



## Call Recording

### **USER GUIDE:** Call Recording

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## Call Recording Overview

Metronet Call Recording allows customers to record inbound and outbound calls for licensed lines. Several enterprise-level recording features are built into the Metronet Call recording product, such as call tagging for recordings and live monitoring.

### Features

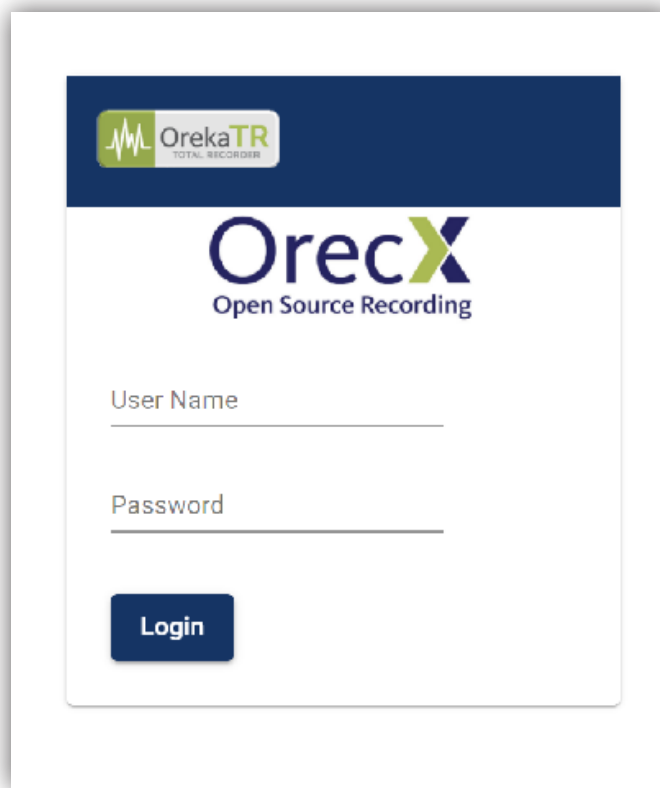
- Metronet Call Recording inbound and outbound calls for licensed users
- Easy playback of recordings via a web-based GUI
- Many searching and filtering options for recorded calls.

Note: This manual is designed for all features and all privilege levels. If certain features are missing, check your privilege level with your system administrator.

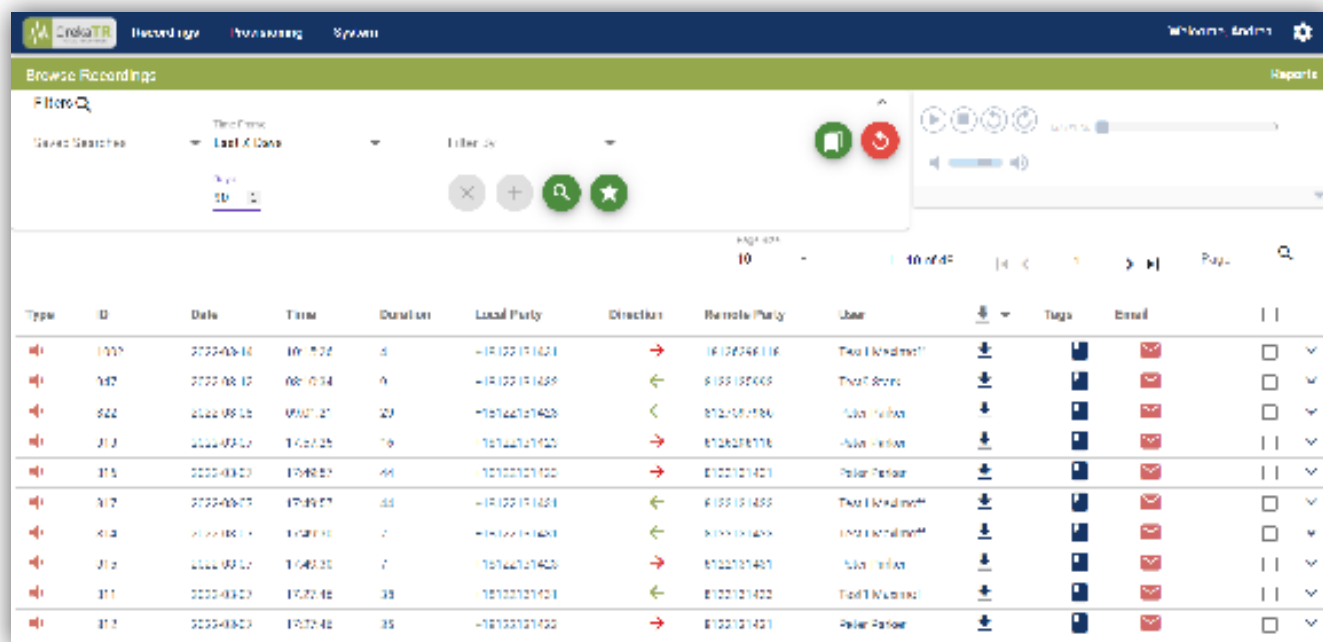
## Accessing the Call Recording Web Portal

Metronet Call Recording has a web-interface, which can be accessed from other computers via the internet.

