

Hosted PBX Call Recording User Interface Guide

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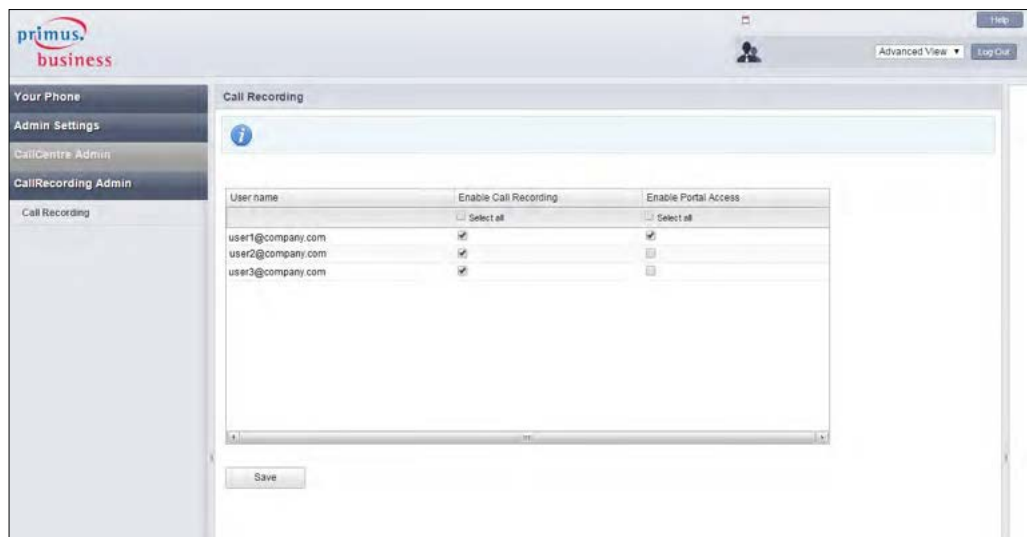
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Granting Access and Logging On

A user with HPBX Portal Administration rights can see which users have the recording service activated, as well as which users have access to the HPBX Recording Portal by navigating to the "Advanced View" in the HPBX portal and selecting "Call Recording Admin" on the menu on the left.

Note: *Important - Do Not Make Changes To Any of These Settings!*

While a HPBX Administrator can modify the settings on this page, it is important that they do not make changes to any of these settings as it will only make partial configuration changes to users and may impact the functionality of their recording service. All changes with regards to assigning the recording service to users, granting recording portal access and associating recording users to portal users must be done by the Primus provisioning team via a change request submitted by the customer to the Primus Technical Support team.



Once a user has been granted access by the administrator, they may log into the Call Recording portal by selecting the "Advanced View" and under the "Your Phone" menu on the left hand side, selecting "Call Recording Portal Login".

This will open a separate tab in the browser and log the user into the Home Tab (Dashboard) of the Call Recording portal.


The latest version and one version prior of the following browsers are supported:

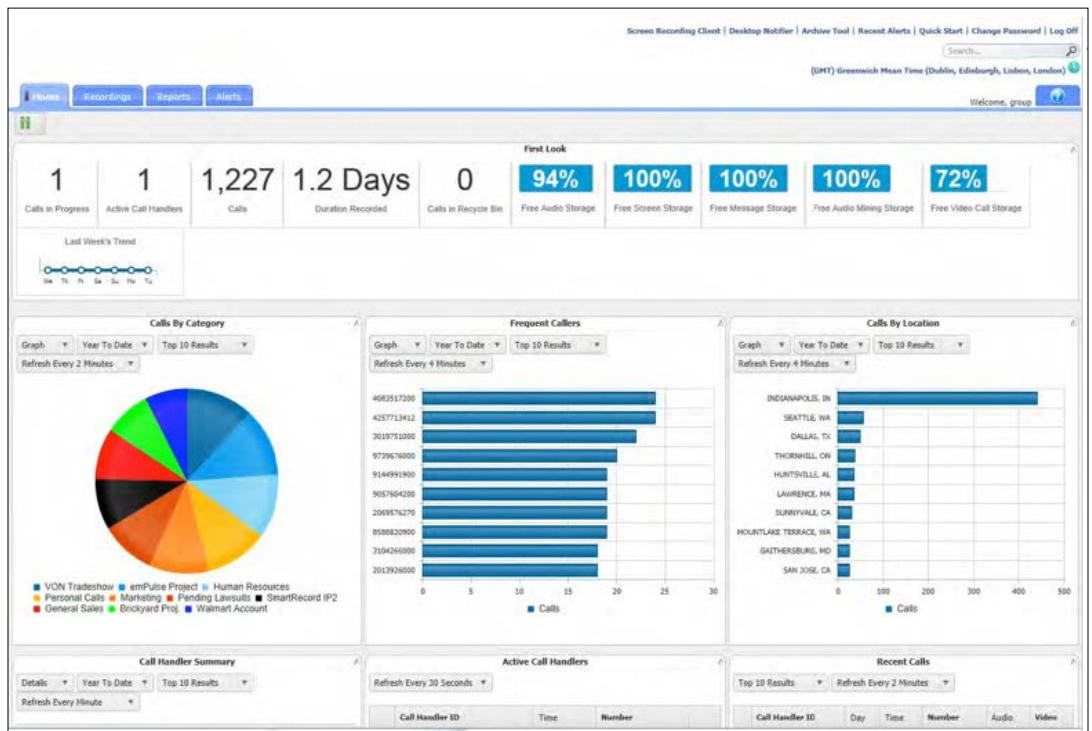
- Google Chrome
- IE
- Firefox
- Safari



Home Tab (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, calls, duration recorded, free storage, etc. The Dashboard is divided into eight distinctive panes that give you a pictorial and data overview of your company's current call usage: First Look, Calls by Category, Frequent Callers, Calls by Location, Call Handler Summary, Active Call Handlers, Recent Calls, and Activity & Heat Map. Where applicable, the panes can be viewed as data or as a graph. Additionally, the panes can be reorganized or relocated by clicking on a pane, dragging it, and dropping it in the desired location on the Dashboard. Each pane can also be collapsed by clicking on the arrow in the upper-right corner of the applicable pane.

With the exception of First Look, Active Call Handlers, Recent Calls, and Activity & Heat Map charts, you have the ability to view each pane as either a text or a graphical display. Additionally, all panes have one field you can click on to drill down into the details of that information or play a call recording. The default is for the Dashboard to refresh every 30 seconds; however, you can reset the refresh value for each element individually except for the First Look pane. Refresh can be temporarily stopped by clicking the  (Pause) button.



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 – identifies the total number of calls in the system that are not terminated, by Group and/or User.
- Active Call Handlers – displays the total number of extensions with an active call. Active Call Handlers displays information by User. Users will only see information based on extensions to which they have access.
- Calls – identifies the total number of completed calls for the user that is currently logged in and that have a recording associated with them. This value is cumulative over the lifetime of the account. However, the number will adjust accordingly when call files are deleted and/or routinely swept from the application.
- Duration Recorded – identifies the sum of duration for recorded calls that have a recording associated with them. This value is cumulative over the lifetime of the account.
- Calls in Recycle Bin – identifies the total number of calls that have a recording associated with them and that are pending deletion. However, the number will adjust accordingly when call files are deleted and/or routinely swept from the application.
- Free Audio Storage – identifies the total amount of free audio storage.
- Last Week's Trend – provides a visual display of the call history for the previous week.

Calls by Category

The Calls by Category pane displays total calls by custom category. Categories are specific to the user. The calls included in the totals are determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Calls by Category pane can be displayed as text or graph by selecting Details or Graph from the drop-down list. You can drill down into the specific recorded calls by clicking on a specific category. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop-down list.

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. The number of frequent callers displayed in the pane will be determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Frequent Callers pane can be displayed as text or graph by selecting Details or Graph from the drop-down list. You can drill down into the specific recorded calls by clicking on a specific frequent caller. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop-down list.



Calls by Location

The Calls by Location pane displays total calls by each location as determined by the NPA/NXX. The calls included in the totals will be determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Calls by Location pane can be displayed as text or as a pie chart by clicking on the View Graph link. You can drill down into the specific recorded calls by clicking on a location under the Location column. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop-down list.

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.). The Call Handler Summary pane can be displayed as text or as a pie chart by clicking on the View Graph link. You can drill down into the specific recorded calls by clicking on a call handler ID under the Call Handler ID column. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop-down list.

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. Users that have access are able to monitor an active call handler's call in progress by clicking on the monitor button. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop-down list.

Recent Calls

The Recent Calls pane displays the most recent calls, incoming and outgoing, by call handler. The number of recent calls displayed in the pane will be determined by the applied filter (for example: Last 30 Days, Last Month, Year to Date, etc.). The Recent Calls pane can be displayed as text or a graph by selecting Details or Graph from the drop-down list. You can play a recorded call by clicking on the recorded call icon. Additionally, you are able to adjust the number of results to display by selecting the applicable number from the Top Results drop-down list.




Activity & Heat Map

The Activity & Heat Map displays the call activity for the top 10 numbers by hourly intervals over a 24 hour period. The Activity & Heat Map can be filtered by Call Handlers, Calling Parties, or Called Parties. Additionally, the call activity can be displayed as Number of Calls or Call Duration (in minutes). The darker coloured blocks represent the higher volume call activity while the lighter coloured blocks represent the lower volume call activity. Each individual colour block is clickable and will take you directly to the Recorded Calls tab where you are able to view the call activity, listen to the recording, add a comment, etc.

Recorded Calls

The Recorded Calls screen displays all completed recorded calls that belong to you or any users you have been given permission to see. In order to better manage this screen, all column headers can be sorted by clicking on the applicable column header. Click once to sort the column in ascending order and click one more time to sort the column in descending order. The following information is displayed on the Recorded Calls screen:



- Number – the number or user description associated with the call
- Day – the day of the week the call took place
- Date – the actual date the call took place
- Time – the time the call originated
- From Number – the originating number
- From Caller ID – displays the name or number of the person that originated the call, if caller ID is available
- To Number – the terminating number
- To Caller ID – displays the name or number of the To Number, if caller ID is available
- Redirected From – displays the number of the person or group transferring the call

- Redirected To – displays the number to which the call was transferred
- Duration – the length of the call
- Recording – clicking on the  icon will start the playback of the recorded call (MP3 file format in your default media player)
- Annotate – comments and markers on calls to indicate where in the call a notable event occurred
- CRM – allows the user to upload recorded calls to Sugar or Salesforce.com through the standard API
- Email – allows the user to email a recorded call
- Comments – any comments associated with the call
- Category – allows the user to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction)
- MD5 – identifies whether or not the call has been hashed using MD5 fingerprinting, thus ensuring that the call has not been tampered with and is satisfying regulatory requirements
- Evaluate – allows Administrators to select individual recorded calls and evaluate the call handler's performance during the call
- Audio Mining – allows users to view the results of the audio mining pack search

Note: Not all columns on the Recorded Calls tab may be available to you depending on what features and licenses have been purchased and applied to individual users.

When users are configured with call recording, the system will record and retain all calls that are made to or from those users.


Please be aware that the way in which media players load and play the recorded call files will vary. For instance, QuickTime Player and Windows Media® Player will immediately launch the recorded call file (see Appendix A for a list of supported features by media player). However, iTunes® will load the recorded call file in the library and you will have to click play to begin listening to the file.

Annotations allow 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 centre manager (or any other user) can find a notable event in a call and mark it for future review with a comment. A  (Annotate button) indicates there are no annotations associated with the corresponding recorded call file. However a  (Annotate button) indicates there are annotations associated with the recorded call file. To add an annotation, click on the Annotate button. Select the Play button to begin playing the recorded call. Select Pause when you come to the point in the call where you wish to add an annotation. Enter a subject marker description and any notes to better identify the annotation and click Add Marker. You can also attach external documents to an annotation by clicking Upload Document. You must repeat each step for each annotation you wish to add to the call.

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


You have the option to upload recorded calls from the Recorded Calls tab to either Sugar or Salesforce.com CRM application. This functionality allows you to connect the recording system with those CRM applications to upload recorded call files to specific contacts in the CRM application.

Note: You can only have one active connection to a CRM application at a time. If you want to log into another CRM application, click CRM Client Settings, select the CRM application, and enter the credentials.




To upload a recorded call to a CRM, select CRM Client Settings link. The CRM Client Settings Link can be accessed from the toolbar on the Recorded Calls tab or from the Archive to CRM dialog box. Select the CRM application from the drop-down list and enter or select the URL, username, and password to that CRM application. Click Test Connection. A message is displayed notifying you if the connection was successful or failed. If the connection was successful, click Save. Select the  (CRM button) that corresponds to the call that you want to upload.

Note: The number of the recorded call must be a number that belongs to at least one contact in the CRM application in order to perform the upload.

If the contact, account, or case you want to upload the call to does not appear, enter new criteria in the CRM Search field and click Search. If multiple contacts, accounts, or cases, deselect the ones you don't need by clicking in the option boxes to remove the check mark. Enter a subject and a note about the recorded call file and click Archive to CRM.

Additionally, situations will occur where you need to send a specific recorded call to a person that may not have access to the application or just for emphasis. In these instances, you have the ability to email the recorded call to that recipient. To send a recorded call file via email, select the  (Email button) that corresponds to the call that you want to send. A new email page will open with the recorded call link displayed in the text area. Select your recipients and send the email.


Note: There will not be an email option for any calls that have been removed after the 90 day storage period has passed.

From the Recorded Calls screen you can also add comments to each of the recorded call files. A  (Add Comment button) indicates there are currently no comments associated with the corresponding recorded call file. A  button indicates there are currently comments associated with the corresponding recorded call file. To add comments to a recorded call file, click on the Add Comment button and enter the applicable text in the text field. Click Submit. This is the point at which the Add Comment button changes to the  button.

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. Click on the Category link and select the specific category from the drop-down list.

Note: Categories are specific to the portal user. Therefore, the categories that you create and assign to your recorded calls cannot be seen by the portal users for the same calls.

If the Listen add-on module has been purchased and applied to specific users, an audio mining pack can be added and released. A filter can then be applied so you have the ability to view the results of the filter and listen to the calls, if necessary. The application also rates the returned calls in order of confidence, or how sure the application is that the word or phrase is contained in the recording. To view the audio mining results, click the  button that corresponds to the recorded call for which you wish to view results.

MD5 is a technique used to ensure that a file has not been altered in any way. When the call is recorded, we take an MD5 hash of it, outputting a string of random characters. The point is that if MD5 fingerprinting is applied to the same call at a later point, it will create the same string of characters, unless the call file has changed. If a different string of characters that don't match the original is created, you know the call has been modified. The default is to hash all calls. Hovering your mouse over the MD5 icon for a specific call will reveal the hash string. If you have the recorded call file downloaded or available in another location, click on the MD5 icon to open the Verify Recording dialog box. Upload the recorded call file to verify the file has not been tampered with.

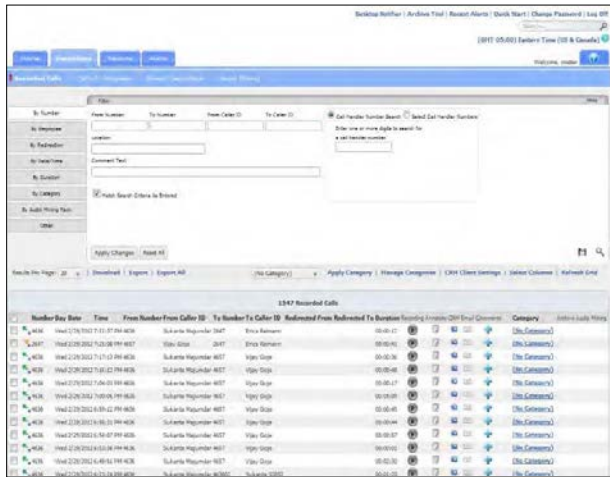
Number, Redirection, Date, Time, Category, or Other (or a combination of all four) filters located below the Recorded Calls, Recycle Bin, Calls in Progress, and Reports navigation tabs can be applied to the screen to assist in searching and displaying only the information pertinent to your current needs. Select the filter you wish to apply by clicking on Filter and then selecting the Number, Redirection, Date, Time, Category, or Others tab(s).

Enter or select the applicable information for each filter and click Apply Changes. To return to the default information, click Reset All. Click Hide to close the Filter window.

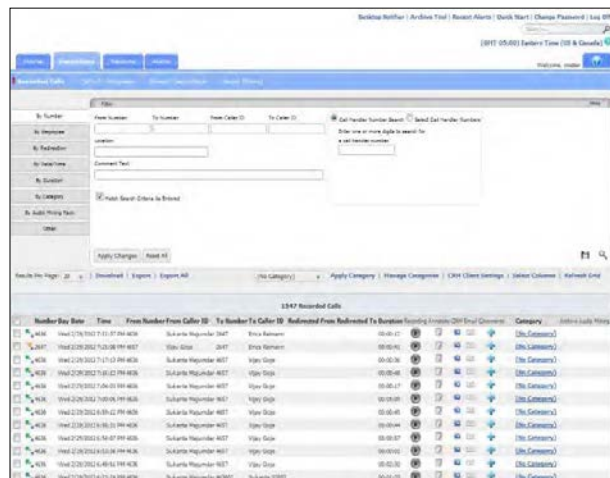
Note: You do not have the option to filter by category under the Reports tab.

