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## About Hosted Call Recording

POPP Hosted Call Recording records business conversations to a secure, searchable database in the cloud.

## Licenses

Hosted Call Recording licenses are added to the phone numbers you want recorded, and come in Standard and Pro versions.

- A Standard or Pro license can optionally be given Admin privileges for access to listen to other end user's calls and/or live-monitor calls in progress
- Only calls for phone numbers with a Pro license can be live-monitored
- A Portal Access Only role is available at no additional charge to give a user access to listen to other end user's calls and/or live-monitor calls, without their own line being recorded.
- Custom roles can be created by POPP in order to fit your specific needs

See the chart below for a breakdown of all default license roles and features:

Role	Calls are Recorded	Portal Access	Access to listen to other end user's calls	Call Recording files can be encrypted on the server	Ability to pause/ resume recording mid-call	Ability to Live Monitor calls in progress for phone numbers with a Pro license
Standard	✓	✓				
Pro	✓	✓		✓	✓	

Administrator Role	Calls are Recorded	Portal Access	Access to listen to other end user's calls	Call Recording files can be encrypted on the server	Ability to pause/ resume recording mid-call	Ability to Live Monitor calls in progress for phone numbers with a Pro license
Standard - Admin	✓	✓	✓			✓
Pro - Admin	✓	✓	✓	✓	✓	✓
Portal Access Only		✓	✓			✓

Contact POPP in order to:

- Add, Remove, or Change which phone numbers have Hosted Call Recording licenses
- Change permissions (roles) assigned to Hosted Call Recording end users

## Encryption with Pro Licenses

Calls recorded on lines with Pro licenses can be encrypted in the server for optimal security (optional).

Hosted Call Recording uses Advanced Encryption Standard (AES) for symmetric encryption (256-bit key) and the Rivest-Shamir-Adleman (RSA) public key algorithm for asymmetric encryption (2,048-bit keys).

## Call Recording Storage

Hosted Call Recording includes 10GB of storage (approximately 1400 hours of recorded calls) that is pooled and shared by all Hosted Call Recording licenses in the business group. Additional storage (chargeable) is available in 10GB increments.

Total storage is calculated by adding the 10GB included storage + additional storage (in 10 GB increments)

Example: if a client has 20GB additional storage, their total storage is: 10GB included + 20GB additional = 30GB total

Call Recording Retention Options - clients must select to retain call recordings based on one of the following:

- Storage Limit (GB) – Set a maximum amount of call recording storage (in 10 GB increments). The oldest call recordings will be deleted automatically when the storage limit is exceeded.
- Timeframe (number of days, months, years) – Set a timeframe for which call recordings will be saved. Once recordings have been stored for the designated timeframe, recordings that have exceeded the designated timeframe are deleted. The client will be billed once per month based on the amount of storage they are using on the bill date.

At 1:00am each day, the Hosted Call Recording service checks storage consumption and if the usage is over the allotted amount/timeframe, the service will begin deleting the oldest call records until the total storage falls under the designated storage threshold (storage limit or timeframe).

## Web Portal

An intuitive web portal provides access to call recordings anytime, anywhere using only a web browser. The portal is mobile-friendly for optional use on a smartphone or tablet.

Search calls by any parameter quickly and easily by date, time, caller/called number, agent's name - or any search term.

Playback occurs right in the browser window.

## Logging In

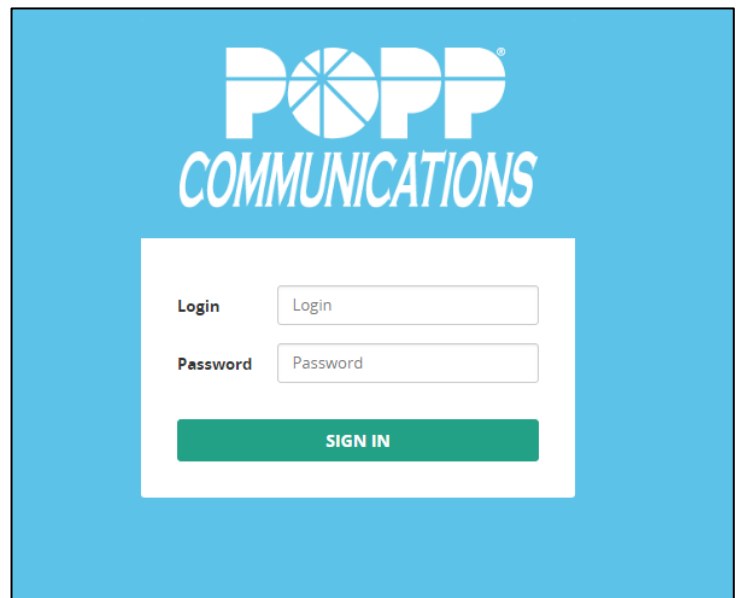
In a web browser, visit: <https://callrec.popp.com>

Login: Enter your 10-digit telephone number

Password: Enter your User Portal password

Click "Sign In"