Inside the web-browser address bar, type the full address bar, type the full address of the Metronet Call Recording server, <https://callrecording.mymetronet.net>.



## Call Recording Interface Overview



The following functions are found along the top edge of the Call Recording interface. The details of each of these functions are discussed in the next sections.

### Recordings

- Browse: Search and Playback of recorded calls. You can also view details regarding each recording and Export/Delete
- Live: Users with a Role that allows Live Monitor will have access to listen to their group's active calls

### Provisioning

- Users: Manage User Accounts
- Groups: Manage Groups (Tenant/Company/Department)
- Roles: Manage Policies for users with elevated access levels

### System

- Audit Trail: Log of all actions performed on the recording platform

## Recordings

### Search

After logging in, you will land on the **Browse Recordings** page to perform a search for all available call recordings.

### Filters

The default search for recordings is all recordings from midnight (00:00:00) for the current day. You can refine the results using the Filter By section by adding/removing Filters and then clicking on the search icon.








A table containing a list of call recordings is displayed below the Filter By search criteria. Each row in the results includes the **Type** (Audio or Screen), **ID**, **Date**, **Time**, **Duration** (seconds), **Local Party** (extension number/agent ID/DID), **Direction** (In or Out), **Remote Party** (Caller ID/ANI), **User** (this is the User in Metronet Call Recording linked to the Local Party).

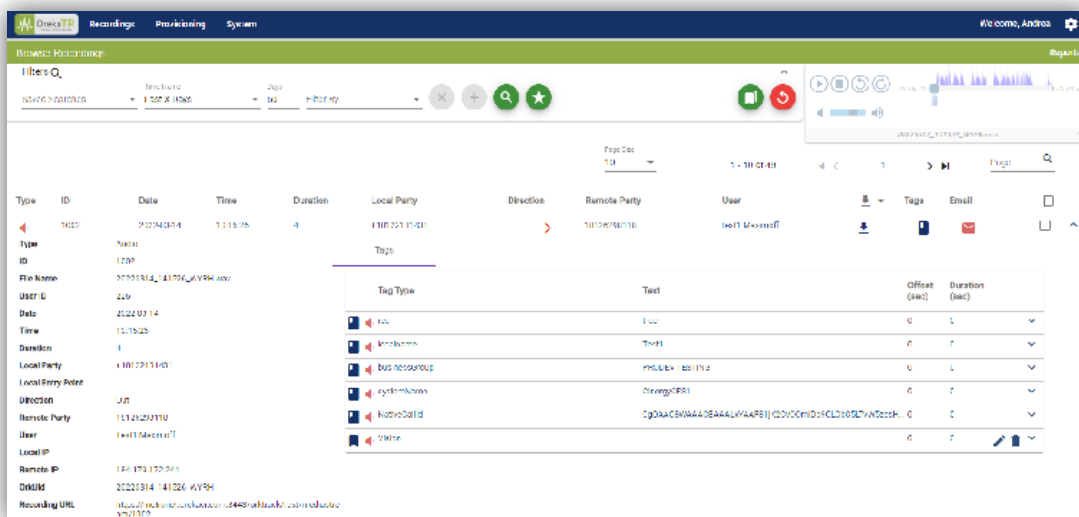
All of these values can be used as Search Criteria by adding a search **Filter**. Multiple criteria can be selected simultaneously by clicking the Add Filter button . To remove a particular filter criterion, click the Remove Filter button . When you are ready to see the results, click on the Search button . If this is a search you will be running again in the future, you can save all the criteria by clicking the Save Search button .

Clicking the column headers will sort the table by the column in ascending/descending order, with the default sort order being the newest recordings in descending order.