Example: Applying a filter

1. Click on the **Filter** toolbar to expand it.

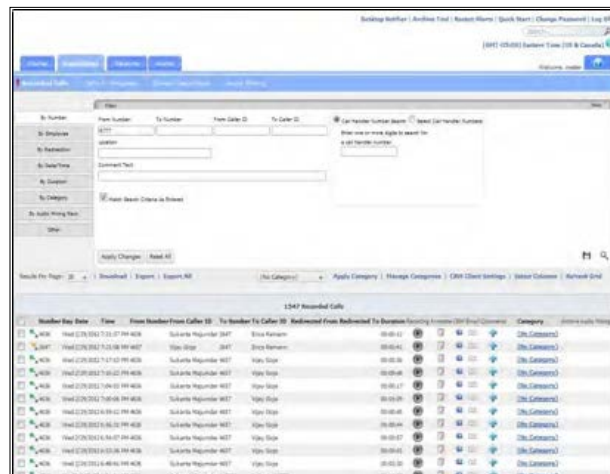


2. If it isn't already selected, select the **By Number** tab.

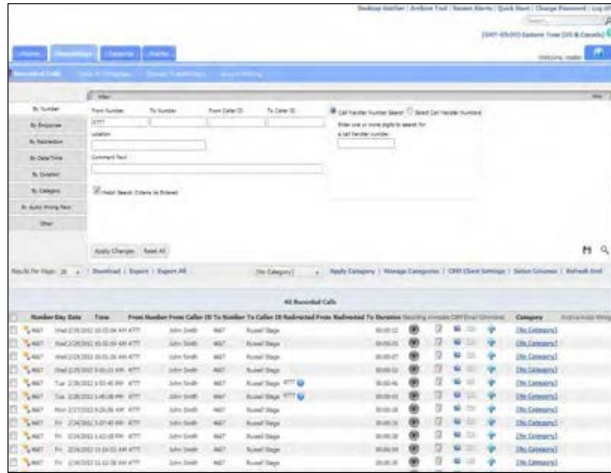


3. Enter the following information:

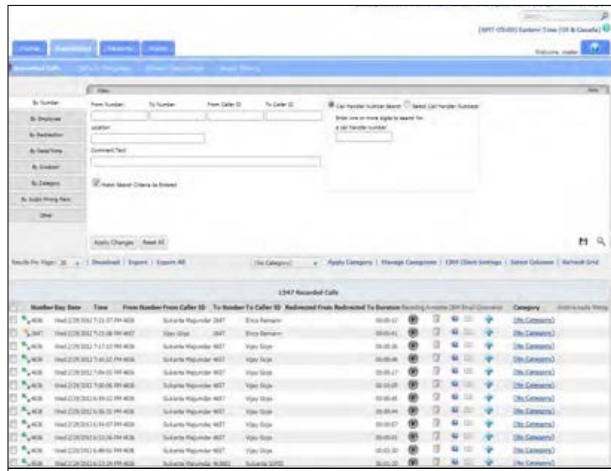
- To Number – enter a number that appears under the **From Number** column of the list of Recorded Calls.



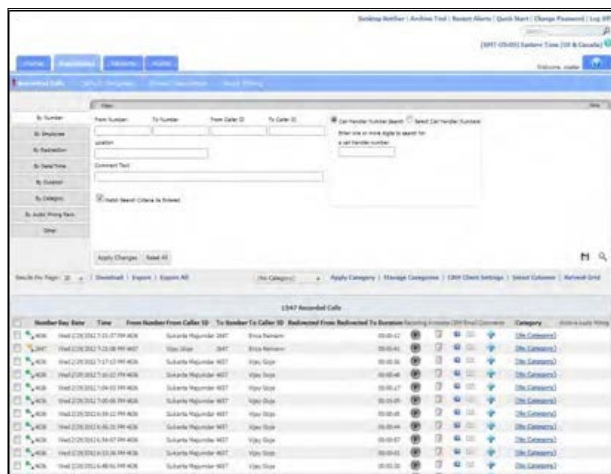
4. Click **Apply Changes** to apply the filter to the list of Recorded Calls.



5. Click **Reset All** to remove the filter from the list of Recorded Calls.

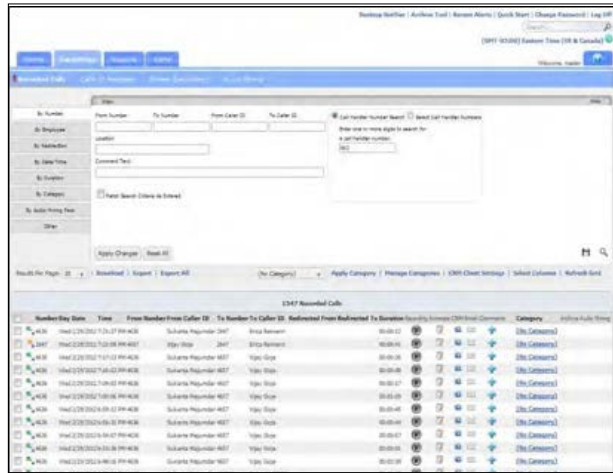


6. If it isn't already selected, select the **By Number** tab.

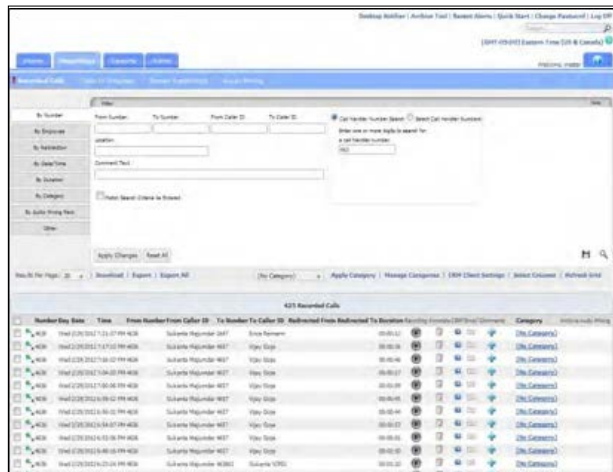


7. Click in the **Call Handler Number Search** option box and enter the following:

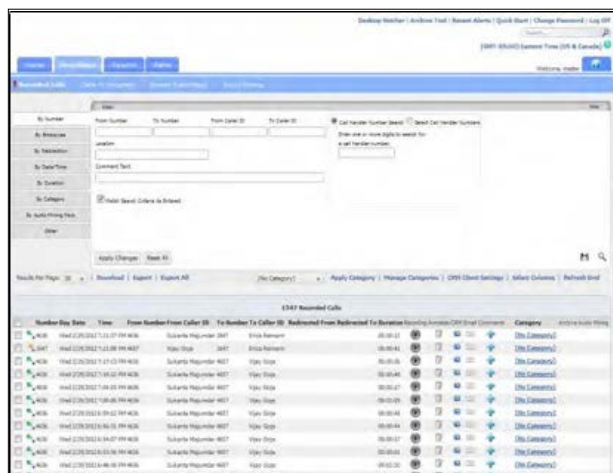
- Enter one or more digits to search for a call handler number – **enter 3 to 4 numbers from a number found on the recorded calls tab**



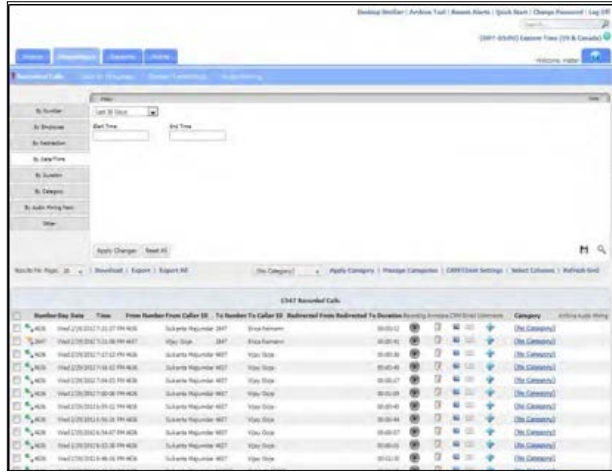
8. Click **Apply Changes** to apply the filter to the list of Recorded Calls.



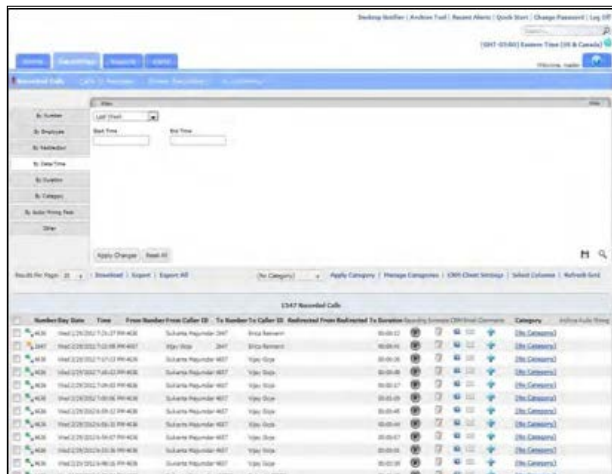
9. Click **Reset All** to remove the filter from the list of Recorded Calls.



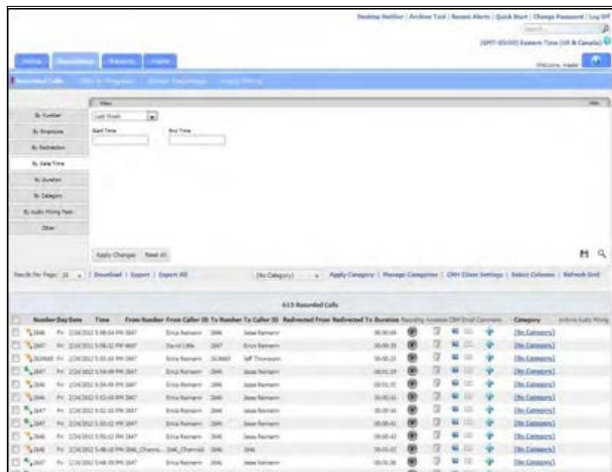
10. Select the **By Date/Time** tab.



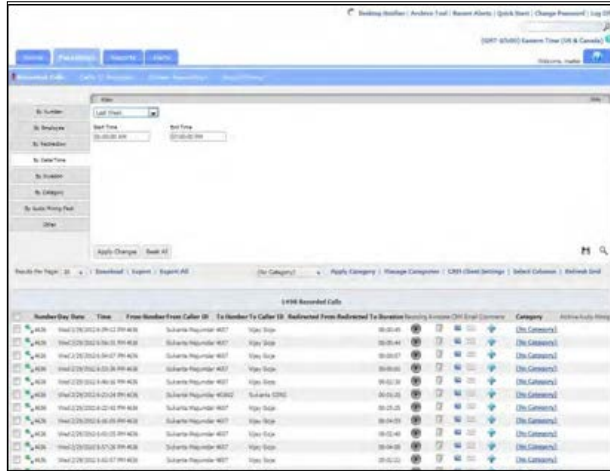
11. Select **Last Week** from the drop-down list.



12. Click **Apply Changes** to apply the filter to the list of Recorded Calls.

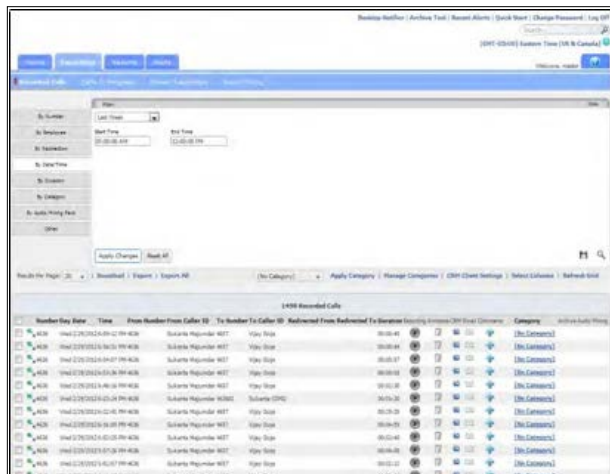


16. Select **Last Week** from the drop-down list.

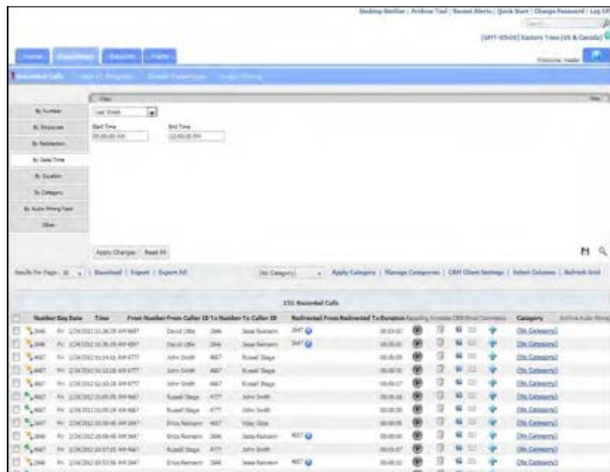


17. Enter the following information under the By Time filter:

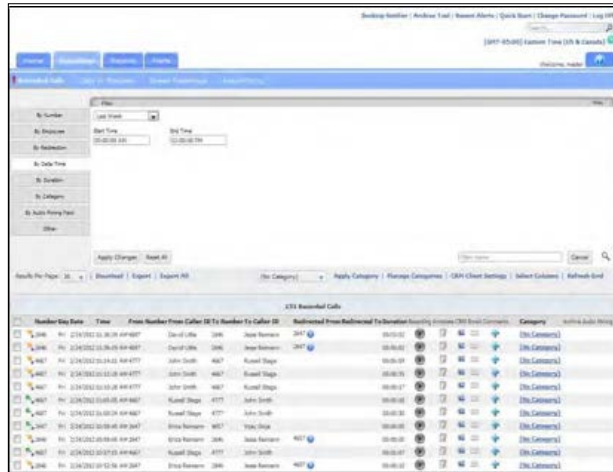
- From – select **05:00:00 a.m.**
- To – select **12:00:00 p.m.**



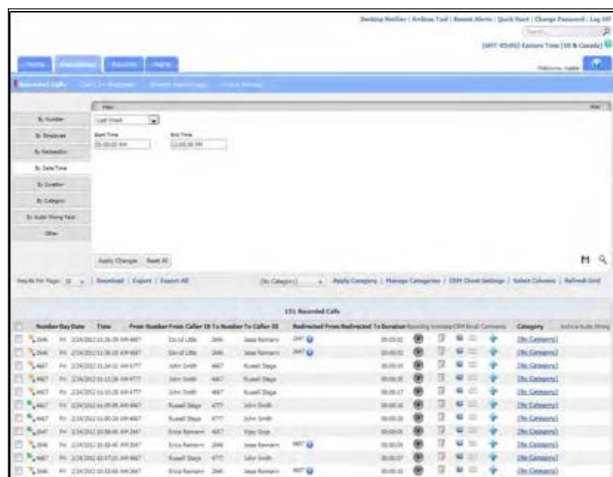
18. Click **Apply Changes** to apply the filter to the list of Recorded Calls.



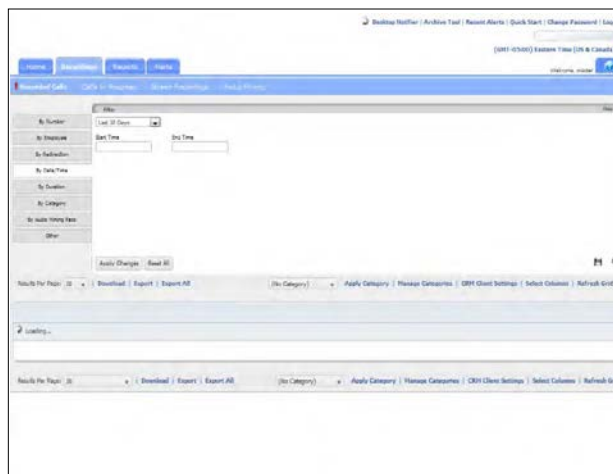
19. Click **H** (Save Filter) button to save the filter criteria.



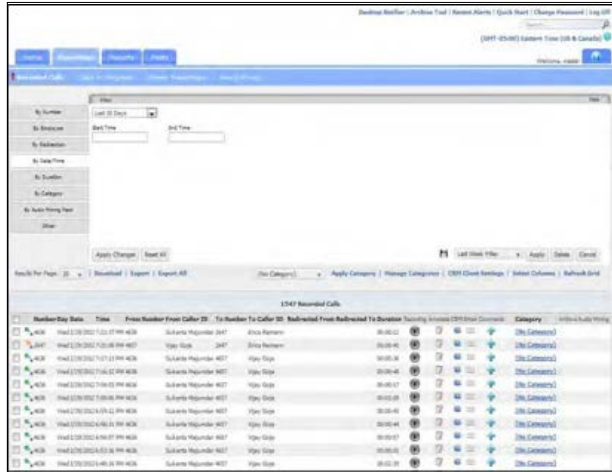
20. Enter the filter name and click **Save Filter**.



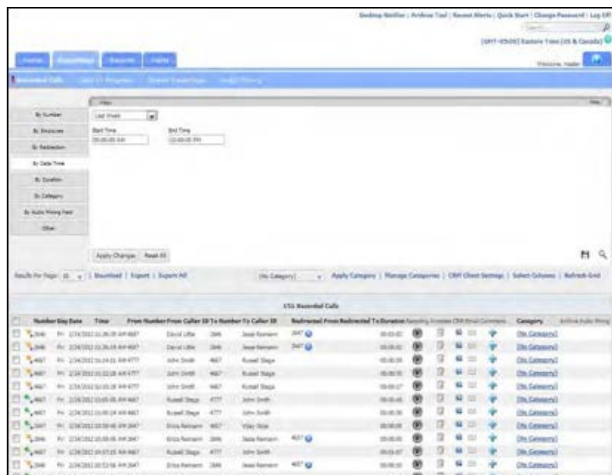
21. Click **Reset All** to remove the filter from the list of Recorded Calls.



