Login

Access to your Call Recordings is available online at https://smartrecord.dsci-net.com/

1 Enter your username and password (provided by your TPx project manager or your company administrator)

2 Click **Sign In**

Dashboard

The Home Tab or Dashboard, provides you with a real-time view of the system data including information about the total number of calls in progress, active call handlers, number of calls, duration of recordings, calls in the recycle bin, trends, etc.
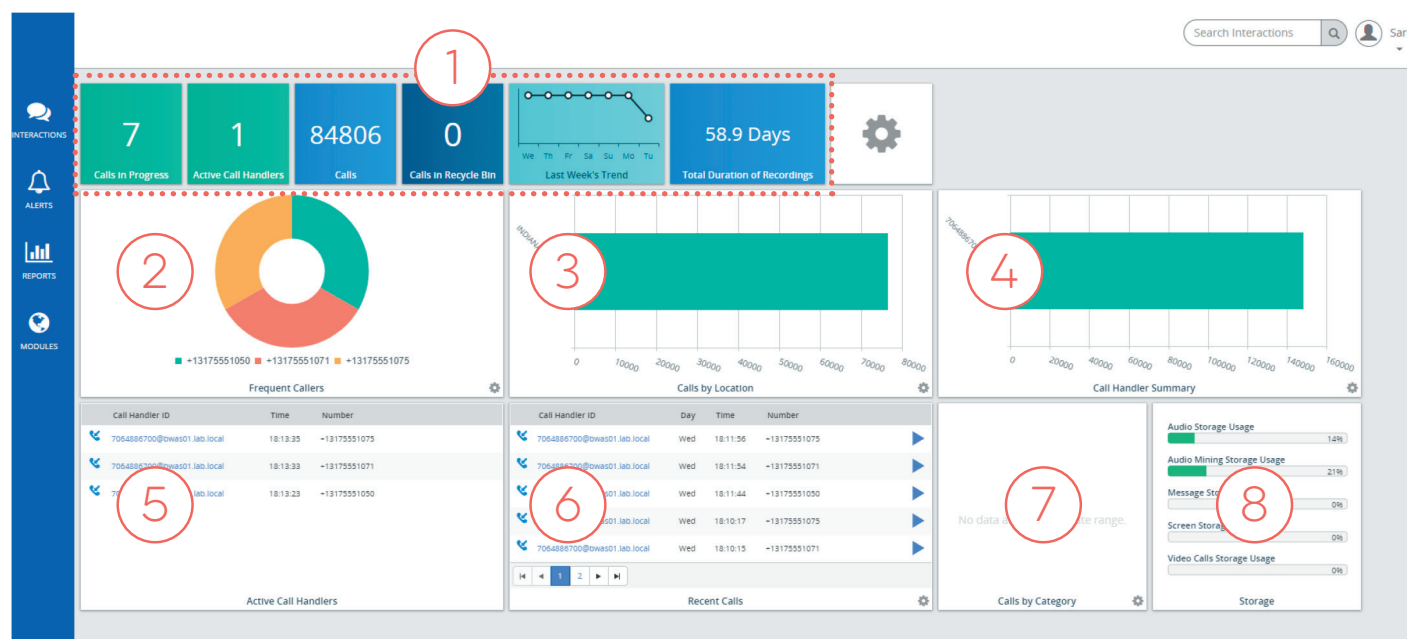
Customizable panes have a ⚙ (Settings) button in the lower right corner.

1 First Look

The First Look appears horizontally across the top of the Dashboard and displays a quick view of totals for the following information: Calls in Progress, Active Call Handlers, Total number of Calls, Calls in Recycle Bin, Last weeks Trend, Total Duration of recordings.

2 Frequent Callers

The Frequent Callers pane displays the total number of calls by calling number for the most frequently called numbers. The Frequent Callers chart displays inbound calls only.

3 Calls by Location

The Calls by Location pane displays total calls by each location as determined by the NPA/NXX.

4 Call Handler Summary

The Call Handler Summary pane displays the maximum duration, average duration, and total number of calls by call handler/number for the duration determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.).

5 Active Call Handlers

The Active Call Handlers pane displays the call handlers/numbers that are currently on calls and the number of the other party.

6 Recent Calls

The Active Call Handlers pane displays the call handlers/numbers that are currently on calls and the number of the other party.