Type	ID	Date	Time	Duration	Local Party	Direction	Remote Party	User	Tags	Email	
Audio	322	2022-03-08	09:01:21	29	+10122131423	←	6127597906	Peter Parker			
Audio	306	2022-03-07	16:07:02	9	+10122131423	←	6126290116	Peter Parker			
Audio	270	2022-03-07	12:23:50	11	+10122131423	←	6122131421	Peter Parker			

Additionally, actions can be performed on call recordings such as:

Play	
Download Audio	
Add Tags	
Email	
View Additional Details (see image below)	




The screenshot displays the 'Browse Recordings' section of the Metronet Business application. It features a sidebar with filters and a main table of recordings. The detailed view of a recording shows the following information:

- Type:** 1002
- ID:** 1002
- Date:** 2022-03-14
- Time:** 10:15:26
- Duration:** 4
- Local Party:** +10122131401
- Remote Party:** 10126290116
- User:** Test1 Maxmoff
- Tags:**
  - Tag Type: Tag
  - Text: Test1
  - Offset (sec): 0
  - Duration (sec): 4

## Playback and Download

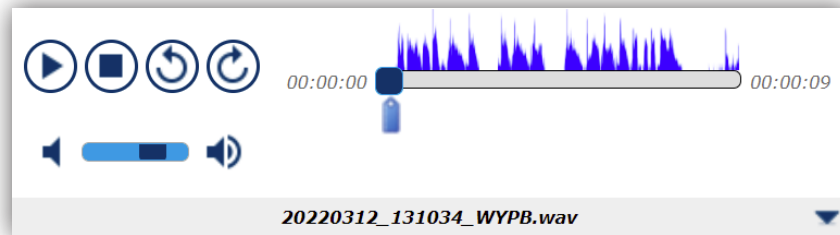
### Playback

Clicking on the speaker icon  in the **Type** column initiates playback of that recording. This will highlight the recording that is being played and activate the built-in player. You can use the player controls to navigate the recording.




The screenshot displays the 'Browse Recordings' section of the Metronet Business application. It features a sidebar with filters and a main table of recordings. The built-in audio player is visible at the top right, showing the recording's progress and volume controls.

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



## Downloading







To download a recording, simply click on the **Download Audio** button . This will then prompt you to save the recording (in WAV format) on your personal computer.


## Live Monitor

(Recordings → Live)

## Listen

The **Live Monitoring** feature allows authorized users to listen to the active calls in real-time.

OrekaTR <span>Recordings</span> <span>Provisioning</span> <span>System</span> <span>Welcome, Andrea</span> <span>⚙️</span>										
Live Monitoring										
Filters  <div>             Filter By <span>Filter Value</span> </div> <div>             Last Name <span>Banner</span>    </div>										
					Page Size	1 - 1 of 1	1		Page	
					10					
User ID	First Name	Last Name	Local Party	Direction	Remote Party	Elapsed Time	Comments	Keep	Discard	Listen
223	Bruce	Banner	+18122131429		Inactive	> 24h		<input type="checkbox"/>	<input type="checkbox"/>	

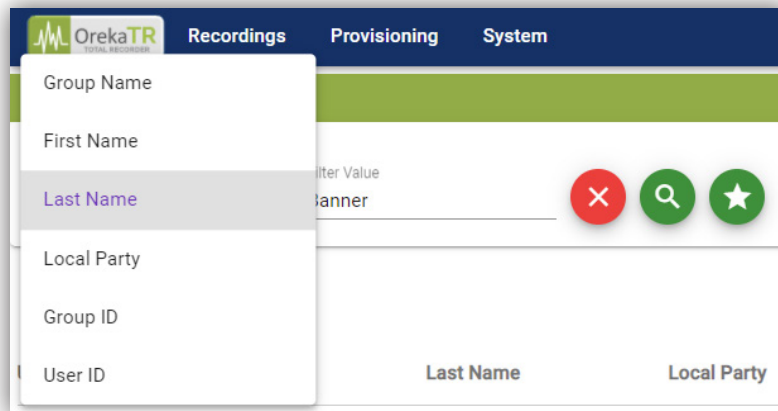
If a user is on a call, call details (**Remote Party**, **Direction**, **Duration**) will populate, and a button will appear in the **Listen** column. To monitor a call in-progress, click on the **Listen**  button in the rightmost column for that user.

You can also choose to discard this recording at the end of the call by checking the **Discard** box.



## Filter




Additionally, you can **filter** your view to limit the scope of the calls visible on the **Live Monitoring** screen:




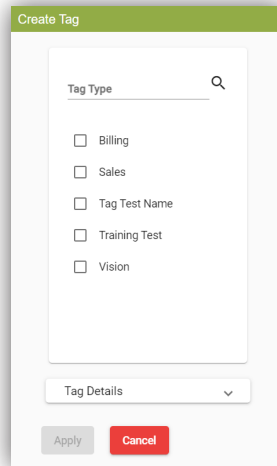
- **Group Name:** Name of Group(s) to monitor
- **First Name:** The first name of the agent to monitor
- **Last Name:** The last name of the agent to monitor
- **Local Party:** Extension number/Agent ID/DID of the user to monitor
- **Group ID:** If known, you can search by the ID of a group instead of the name, which results in a quicker search
- **User ID:** As with the Group ID, if known, the User ID can be used to search instead of Name(s) for a quicker search

## Tags

Metronet Call Recording allows you to **Tag** or categorize a recording for later searching (using **Filters**) or exclusion by an administrator regarding retention and backup. When the user has the appropriate permissions, they may assign a tag(s) to calls, create a new tag(s), etc. Note: Some tags are automatically added by the recording platform and contain information passed along by your telephony platform. These are called **System Tags**.

