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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

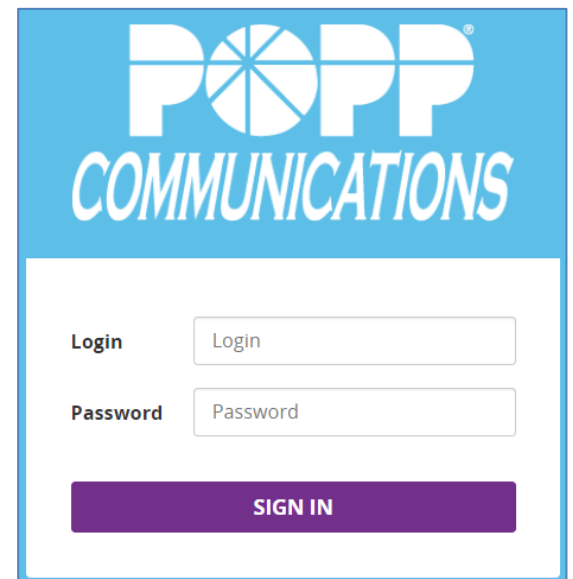
In a web browser, visit: <https://callrec.popp.com>

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.).

Recordings

ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG ADVANCED SEARCH

2023/06/20 - 2023/07/19 Select a User or Group Search for text Search

No auto-refresh Tags Download Export Delete More 0-1 of 1

USER DATE TIME DURATION ORIG. CALLING NUMBER CALLER PARTY CALLED PARTY TAGS

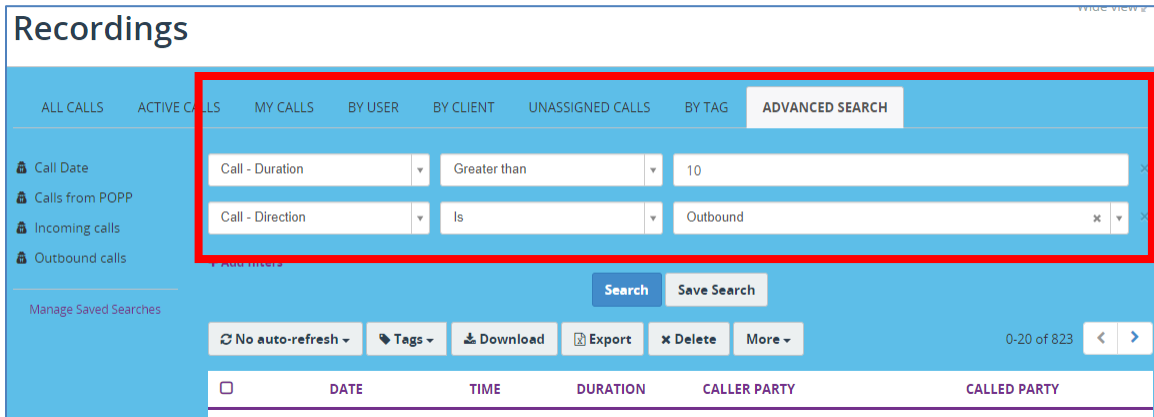
Advanced Search

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

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

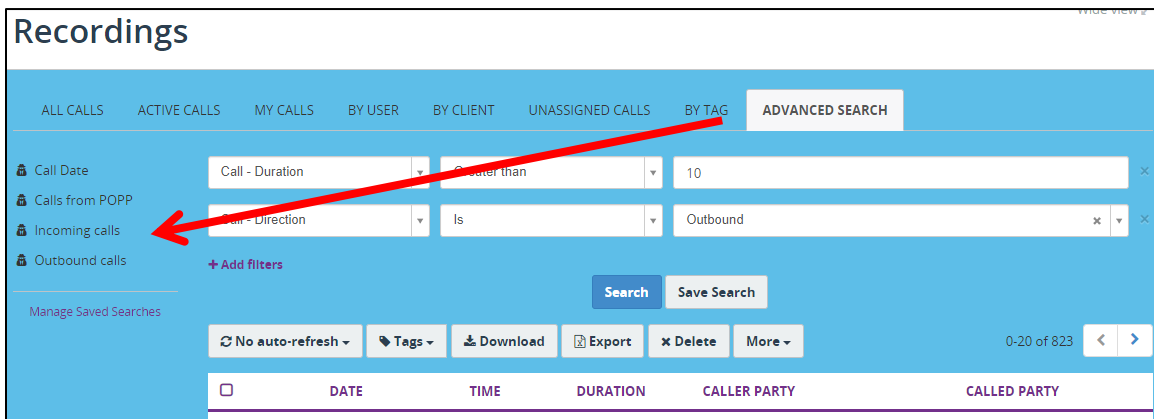
The criteria support different comparison operators like:

- Equal to
- Not equal to
- Starts with
- Ends with
- Includes
- Is empty
- Not empty
- Simple match pattern
- Regex pattern
- Before date
- After date
- Between
- Older than __ minutes/days
- Newer than __ minutes/days
- Within day/week/month/quarter/year range



Saved Searches

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



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:

	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY
<input type="checkbox"/>	May 2, 2023	7:22 AM	0:45	763233 (Showroom 4)	612236
<input type="checkbox"/> 3/3	May 2, 2023	7:22 AM	0:09	763233 (Showroom 4)	763233
<input type="checkbox"/> 1/3	May 2, 2023	7:21 AM	0:32	763233 (Showroom 4)	612236
<input type="checkbox"/> 3/3	May 2, 2023	7:21 AM	0:02	763233 (Showroom 4)	651789
<input type="checkbox"/> 2/3	May 2, 2023	7:21 AM	0:05	763233 (Showroom 4)	651789

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.

The screenshot shows a call recording interface. At the top, there is a table with columns: DATE, TIME, DURATION, CALLER PARTY, and CALLED PARTY. Below the table, there is a detailed view of a call. The call details include: Group: Users, Caller Party: 763233 (Showroom 4), Called Party: 763233 (assign to client), Date/Time: May 2, 2023 7:22:03 AM, and Duration: 0:09. Below the call details is an audio player with a play button, a progress bar, and a volume icon. There are buttons for 'More details' and 'Save audio file'. At the bottom, there is a 'Notes' section with an 'Add note' button. A red box highlights the 'ALL CALLS IN THIS INTERACTION' section, which contains a table with columns: TIME, DURATION, CALLER -> CALLED, and TIMELINE. The table has three rows: 7:21 AM 0:32 763233 (Showroom 4) -> 612236, 7:22 AM 0:10 763233 -> 763233 (Showroom 5), and 7:22 AM 0:09 763233 (Showroom 4) -> 763233. Each row has a 'View' button.

DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY
May 2, 2023	7:22 AM	0:45	763233 (Showroom 4)	612236
3/3	May 2, 2023	7:22 AM	763233 (Showroom 4)	763233

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

Caller Party: 763233 [Showroom 4](#)

Called Party: 763233 [assign to client](#)

Date/Time: May 2, 2023 7:22:03 AM

Duration: 0:09

00:00 00:00

[More details](#) [Save audio file](#)

Notes: [Add note](#)

ALL CALLS IN THIS INTERACTION

TIME	DURATION	CALLER -> CALLED	TIMELINE
7:21 AM	0:32	763233 (Showroom 4) -> 612236	View
7:22 AM	0:10	763233 -> 763233 (Showroom 5)	View
7:22 AM	0:09	763233 (Showroom 4) -> 763233	View

Advanced Audio Player

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

The screenshot shows the Advanced Audio Player interface. It displays call details for a call on May 2, 2023 at 7:22 AM with a duration of 0:45. The caller is 763233 (Showroom 4) and the called party is 612236. Below the call details is an audio player with a play button, a progress bar, and a volume icon. A red arrow points to the 'More details' button. There are buttons for 'More details' and 'Save audio file'. At the bottom, there is a 'Notes' section with an 'Add note' button.

May 2, 2023 7:22 AM 0:45 763233 (Showroom 4) 612236

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

Caller Party: 763233 [Showroom 4](#)

Called Party: 612236 [assign to client](#)

Date/Time: May 2, 2023 7:22:31 AM

Duration: 0:45

00:00 00:00

[More details](#) [Save audio file](#)

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.