22. Select (Apply Saved Filter).

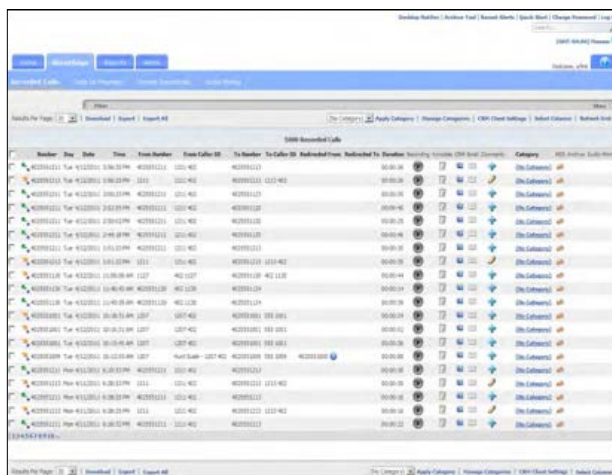


23. Select **Last Week Filter** from the drop-down list and click **Apply**.

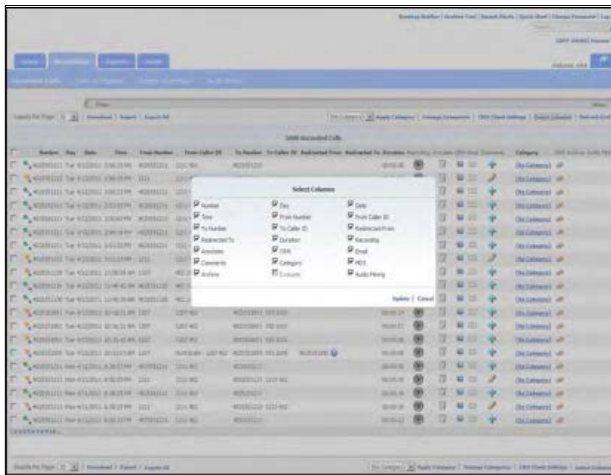


Example: Managing the Recorded Calls tab columns

1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.

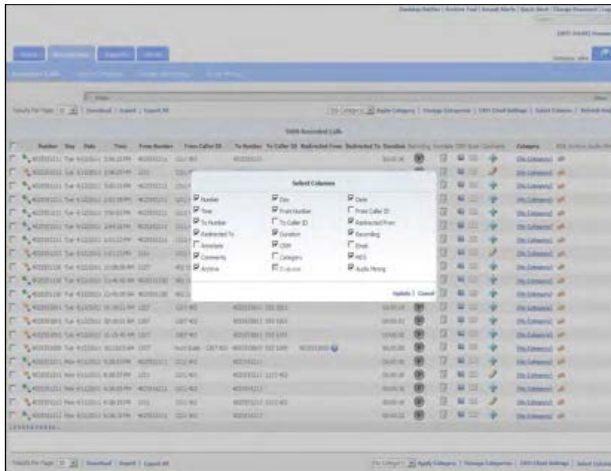


2. Select the **Select Columns** link at the top or bottom of the Recorded Calls page.

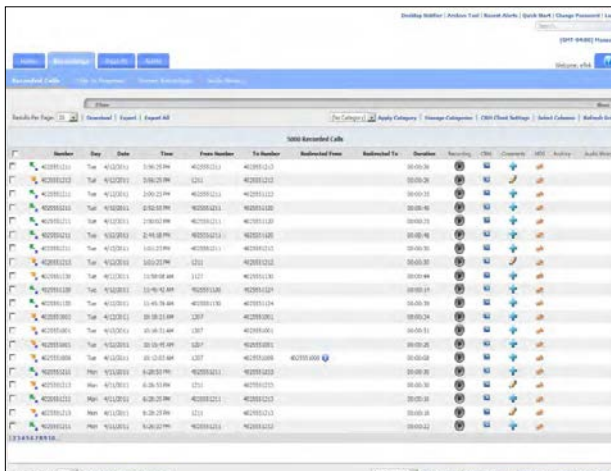


3. Select the following option boxes:

- Annotate
- To Caller ID
- Category
- From Caller ID
- Email

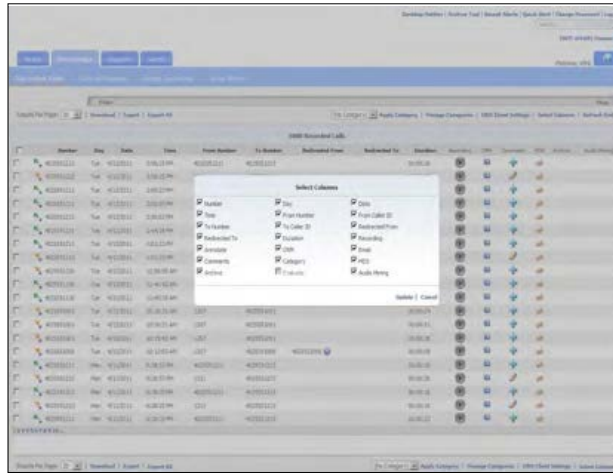


4. Select the **Update** link.

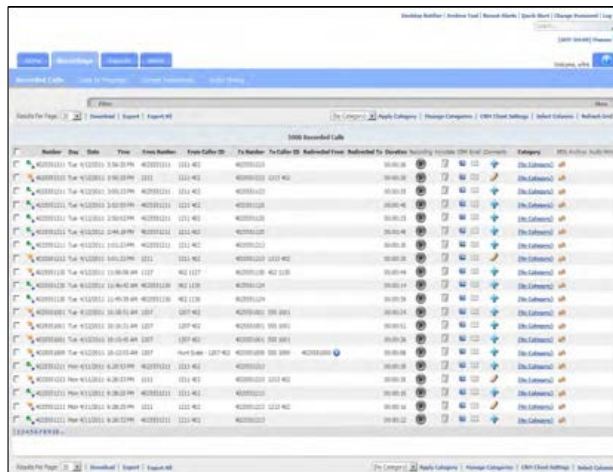


5. Select the **Select Columns** link at the top or bottom of the Recorded Calls page and then select the following option boxes:

- Annotate
- To Caller ID
- Category
- From Caller ID
- Email



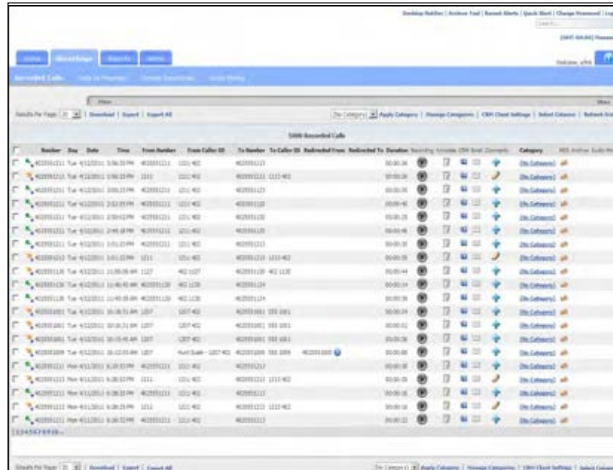
6. Select the **Update** link.




Example: Playing recorded audio

1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.

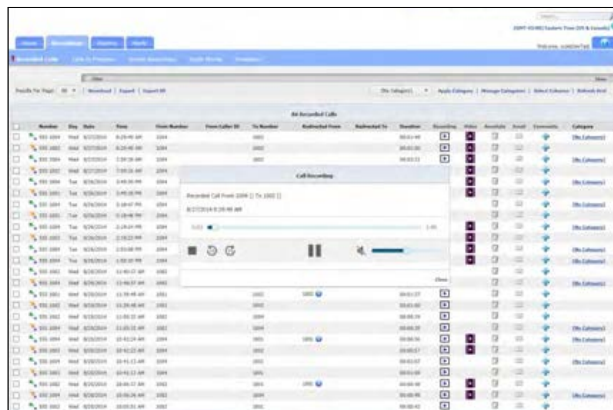
Note: This example is shown using QuickTime Player.



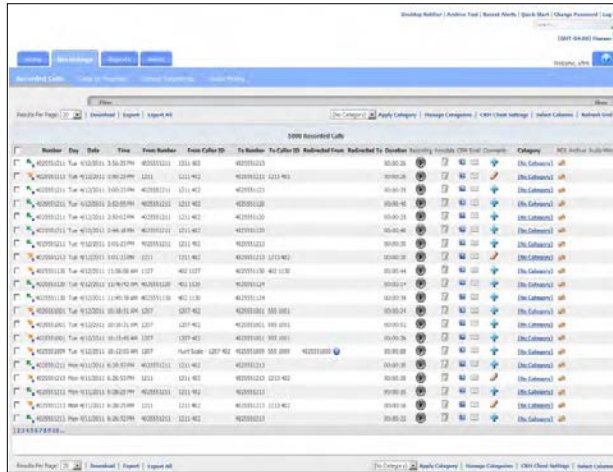
2. Select a call and click on the  (Recording button) that corresponds to that call.

Your default media player will open and begin playing the recorded call file (MP3 file).

Note: The way in which media players load and play the recorded call files will vary. For instance, QuickTime Player and Windows Media® Player will immediately launch the recorded call file. However, iTunes® will load the recorded call file in the library and you will have to click play to begin listening to the file.

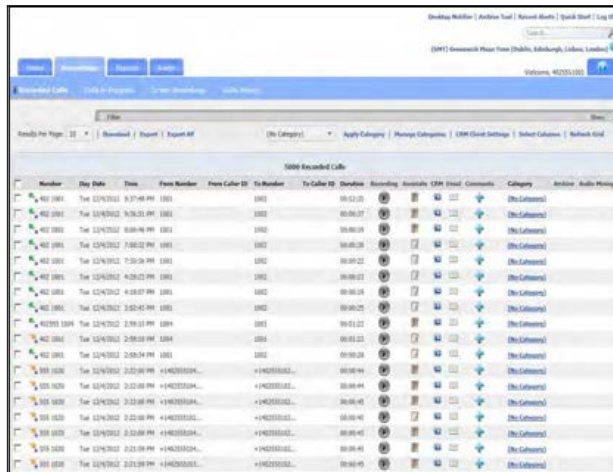



3. Click the browser's **Back** button to return to the Recorded Calls screen.

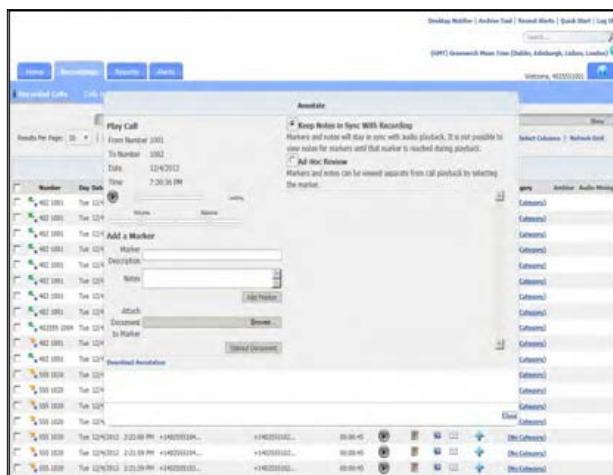


Example: Adding an annotation to a recorded call

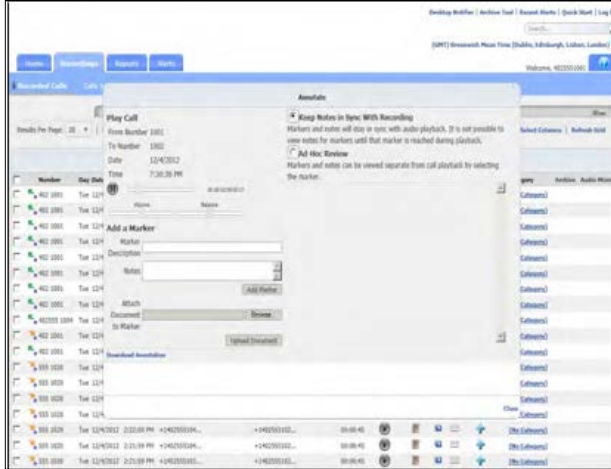
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



2. Select a call and click on the  (Annotate button) that corresponds to that call.

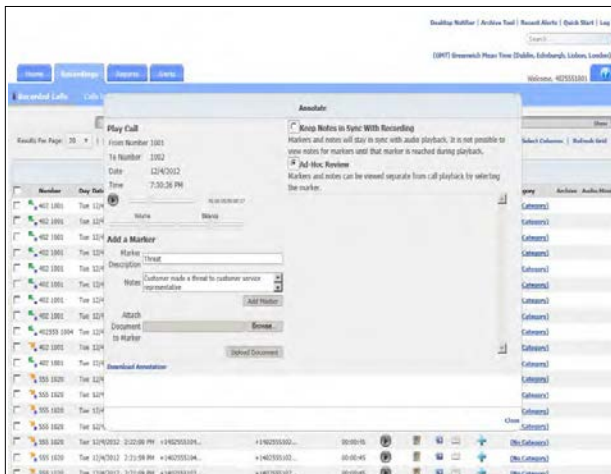


3. Select the **Play** button to begin playing the recorded call.
4. Select **Pause** when you come to the point in the call that you wish to annotate.

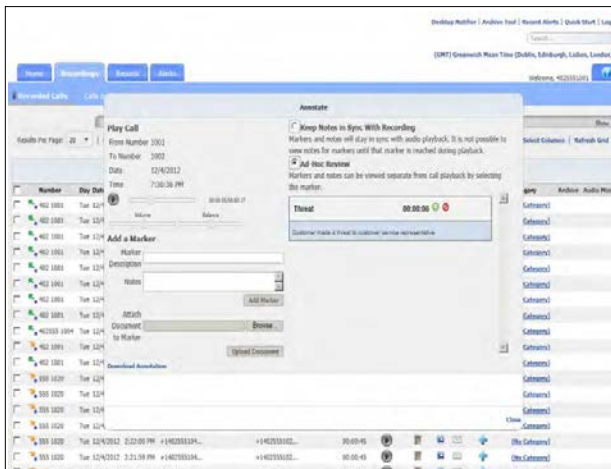


5. Enter the following information:

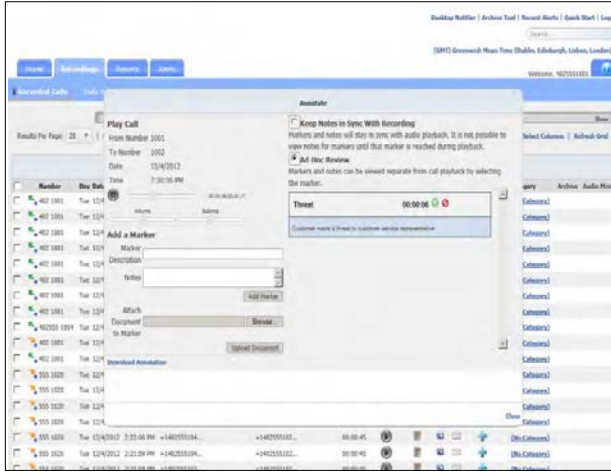
- Marker Description – **Threat**
- Notes – **Customer made a threat to customer service representative**



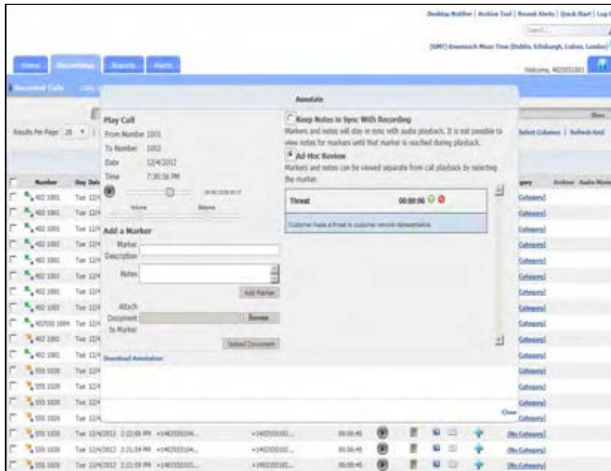
6. Click the **Add Marker** button.



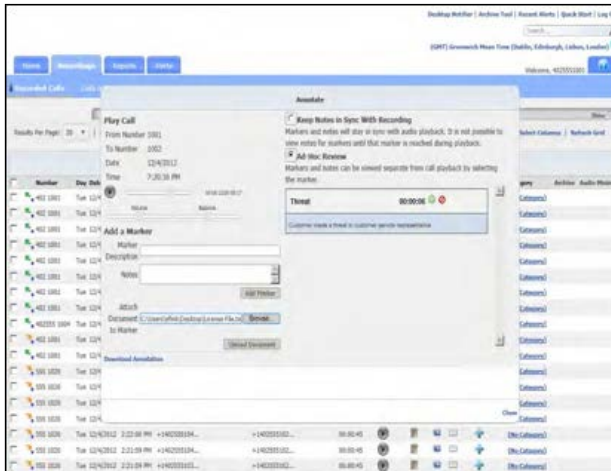
7. Select the **Play** button to begin playing the recorded call.