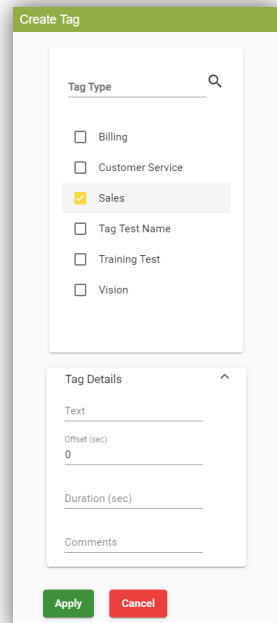
Recording contains System Tags	
Recording contains no Tags	
Recording contains Tags that have been manually added.	

From the **Browse Recording** page, click on the **Add Tags** button  to Add/Create a new Tag for that recording. The following pop-up will appear where you can choose an existing Tag Type or Create a new one by typing the name in the **Tag Type** field:

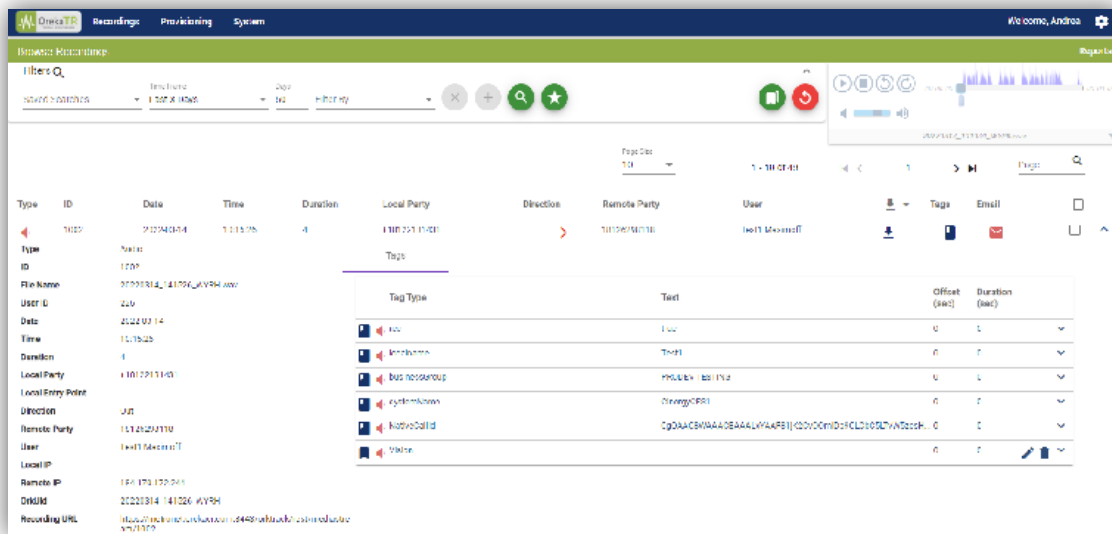
A screenshot of the 'Create Tag' dialog box. It has a green header bar with the text 'Create Tag'. Below the header is a search bar labeled 'Tag Type' with a magnifying glass icon. Underneath the search bar is a list of tag types with checkboxes: 'Billing', 'Sales', 'Tag Test Name', 'Training Test', and 'Vision'. At the bottom of the dialog is a 'Tag Details' section with a downward arrow, and two buttons: 'Apply' and 'Cancel'.

Once you have chosen or created a new Tag Type, you can optionally add Tag Details by expanding the Tag Details section (see image below) and applying information such as:

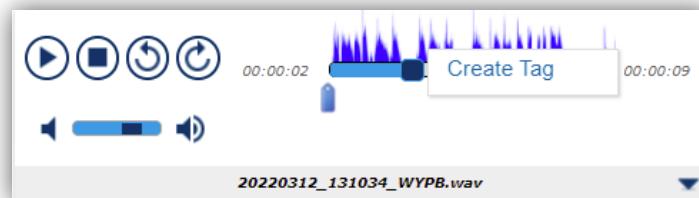
- **Text:** Brief description
- **Offset:** Value (in seconds) from the beginning of the recording where this Tag should be placed
- **Duration:** Value (in seconds) to optionally bookmark a section of a recording using this Tag
- **Comments:** Optional additional information regarding this Tag

A screenshot of the 'Create Tag' dialog box with the 'Tag Details' section expanded. The 'Tag Type' search bar is at the top. Below it is a list of tag types with checkboxes: 'Billing', 'Customer Service', 'Sales' (which is selected with a yellow checkmark), 'Tag Test Name', 'Training Test', and 'Vision'. The 'Tag Details' section is expanded, showing fields for 'Text', 'Offset (sec)' (with a value of 0), 'Duration (sec)', and 'Comments'. At the bottom are 'Apply' and 'Cancel' buttons.