7 Calls by Category

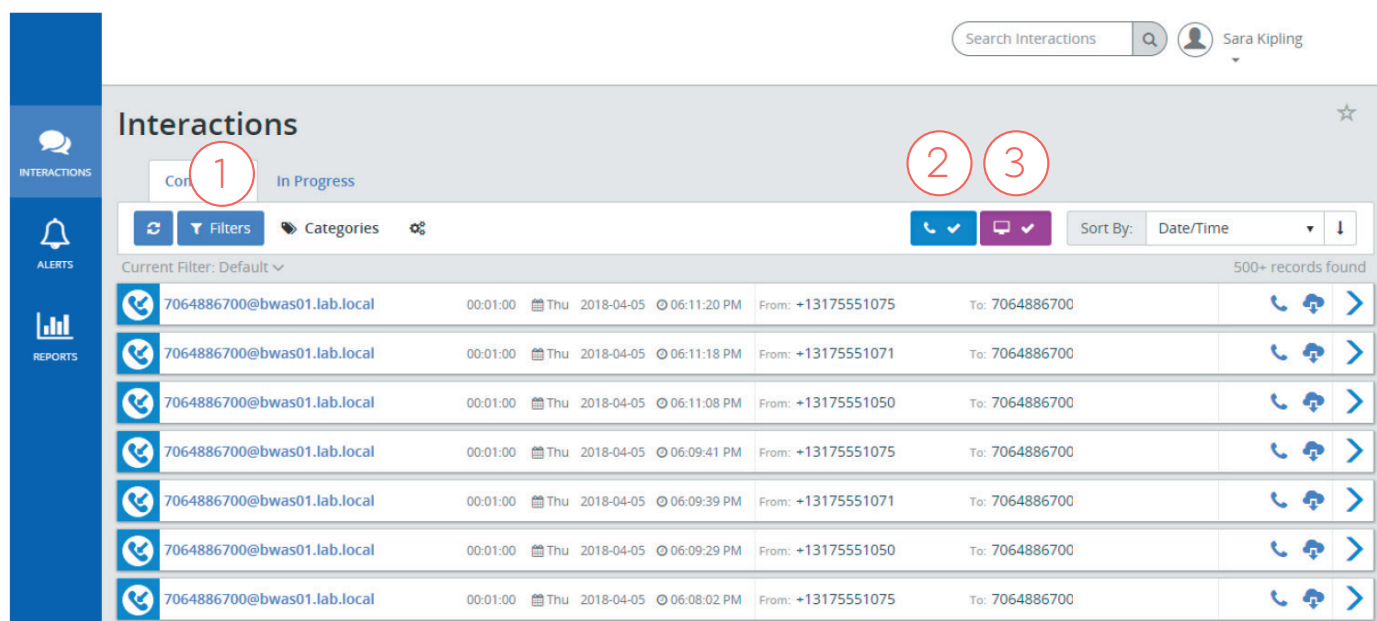The Calls by Category pane displays total calls by custom category.

8 Storage

This displays the current usage of Audio Storage, Audio Mining Storage*, Message Storage*, Screen Storage*, and Video Calls Storage*.

Requires Add-On Services

Interactions

On the left side of the Dashboard, the first tab option is Interactions. Clicking this will take you to the Interactions page.

The default view of the Interactions page is the **Completed** tab, displaying the completed calls.

1 Filters

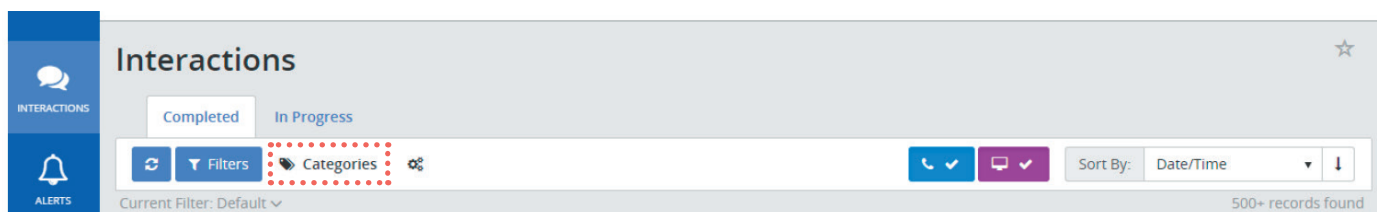You can apply filters to customize what you see and easily change views.