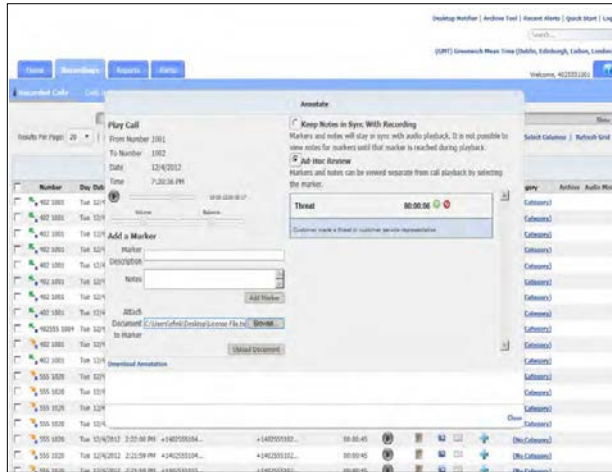
8. Select **Pause** when you come to the point in the call that you wish to annotate.



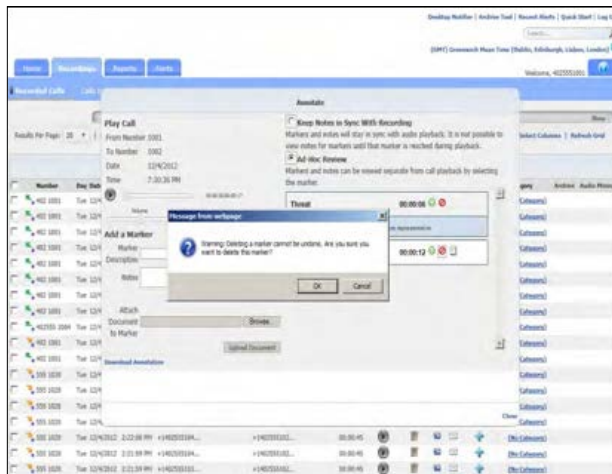
9. Click the **Browse** button and select a document.



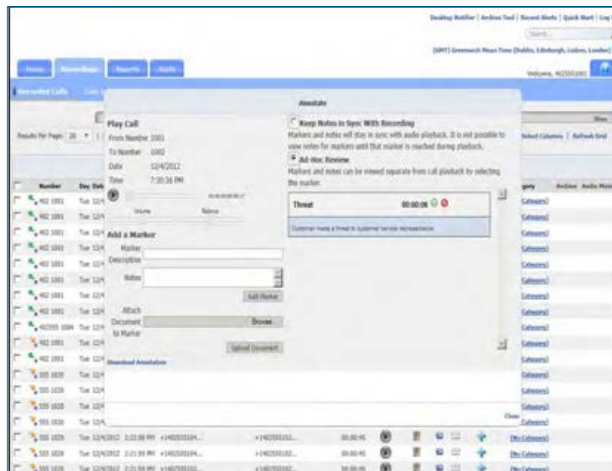
10. Click the Upload Document button.



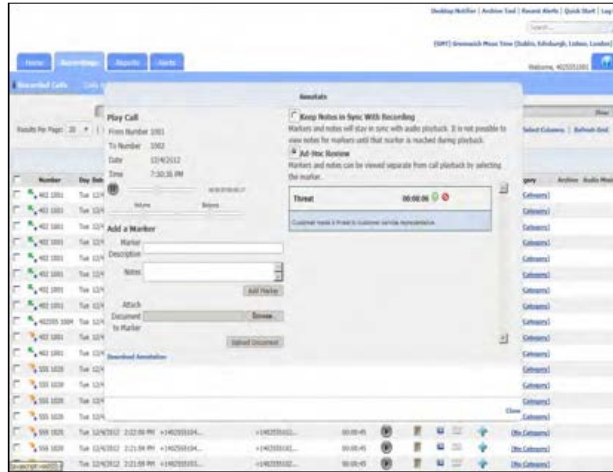
11. Click the (Delete Marker) button that corresponds to the uploaded document.



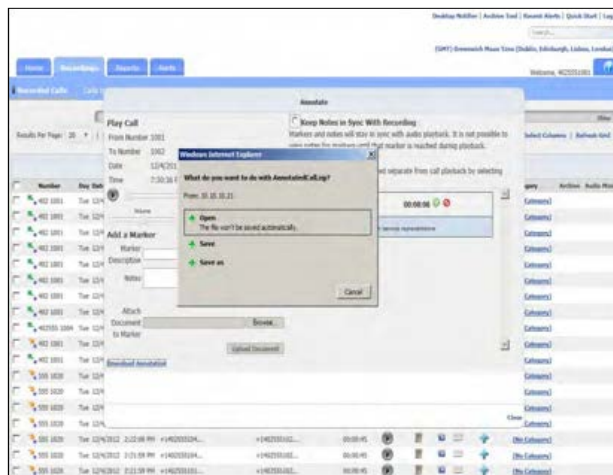
12. Click **OK**.



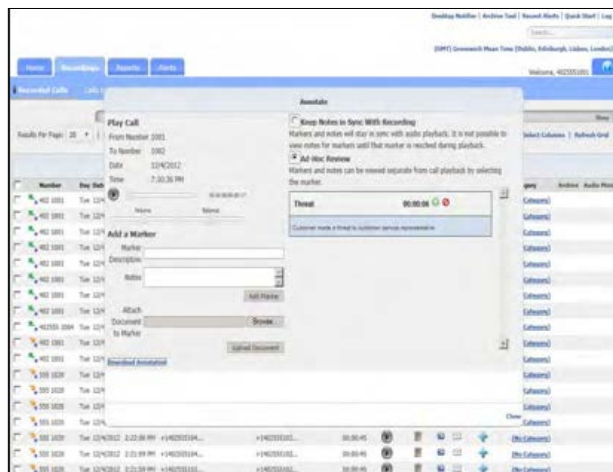
13. Click the (Seek) button to jump to the annotated spot in the call.



14. Click the **Download Annotation** link.

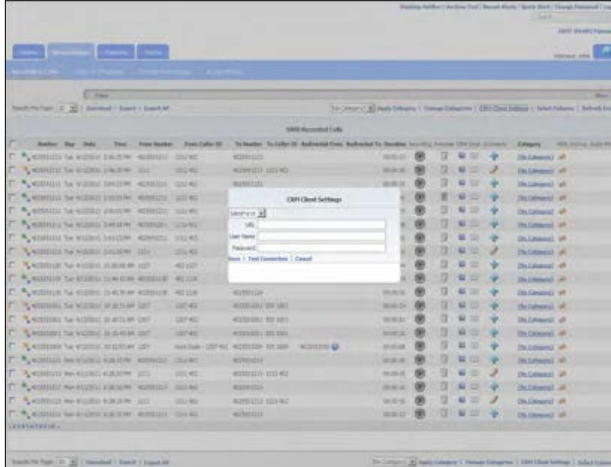


15. Click the in the right corner of the AnnotatedCall.zip dialog box.



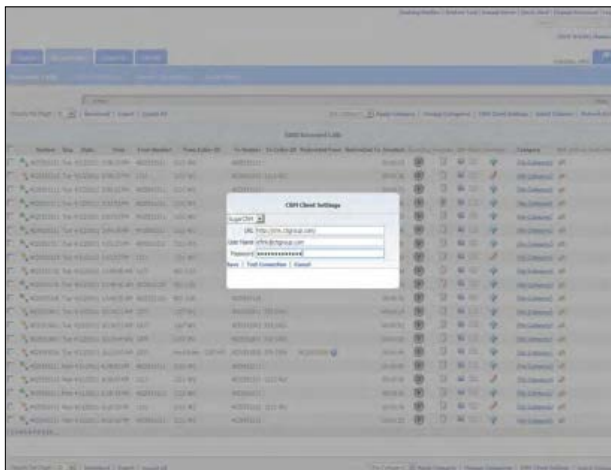
- Click on the **CRM Client Settings** link found at the top or bottom of the Recorded Calls tab.
- Select a CRM application from the drop-down list.

Note: You can only have one active connection to a CRM application at a time. If you want to log into another CRM application, click CRM Client Settings, select the CRM application, and enter the credentials.

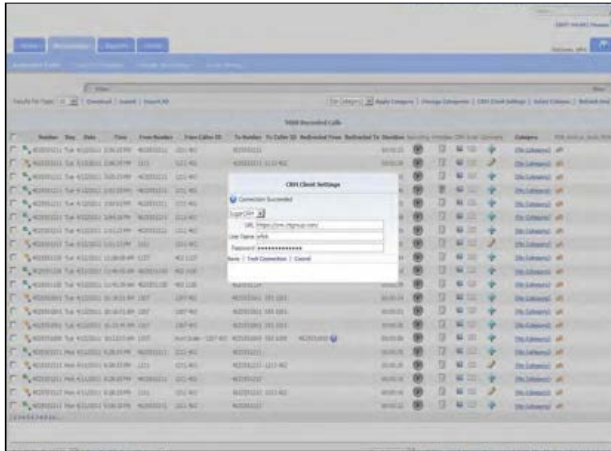


- Enter or select the following information:
 - URL** – the URL where the CRM application is located
 - User Name** – your user name used to access the CRM application
 - Password** – your password used to access the CRM application

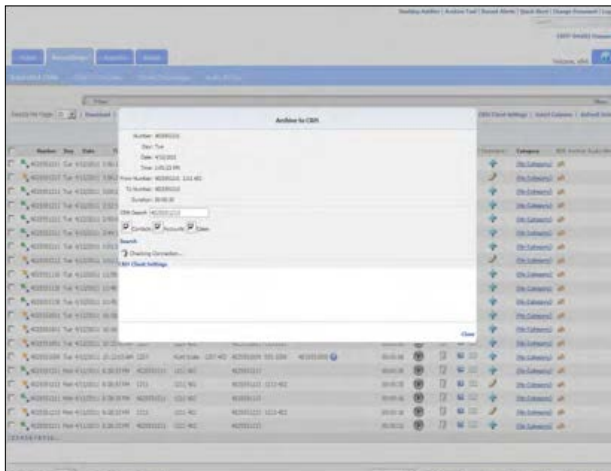
Note: Once you have performed steps 3 & 4 the first time, you will not be asked to enter the information again.



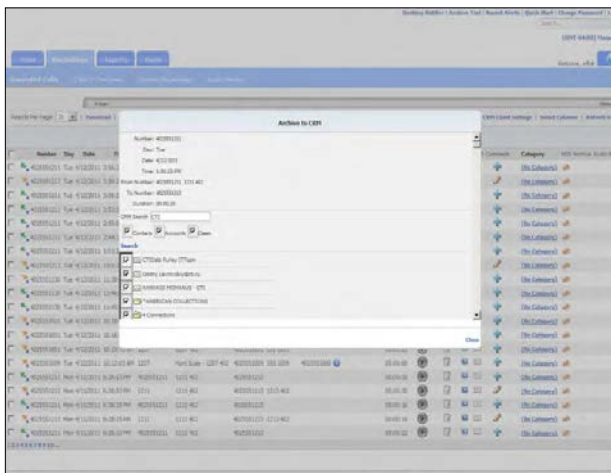
5. Click **Test Connection**.
6. Click **Save** to save your credentials.



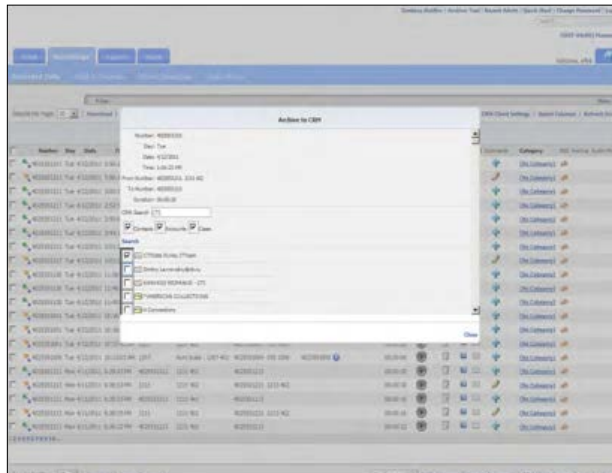
7. Select a call and click on the (CRM) button that corresponds to that call.



8. If applicable, enter new search criteria in the CRM Search field. Select or deselect Contacts, Accounts, or Cases, depending on what you want to upload this call to. Click **Search**.

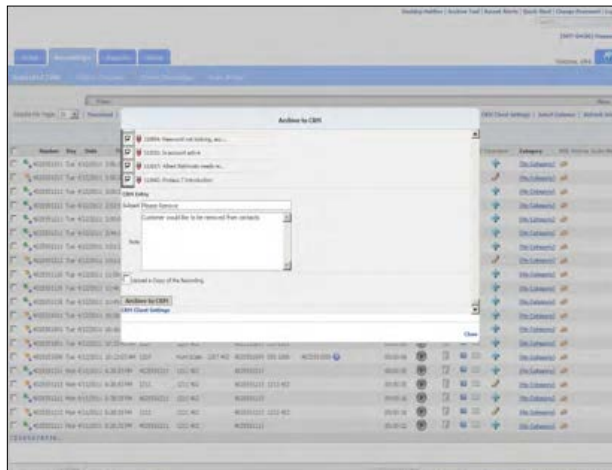


9. If multiple contacts, accounts, or cases, deselect the ones you don't need by clicking in the option boxes to remove the check mark.



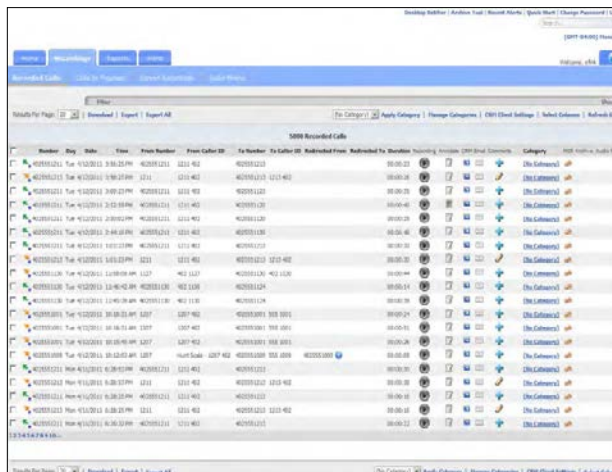
10. Enter the following information:

- Subject – **Please Remove**
- Note – **Customer would like to be removed from contacts**



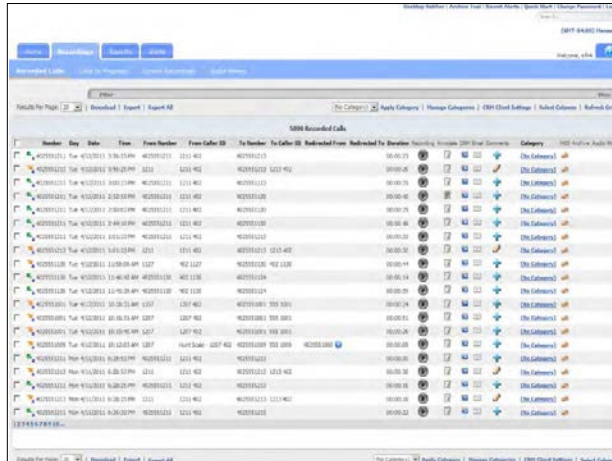
11. Select the **Archive to CRM** link.


12. Select the **Close** link to close the CRM dialog box.

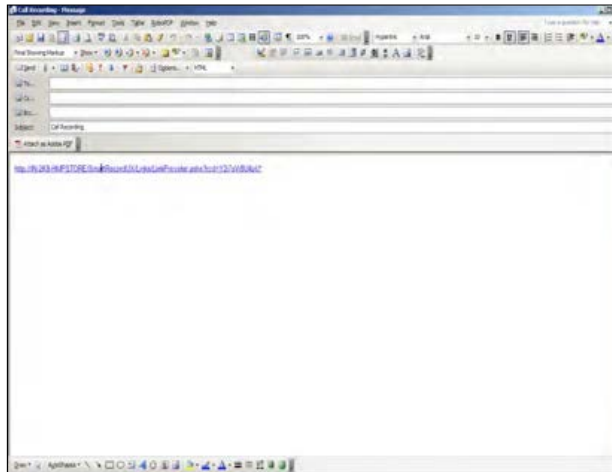


Example: Emailing a recorded call

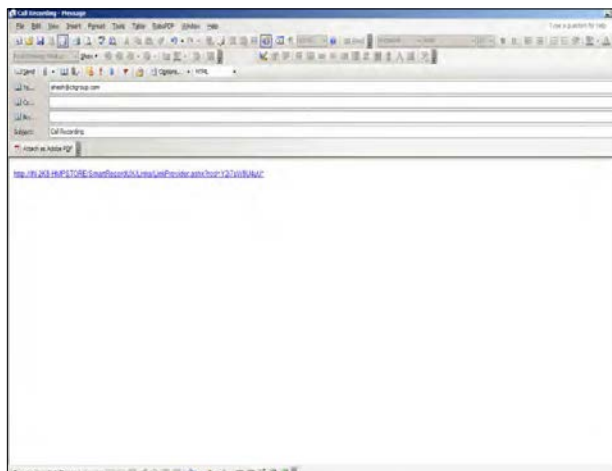
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