**Note:** If you are having trouble logging in, contact POPP at 763-797-7900.

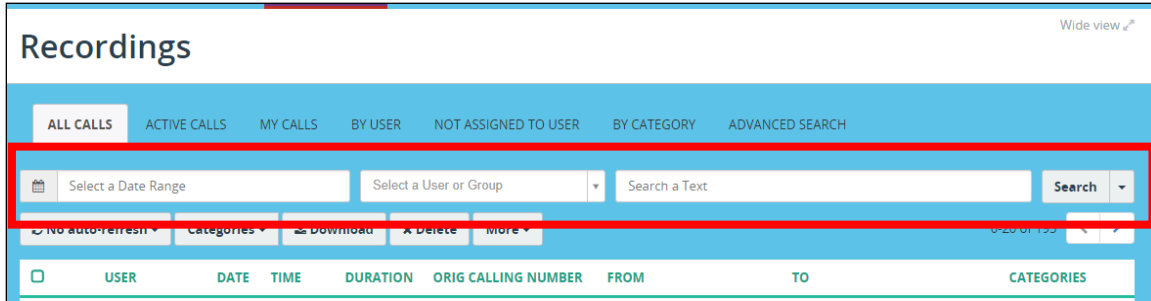


## Search Capabilities

Hosted Call Recording provides intuitive yet powerful search capabilities. Calls can be searched and retrieved based on multiple criteria.

### Basic Search

The Recordings page includes quick search capability by Date Range, User/Group and Text (phone number, name, notes, etc.).

A screenshot of the 'Recordings' page in a web application. The page has a blue header with the title 'Recordings' and a 'Wide view' link. Below the header is a navigation bar with tabs: 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY USER', 'NOT ASSIGNED TO USER', 'BY CATEGORY', and 'ADVANCED SEARCH'. The 'ALL CALLS' tab is selected. Below the navigation bar is a search bar with three input fields: 'Select a Date Range', 'Select a User or Group', and 'Search a Text'. A red rectangle highlights the search bar area. To the right of the search bar is a 'Search' button with a dropdown arrow. Below the search bar is a row of buttons: 'No auto-refresh', 'Categories', 'Download', 'Delete', and 'More'. At the bottom of the page is a table with columns: 'USER', 'DATE', 'TIME', 'DURATION', 'ORIG CALLING NUMBER', 'FROM', 'TO', and 'CATEGORIES'.

### Advanced Search

The Advanced search capability allows you to search recordings by multiple criteria simultaneously:

- Date, Time
- Duration
- Extension
- Caller ID
- User
- Group
- Etc.

The criteria support different comparison operators like:

- Equal to
- Not equal to
- Starts with
- Ends with
- Includes
- Is empty
- Not empty
- Before
- After
- Between
- Older than \_\_\_ minutes/days
- Newer than \_\_\_ minutes/days
- etc.

**Recordings**

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

Duration greater than... Duration Greater than 10

Duration less than 10...

5 Call Grouping Call Direction Is Outbound

Customer 0003029

Customer 0003029 o...

Example Saved Search

Run Search Save Search

No auto-refresh Categories Download Delete More

0-20 of 152

DATE	TIME	DURATION	FROM	TO
Today	12:25 PM	0:15	7632337680 (Laura Pinski)	6519944118

## Saved Searches

Save frequently used Advanced Search criteria and easily access them via “Saved Searches”.

**Recordings**

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

Duration greater than... Duration Greater than 10

Duration less than 10...

5 Call Grouping Call Direction Is Outbound

Customer 0003029

Customer 0003029 o...

Example Saved Search

Run Search Save Search

No auto-refresh Categories Download Delete More

0-20 of 152

DATE	TIME	DURATION	FROM	TO
Today	12:25 PM	0:15	7632337680 (Laura Pinski)	6519944118

## Interaction Grouping

Hosted Call Recording intelligently groups calls together into an “interaction” when a call is transferred from one extension to another, or when repeated calls are completed to/from the same phone number.

Grouped calls will display the following icon to show that they are part of one interaction:

No auto-refresh Categories Download Delete More

0-5 of 5

	DATE	TIME	DURATION	FROM	TO
5/5	Apr 20, 2018	5:49 PM	0:04	7632869237	7632337685 (Showroom 5)
4/5	Apr 20, 2018	5:49 PM	0:07	7632869237	7632337684 (Showroom 4)
3/5	Apr 20, 2018	5:49 PM	0:08	7632869237	7632337683 (Showroom 3)
2/5	Apr 20, 2018	5:49 PM	0:08	7632869237	7632337682 (Showroom 2)
1/5	Apr 20, 2018	5:48 PM	0:10	7632869237	7632337681 (Showroom 1)

Opening one recording within the interaction will show the timeline of each call within the interaction, and allow for simple playback of all other calls in the interaction, so long as those lines have Hosted Call Recording licenses.

	DATE	TIME	DURATION	FROM	TO
<input type="checkbox"/> 5/5	Apr 20, 2018	5:49 PM	0:04	7632869237	7632337685 (Showroom 5)
<input type="checkbox"/> 4/5	Apr 20, 2018	5:49 PM	0:07	7632869237	7632337684 (Showroom 4)
<input type="checkbox"/> 3/5	Apr 20, 2018	5:49 PM	0:08	7632869237	7632337683 (Showroom 3)
<input type="checkbox"/> 2/5	Apr 20, 2018	5:49 PM	0:08	7632869237	7632337682 (Showroom 2)
<input type="checkbox"/> 1/5	Apr 20, 2018	5:48 PM	0:10	7632869237	7632337681 (Showroom 1)

Group: [Users](#) Open in new window

From: 7632869237

To: 7632337681 ([Showroom 1](#))

Date/Time: Apr 20, 2018 5:48:48 PM

Duration: 0:10

▶ 0:00 Save audio file

[More details](#)