2 Quick Filter: Recorded Calls

3 Quick Filter: Screen Recordings

Manage & Create Categories

The ability to create categories for calls is beneficial to call handlers and managers, allowing them to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction). You are then able to filter calls or run reports based upon these call categories.
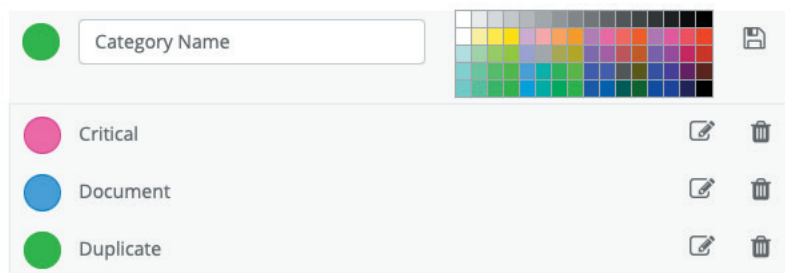
NOTE: Categories are specific to the user. Therefore, the categories that you create and assign to your recorded calls cannot be seen by other users.

Create a New Category

You can apply filters to customize what you see and easily change views.

1 Enter the category name

2 Select the category color tag

3 Click the 💾 icon

Edit a Category

1 Click the ✏️ button next to edit either the category name or updated its color.

2 Click the 🗑️ button to delete a category.

Options

Options allows you to select multiple completed calls for export. Selected calls will turn from blue to dark gray.

When you finish selecting calls, click ⚙ to open the **Options** window. The Information will be automatically exported to a CSV file.

Recorded Call Details

To access the Recorded Call details, click the ❯ icon on the right side of the call record. Below the media player is the Recorded Call Detail. The following information is displayed:

The ✉ icon lets you to email a recorded call.

The ☁ icon enables archive to CRM

The 📥 icon provides options for download

The ♻ icon allows you to send the audio to the recycle bin.

Annotations

The Annotations tab allows you to add comments and markers to specific parts of calls to indicate where in the call a notable event might have occurred. For example: a contact center manager (or any other user) can find a notable event in a call and mark it for future review with a comment. A indicates there are annotations associated with the recorded call file.

> NOTE: Pausing or resuming a recording will automatically create an annotation for the call.

Calls in Progress

The Calls in Progress screen displays all calls that are currently taking place. There are several functions that can be performed from the Calls in Progress tab including screen and call recording on demand; pause/resume; monitor, whisper, or barge calls; save recordings; and add notes and categories.

The following information is displayed on the Calls in Progress screen:

Number displays the number or description associated with the call.

Day displays the day of the week the call took place.

Date displays the actual date the call took place.

Time displays the time the call originated.

From displays the originating number.

To displays the terminating number.

Recording Status displays whether or not a specific call is being call and/or screen recorded. If On Demand is identified as a trigger in an active Recording Policy, these buttons will also act as the Pause/ Resume triggers for both call and screen recording.

Monitor If monitoring is available, a Monitor button is displayed for each call in progress. Monitoring allows the user to listen in on a call undetected by the other call participants.

Whisper If whisper is available, a Whisper button is displayed for each call in progress. Whisper allows the user to listen in on a call and actively participate with the call handler (selected number), but not to the other party on the call.

Barge If barge is available, a Barge button is displayed for each call in progress. Barge allows the user to actively participate in a call that is currently taking place and actively participate with both parties of the call.

Save Recording identifies whether or not the call is to be saved as a recorded call when it is complete. If all calls are set to be saved, the option box will appear disabled. If calls are not set to be saved, the option box will be enabled and the user can save a call on the fly by clicking in the option box while the call is still in progress.

Screen Recording identifies whether or not the screen recording functionality is available for this particular call. If screen recording is available, a check mark will appear.

Comments allows the user to add comments to associate with the call.

Category allows the user to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction).

NOTE: Monitor, Whisper, Barge, Screen Recording, Comments, and Category are features identified in the Administrative interface and allocated by Group and Subscriber. Some of these features may not be available if they were not allocated to the Group and/or Subscriber. Additionally, Recording Status and Screen Recording are features that are configured by Subscriber and may not be available or contain all possible functionality.

NOTE: Pausing or resuming a recording will automatically create an annotation for the call.

Alerts

Do you wish that you could be alerted to any emergency, long duration, international, etc., calls made from within your organization? You can create Alerts based on specific call conditions. When those conditions are met, you will be notified with the pertinent details so that you can address any issues or make any necessary changes to current policies or procedures.

Reports

There are nine reports included in the application that assist the user with administration activities. The reports identify information that can be found on the dashboard, or Home tab, but in more detail. Reports can be viewed as text or in a graphical format. You also have the ability to export reports and save them to your own PC. Additionally, you can filter on information in the reports such as number, date, and time.

Reports are divided into two categories:

1 Recorded Call Reports
   – Call Handler Activity
   – Calling Locations
   – Calls by Category
   – Daily Usage
   – Hourly Usage
   – Frequent Callers

2 Organization Reports
   – Unused Numbers
   – User Details