2. Select a call and click on the  (Email) button that corresponds to that call.

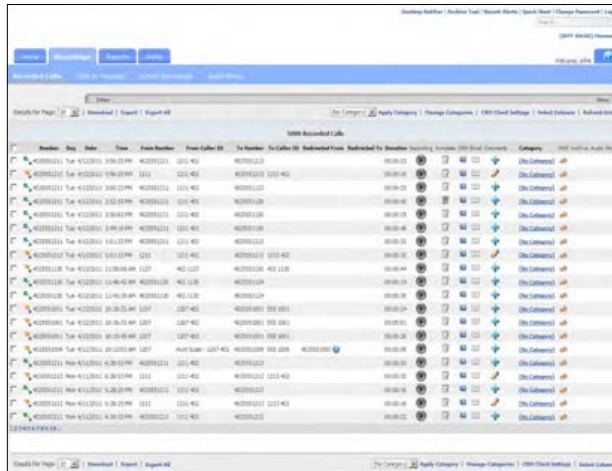



3. Enter the email address(es) of the person(s) to which you wish to send the recorded call.
4. Click **Send**.



Example: Adding comments to a recorded call

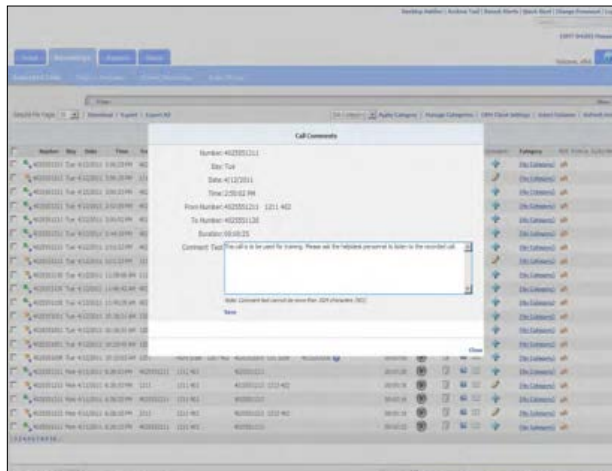
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



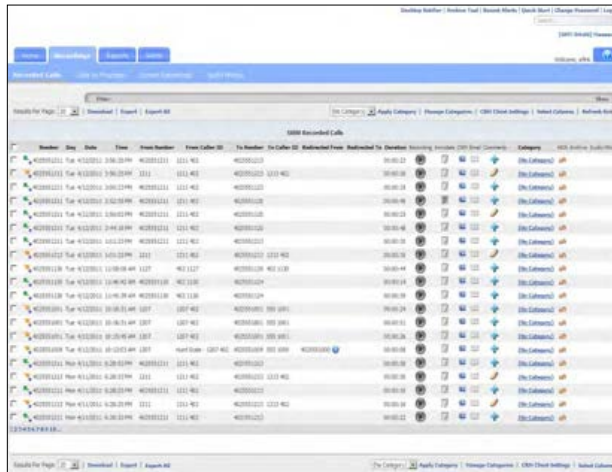
2. Select a call and click on the  (Add Comment) button that corresponds to that call.
3. Enter the following information:

- Comment – **This call is to be used for training. Please ask the help desk personnel to listen to the recorded call**

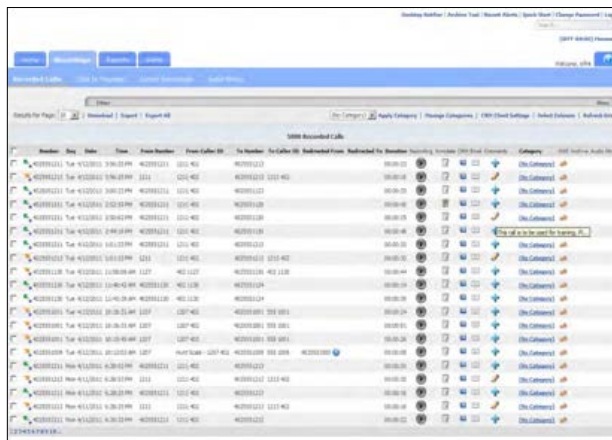
Note: Comment text cannot be greater than 1024 characters.




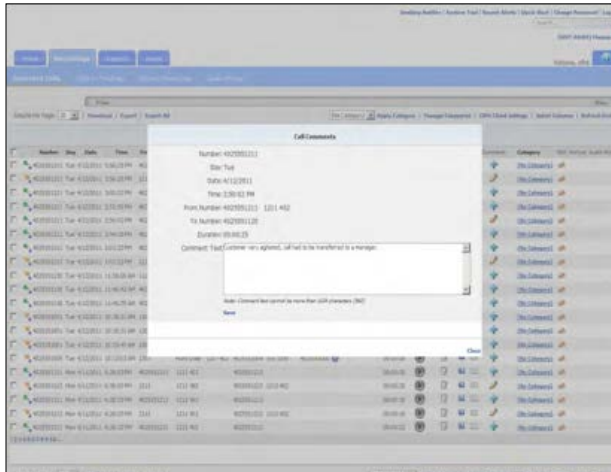
- Click **Save**. Notice that the Add Comment button has changed to a button indicating that there is a comment associated with this call.



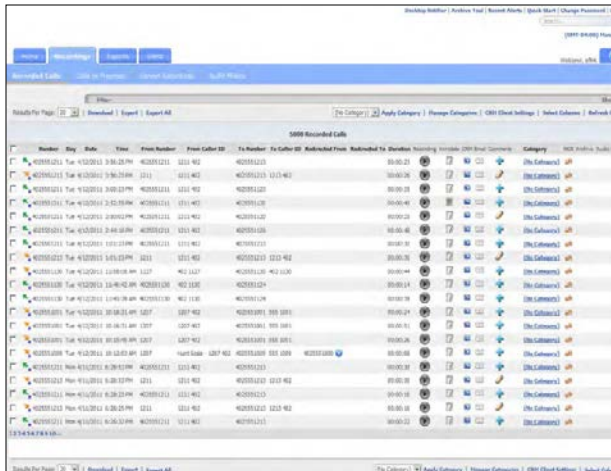
- Position your mouse pointer over the comment icon button. Notice that part of the comment is displayed as a tooltip.




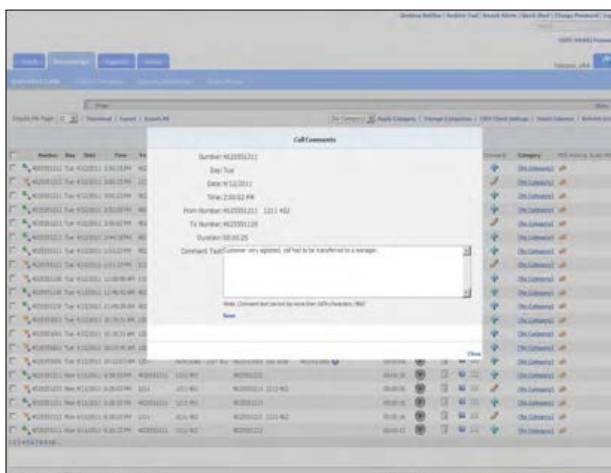
6. Click on the  button.
7. Review the comment, select it, and enter the following:
 - Comment – **Customer very agitated, call had to be transferred to a manager**



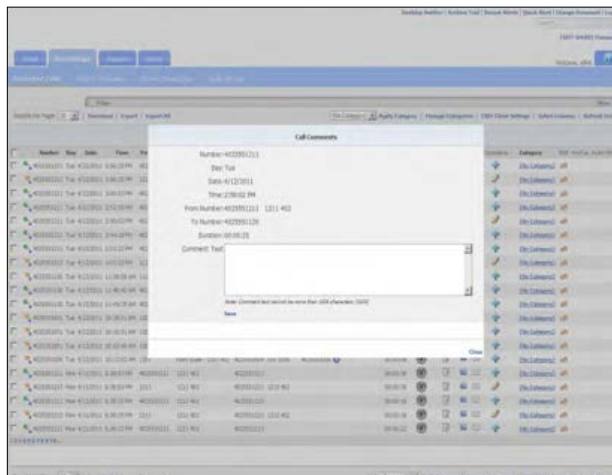
8. Click **Save** to save your changes.




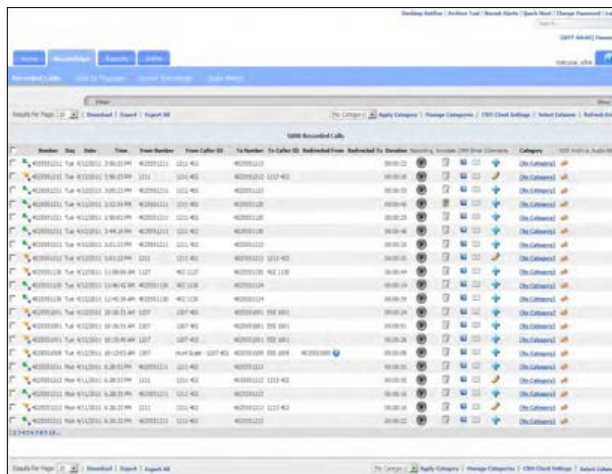
9. Click on the  button.



10. Delete the comment from the Comment field by selecting it and clicking the Delete button on your keyboard.

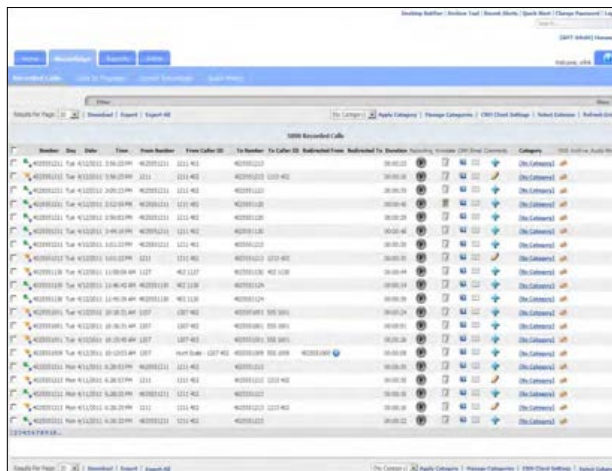


11. Click **Save** to save your changes. Notice that the  button has changed back to the Add Comment button.

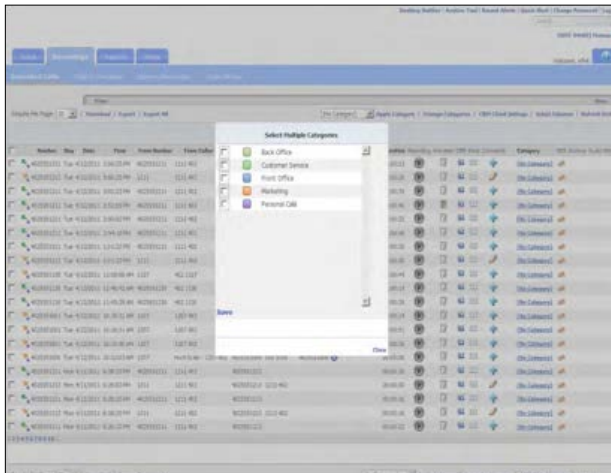


Example: Categorizing a recorded call

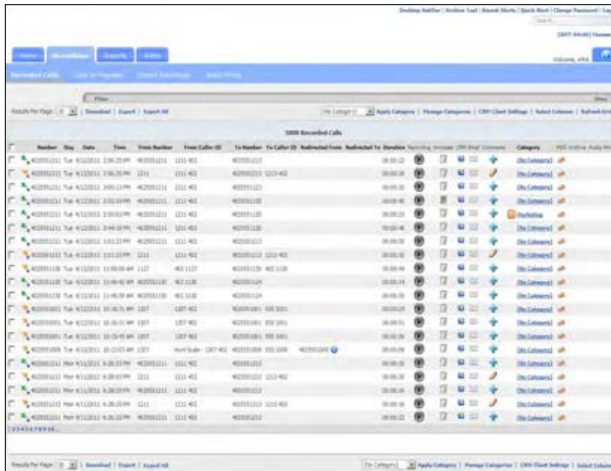
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



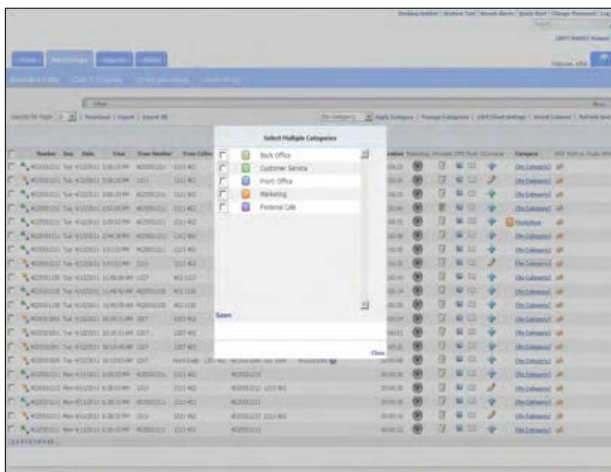
2. Select the **Category** link that corresponds to the call that you wish to categorize.



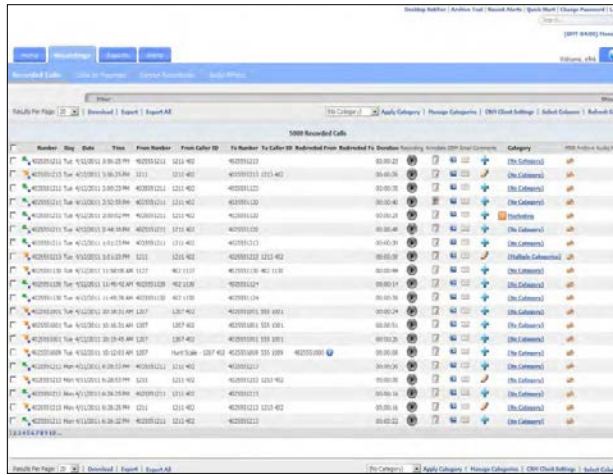
3. Select one category to apply to the call by clicking in the corresponding option box and click **Save**.



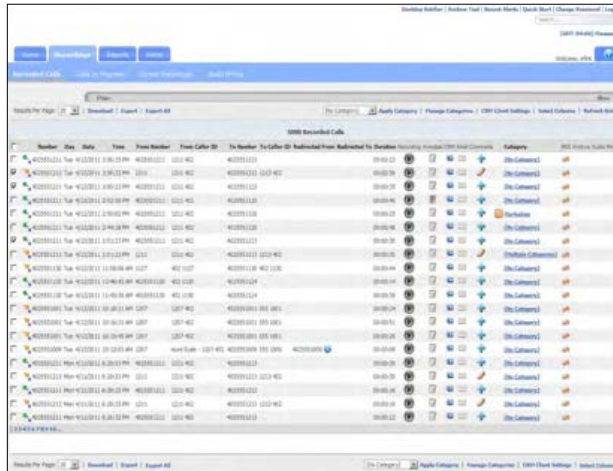
4. Select the **Category** link that corresponds to another call that you wish to categorize.



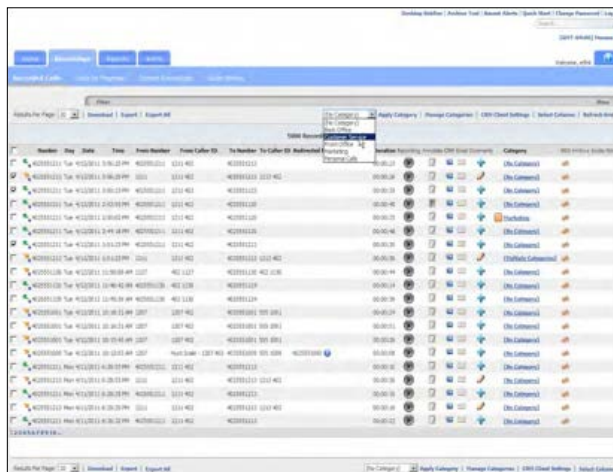
5. Select several categories to apply to the call by clicking in the corresponding option boxes and click **Save**.



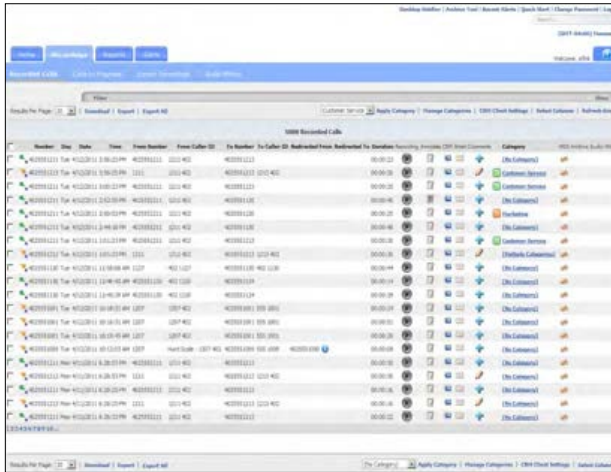
6. Select two or three recorded call option boxes (located to the left of the recorded calls).



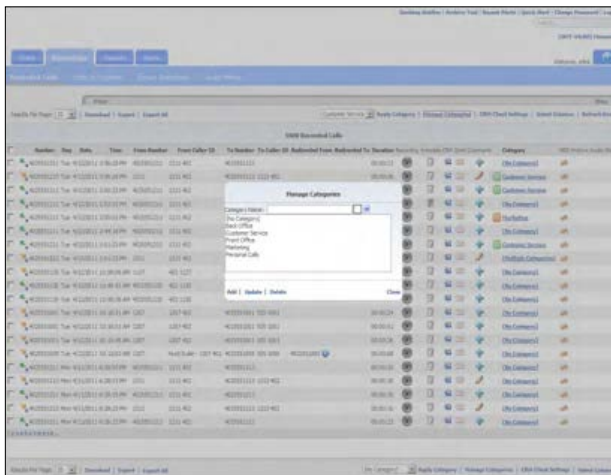
7. Select the category you wish to apply from the drop-down list found at the top or bottom of the Recorded Calls page.