Notes: [Add note](#)

### ALL CALLS IN THIS INTERACTION

TIME	DURATION	FROM -> TO	TIMELINE	
5:48 PM	0:10	7632869237 -> 7632337681 (Showroom 1)		<a href="#">View</a>
5:49 PM	0:08	7632869237 -> 7632337682 (Showroom 2)		<a href="#">View</a>
5:49 PM	0:08	7632869237 -> 7632337683 (Showroom 3)		<a href="#">View</a>
5:49 PM	0:07	7632869237 -> 7632337684 (Showroom 4)		<a href="#">View</a>
5:49 PM	0:04	7632869237 -> 7632337685 (Showroom 5)		<a href="#">View</a>

## Advanced Audio Player

Open the Advanced Audio Player by clicking “More Details” while viewing a call.

Showroom 1 Today 9:24 AM 0:05 7632337680 7632337681 (Showroom 1) 6127677677

Group: [Users](#) Open in new window

From: 7632337681 ([Showroom 1](#))

Orig Calling Nu... 7632337680

To: 6127677677

Date/Time: Today 9:24:53 AM

Duration: 0:05

▶ 0:00 Save audio file

[More details](#)

Notes: [Add note](#)

The Advanced player shows the waveform of the call audio, which allows for skipping over silent periods of the call.

Playback may optionally be increased up to 2x speed for faster replay.

Call 7632337681 -> 7635121111

Mark as confidential
Delete Call

Encrypted
Edit Categories

MEDIA PLAYER

Switch to basic player
Wide view



Play
x1
x1.2
x1.5
x1.7
x2

Save audio file

INFO

Date: Today  
Connect Time: 11:02:11 AM  
Disconnect Time: 11:02:54 AM  
Duration: 0:43  
Watermark: View

FROM

User: Showroom 1  
Group: Users  
Phone Number: 7632337681  
Orig Calling Num...: 7632337680  
Phone Name: Showroom 1  
Live monitor phone 7632337681

TO

User:  
Phone Number: 7635121111  
Phone Name:  
Live monitor phone 7635121111

## Live Monitoring

Live Monitoring allows end users with Admin permissions to listen to active calls (for phone numbers with Pro licenses only) in real-time, in order to monitor customer service, train new employees, etc.

Live Monitoring requires installation of the Live Player application. The Live Player app is available for free download at [www.popp.com](http://www.popp.com) → Support → Portals → Live Player Plugin.


The app is only available for Windows.

Recordings

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

Select a User or Group
Search a Text
Search

Auto-refresh
Categories
Download
Delete
More
0-1 of 1

USER	DATE	TIME	DURATION	FROM	TO	TIMELINE
<input type="checkbox"/> Bryan Peterson Group: Users From: 7637977900 To: 7632337687 (Bryan Peterson) Call State: In progress... <a href="#">Live monitor this call</a> Date/Time: Today 4:35:53 PM More details Notes: <a href="#">Add note</a>	Today	4:35 PM	In progress...	7637977900	7632337687 (Bryan Peterson)	 Open in new window

20 per page
0-1 of 1

Live Player
File Play Help

Status: Monitoring Call

Call details  
Caller Party: 7637977900  
Called Party: 7632337687 (Bryan Peterson)  
Start Time: 16:35:53

Re-play Stop Exit

Two modes of live monitoring are supported:

- Monitoring of individual call
- Automatic monitoring of consecutive calls of a particular extension or phone number

## Recording Rules

Hosted Call Recording supports two recording modes:

- Automatic recording of all inbound and/or outbound calls
- On-demand / selective recording

The recording rules are configurable at the user-level. Contact POPP to make adjustments to recording rules.

If a call is transferred between a phone number with Hosted Call Recording license, and a phone number without a license, only the portion of the call that the licensed phone number was a part of will be recorded.

## Pause/Resume and On-Demand Recording

Hosted Call Recording supports pause/resume recording to comply with PCI requirements, such when taking credit card information or other sensitive data.

End users with a Pro license may pause and resume recording during a call using their Poly VVX or Yealink Txx phone, or via the web portal.

Besides pause/resume recording, Hosted Call Recording also supports on-demand recording.

Authorized end users may activate/deactivate recording, from a Poly VVX, a Yealink Txx phone, or from the web portal in real-time during a call. If an end user decides during a call that they would like to keep the recording, then the call recording is stored from the very beginning of a call, also known as “look-back” recording.

Live Monitoring is unavailable while call recording is paused.

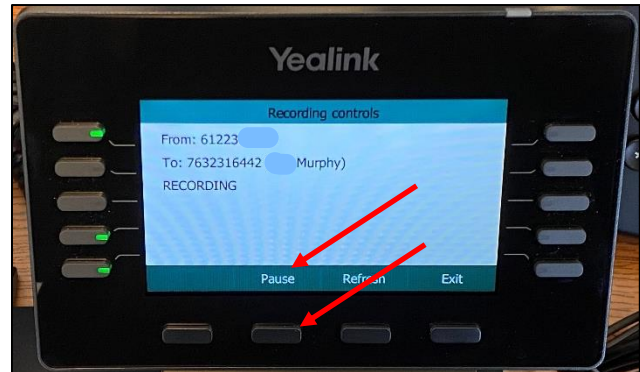
Pause/Resume recording through the web portal within the Call Status window:

The screenshot displays the POPP web portal interface. At the top, there is a navigation bar with the POPP logo and links to Dashboard, Recordings, Reports, and Administration. Below this, the call details are shown: 'Call 7637977900 -> 7632337687'. A status bar indicates the call is 'Encrypted' and provides an 'Edit Categories' option. The main section is titled 'CALL STATUS'. It shows the 'Call State' as 'In progress...', the 'Duration' as '54s', and 'On-demand recording' as '✓ Call is being recorded' with a 'Disable Recording' button. The 'Recording State' is 'Pause Recording', which is highlighted with a red rectangular box.



