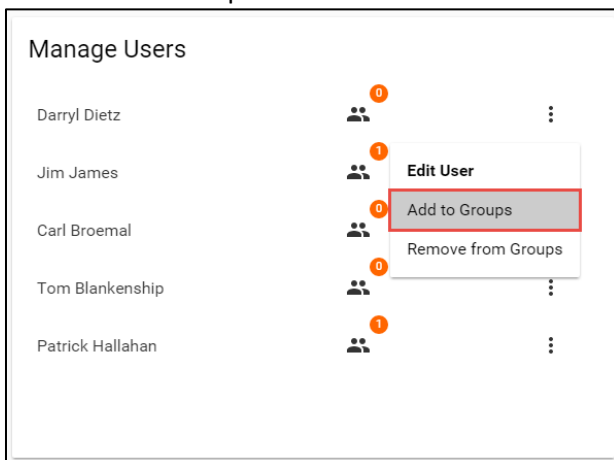

4. Save Changes.
5. To delete a User from a group they are currently assigned to, select the trash can icon next to the group.
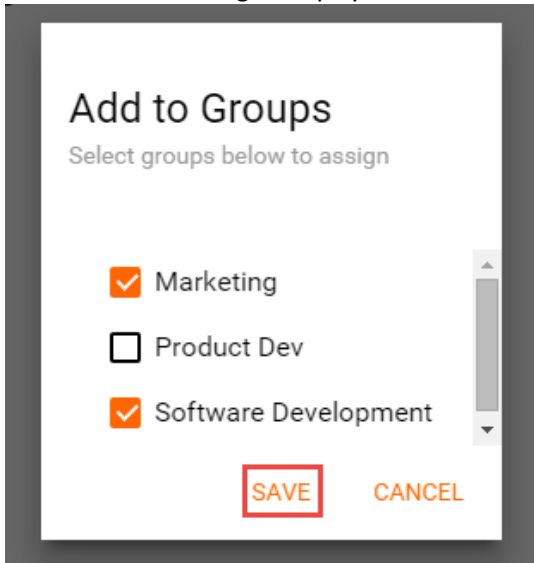

9.3 Adding a Recorded User to a Group

1. Select the three dots option icon next to the User you wish to add to a new Recording Group.
2. Select Add to Groups.

3. A new window appears with the available Recording Groups the User can be added to.

4. Select the Recording Groups you wish to add the User to and select Save.

Add to Groups
Select groups below to assign

- ☑ Marketing
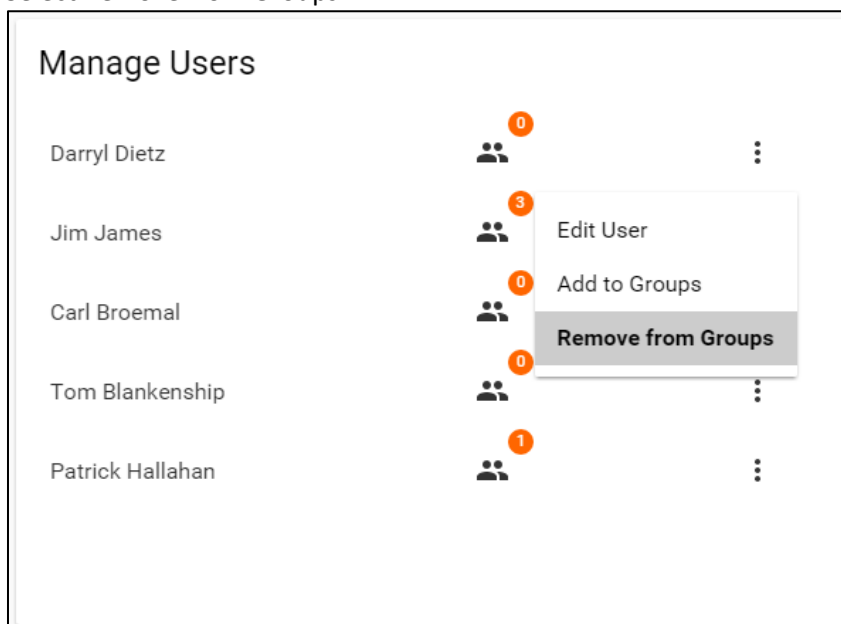- ☐ Product Dev
- ☑ Software Development

SAVE   CANCEL

5. When you navigate back to the Manage Users main page the group icon next to the user's name will show the updated number of groups the user is assigned.
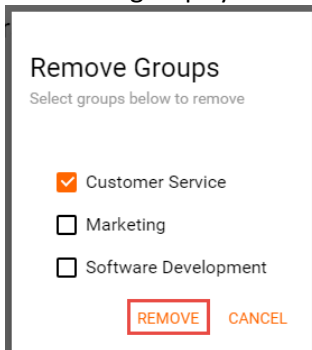
Jim James   **3**

9.4 Remove a Recorded User from a Group

1. Select the three dots option icon next to the User you wish to add to a new Recording Group.
2. Select Remove from Groups.

Manage Users

Darryl Dietz	**0**
Jim James	**3**	Edit User
Carl Broemal	**0**	Add to Groups
Tom Blankenship	**0**	**Remove from Groups**
Patrick Hallahan	**1**	

3. A new window appears with a list of all the groups the User is currently assigned.
4. Select the groups you wish to remove the User from and select Remove.

Remove Groups
Select groups below to remove

☑ Customer Service
☐ Marketing
☐ Software Development

REMOVE   CANCEL

5. When you navigate back to the Manage Users main page the group icon next to the User's name will show the new number of groups the User is assigned to.

Jim James