

## USER GUIDE



# Call Recording

Quick Guide to help you start accessing web interface, dashboard, playback call recording, view reports, change password, download recordings etc.

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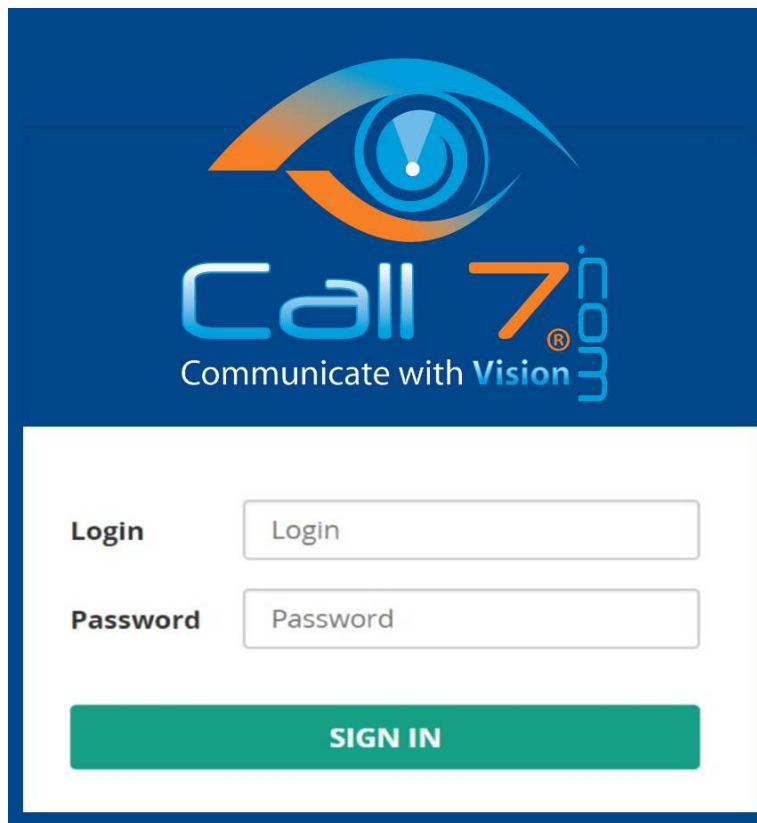
# 1. Accessing web interface

First Communications has a web-interface, which can be accessed from other computers via the network and/or the internet.

Inside web-browser address bar, type the address <https://rec.uc-view.com>

Login details are provided in the email. If you did not receive the email or have trouble accessing portal please email [Support@Call7.com](mailto:Support@Call7.com) or call 800.881.3066

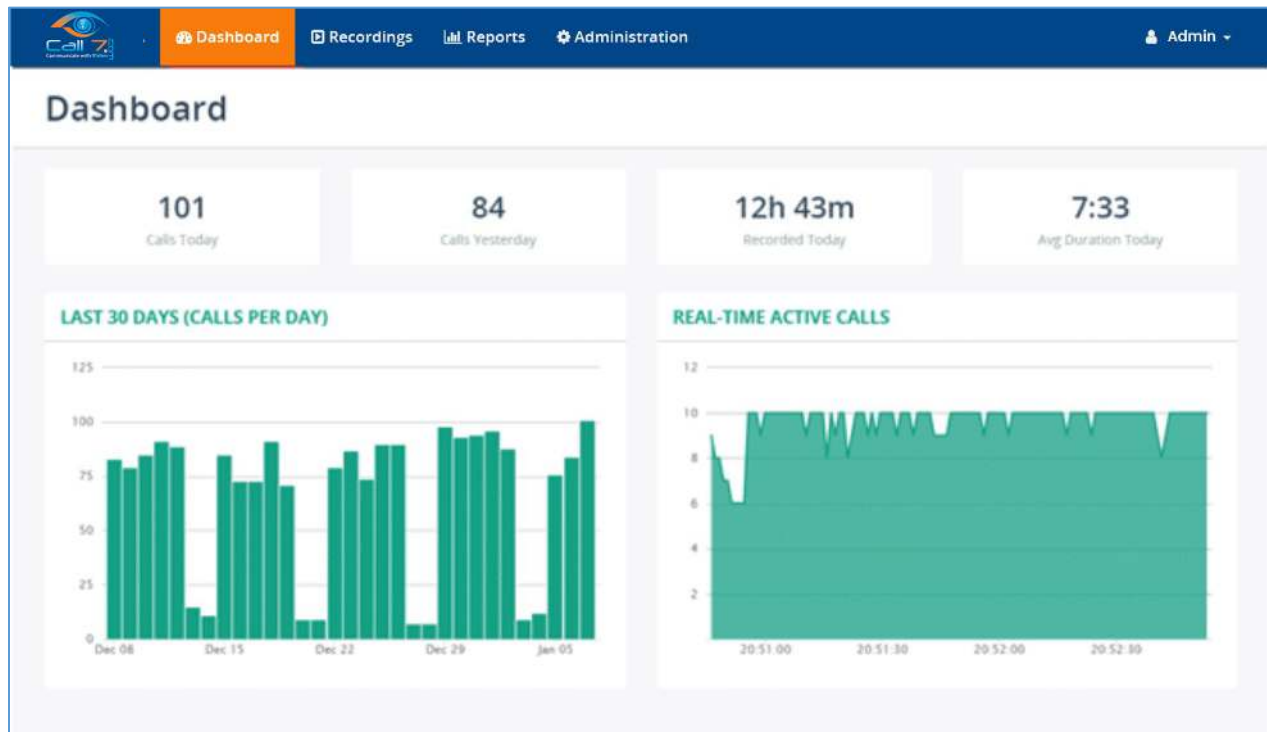
If web address is correct then you should see the login page:

The image shows the login page for Call 7 Vision. At the top, there is a logo featuring a stylized eye with a blue and orange gradient, and the text "Call 7 Vision" in a blue, sans-serif font. Below the logo, the tagline "Communicate with Vision" is written in a smaller, blue font. The main content area is a white box with a blue border. It contains two input fields: one labeled "Login" and another labeled "Password". Below these fields is a large, green button with the text "SIGN IN" in white, uppercase letters.