## Poly VVX and Yealink Txx Phone Call Recording Application & PIN

While using a Poly VVX or Yealink Txx phone with the Call Recording application, press the “CallRec” soft key to access Recording controls, then press the Pause and Resume soft keys as desired.



The Poly VVX phone Call Recording application may ask for a PIN following a reboot of the phone.

The default PIN is **[last 4-digits of the phone's Direct Inward Dial number]7677**

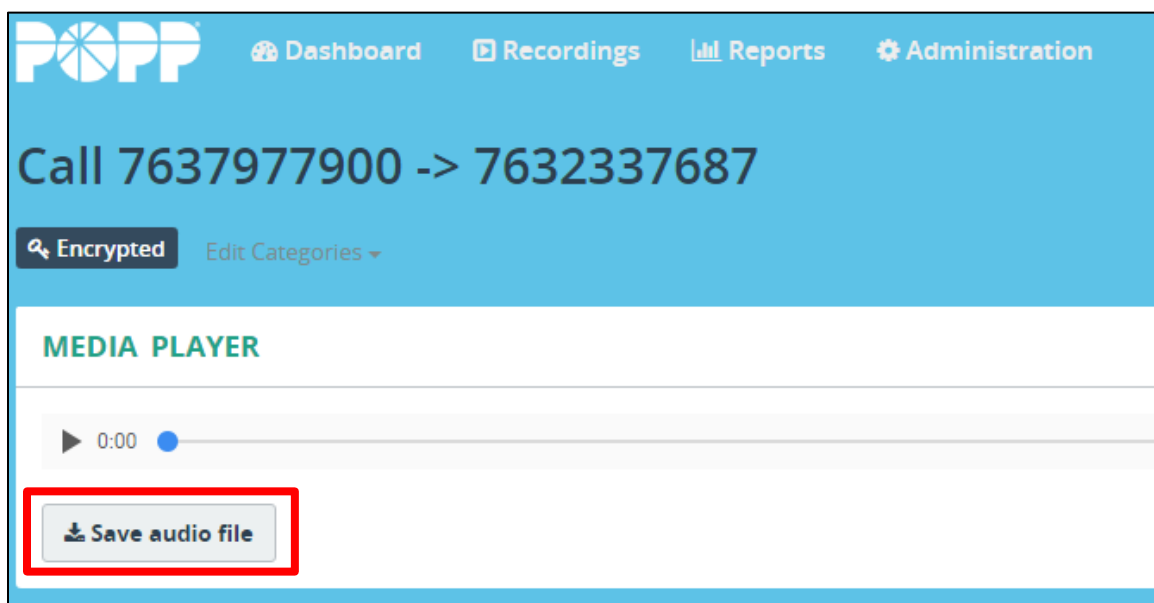
For example, an end user with DID of 612-555-1234 would enter a default PIN of **12347677**.

## Download a Single Recording

Recordings can optionally be downloaded to your computer.

To download a single recording, locate the call you want to download and click 'Save Audio File' to initiate the download.

If calls are encrypted (option available with Pro license), a single recording is decrypted before download to allow for easy playback on the computer's audio program.



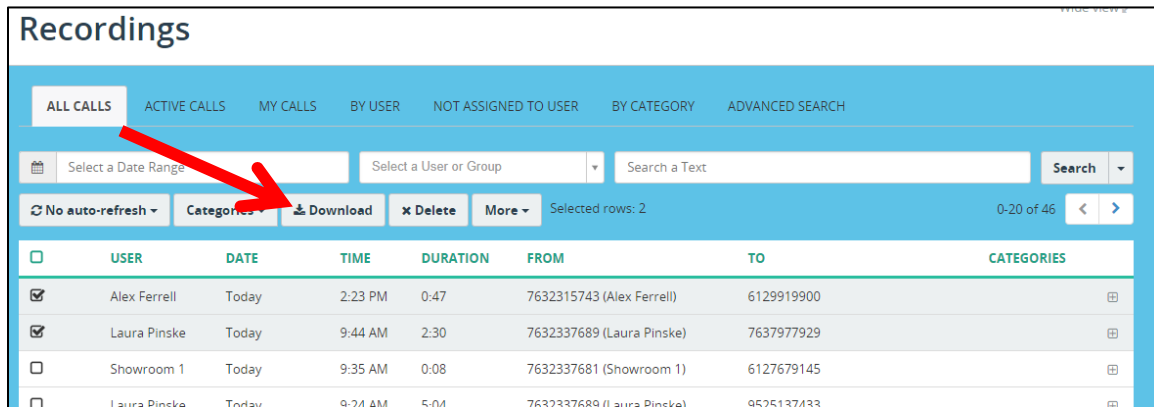
## Download Multiple Recordings

With the proper permissions, you may optionally download multiple recordings to your computer.