The screenshot shows a call recording interface for a call from 7632337681 to 7632337682. At the top right, there are buttons for "Mark as confidential" and "Delete Call". Below the call ID is an "Edit Tags" link. A red box highlights the "MEDIA PLAYER" section, which contains a waveform of the call audio, a "Play" button, volume controls (x1, x1.2, x1.5, x1.7, x2), and a "Save audio file" button. Below the media player are tabs for "CALL DETAILS" and "NOTES". The "CALL DETAILS" section is divided into three columns: "INFO", "CALLER PARTY", and "CALLED PARTY".

INFO	CALLER PARTY	CALLED PARTY
Date: May 2, 2023	Client: Unknown client (assign)	User: Showroom 2
Connect Time: 7:42:35 AM	Phone Number: 7632337681	Group: Test 1 & 2, Users
Disconnect Time: 7:42:57 AM	Phone Name:	Phone Number: 7632337682
Duration: 0:22		Phone Name: Showroom 2
Watermark: View		

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.

The screenshot shows the "Recordings" interface. At the top, there are tabs for "ALL CALLS", "ACTIVE CALLS", "MY CALLS", "BY USER", "BY CLIENT", "UNASSIGNED CALLS", "BY TAG", and "ADVANCED SEARCH". Below the tabs is a search bar with "Select a User or Group" and "Search for text" fields, and a "Search" button. There are also buttons for "Auto-refresh", "Tags", "Download", "Export", "Delete", and "More". A table lists recordings with columns for "USER", "DATE", "TIME", "DURATION", "CALLER PARTY", "CALLED PARTY", and "TIMELINE". One recording is highlighted, and its details are shown in a modal window. The "More details" button in the details view is highlighted with a red box. The "CALL STATUS" section shows "Call State: In progress...", "Duration: 17:06", "On-demand recording: Call is being recorded", and "Recording State: Pause Recording". The "LIVE MONITORING" section at the bottom has an "Animation: ON" indicator and a "Start live monitoring" button.

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 adjust 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.

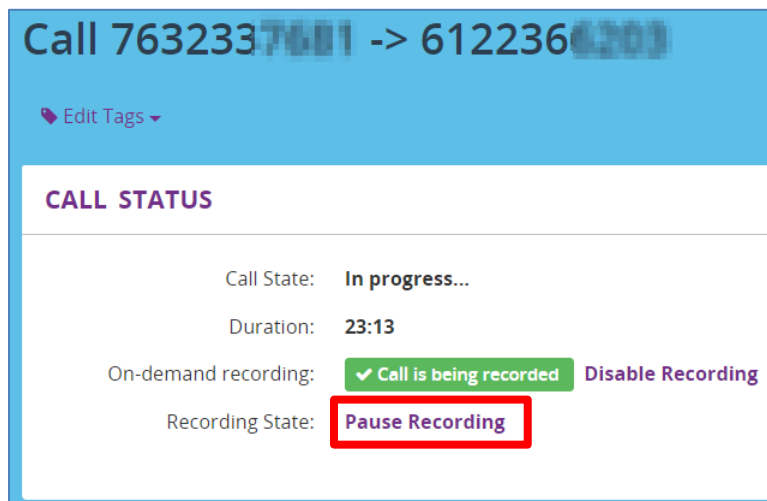
End users with a Pro license may pause and resume recording during a call using their Poly VVX or Yealink Txx phone, or via the web portal.

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.

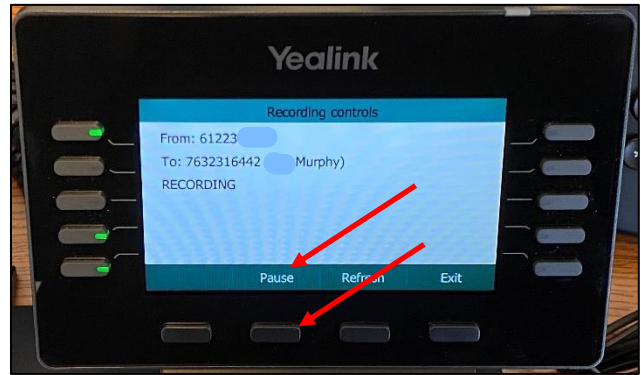
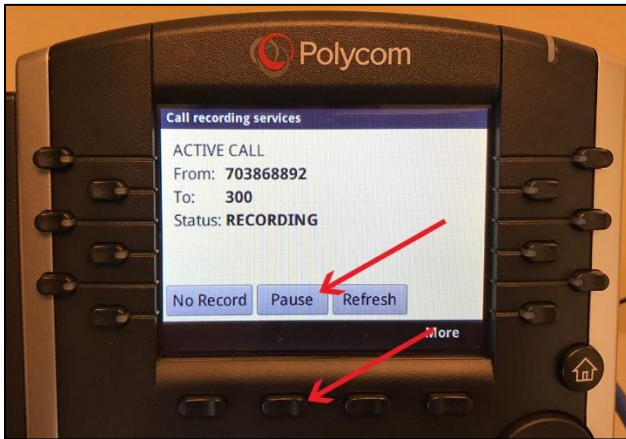
Live Monitoring is unavailable while call recording is paused.