However, if a web-page is not opening on a particular browser please try opening the same on other browser.

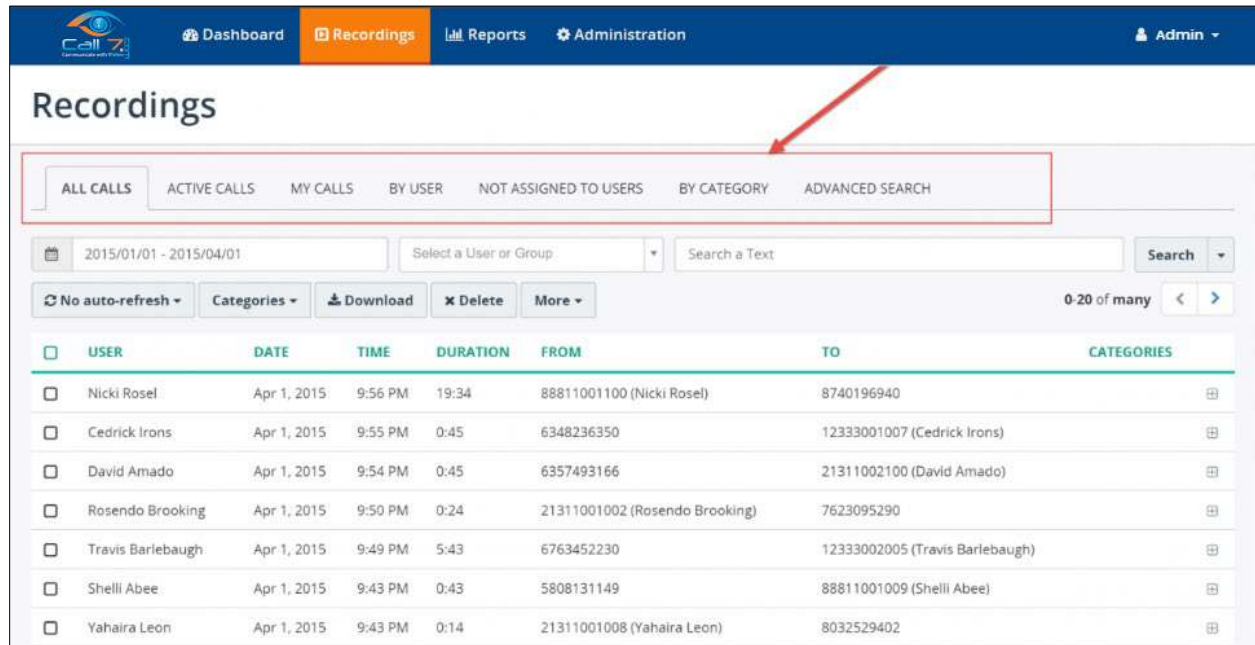
## 2. Dashboard

First Communications dashboard provides a thorough overview of calls-per-day, average call duration, current active calls, etc.



### 3. Call recordings views

First Communications supports the following call recording views as pictured:

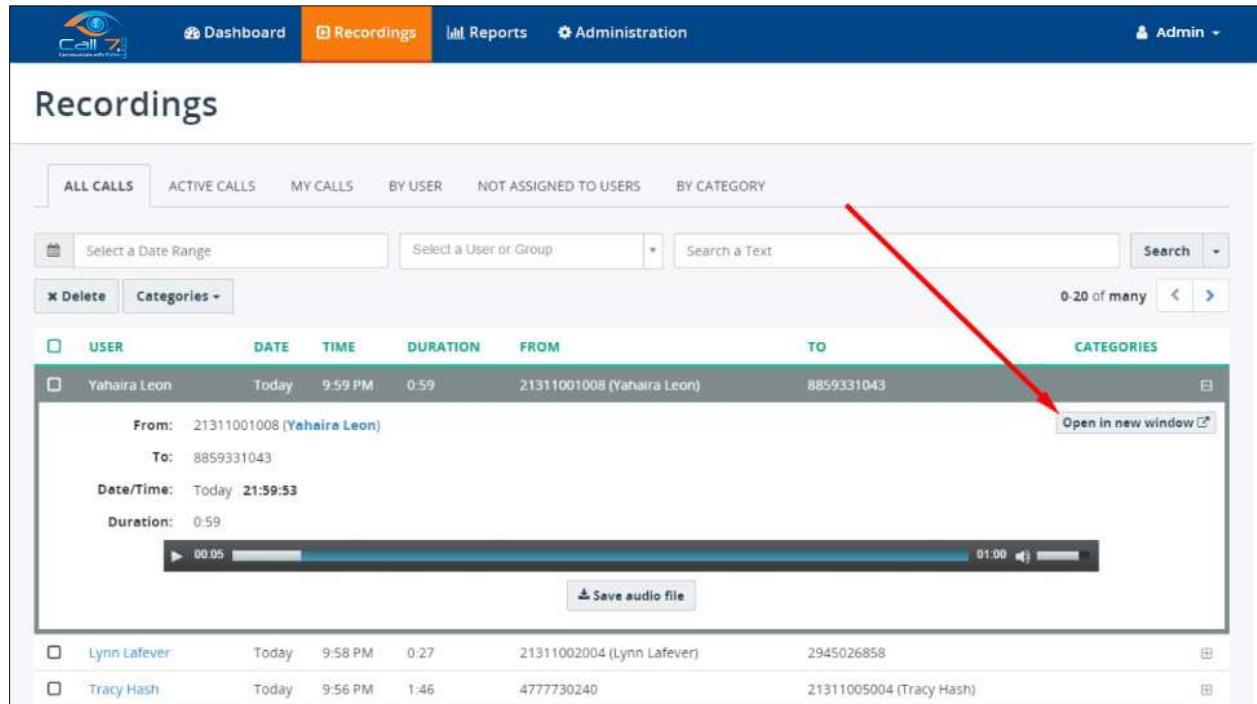


View	Description
All calls	Displays all call recording (including active calls).
Active calls	Displays only active calls
My calls	Displays call recordings associated with the current logged in user
By user	Displays call recordings, which are grouped by user and user group
Not assigned to users	Displays call recordings, which were not assigned to any users; this view is visible to administrator accounts only.
By category	Displays calls recordings grouped by category

## 4. Playback call recordings

### 4.1 Inline basic audio player

Click on the call list, and you will be able to see call details within a basic media player, which is right inside the call list.



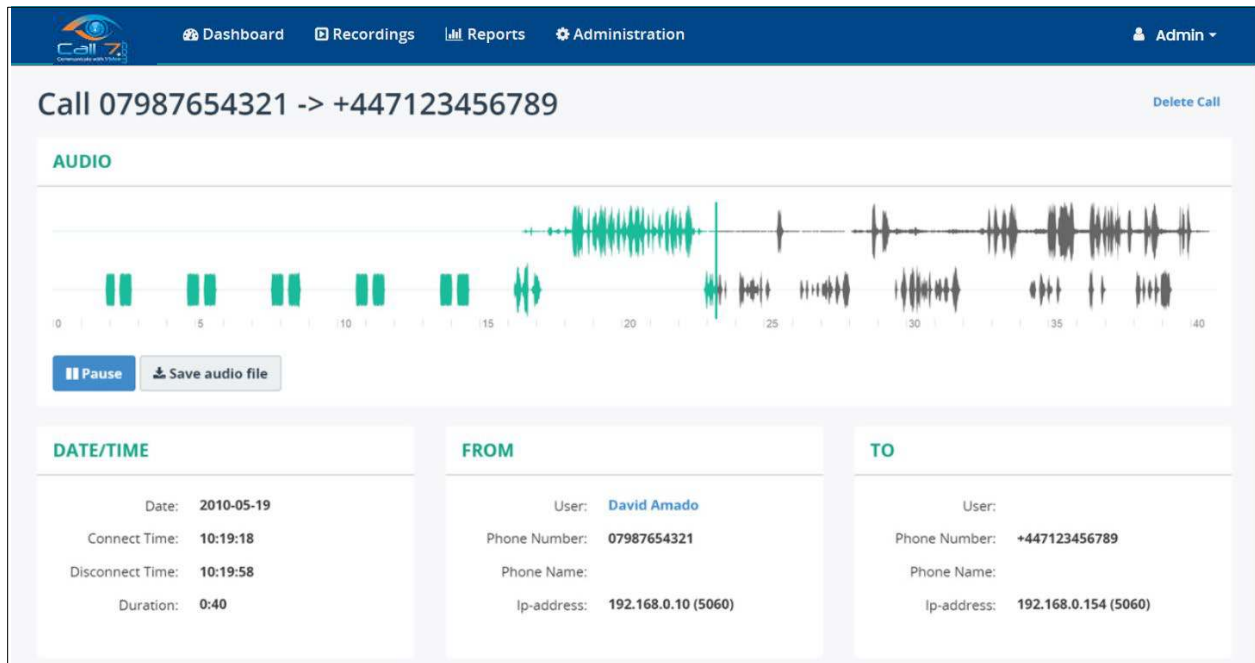
The screenshot displays the 'Recordings' section of the application. The top navigation bar includes 'Dashboard', 'Recordings' (active), 'Reports', and 'Administration'. The 'Recordings' page has tabs for 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY USER', 'NOT ASSIGNED TO USERS', and 'BY CATEGORY'. Below these are search filters: 'Select a Date Range', 'Select a User or Group', and 'Search a Text'. A table lists recordings with columns: USER, DATE, TIME, DURATION, FROM, TO, and CATEGORIES. The first row is selected, showing details for 'Yahaira Leon' with a duration of 0:59. An inline audio player is embedded in the row, showing a progress bar at 00:05 and a 'Save audio file' button. A red arrow points to the 'Open in new window' link next to the audio player.

USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES
Yahaira Leon	Today	9:59 PM	0:59	21311001008 (Yahaira Leon)	8859331043	<div> <div>From: 21311001008 (Yahaira Leon)</div> <div>To: 8859331043</div> <div>Date/Time: Today 21:59:53</div> <div>Duration: 0:59</div> <div> <div>00:05</div> <div></div> <div>01:00</div> </div> <div>Save audio file</div> </div> <div>Open in new window</div>
Lynn Lafever	Today	9:58 PM	0:27	21311002004 (Lynn Lafever)	2945026858	
Tracy Hash	Today	9:56 PM	1:46	4777730240	21311005004 (Tracy Hash)	

### 4.2 Advanced audio player

Click on Open in new window and you will be able to see detailed call information with an advanced audio player.

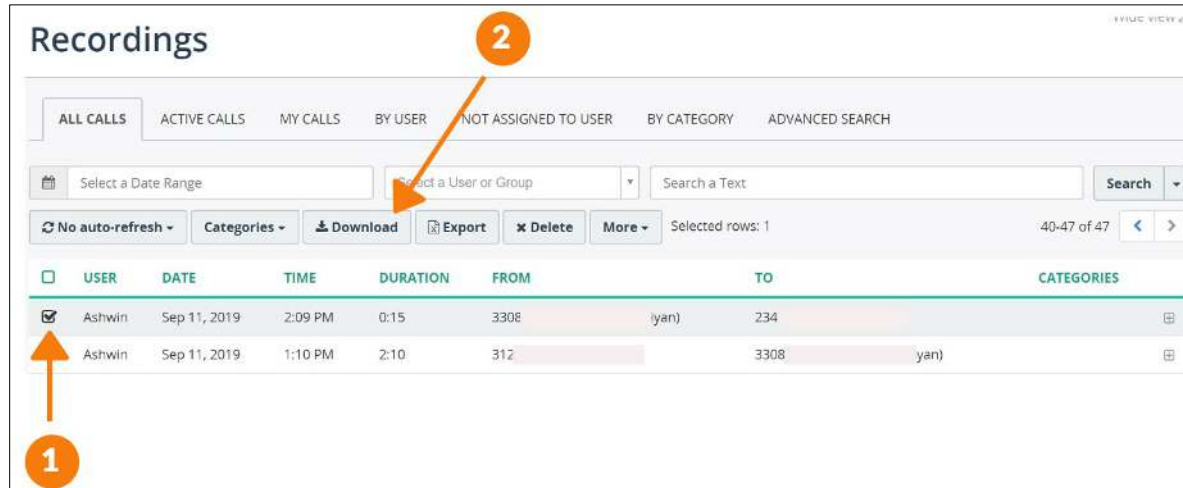
This visual audio presentation presents an easy way to detect periods of silence and talk-over within the conversation



## 4.3 Download Call Recordings

To download call recordings:

1. Select Recording option at the top
2. Select the call you want to download and hit "Download" option

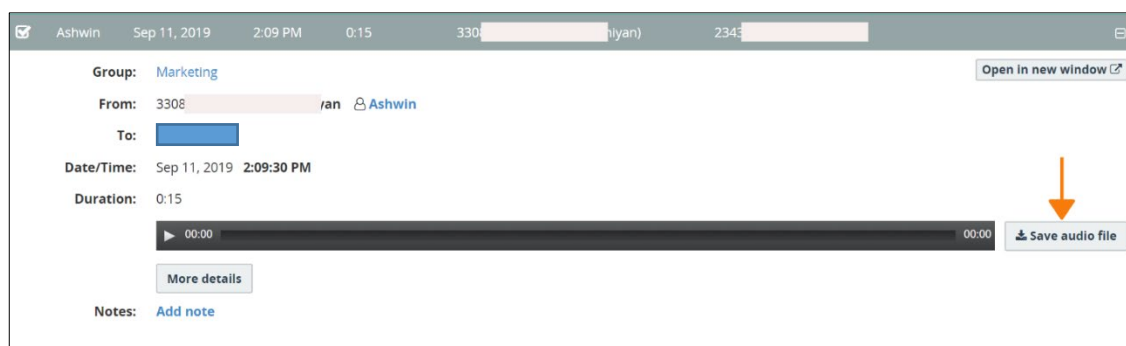


OR

1. Select the call you want to download and hit "+" option



2. Click on "Save Audio File"





## 5. Searching calls

First Communications allows for an easy search of calls by utilizing different parameters, such as:

The screenshot shows the 'Recordings' section of the Call 7 interface. At the top, there are tabs for 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY USER', 'BY CLIENT', 'NOT ASSIGNED TO USER', 'BY CATEGORY', and 'ADVANCED SEARCH'. Below these tabs are three search filters: 'Select a Date Range' (labeled 1), 'Select a User or Group' (labeled 2), and 'Search a Text' (labeled 3). Below the filters are buttons for 'No auto-refresh', 'Categories', 'Download', 'Export', 'Delete', and 'More'. A table of call recordings is displayed below the buttons, showing columns for 'USER', 'DATE', 'TIME', 'DURATION', 'FROM', 'TO', and 'CATEGORIES'. The table contains six rows of call data for a user named 'Ashwin'.

	USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES
<input type="checkbox"/>	Ashwin	Today	11:16 AM	0:58	920 [REDACTED]	3308 [REDACTED]	[REDACTED]
<input type="checkbox"/>	Ashwin	Today	8:46 AM	1:30	3129 [REDACTED]	330 [REDACTED]	[REDACTED]
<input type="checkbox"/>	Ashwin	Sep 13, 2019	4:50 PM	0:08	3308 [REDACTED]	330 [REDACTED]	[REDACTED]
<input type="checkbox"/>	Ashwin	Sep 13, 2019	4:50 PM	0:08	3308 [REDACTED]	330 [REDACTED]	[REDACTED]
<input type="checkbox"/>	Ashwin	Sep 13, 2019	4:50 PM	0:06	3308 [REDACTED]	234 [REDACTED]	[REDACTED]
<input type="checkbox"/>	Ashwin	Sep 13, 2019	4:49 PM	0:01	3308 [REDACTED]	234 [REDACTED]	[REDACTED]

1. Date range
2. User or Group name
3. Any text. The entered text is searched within caller/called phone number, name fields, and call notes.

## 6. Advanced searching calls

Advanced search web-page provides the ability to search call recordings utilizing multiple criteria, such as:

- User
- Group
- Call ID
- Phone number (FROM and/or TO)
- Date range
- Call duration

Each of these criteria supports different comparison operators like **Equal To**, **Not equal to**, **Starts with**, **Ends with**, **Includes**, **Is empty**, **Not empty**, **Match simple pattern**, **Match regex pattern**, **Before**, **After**, **Between**, **Older than \_\_\_ days**, **Newer than \_\_\_ days**.

### Recordings

ALL CALLS ACTIVE CALLS MY CALLS BY USER NOT ASSIGNED TO USERS BY CATEGORY ADVANCED SEARCH

Group

Is

Sales Department

Duration

Between

30

-

60

[+ Add Criteria](#)

Search

✕ Delete

Categories ▾

No auto-refresh ▾

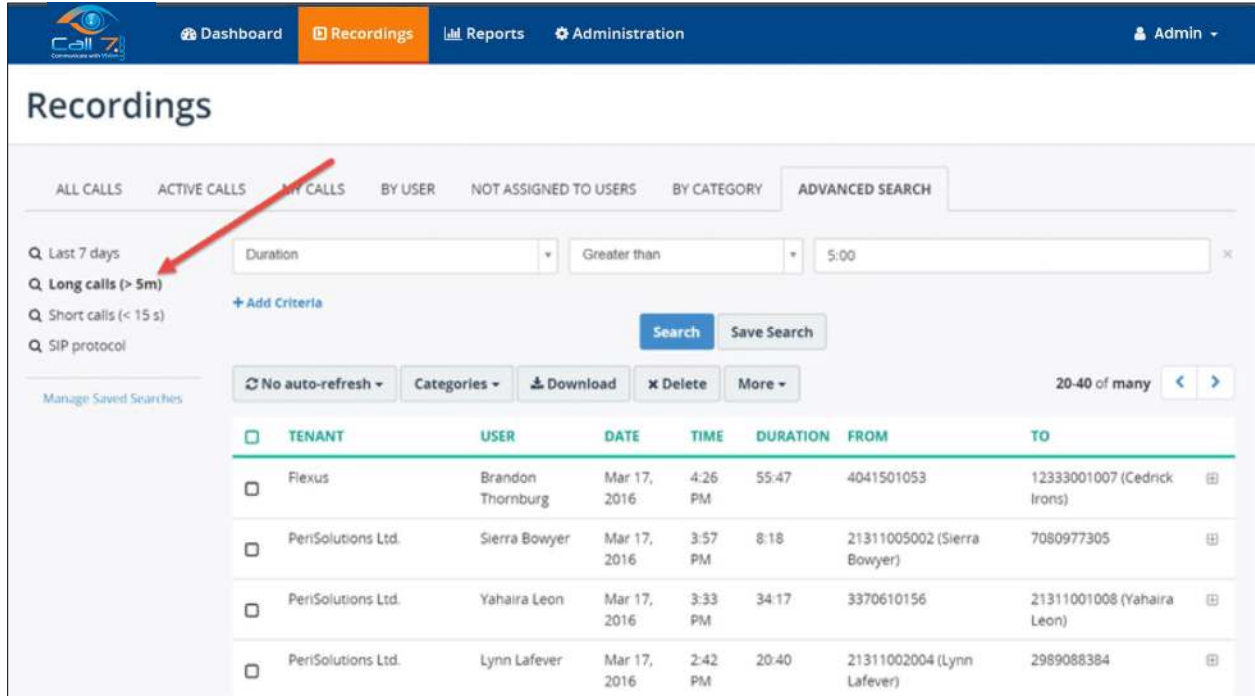
Download

0-20 of many

<input type="checkbox"/>	DATE	TIME	DURATION	FROM	TO
<input type="checkbox"/>	May 3, 2015	11:24 AM	0:59	12333001100 (Micheal Harvell)	8303620297
<input type="checkbox"/>	May 2, 2015	7:22 PM	0:45	3910091940	12333001011 (Veta Pospisil)
<input type="checkbox"/>	May 2, 2015	6:25 PM	0:57	12333001010 (Manual Spoor)	5281360644

## Saved Search

You can save the searched criteria, and use it later:



The screenshot shows the 'Recordings' section of the Call 7 interface. The top navigation bar includes 'Dashboard', 'Recordings' (highlighted), 'Reports', and 'Administration'. The 'Recordings' section has tabs for 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY USER', 'NOT ASSIGNED TO USERS', 'BY CATEGORY', and 'ADVANCED SEARCH'. The 'ADVANCED SEARCH' tab is active, showing search criteria: 'Last 7 days', 'Long calls (> 5m)' (highlighted with a red arrow), 'Short calls (< 15 s)', and 'SIP protocol'. Below the search criteria are buttons for 'Search' and 'Save Search'. A table of recordings is displayed with columns: TENANT, USER, DATE, TIME, DURATION, FROM, and TO. The table shows four recordings from March 17, 2016.