From the Recordings page, place a checkmark in the box of all recordings you want to download and click “Download”.

If calls are encrypted (Pro license only), multiple encrypted recordings remain encrypted when downloaded in this manner.

A decrypting application is available from POPP to enable decryption for playback on your computer.

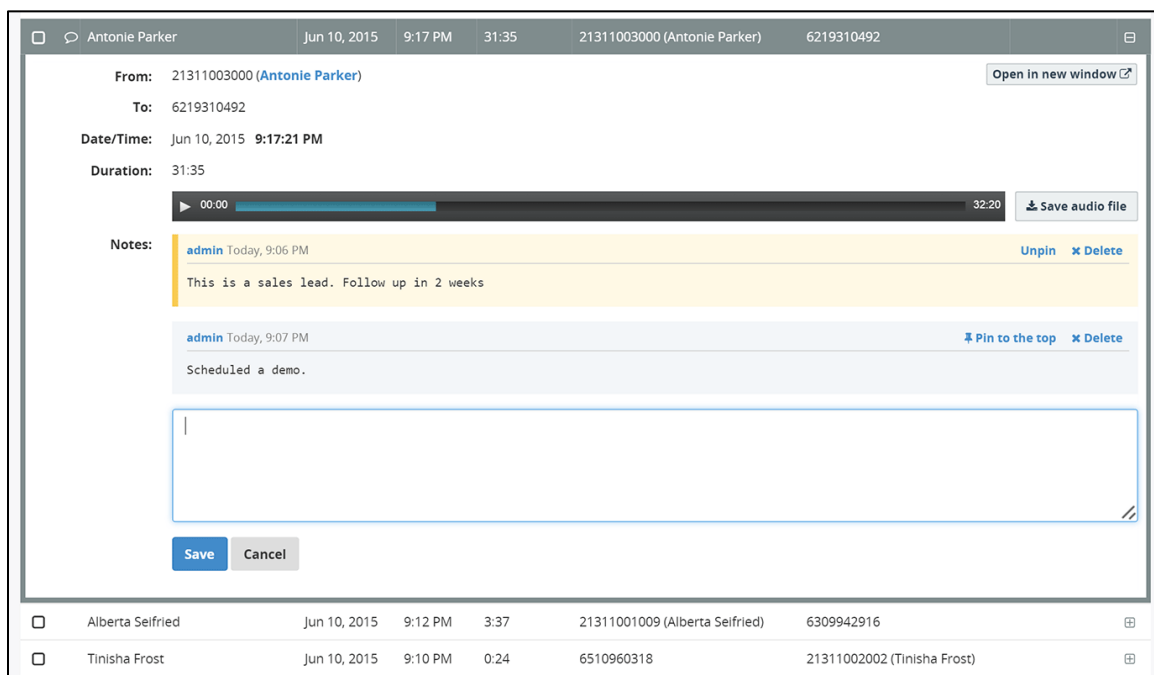


## Call Notes

View and add notes to call recordings.

Notes are displayed in the order in which they are created. You may optionally pin an important note to the top.

Notes are searchable using the web portal.