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



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**

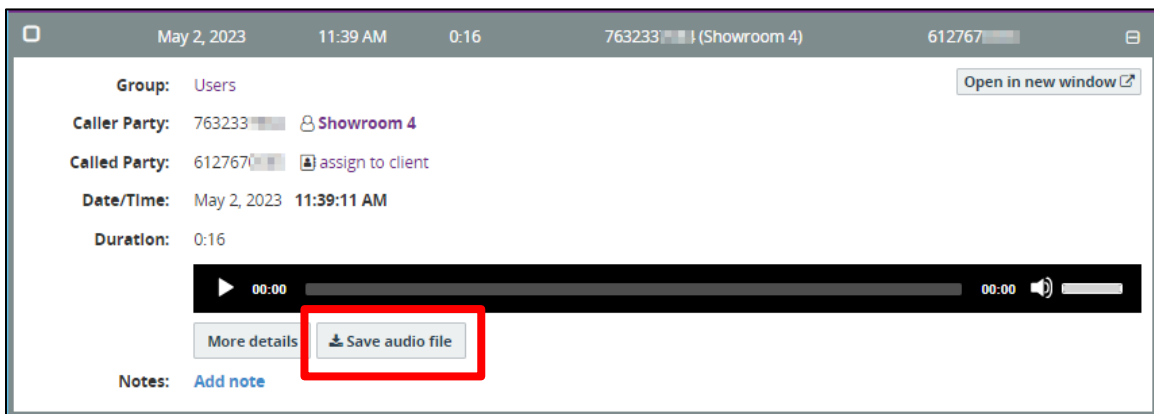
For example, an end user with DID of 612-555-1234 would enter a default PIN of **12347677**.

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.



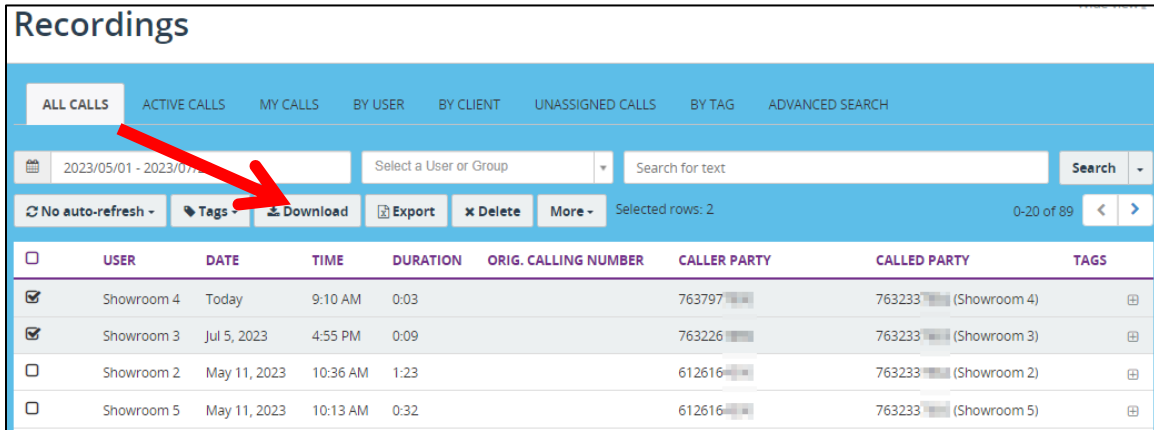
Download Multiple Recordings

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.