TENANT	USER	DATE	TIME	DURATION	FROM	TO
Flexus	Brandon Thornburg	Mar 17, 2016	4:26 PM	55:47	4041501053	12333001007 (Cedrick Irons)
PeriSolutions Ltd.	Sierra Bowyer	Mar 17, 2016	3:57 PM	8:18	21311005002 (Sierra Bowyer)	7080977305
PeriSolutions Ltd.	Yahaira Leon	Mar 17, 2016	3:33 PM	34:17	3370610156	21311001008 (Yahaira Leon)
PeriSolutions Ltd.	Lynn Lafever	Mar 17, 2016	2:42 PM	20:40	21311002004 (Lynn Lafever)	2989088384

## 7. Add notes to calls

When the user has been given the appropriate permission, he or she will be able to view and add new notes to call recordings.

These call notes are displayed inline and in a new window


Notes are displayed from oldest to newest; additionally, it is possible to pin any notes on top (out of order).

### Call notes inline


The screenshot displays the 'Call Recording' interface. At the top, a header bar shows the call details: 'Antonie Parker', 'Jun 10, 2015', '9:17 PM', '31:35', '21311003000 (Antonie Parker)', and '6219310492'. Below this, the call details section includes 'From: 21311003000 (Antonie Parker)', 'To: 6219310492', 'Date/Time: Jun 10, 2015 9:17:21 PM', and 'Duration: 31:35'. A progress bar shows the call duration from 00:00 to 32:20, with a 'Save audio file' button. The 'Notes' section contains two entries: a yellow note from 'admin' at 9:06 PM stating 'This is a sales lead. Follow up in 2 weeks' with 'Unpin' and 'Delete' options, and a blue note from 'admin' at 9:07 PM stating 'Scheduled a demo.' with 'Pin to the top' and 'Delete' options. Below the notes is a text input field for adding new notes, with 'Save' and 'Cancel' buttons. At the bottom, a table lists other calls:

Call ID	Name	Date	Time	Duration	Call ID (Name)	Call ID
21311001009	Alberta Seifried	Jun 10, 2015	9:12 PM	3:37	21311001009 (Alberta Seifried)	6309942916
6510960318	Tinisha Frost	Jun 10, 2015	9:10 PM	0:24	6510960318	21311002002 (Tinisha Frost)

## Call notes in new window



[Dashboard](#) [Recordings](#) [Reports](#) [Administration](#)

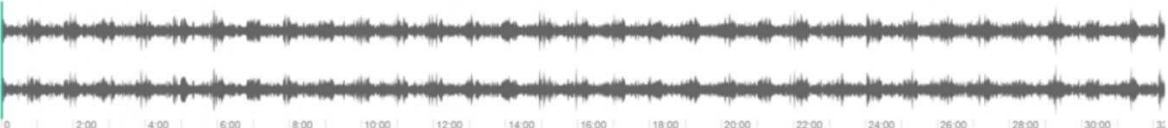
 Admin

Call 21311003000 -> 6219310492

Delete Call

AUDIO

Switch to basic player



▶ Play

⬇ Save audio file

DATE/TIME

Date: Jun 10, 2015

Connect Time: 9:17:21 PM

Disconnect Time: 9:48:56 PM

Duration: 31:35

Watermark: [View](#)

FROM

User: [Antonie Parker](#)

Phone Number: 21311003000

Phone Name: Antonie Parker

Ip-address:

TO

User:

Phone Number: 6219310492

Phone Name:

Ip-address:

Notes 2

admin Today, 9:06 PM

⌵ Unpin ✕ Delete

This is a sales lead. Follow up in 2 weeks

admin Today, 9:07 PM

⌵ Pin to the top ✕ Delete

Scheduled a demo.

Save

Cancel

CALL 7, Incorporated

12

## 8. Categorizing calls

First Communications supports categories for call recordings. When the user has the appropriate permissions, he or she may assign categories to calls, create new categories, etc.

To utilize categories, check one or more call recordings in a list, and then click the "Categories" button, next, select one or more categories, which you would like to assign to the call.