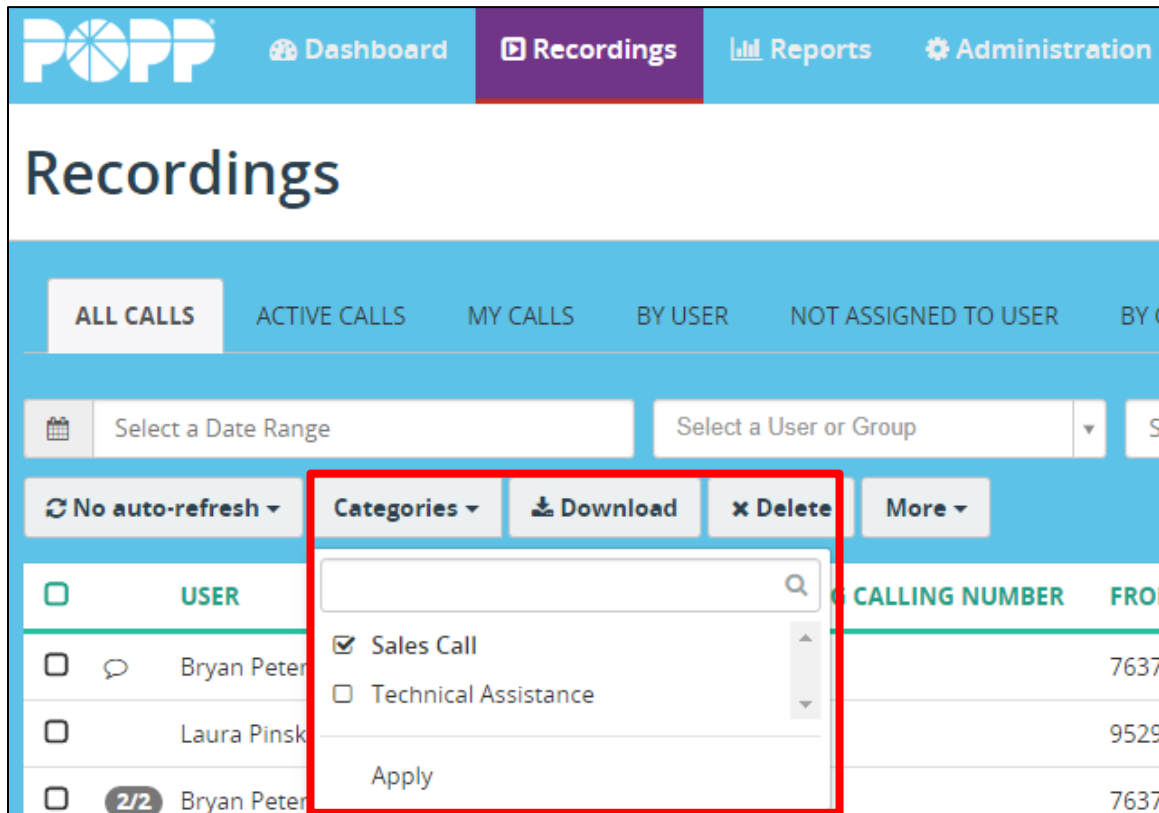


## Categorization / Tagging of Calls

Hosted Call Recording supports categorization (tagging) of call recordings.

With appropriate permissions, create new categories and assign categories to calls.

Below is an example showing categories for “Sales Call” and “Technical Assistance” in order to assist with call categorization.

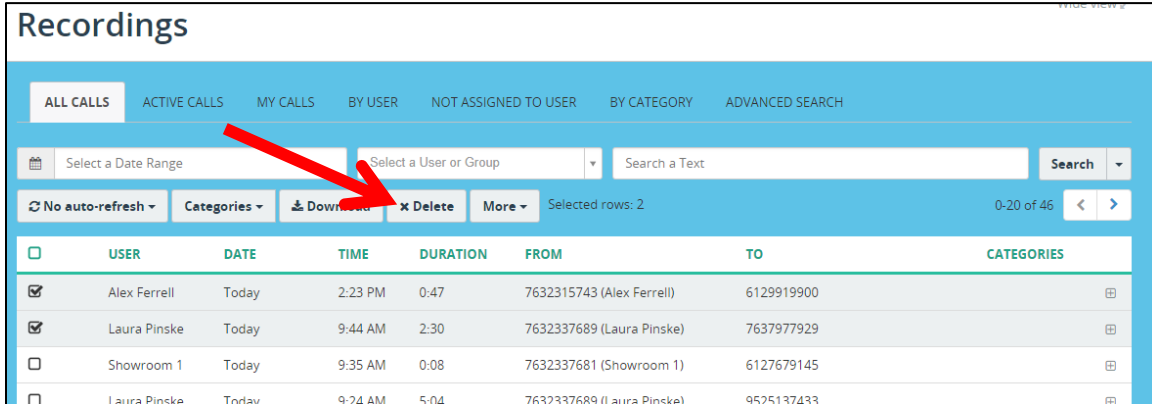


## Deleting a Call

By default, end users with Admin permissions are able to delete recordings.

Check the box next to the recording(s) you want to delete, and click 'Delete'.

When a recording has been deleted, it cannot be recovered.



The screenshot shows the 'Recordings' interface. At the top, there are tabs: ALL CALLS, ACTIVE CALLS, MY CALLS, BY USER, NOT ASSIGNED TO USER, BY CATEGORY, and ADVANCED SEARCH. Below the tabs are search filters: 'Select a Date Range', 'Select a User or Group', and 'Search a Text'. A red arrow points to the 'Delete' button in the toolbar. The toolbar also includes 'No auto-refresh', 'Categories', 'Download', 'Delete', and 'More'. Below the toolbar is a table with columns: USER, DATE, TIME, DURATION, FROM, TO, and CATEGORIES. The table contains four rows of call recordings. The first two rows are selected, indicated by checked checkboxes in the first column.

	USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES
<input checked="" type="checkbox"/>	Alex Ferrell	Today	2:23 PM	0:47	7632315743 (Alex Ferrell)	6129919900	
<input checked="" type="checkbox"/>	Laura Pinske	Today	9:44 AM	2:30	7632337689 (Laura Pinske)	7637977929	
<input type="checkbox"/>	Showroom 1	Today	9:35 AM	0:08	7632337681 (Showroom 1)	6127679145	
<input type="checkbox"/>	Laura Pinske	Today	9:24 AM	5:04	7632337689 (Laura Pinske)	9525137433	

## Multi-Language Support in the Web Portal

Hosted Call Recording supports multiple languages in the web portal.

End users may select their own language.