All Tags are then visible in the Details section of their respective recording segment (ex: Confirmed Sale, Upset):

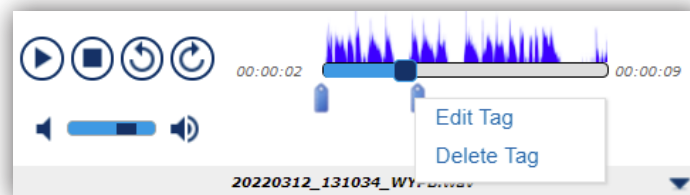


You can also add a Tag to a segment by performing a right-click on the player while playing back a recording:



This will bring up the **Create Tag** Dialog box.

You can additionally edit an existing Tag by performing a right-click as shown below:



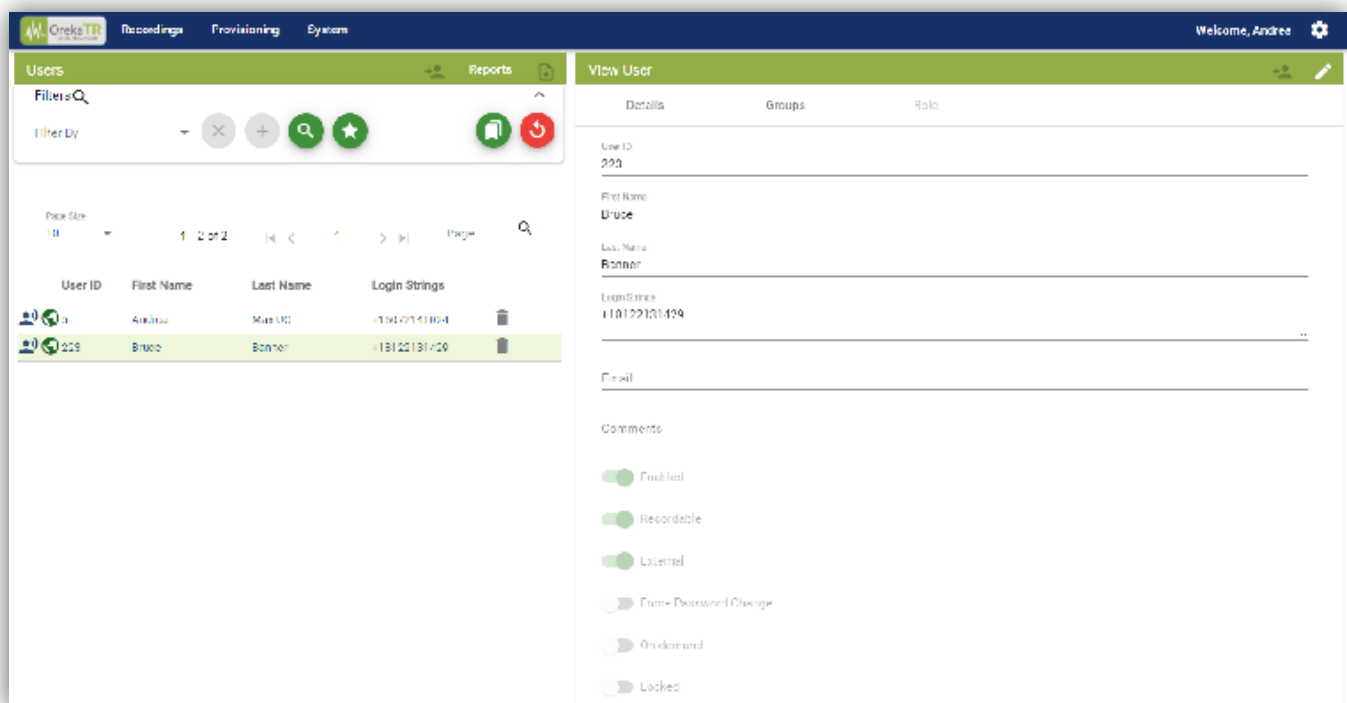
## Provisioning

### Users

Metronet Call Recording users are managed in the Provisioning/Users page. It is possible to create, edit, disable, and delete users. You can also configure users to be recordable or not. Non-recordable users typically have administrative privileges and do not count against the licensed recordable user limit. If you require additional non-recordable users, please contact us.

Your license key limits the number of active users you can have at any point in time. To free a few licenses, you can delete users or simply disable them. Being disabled, they will still be visible, but no new recordings will be associated with them, and those disabled users won't be able to log into Metronet Call Recording.