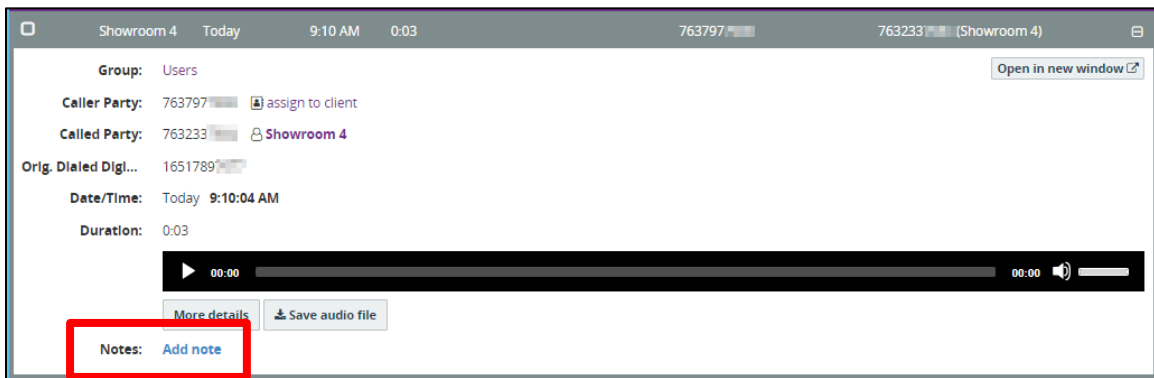


Call Notes

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.

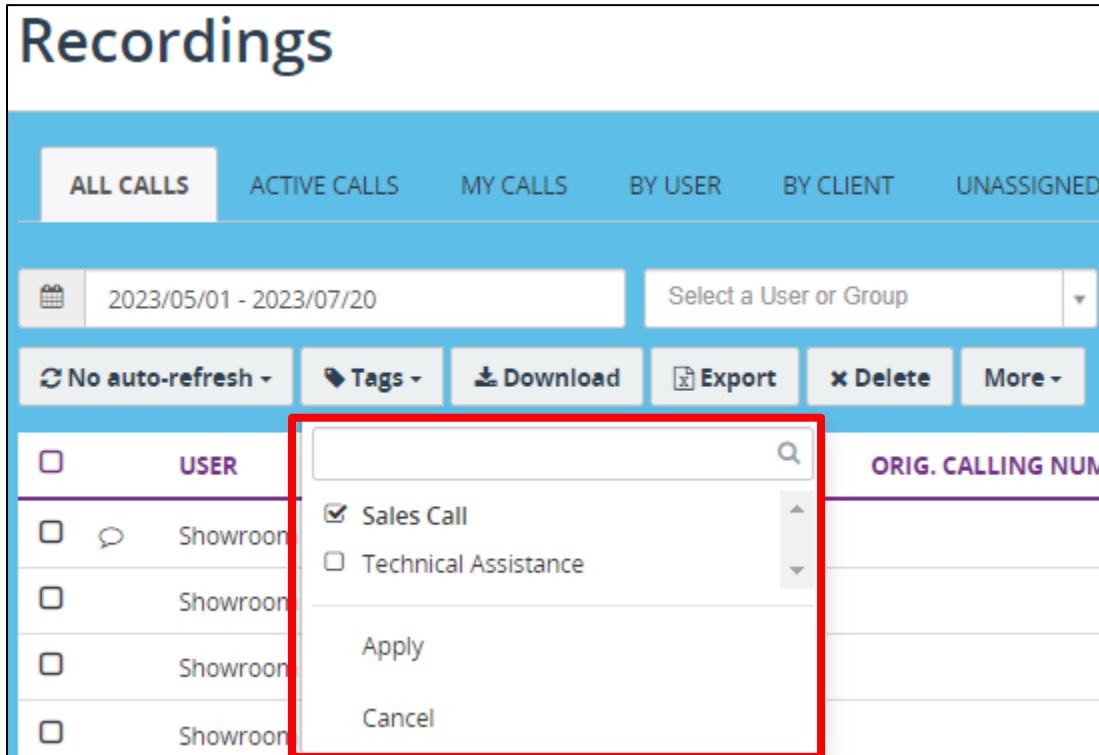


Tagging (Categorization) of Calls

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

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

Below is an example showing tags 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 POPP call recording interface. At the top, there are navigation tabs: ALL CALLS, ACTIVE CALLS, MY CALLS, BY USER, BY CLIENT, UNASSIGNED CALLS, BY TAG, and ADVANCED SEARCH. Below the tabs is a search bar with a date range (2023/05/01 - 2023/07/20) and a search for text field. A red arrow points to the 'Delete' button in the action bar. The table below shows a list of recordings with columns: USER, DATE, TIME, DURATION, ORIG. CALLING NUMBER, CALLER PARTY, CALLED PARTY, and TAGS.