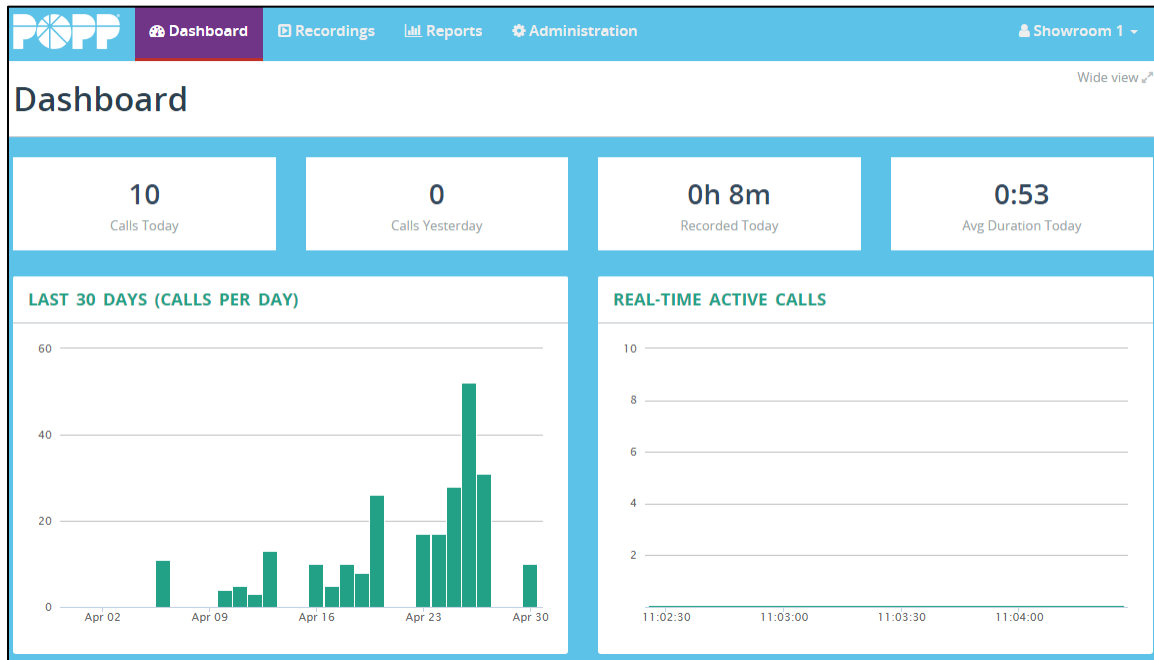
The following screenshot shows the web portal in Spanish language:



## Reporting

### Real-Time Dashboard

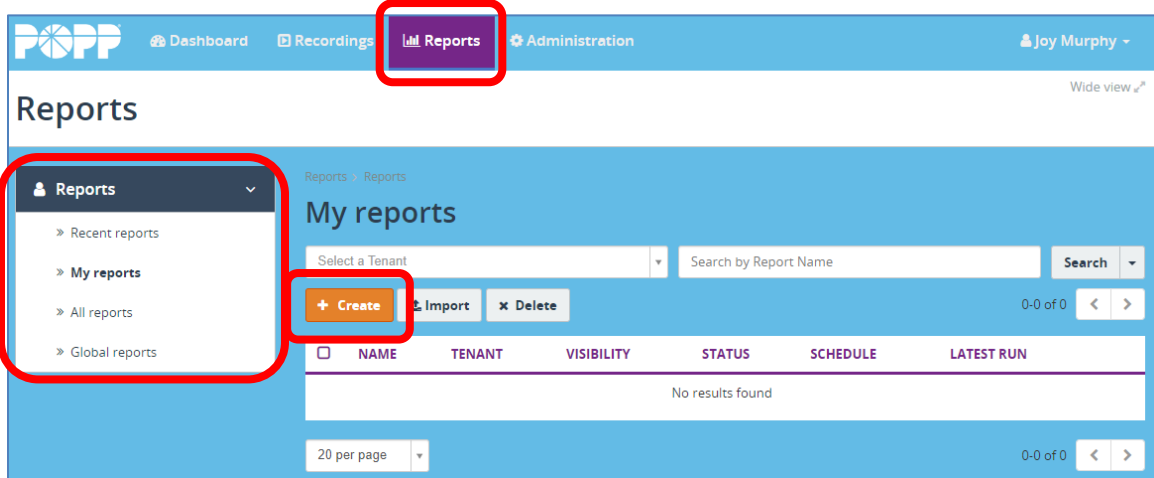
Hosted Call Recording's dashboard provides an at-a-glance view of calls-per-day, call duration, real-time active calls, total number of recorded calls, and more:



## Historical Reports

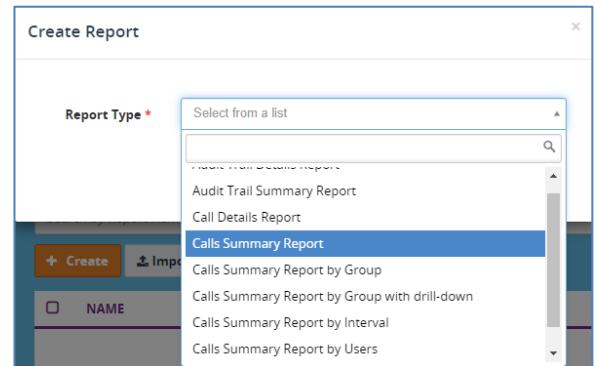
Create templates for customized reports showing a summary of user and call activity. View reports in the portal, export to PDF or Excel, and set up scheduling for automatic report delivery.

To build a report template, from the **Reports tab**, click on **Reports**, then click on **My Reports**, then click **Create**:



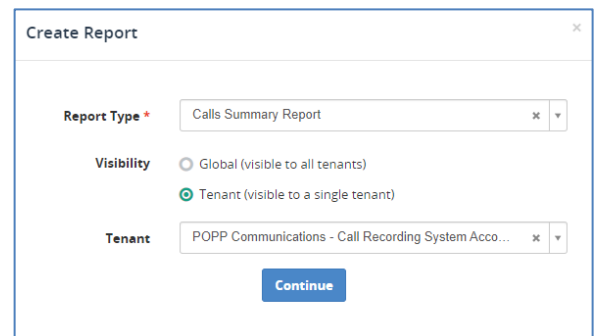
Select a **Report Type** from the list. Common report types are:

- Calls Summary Report
- Calls Summary Report by Group
- Calls Summary Report by Users
- User Details Report.