There is one pre-defined and non-editable user in Metronet Call Recording: "admin." This user has all the possible privileges or access policies enabled and is reserved for the main administrator.




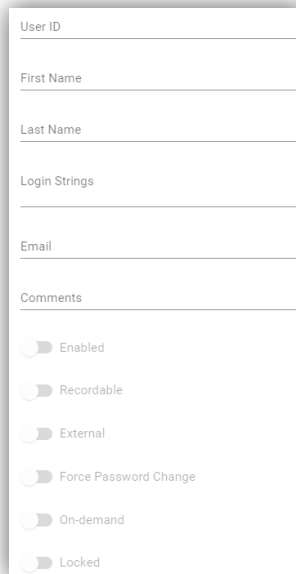
The screenshot displays the 'Users' management page in the Metronet Call Recording application. The top navigation bar includes 'Recordings', 'Provisioning', and 'System'. The 'Users' section is active, showing a list of users with columns for User ID, First Name, Last Name, and Login Strings. Two users are listed: 'Admin' (User ID 1) and 'Bruce' (User ID 222). The 'Bruce' user is highlighted. To the right, the 'View User' panel shows details for User ID 222, including First Name 'Bruce', Last Name 'Banner', and Login Strings '118122131429'. Below the details, there are several toggle switches for user settings: Enabled (checked), Recordable (checked), Latent (checked), Force Password Change (unchecked), Overload (unchecked), and Locked (unchecked).

### Users

Users can be created as Recordable (👤) or Non-Recordable (👤). It will also show if they are an External user (🌐).

## Creating a New User

If you are a user with permission to create new users and there are licenses available, clicking on the Create User Button  will activate the Create User form:

The image shows a vertical form for creating a new user. It contains several text input fields: 'User ID', 'First Name', 'Last Name', 'Login Strings', 'Email', and 'Comments'. Below these fields are seven toggle switches, each with a label: 'Enabled', 'Recordable', 'External', 'Force Password Change', 'On-demand', and 'Locked'. All toggle switches are currently in the 'off' position.

- **First Name:** User's First Name
- **Last Name:** User's Last Name
- **Login Strings:** Each user can have multiple login strings entered as a CSV list of text strings. Those login strings serve two purposes:
  - They act as unique identifiers for Metronet Call Recording users.
  - They specify what phone numbers or extensions are to be recorded.
- **Password (optional):** Password to allow the user to login to Metronet Call Recording combined with their login screen
- **Confirm Password:** Must match Password as confirmation
- **Email (optional):** User's email address. Used for receiving recordings via email.
- **Comments (optional):** Notes or remarks
- **Enabled:** Enables or disables the user account
- **Recordable:** Enables or disables the recording of this user's calls
- **External (optional):** To be enabled only if the user has been provisioned by an external 3rd party service and is authenticated by another source such as LDAP
- **Force Password Change:** Forces the user to choose a new password when they next log in to Metronet Call Recording
- **On-Demand:** Indicates to the recording platform this user's call will only be recorded if triggered by an external source during the call
- **Auto Renew:** When checked, will bring you back to the Create User form to provision additional users after pressing Submit

## Searching for a User

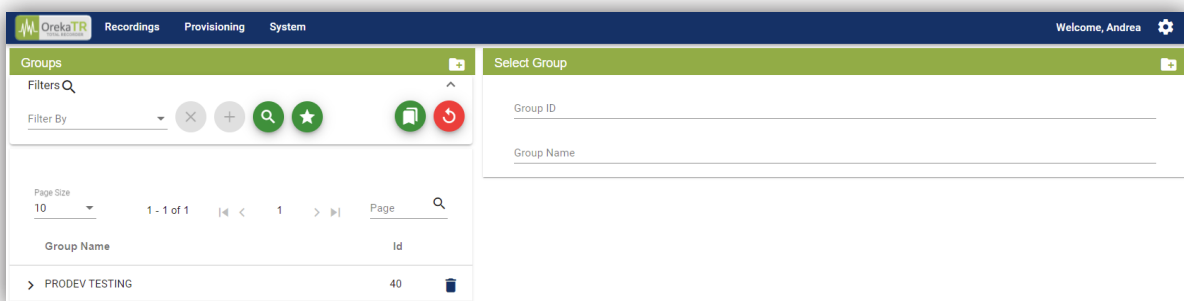
Using the Filter By drop-down, you can search for Users based on the above attributes and several other fields such as Group and Role affiliation. Several Filters can be added to narrow down the scope of your search:



## Groups

Groups can be useful, e.g. for filtering or creating specific recording rules on a group of people. Users can belong to multiple groups. Groups can also be part of other groups, thereby creating a group hierarchy of any depth.