<input type="checkbox"/>	USER	DATE	TIME	DURATION	ORIG. CALLING NUMBER	CALLER PARTY	CALLED PARTY	TAGS
<input type="checkbox"/>	Showroom 4	Today	9:10 AM	0:03	763797		7632337684 (Showroom 4)	
<input type="checkbox"/>	Showroom 3	Jul 5, 2023	4:55 PM	0:09	763226		7632337683 (Showroom 3)	
<input type="checkbox"/>	Showroom 2	May 11, 2023	10:36 AM	1:23	612616		7632337682 (Showroom 2)	

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:

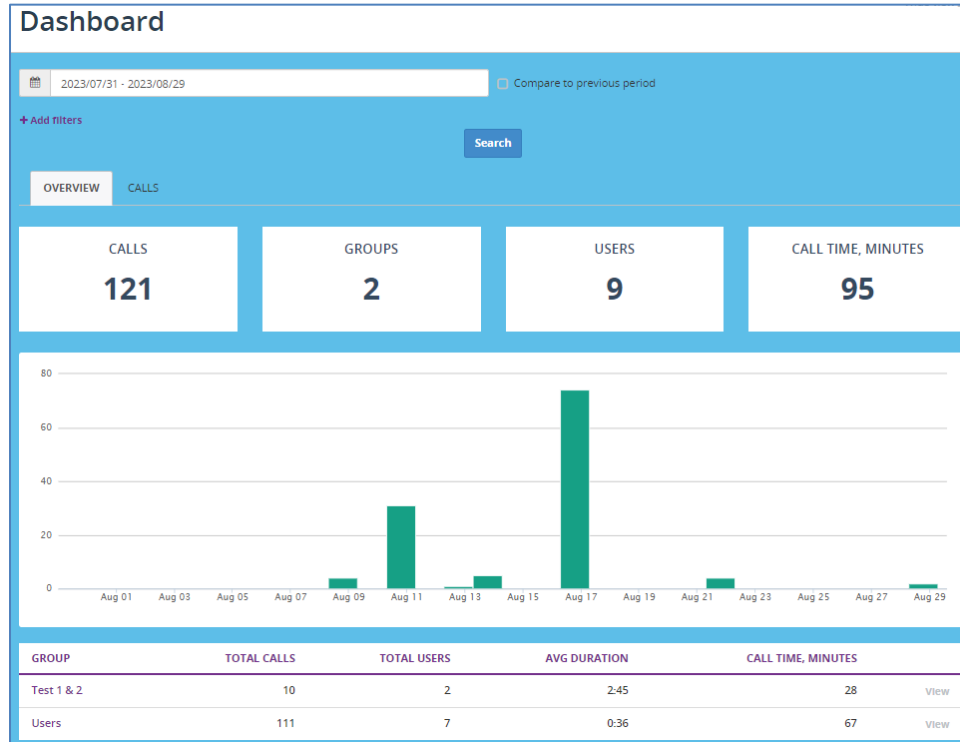
The screenshot displays the 'Grabaciones' (Recordings) page in Spanish. The navigation bar includes 'Tablero', 'Grabaciones', 'Reportes', and 'Administración'. The main header shows 'Grabaciones' and 'Vista amplia'. Below the header, there are filter tabs: 'TODAS LAS LLAMADAS', 'LLAMADAS ACTIVAS', 'MIS LLAMADAS', 'POR USUARIO', 'POR CLIENTE', 'LLAMADAS NO ASIGNADAS', and 'POR ETIQUETA'. A search bar is present with a date range of '2023/05/01 - 2023/07/20', a dropdown for 'Seleccionar un Usuario o Grupo', and a text input 'Buscar texto'. Action buttons include 'Sin actualización automática', 'Etiquetas', 'Descargas', 'Exportar', 'Eliminar', and 'Más'. The table below shows a list of recordings with columns: USUARIO, FECHA, HORA, DURACIÓN, ORIG. NÚMERO QUE LLAMA, PARTIDO DE LA PERSONA QUE LLAMA, PARTIDO LLAMADO, and ETIQUETAS. One recording is visible from 'Showroom 4' on 'Hoy' at '9:10' with a duration of '0:03'.