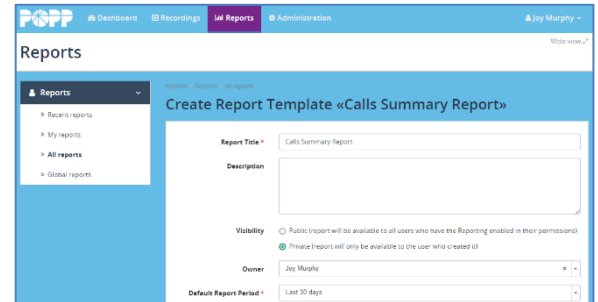
### Example – Create Calls Summary Report

- Select Calls Summary Report and click Continue



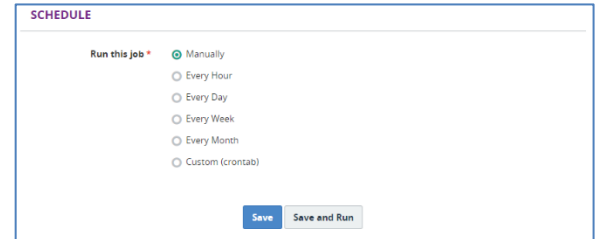
- There are many settings that can be customized when setting up a report template (e.g., summary attributes, chart type, sorting, columns, etc.). You can leave these settings as is, or customize the settings to define a custom layout and configuration. You can also elect to send the report (as Excel or PDF) via email.

- The following settings (denoted with a red asterisk) are required:
  - Report Title** (default is Calls Summary Report)
  - Default Report Period** (default is Last 30 days)
  - Run this job** (default is Manually)



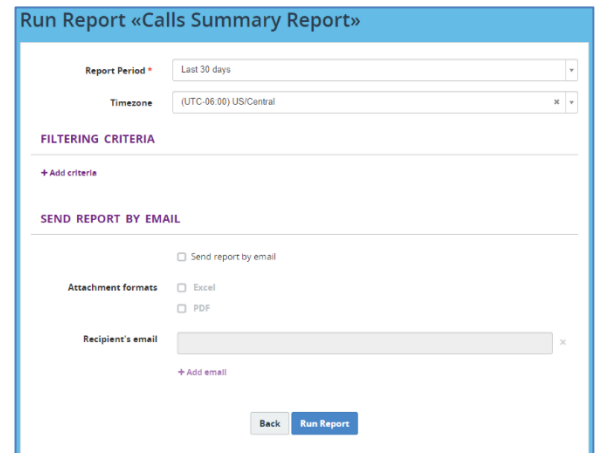
The screenshot shows the 'Create Report Template' form for a 'Calls Summary Report'. The form includes fields for 'Report Title' (set to 'Calls Summary Report'), 'Description', 'Visibility' (set to 'Private'), 'Owner' (set to 'Joy Murphy'), and 'Default Report Period' (set to 'Last 30 days').

- Click **Save and Run**



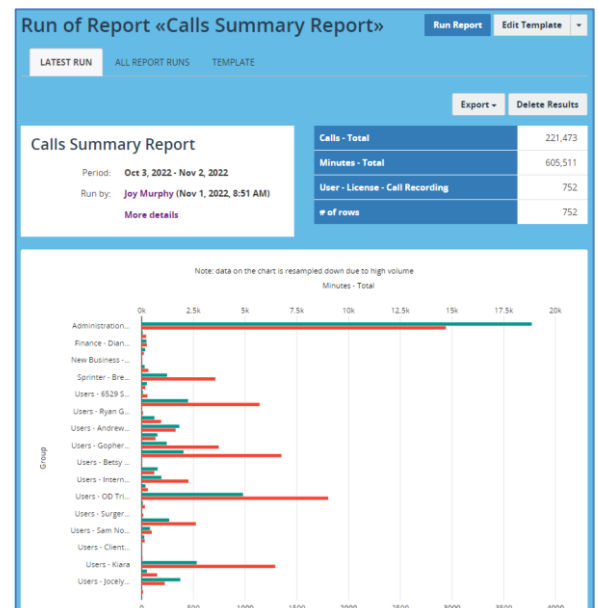
The screenshot shows the 'SCHEDULE' section of the report configuration. It includes a 'Run this job' dropdown set to 'Manually', with options for 'Every Hour', 'Every Day', 'Every Week', 'Every Month', and 'Custom (cron tab)'. There are 'Save' and 'Save and Run' buttons at the bottom.

- Check the box and enter an email address to send the report via email (optional)
- Click **Run Report**



The screenshot shows the 'Run Report' form for a 'Calls Summary Report'. It includes fields for 'Report Period' (set to 'Last 30 days') and 'Timezone' (set to '(UTC-06:00) US/Central'). There is a 'FILTERING CRITERIA' section with an 'Add criteria' button. Below that is a 'SEND REPORT BY EMAIL' section with checkboxes for 'Send report by email', 'Excel', and 'PDF'. A 'Recipient's email' field is present with an 'Add email' button. At the bottom are 'Back' and 'Run Report' buttons.

- The report will generate and display on-screen
- Click **Edit Template** to View, Export, Clone, or Delete this template



## For Additional Training and Support

- Visit [www.popp.com](http://www.popp.com) or call POPP Communications at 763-797-7900