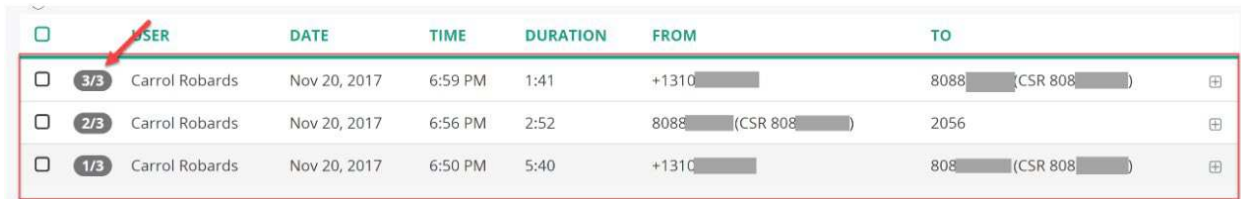
The screenshot shows the 'Recordings' page in the Call 7 application. The top navigation bar includes 'Dashboard', 'Recordings' (active), 'Reports', and 'Administration'. A user profile 'Admin' is in the top right. Below the navigation bar, there's a 'License expires in 20 days' notice. The main section is titled 'Recordings' and has tabs for 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY USER', 'NOT ASSIGNED TO USERS', and 'BY CATEGORY'. Below these tabs are search filters: 'Select a Date Range', 'Select a User or Group', and 'Search a Text'. A 'Delete' button and a 'Categories' dropdown are also present. The 'Categories' dropdown is open, showing a list of categories: 'Back Office', 'Lead' (selected), 'Lead/Won', 'Lead/In progress', 'Lead/Lost', 'Sales' (checked), and 'Technical Support'. An 'Apply' button is at the bottom of the dropdown. The main table displays a list of call recordings with columns: 'USER', 'DURATION', 'FROM', 'TO', and 'CATEGORIES'. The table shows 20 records, with the first few being 'Lead' and 'Sales' categories, and the last few being 'Technical Support'.

USER	DURATION	FROM	TO	CATEGORIES
David	:21	102	8662367979	Sales, Lead
David	:10	102	8662367979	Sales
David	:22	102	8662367979	Lead, Sales
Dakota Vialpando	:12	4772420007	21311001007 (Dakota Vialpando)	Technical Support
Dakota Vialpando	:46	3314291406	21311001007 (Dakota Vialpando)	
Alberta Seifried	:46	21311001009 (Alberta Seifried)	8923553624	
Dakota Vialpando	Jan 7, 2015 20:27:24 0:03	1288769878	21311001007 (Dakota Vialpando)	Technical Support
Justin Frost	Jan 7, 2015 20:23:29 0:21	4994645761	21311002102 (Justin Frost)	
Gwyn Brace	Jan 7, 2015 20:19:43 0:16	4325482861	21311005100 (Gwyn Brace)	
Idalia Alligood	Jan 7, 2015 20:14:53 0:24	4979922902	21311001006 (Idalia Alligood)	Technical Support

## 9. View multi-part calls

First Communications automatically recognizes multiple call parts of longer interaction, for example, when a call has been transferred from one agent to another, or when a call has been put on hold, the agent made a consultative call to his/her supervisor and then resumed the initial call.

On the recordings page, users can see if the call segment is a part of a longer interaction.



	USER	DATE	TIME	DURATION	FROM	TO
<input type="checkbox"/>	3/3 Carrol Robards	Nov 20, 2017	6:59 PM	1:41	+1310 [redacted]	8088 [redacted] (CSR 808 [redacted])
<input type="checkbox"/>	2/3 Carrol Robards	Nov 20, 2017	6:56 PM	2:52	8088 [redacted] (CSR 808 [redacted])	2056
<input type="checkbox"/>	1/3 Carrol Robards	Nov 20, 2017	6:50 PM	5:40	+1310 [redacted]	808 [redacted] (CSR 808 [redacted])

### Visualization of multi-part calls

Each call segment is shown on a timeline. Users can navigate easily to the next segment and playback it.



**MEDIA PLAYER** Switch to basic player | Wide view

0 : 10 20 30 40 50 60 1:10 1:20 1:30 1:40 1:50 2:00 2:10 2:20 2:30 2:40 2:50 3:00 3:10 3:20 3:30 3:40 3:50 4:00 4:10 4:20 4:30 4:40 4:50 5:00 5:10 5:20 5:30

**ALL CALLS IN THIS INTERACTION**

TIME	DURATION	FROM -> TO	TIMELINE
6:50 PM	5:40	+1310 [redacted] -> 808 [redacted] (CSR 808 [redacted])	 <a href="#">View</a>
6:56 PM	2:52	808 [redacted] (CSR 808 [redacted]) -> 2056	 <a href="#">View</a>
6:59 PM	1:41	+1310 [redacted] -> 808 [redacted] (CSR 808 [redacted])	 <a href="#">View</a>

## Supported call scenarios

First Communications merges multiple call parts into a single interaction in the following call scenarios:

1. An inbound call is transferred from one agent to another; in this case, both parts of the call will be added to the interaction.
2. An agent puts their first call on hold, makes an outbound consultative call, and then returns to their original call. In this case, all 3 calls will be added to the interaction.
3. An agent has an active call occurring, and he/she receives a second incoming call. The agent places the first call on hold and proceeds to answer the new call. The agent then returns to their original call. In this scenario, the incoming call that occurs between the hold/resume events is treated as an outside interaction. Only the 1st and the 3rd call parts will be added to the interaction.