	USUARIO	FECHA	HORA	DURACIÓN	ORIG. NÚMERO QUE LLAMA	PARTIDO DE LA PERSONA QUE LLAMA	PARTIDO LLAMADO	ETIQUETAS
<input type="checkbox"/>	Showroom 4	Hoy	9:10	0:03		763797	763233 (Showroom 4)	

Reporting

Real-Time Dashboard

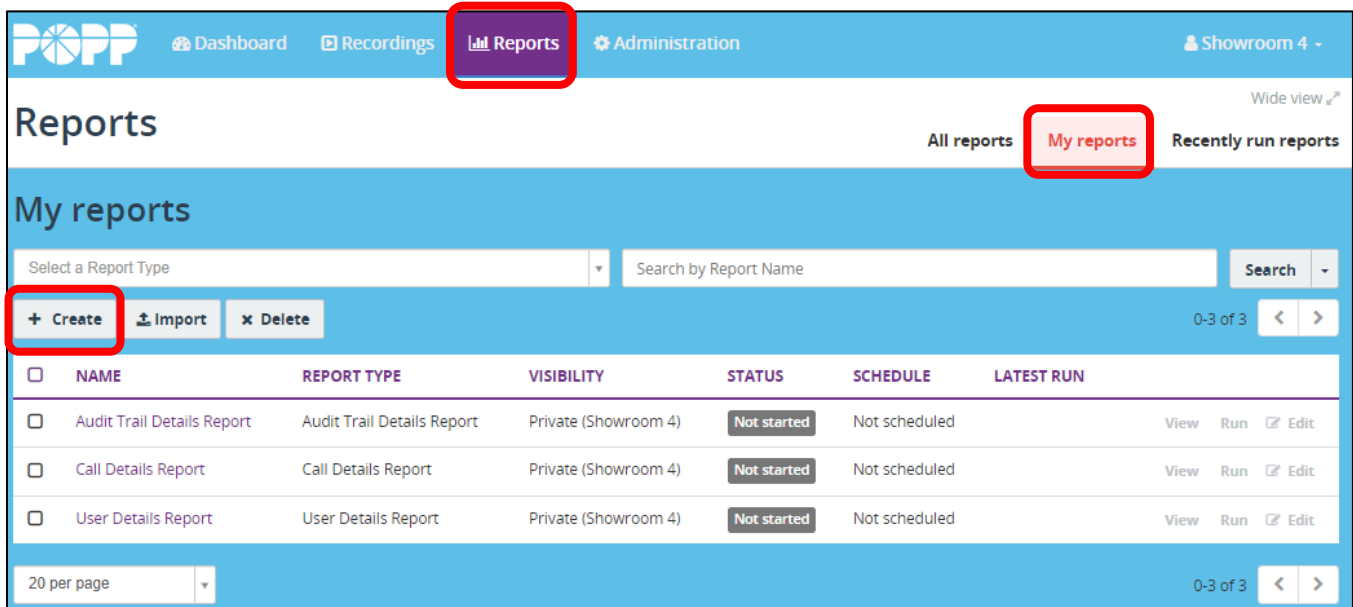
Hosted Call Recording's dashboard provides an at-a-glance view of total calls, groups, users, total call time, and average call duration:



Historical Reports

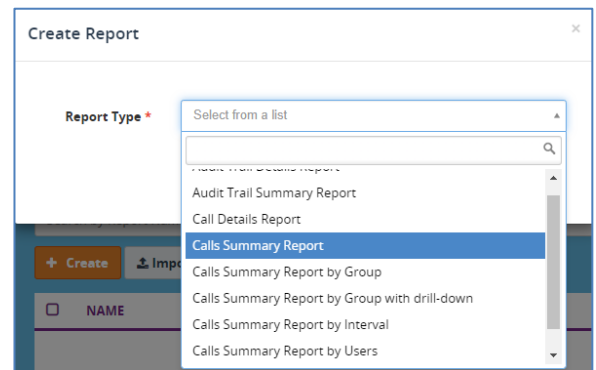
Create templates for customized reports showing a summary of user and call activity. View reports in the portal, export to PDF or Excel, and set up scheduling for automatic report delivery.