8. Select the **Apply Category** link.

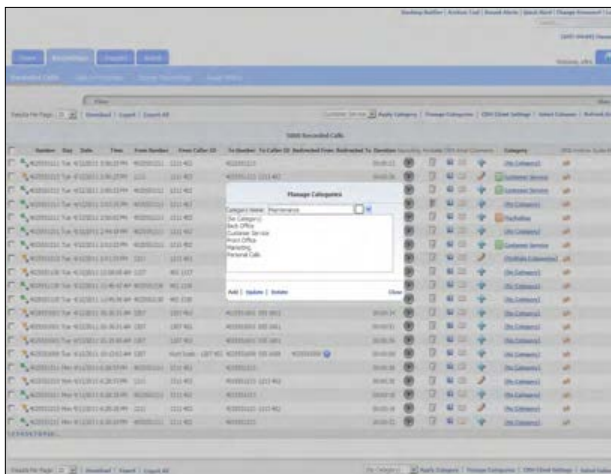


9. Select the **Manage Categories** link.

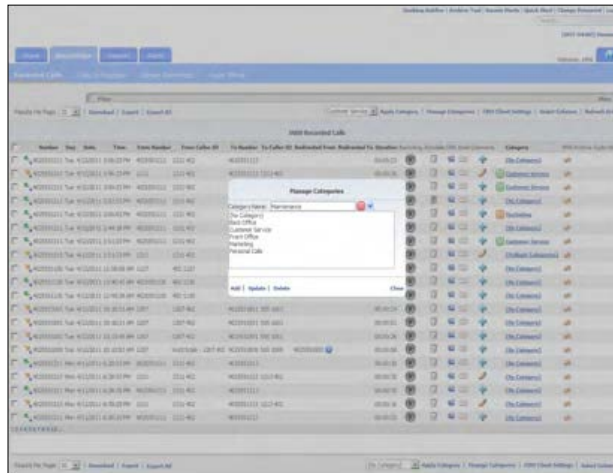


10. Enter the following:

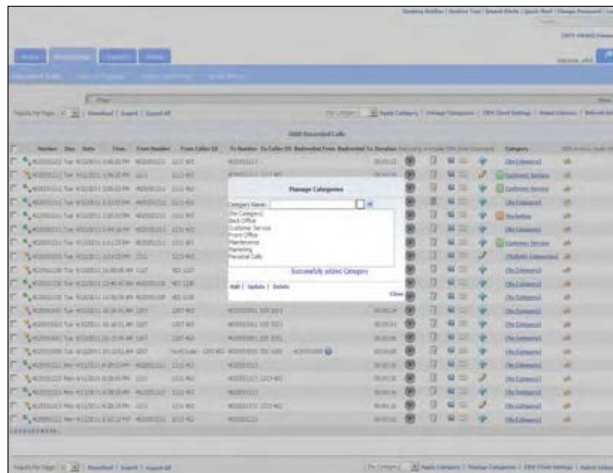
- Category Name – **Maintenance**



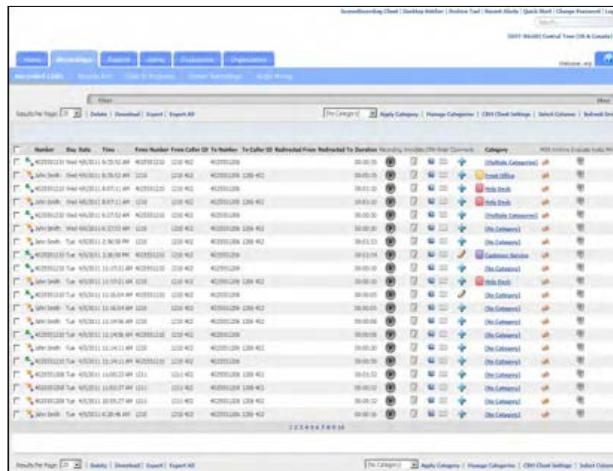
11. Select the drop-down arrow to the right of the Category Name field and select the color red.



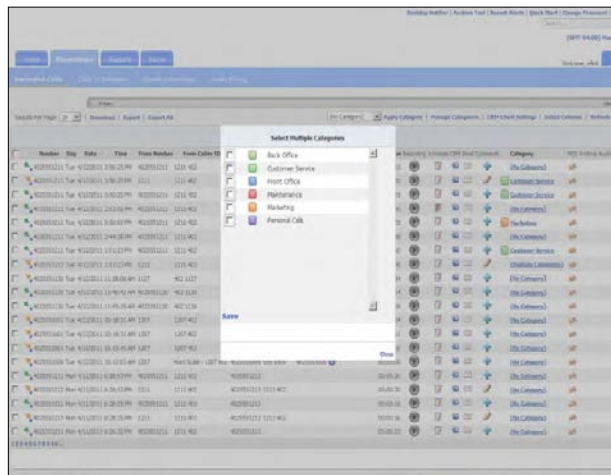
12. Select the **Add** link.



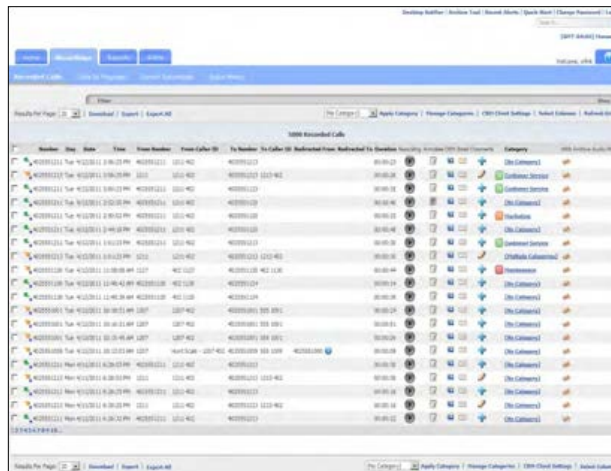
13. Select the **Close** link to close the Manage Categories dialog box.



14. Select the **Category** link that corresponds to a call that is not already categorized.

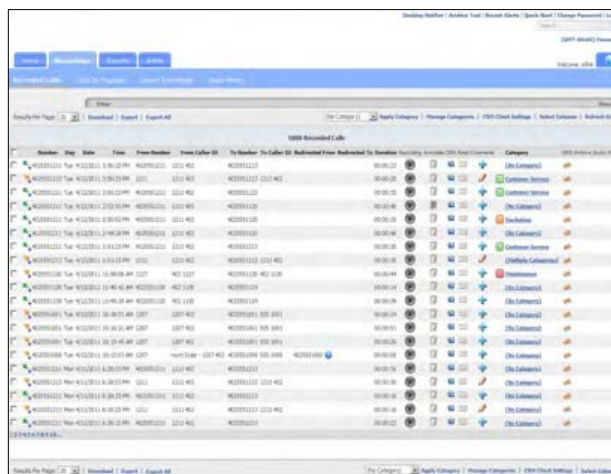


15. Select the **Maintenance** category that we just added by clicking in the corresponding option box and click **Save**.

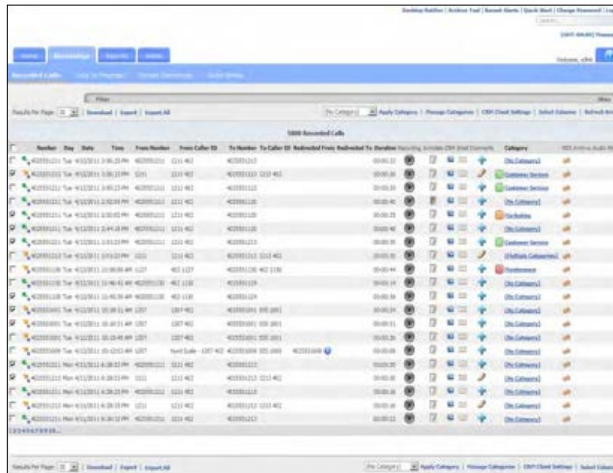


Example: Downloading a recorded call

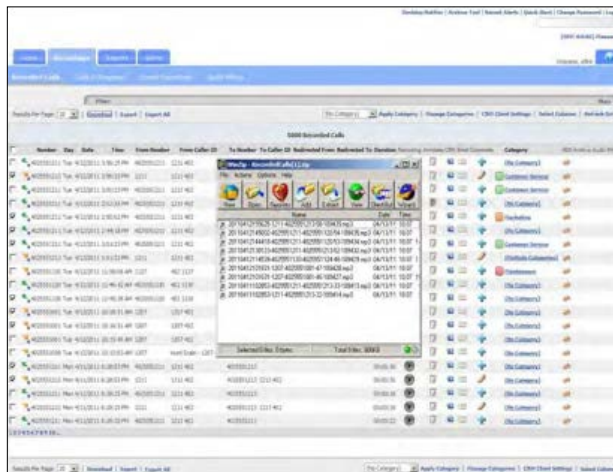
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



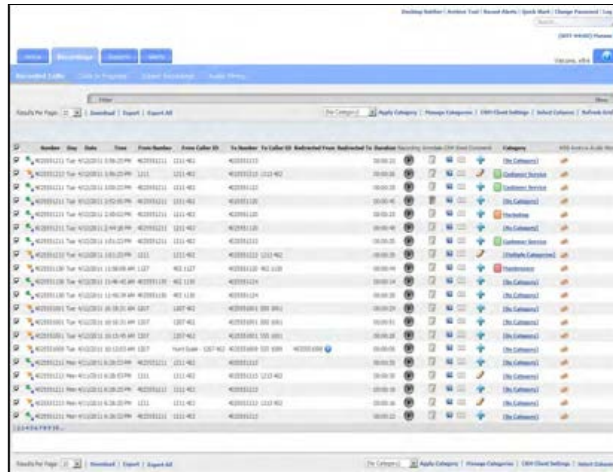
- Select the recorded calls you wish to download by clicking in the corresponding option box to the left of the Number column.



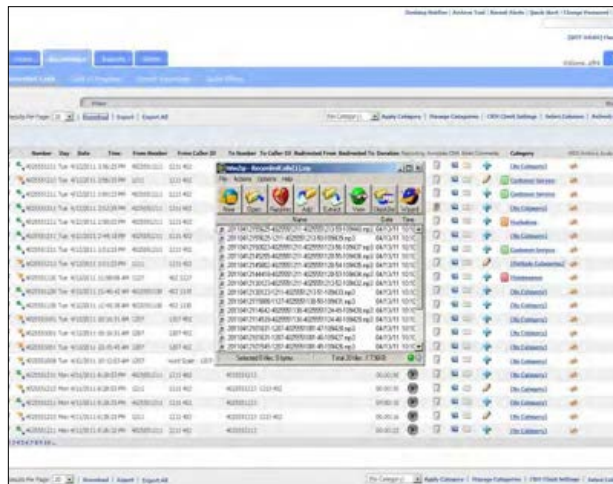
- Select the **Download** link at the top or bottom of the Recorded Calls page.
- Normally you would choose to extract the files and save them to the location of your choice. For the purposes of this example, click the **X** in the right corner of the RecordedCalls.zip dialog box.



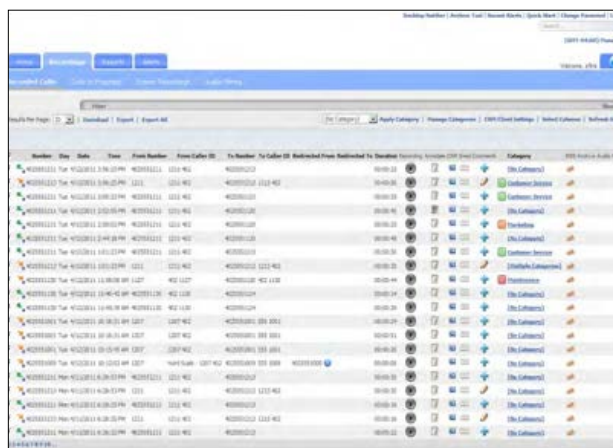
5. You can also select all files to download. Click in the option box that is located to the left of the Number column, in the header to select all recorded calls.



6. Select the **Download** link at the top or bottom of the Recorded Calls page.



7. Normally you would choose to extract the files and save them to the location of your choice. For the purposes of this example, click the **X** in the right corner of the RecordedCalls.zip dialog box.



Example: Exporting Call Details for a recorded call

1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.

The screenshot shows the 'Recorded Calls' page in the Primus Business interface. The page displays a table with columns for Number, Day, Date, Time, From Number, From Caller ID, To Number, To Caller ID, and various call details. The table is filtered to show recorded calls. The 'Export' link is visible at the top right of the table area.

2. Select the recorded calls you wish to export the call details for by clicking in the corresponding option box to the left of the Number column. Note that all columns of the recorded call are exported, regardless of any columns that are not displayed on the Recorded Calls screen as set with the Select Columns function.

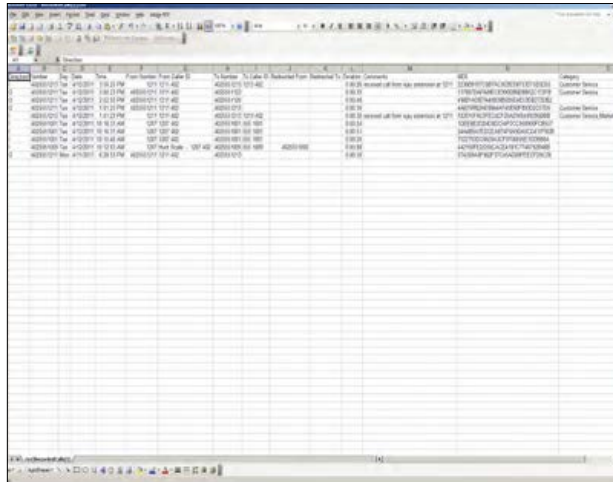
This screenshot is similar to the previous one, but with several rows in the table selected. The selection checkboxes in the leftmost column are checked for those rows. The 'Export' link remains visible at the top right.

3. Select the **Export** link at the top or bottom of the Recorded Calls page.

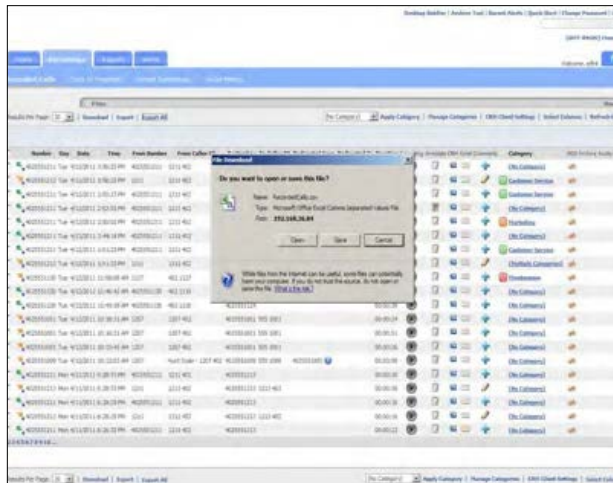
The screenshot shows the 'Recorded Calls' page with the 'Export' dialog box open. The dialog box asks 'Do you want to export to excel file?' and provides options to 'Open', 'Save', or 'Cancel'. The background table is dimmed, and the 'Export' link is no longer visible.

4. Select **Open**.

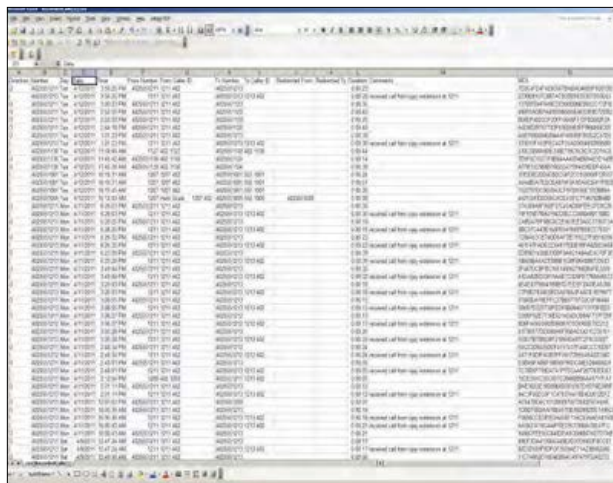
5. Click the **X** in the right corner of the RecordedCalls.csv window to close the file.



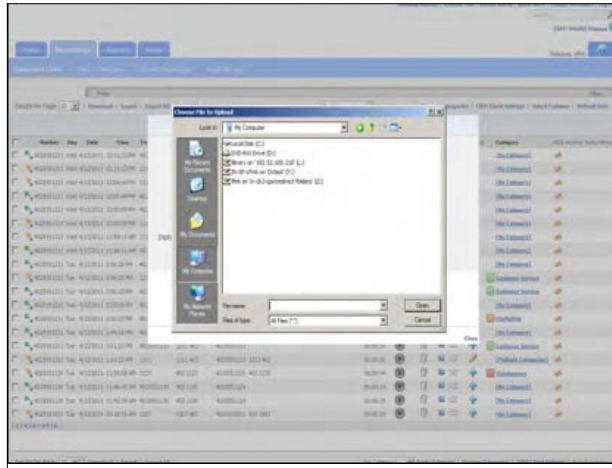
6. Select the **Export All** link at the top or bottom of the Recorded Calls page to export the details for all calls.



7. Select **open**.

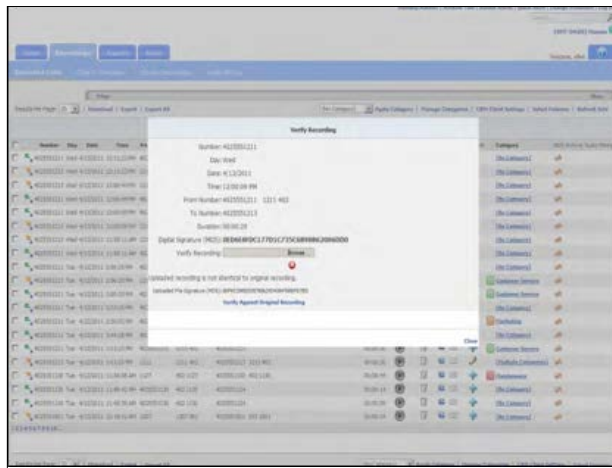


3. Click **Browse** to locate the recorded call file.



4. Click **Verify Against Original Recording**. You will receive a message notifying you whether or not the uploaded recording is identical to the original recording.