Groups can be used to separate Users by departments, companies, or any other organizational unit as needed.



Legend:

Reset Search	
Delete Group	
Create New	

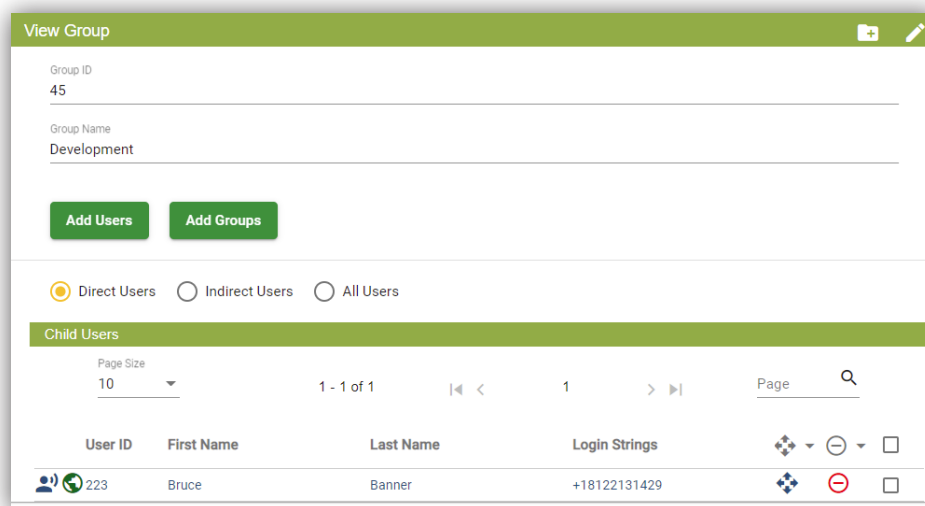
## Creating a New Group

To add a new **Group**, click on the **Create Group** button  and then enter Group Name. Click Submit.

**Auto Renew:** When checked, will bring you back to the Create Group form to provision additional Groups after pressing Submit.

## View Group

To manage Group Membership, click on a group to select it. You will then be presented with the **View Group** section:



**View Group**

Group ID  
45




Group Name  
Development

**Add Users** **Add Groups**

☒ Direct Users ☐ Indirect Users ☐ All Users

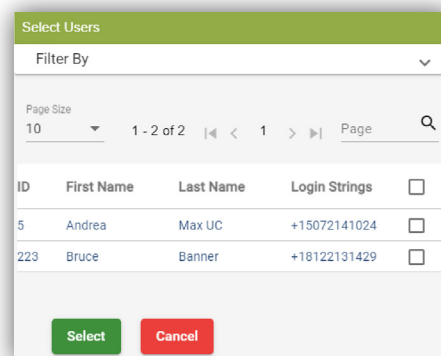
**Child Users**

Page Size: 10 | 1 - 1 of 1 | Page: 1


User ID	First Name	Last Name	Login Strings	
223	Bruce	Banner	+18122131429	  

## Adding Users to a Group



Click on Add Users, which will bring up a list of Users that you can select to add to the Group. If the list of available Users is too long, you may use the Filter By field to narrow the scope of your search.



**Select Users**


Filter By: 

Page Size: 10 | 1 - 2 of 2 | Page: 1



ID	First Name	Last Name	Login Strings	
5	Andrea	Max UC	+15072141024	
223	Bruce	Banner	+18122131429	





**Select** **Cancel**

## Adding a Group to a Group








Click on **Add Groups**  while viewing a group, which will bring up a list of Groups that you can select to add to the Group. If the list of available Groups is too long, you may use the Filter By field to narrow your search scope.

## Managing Group Membership

To remove a User, a Group click on the **Remove User from Group** button . To move a user from one group to another, select the user you would like to move, and then click the **Change Group** button . You will then be presented with a popup with a list of Groups you can choose as a target for the move. Choose a Group and then click Select.

Child Users						
<div> <div>Page Size</div> <div>10</div> <div>1 - 1 of 1</div> <div> <div>1</div> <div>&lt;</div> <div>&gt;</div> </div> <div>Page</div> <div> <div> <div></div> </div> </div> </div>						
User ID	First Name	Last Name	Login Strings			
 223	Bruce	Banner	+18122131429			

To remove a Group from a Subgroup, click on the **Remove Subgroup from Group** button :

<div> <div>Page Size</div> <div>10</div> <div>1 - 1 of 1</div> <div> <div>1</div> <div>&lt;</div> <div>&gt;</div> </div> <div>Page</div> <div> <div> <div></div> </div> </div> </div>		
Group Name	Id	
✓ PRODEV TESTING	40	
Sales	44	 
Development	45	 
Administration	46	 