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



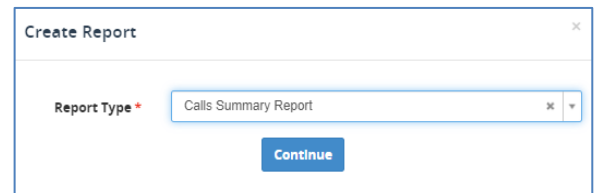
Select a **Report Type** from the list. Common report types are:

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



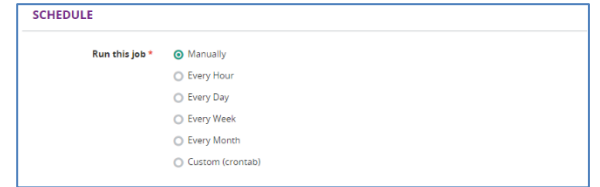
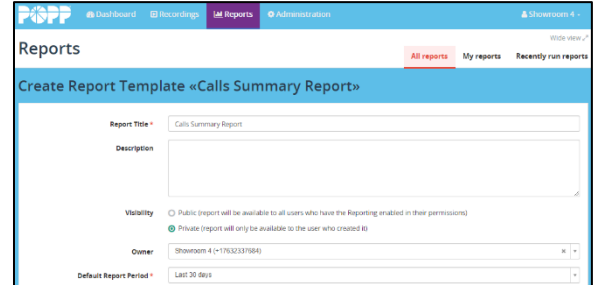
Example – Create Calls Summary Report

- Select Calls Summary Report and click Continue

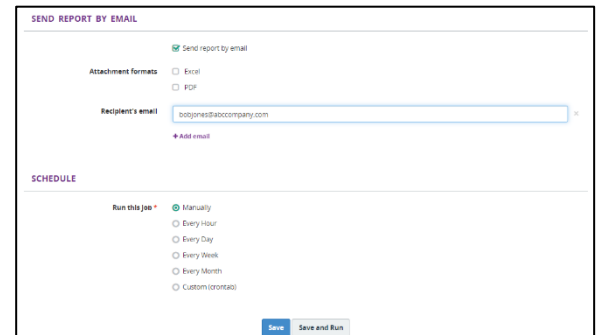


- There are many settings that can be customized when setting up a report template (e.g., summary attributes, chart type, sorting, columns, etc.). You can leave these settings as is, or customize the settings to define a custom layout and configuration. You can also elect to send the report (as Excel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

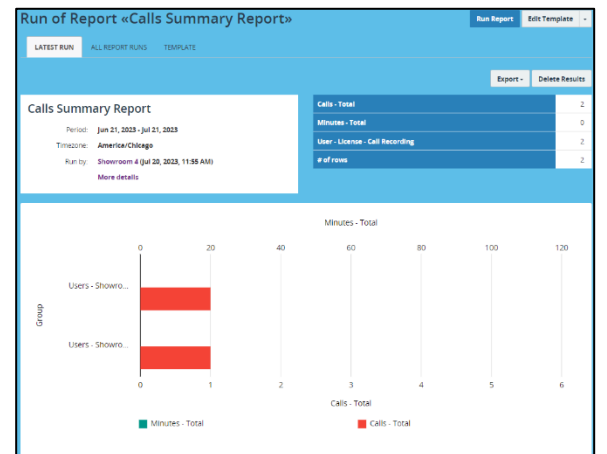
- The following settings (denoted with a red asterisk) are required:
 - Report Title** (default is Calls Summary Report)
 - Default Report Period** (default is Last 30 days)
 - Run this job** (default is Manually)



- Check the box to **Send report by email**, select **Excel or PDF**, and enter an email address to send the report via email (optional)
- Click **Save and Run**



- 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 or call POPP Communications at 763-797-7900