5. Click **Close** to return to the Recorded Calls Screen.







Calls in Progress

The Calls in Progress screen displays all calls that are currently taking place. From the Calls in Progress tab a user can monitor active calls and add notes and categories. In order to better manage Calls in Progress, all column headers can be sorted by clicking on the applicable column header. Click once to sort the column in ascending order and click one more time to sort the column in descending order. 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.




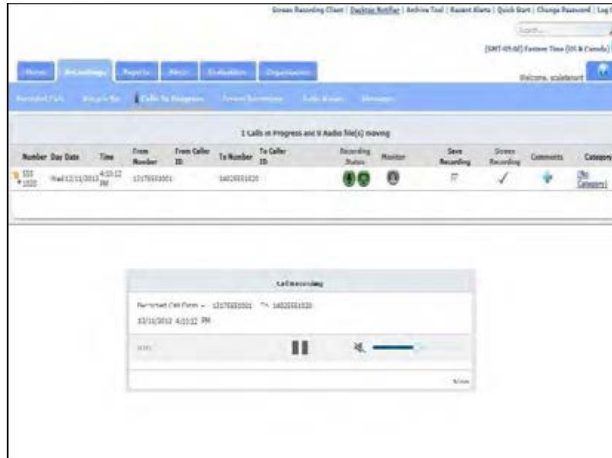
- From Number – displays the originating number.
- From Caller ID – identifies the name or number of the person that originated the call, if caller ID is available.
- To Number – displays the terminating number.
- To Caller ID – identifies the name or number of the To Number, if caller ID is available.
- External ID – allows users to associate an external call ID to a clip recording.
- Recording Status – identifies whether or not calls in progress are being called and/or screen recorded. An Audio Recording button is displayed if the call in progress is being audio recorded. Similarly, a Screen Recording button is displayed in the same column if the call in progress is being screen recorded.
- 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 via an inline audio player in their browser.
- Save Recording – identifies that the call is to be saved as a recorded call when it is complete. As all calls are saved, the option box will appear disabled and cannot be modified.
- Screen Recording – identifies whether or not the screen recording functionality is available for this particular call (requires the Screen Recording add-on to be applied to the user). If screen recording is in progress, a check mark will appear.
- Comments – allows the user to add comments to associate with the call. A  (Add Comment button) indicates there are currently no comments associated with the corresponding call in progress. A  button indicates there are currently comments associated with the corresponding call file. To add comments to a call file, click on the  Add Comment button and enter the applicable text in the text field. Click Submit to save your changes. This is the point at which the Add Comment button changes to .
- Category – allows the user to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction). When the call completes, the call will show the applied category in the Recorded Calls screen.

Example: Monitoring an active call

1. Click the **Recordings** tab and select **Calls in Progress** to ensure that you are looking at the list of calls in progress.



2. Select a call and click on the  (Monitor Live Conversation button) that corresponds to that call. An inline audio player will open and will start playing the call (requires HTML5 compatible browser).



Example: Adding comments to a call in progress

1. Click the **Recordings** tab and select **Calls in Progress** to ensure that you are looking at the list of calls in progress.

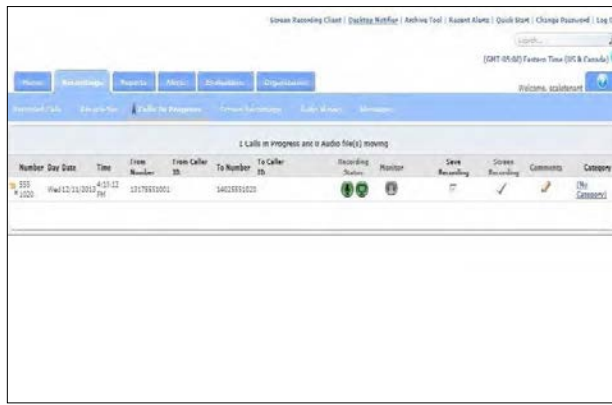


2. Select a call and click on the **+** (Add Comment) button that corresponds to that call and enter the comment text.

Note: Comment text cannot be greater than 1024 characters.



3. Click **Save**.



Example: Categorizing a call in progress

1. Click the **Recordings** tab and select **Calls in Progress** to ensure that you are looking at the list of calls in progress.



2. Select the **Category** link that corresponds to the call you wish to categorize.



3. Select a category from the drop-down list.





Screen Recordings

Screen recording captures the call handler's desktop and records the actions taken by them in order to satisfy their customer call. This is useful for future training, review by the manager, or documentation purposes. In order to better manage this screen, column headers that appear in bold lettering can be sorted by clicking on the applicable column header. Click once to sort the column in ascending order and click one more time to sort the column in descending order. You can also determine how many screen recordings to display on the page by selecting a new value from the Results Per Page drop-down list. The following information is displayed on the Screen Recording screen:


- Employee Name – the name of the call handler whose screen was recorded
- Day – the day of the week the call took place
- Date – the actual date the call took place
- Time – the time the call originated
- Duration – the length of the call
- Related Calls – identifies whether or not there is a recording associated with the call and allows you to play the associated recording

- Recording – allows the user to play the actual screen recording
- Export Video – allows the user to export the screen recording as a video
- Download – allows the user to download individual screen recordings as a zipped files but without the audio file
- MD5 – identifies whether or not the screen recording has been hashed using MD5 fingerprinting, thus ensuring that the screen recording has not been tampered with and is satisfying regulatory requirements

Related calls display any recorded calls that correspond to a screen recording. The dialog quickly identifies the day, date, and time; from number; from caller ID; to number, the duration of the call; and the recording. To view and play related calls select the  (Related Calls) button that corresponds to the recording for which you wish to view and/or play a recorded call. When the Related Calls dialog is displayed, click on the  (Recording) button to listen to the related call. Your default media player will open and begin playing the recorded call file (MP3 file).

Note: The way in which media players load and play the recorded call files will vary. For instance, QuickTime Player and Windows Media® Player will immediately launch the recorded file. However, iTunes® will load the recorded file in the library and you will have to click play to begin listening to the file.


When numbers are assigned to Users, all screen activity that is made from or to those numbers. During an active screen recording call, a check mark will appear under the Screen Recording column on the Calls in Progress screen. Once a screen recording is complete, a Recording button will appear under the Recording column on the Screen Recording screen indicating there is a screen recording file for that call.


To play a screen recording, click the  (Screen Recording) button that corresponds to the recording that you want to play. Click the Play button to begin playing the recording.

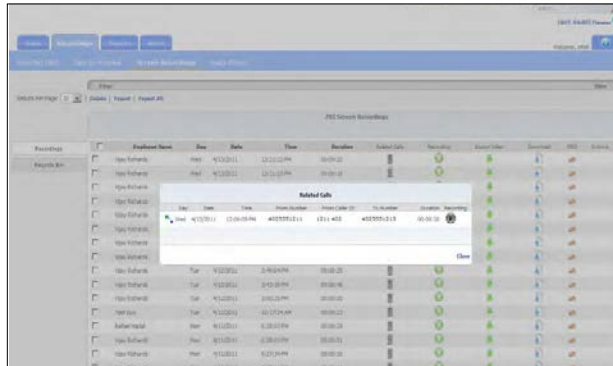
Note: If you do not have the required Java plug-in installed, a dialog window will appear first and prompt you to install the plug-in.


Another useful function included in this application is the ability to export screen recordings details into a CSV file. You can export one, multiple, or all screen recordings. There are two types of exports in screen recording:

- Export - exports the details of the screen recording to a .csv file. This method is accessed by using the Export link at the top of the Recordings screen.
- Export Video - zips and exports the video as a .mov file. This method is accessed by using the individual Export Video links that correspond to specific screen recordings.

Exporting a screen recording as a .mov file is as simple as clicking the  (Export Video) button that corresponds to the recording you wish to export. The expected result will either be a QuickTime view of the screen recording or a message notifying you that you will receive an email once the file has finished exporting.

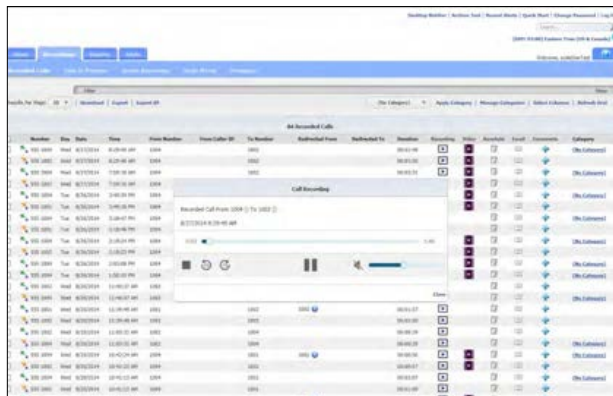
2. Select the  (Related Calls) button that corresponds to the recording for which you wish to view and/or play a recorded call.



3. Select the  (Recording) button.

Your default media player will open and begin playing the recorded call file (MP3 file).

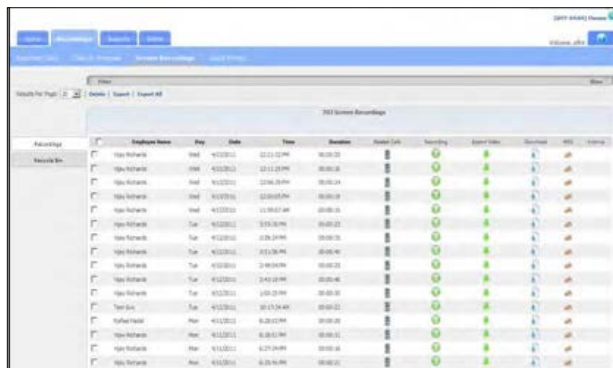
Note: The way in which media players load and play the recorded call files will vary. For instance, QuickTime Player and Windows Media® Player will immediately launch the recorded call file. However, iTunes® will load the recorded call file in the library and you will have to click play to begin listening to the file.




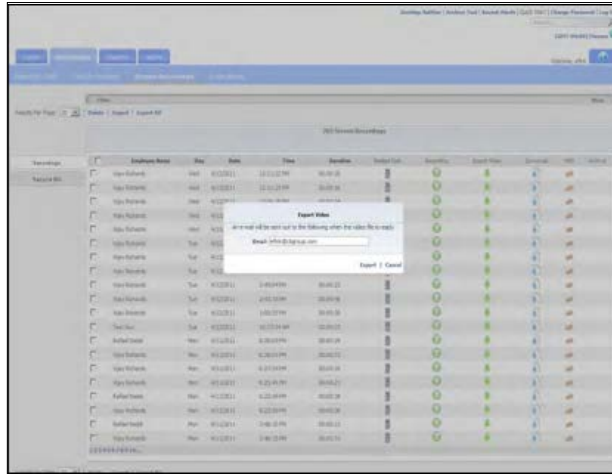
4. Click the browser's **Back** button to return to the Recordings page.

Example: Playing a screen recording

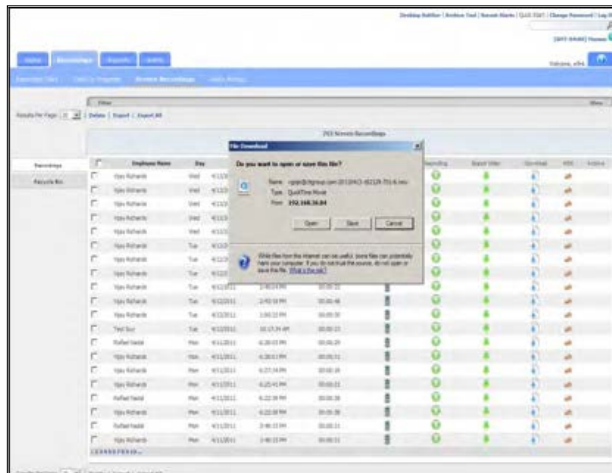
1. Click the **Recordings** tab and select **Screen Recordings** to ensure that you are looking at the list of screen recordings.



2. Select the  (Export Video) button that corresponds to the recording that you want to export.

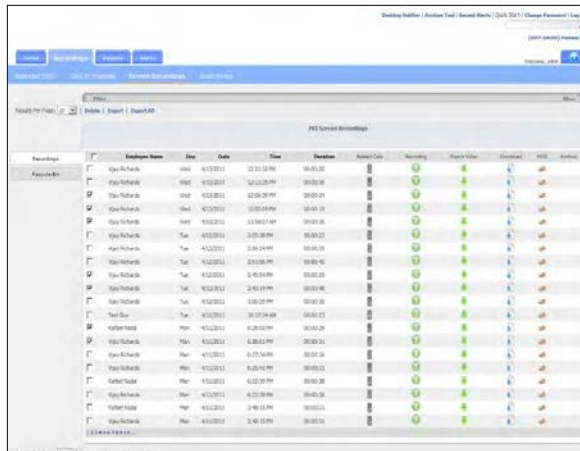


3. Since some screen recording files are large and can not only take time to download but slow down other resources, one of the following will occur:
 - An Export Video dialog box will appear notifying you that an email will be sent with a link to the video when it has finished downloading. Enter the **Email** address to where you want the email sent and click **Export**.
 - A QuickTime dialog box will appear asking if you would like to open or save the video. Choose **Open** and then click the **Play** button.

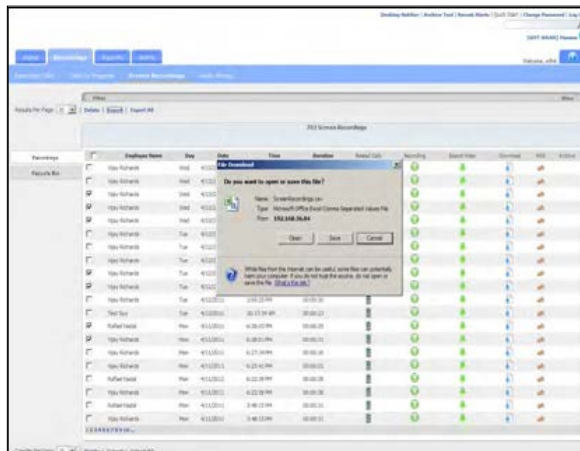


Example: Exporting a screen recording details as a .csv file

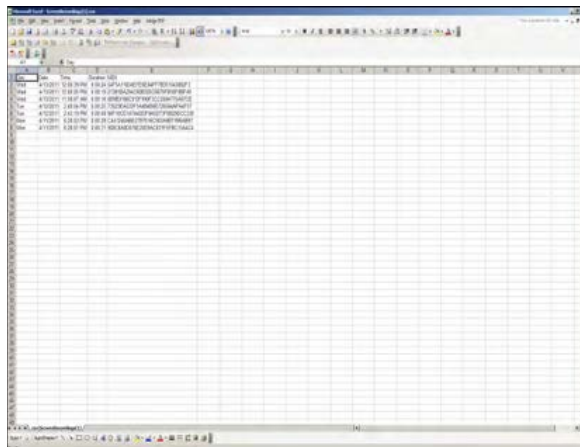
1. Click the **Recordings** tab and select **Screen Recordings** to ensure that you are looking at the list of screen recordings.
2. Select the screen recordings you wish to export by clicking in the corresponding option box to the left of the Number column.



3. Select the **Export** link at the top of the Recording page.

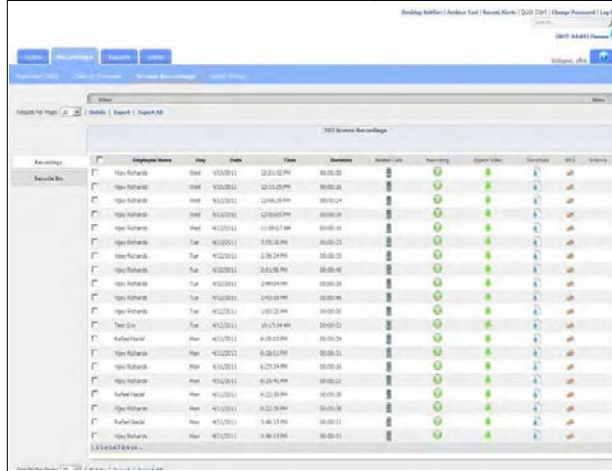


4. Click **Open**.
5. Click the **X** in the right corner of the RecordedCalls[1].csv window to close.

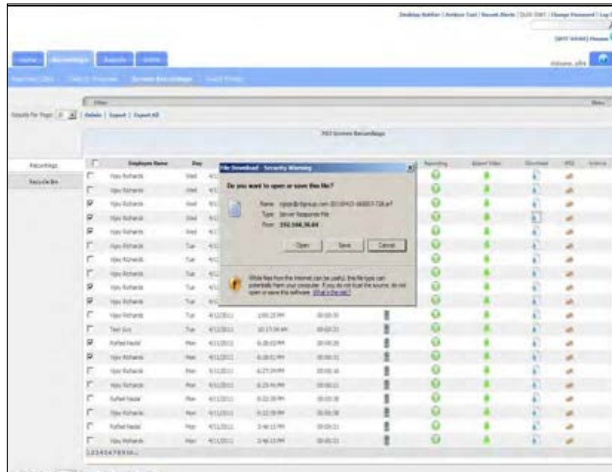


Example: Downloading a screen recording

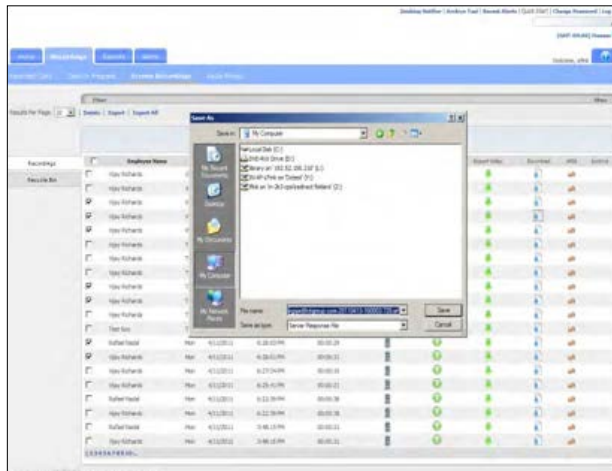
1. Click the **Recordings** tab and select **Screen Recordings** to ensure that you are looking at the list of screen recordings.