## System

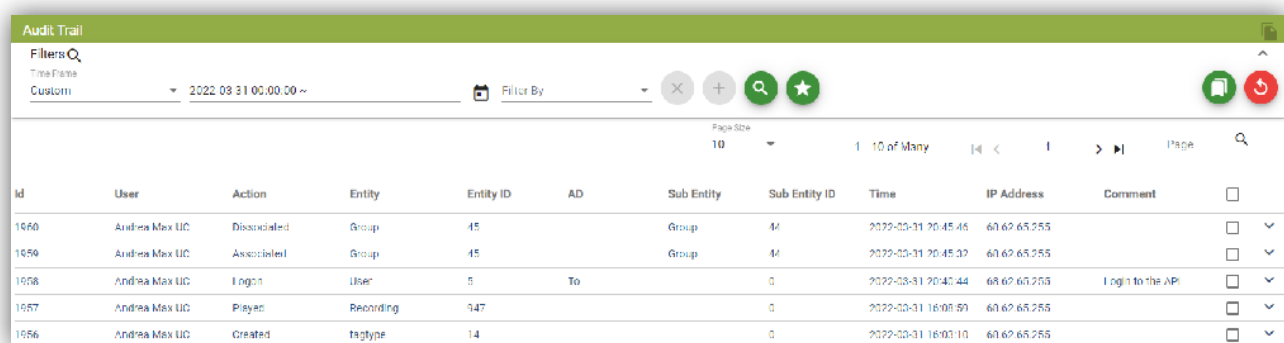
### Audit Trail

Metronet Call Recording provides a comprehensive, detailed **Audit Trail** solution that is designed to meet corporate and regulatory needs. Audit Trail enables organizations to verify and demonstrate adherence to security policies and compliance imperatives by providing a complete solution encompassing all data and all Metronet Call Recording applications.

Every function performed by every user is logged to Audit Trail. The log message includes data as:

- **User:** Initiator of action
- **Action:** Operation performed by the initiator, i.e. played, created, updated, deleted, logged on, etc.
- **Entity:** Type of resource affected by Action
- **Entity ID:** Recording ID, User ID, or Group ID affected by Action
- **Sub Entity ID:** Group ID or Role ID affected by Action
- **Time:** Date and Timestamp of Action
- **IP Address:** IP address, from which the Metronet Call Recording was accessed
- **Comment:** Additional info related to Action

The search function allows filtering data by any of the above values using the Filter By field.



The screenshot shows the 'Audit Trail' window with a green header. Below the header is a filter bar with a search icon, a dropdown menu set to 'Time Range', a date range '2022-03-31 00:00:00 ~', a 'Filter By' dropdown, and several action buttons (close, add, search, star). Below the filter bar is a table with columns: Id, User, Action, Entity, Entity ID, AD, Sub Entity, Sub Entity ID, Time, IP Address, Comment, and a checkbox. The table contains five rows of data. At the bottom right of the table, there are 'Page Size' (set to 10), '1 of 10 of Many', and 'Page' navigation controls.

Id	User	Action	Entity	Entity ID	AD	Sub Entity	Sub Entity ID	Time	IP Address	Comment	
1060	Andrea Max UC	Dissociated	Group	45		Group	46	2022-03-31 20:45:46	60.62.65.255		<input type="checkbox"/>
1059	Andrea Max UC	Associated	Group	45		Group	46	2022-03-31 20:45:32	60.62.65.255		<input type="checkbox"/>
1058	Andrea Max UC	Login	User	5	To		0	2022-03-31 20:45:44	60.62.65.255	Login to the API	<input type="checkbox"/>
1057	Andrea Max UC	Played	Recording	047			0	2022-03-31 16:05:50	60.62.65.255		<input type="checkbox"/>
1056	Andrea Max UC	Created	tagtype	14			0	2022-03-31 16:00:10	60.62.65.255		<input type="checkbox"/>

## Settings

The Settings button (⚙️) is in the upper right.

### Profile

This section can be used to change the Timezone used for displaying call recordings, as well as your password.

The screenshot shows a user profile form for 'Andrea Max UC'. It includes fields for First Name (Andrea), Last Name (Max UC), Login Strings (+15072141024), and User ID (5). Below these is a 'User Preferences' section with password change options (Old Password, New Password, Confirm Password) and a 'Change Password' button. At the bottom, there is a 'Select Timezone' dropdown menu currently set to 'America/New\_York'.

### About

Used to view your software version.

The screenshot shows an 'About OrkUI' dialog box. It displays the following information: OrkUI : 3.10-12737, Build date : 2021/12/21 20:22:18, OrkTrack : 3.10-12737, and Build date : 2021/12/21 20:22:18. At the bottom, it states '© 2018 OrecX. All Rights Reserved.'

### Logout

Log off from your current session in Metronet Call Recording.