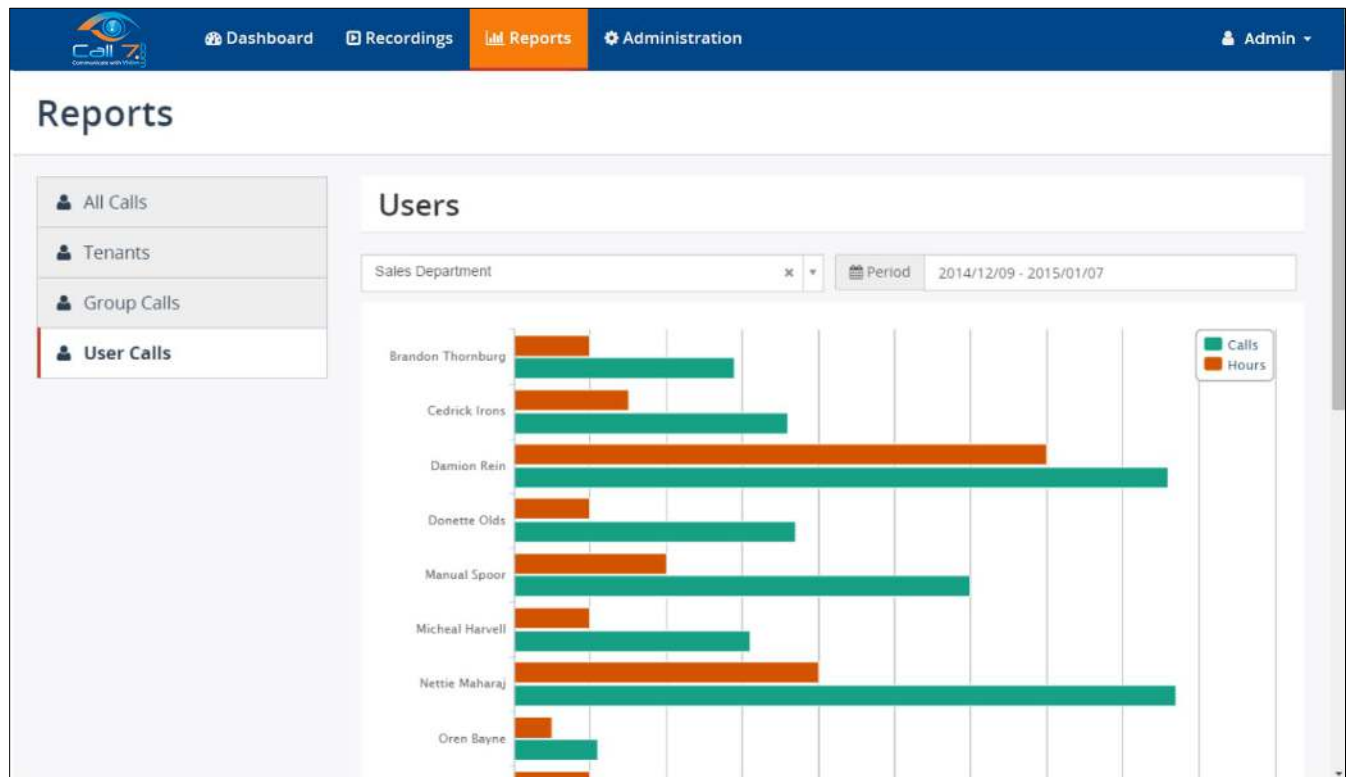


## 10. Reports (Admin Only)

First Communications provides extensive reporting. Reports are available from top menu [Reports](#).

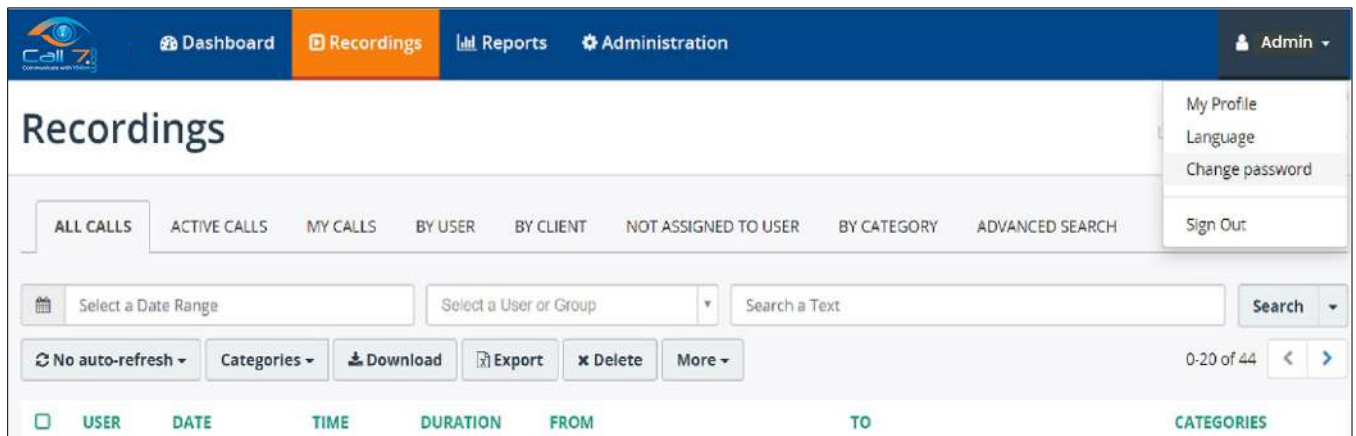
First Communications supports multiple reports, such as:

- Per day
- Per group
- Per user
- Agent evaluation reports



# 11. Change password

In order to change own password, click on your login name in the right top corner and select Change my password from drop-down menu.



In order to change other user password: **(Admin Only)**

1. Click on Administration -> User Management -> Users
2. Select a user and hit "Edit"
3. Click Reset Password

### WEB ACCESS SETTINGS

Login

Allow web access?

☒ Yes, user can login to web portal

Authenticate with

☒ Password
 ☐ LDAP
 ☐ Broadworks Web Portal
 ☐ Metaswitch CommPortal
 ☐ SAML 2.0

Reset password

[Reset password](#)

Must Change Password

☐ Must change password on next login

Valid till