2. Select the (Download) button that corresponds to the recording that you want to download.



3. Select **Save**.
4. Browse to the location you wish to save the downloaded file and click **Save**.



Audio Mining


Audio Mining is available to customers who subscribe to the Listen add-on module and allows the user to enter key terms and phrases (speech packs) that the system searches recorded calls for and presents the results (phrases) in order of relevance. When the recorded call terminates, the system examines each call phonetically and records the phonetic patterns. The phonetic patterns are matched to the search terms or phrases and presented to the user.

There are two phases to audio mining: creating and releasing the speech packs, and assigning the released audio mining packs as a filter to the recorded calls.

The Audio Mining dashboard provides summary statistics about matched calls. The following information is available from the Audio Mining dashboard:

- Audio Mining Pack Trends - displays the audio mining packs that matched calls, for a specific period of time
- Audio Mining Pack Statistics - identifies the percentage of calls and actual call count that match the audio mining pack and the average, maximum, and minimum duration of those calls
- Top 10 Phrase Statistics - displays the top 10 phrase statistics based on the highest number of times the phrase was found in a call as well as the average, maximum, and minimum confidence scores
- First Call Resolution - identifies the number of follow up calls that were made in order to match the audio mining pack
- Call Handler Trends by Pack - displays the number of audio mining packs that matched a call, by call handler
- Pack Correlation - identifies the average number of times an audio mining pack matches a call

In order for the Audio Mining feature to work, users must add and release audio mining packs. Once an audio mining pack is added and released, it will then be available from the filtering tab to assign to calls.


To create a new audio mining pack, begin by selecting the  (Add) button. The audio mining pack appears under the hierarchy and the New Audio Mining Pack dialog appears. Enter a more meaningful name for the audio mining pack and click Save. Click on Default (Or Operation) located under your new audio mining pack and enter or select the following information:

- Operation - this is an And or Or clause that defines the search criteria
- Operation Name - enter a meaningful name for the operation

If applicable click the Add And (Match All) Operation or Add Or (Match One) Operation link(s) to add additional operations to the audio mining pack. Or, click Add Phrase to add a phrase to search for. Click Save.

In order to apply the audio mining pack to recorded calls and return results, it must first be released in the system. Release an audio mining pack by

selecting the specific pack and clicking the ✓ (Release) button. The audio mining pack will appear under the Released Audio Mining Packs section of the hierarchy.

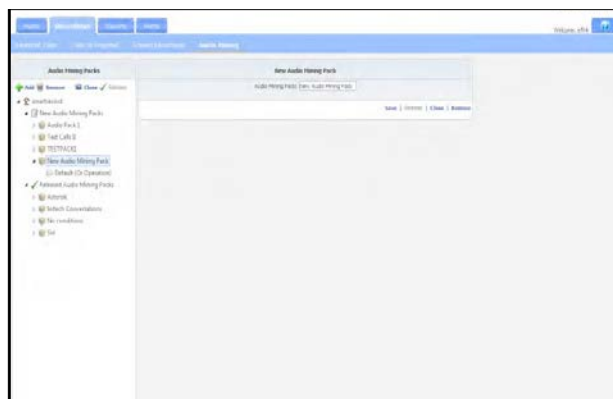
Once audio mining packs are released, they become available as a filter under Recorded Calls. Users apply an audio mining pack to the recorded calls in order to return the desired search results. To apply an audio mining pack to a recorded call as a filter, click on the Recordings tab and select Recorded Calls. Expand the Filter toolbar by clicking once on it. Click on the Filter toolbar to expand it and select the By Audio Mining Pack tab. Select the audio mining pack from the Audio Mining pack drop-down list. This is the audio mining pack that will be applied to the recorded calls. If applicable, enter the minimum confidence score that you would like to apply to the filter. The “Only return calls which have been searched and do not match the audio mining pack” option will return the recorded calls that do not have the word and/or phrase contained in the selected audio mining pack. Click Apply Changes. An  icon will appear under the Audio Mining tab for each recorded call that matched the criteria. A number will appear to the right of the icon displaying the Maximum Confidence score for the returned results. Click on the Audio Mining icon to view the results of the search.

Example: Creating a new audio mining pack

1. Click the **Recordings** tab and select **Audio Mining** to ensure that you are looking at the list of audio mining packs.



2. Select the  (Add) button.



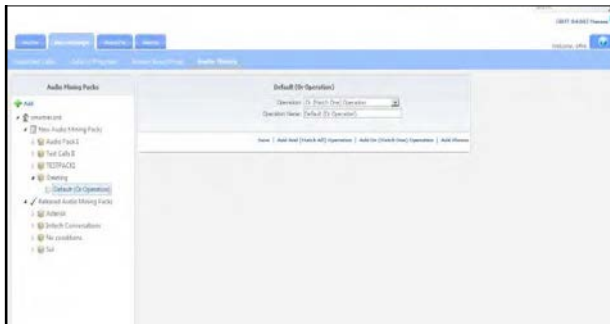
- Enter or select the following information:
 - Audio Mining Pack - **Greeting**



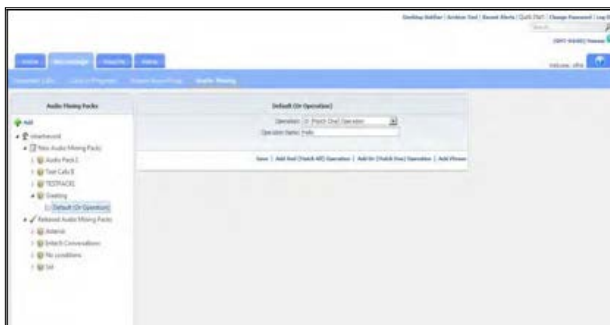
- Click **Save**.



- Click on **Default (Or Operation)** located under your new audio mining pack.



- Enter or select the following information:
 - Operation Name - **Hello**

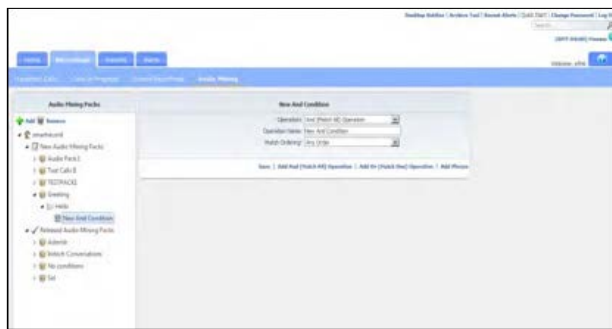


7. Click **Save**.



8. Click on Add And (Match All) Operation.

Note: New operations can appear at the parent level or under any existing operation level in the audio mining pack. Depending on where you want it to appear, you may have to select a new level first.



9. Enter or select the following information:

- Operation Name – **Good Morning**
- Match Ordering – **Any Order**


10. Click **Save**.

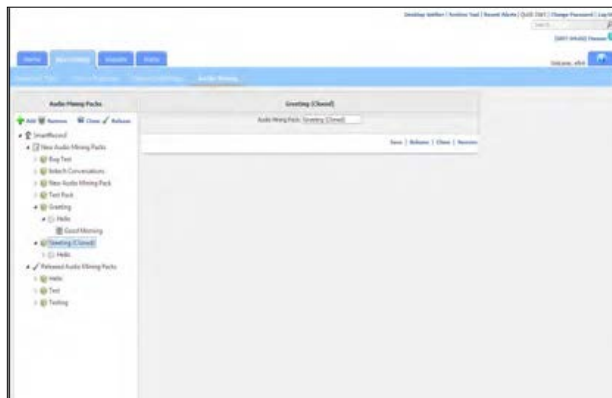


Example: Cloning an audio mining pack

1. Click the **Recordings** tab and select **Audio Mining** to ensure that you are looking at the list of audio mining packs.



2. Select the audio mining pack that you want to clone by clicking on it in the hierarchy tree.
3. Select the  (Clone) button or Clone link.



4. Enter or select the following information:
 - Operation Name – **Call Handler Greeting**



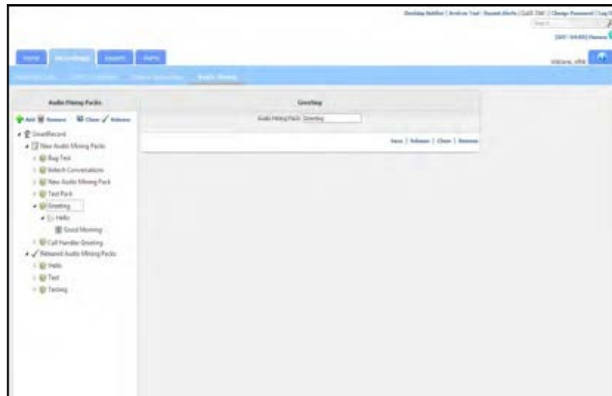
5. Click **Save**.

Example: Releasing an audio mining pack

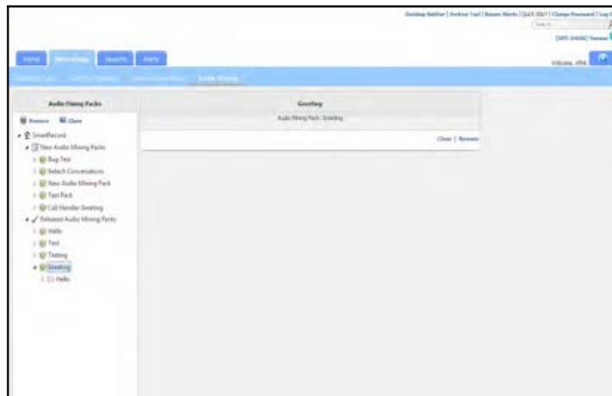
1. Click the **Recordings** tab and select **Audio Mining** to ensure that you are looking at the list of audio mining packs.



2. Select the audio mining pack that you want to release by clicking on it in the hierarchy tree under New Audio Mining Packs.

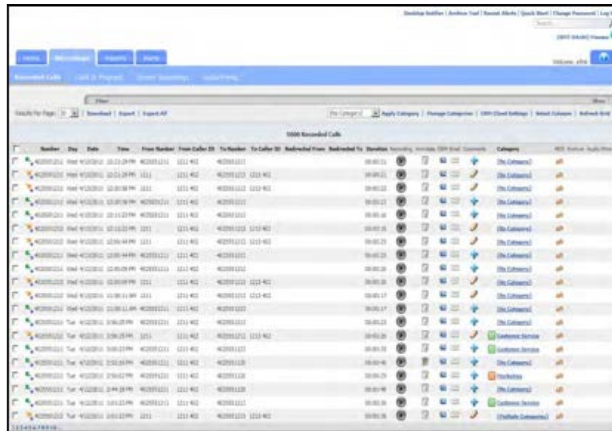


3. Select the  (Release) button or click the Release link.

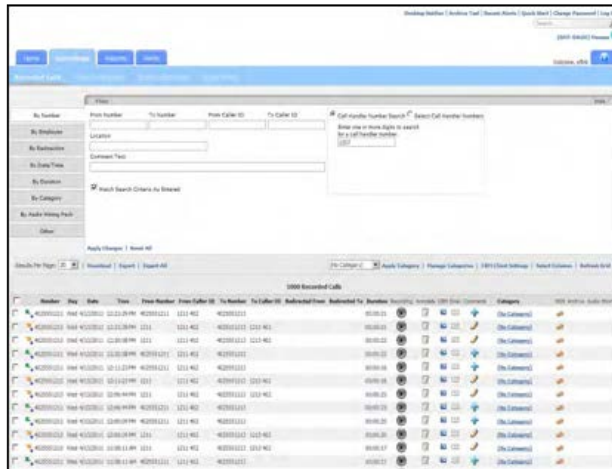


Example: Applying an audio mining pack

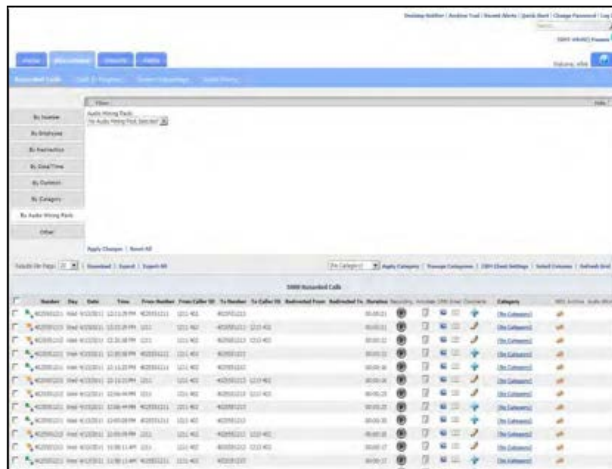
1. Click the **Recordings** tab and select **Recorded Calls** to ensure that you are looking at the list of recorded calls.



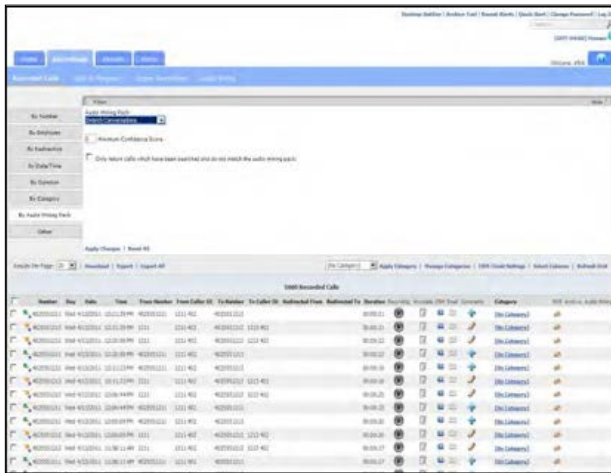
2. Click on the **Filter** toolbar to expand it.



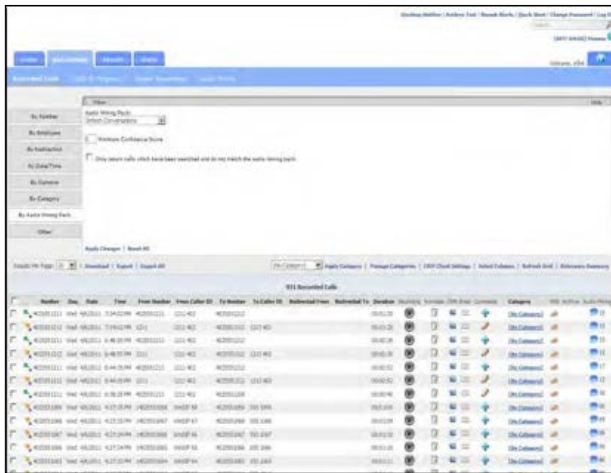
3. Select the **By Audio Mining Pack** tab.



- Enter or select the following information:
 - Audio Mining Pack – **Greeting (or any other that shows up in the list)**

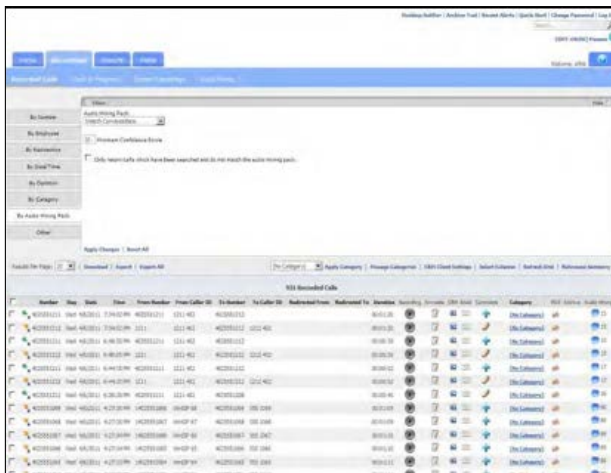


- Click **Apply Changes**.



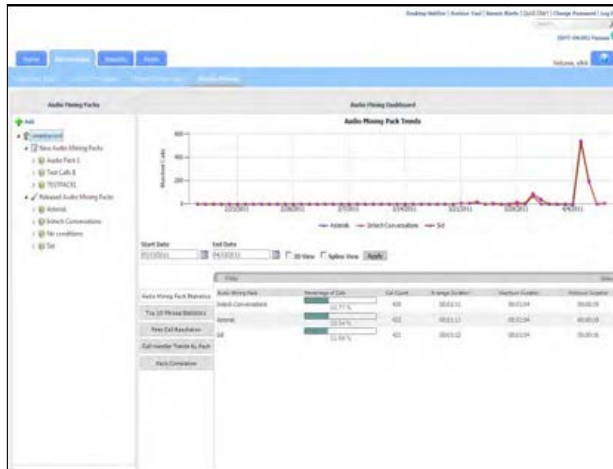
- Enter or select the following information:
 - Minimum Confidence Score - **10**

- Click **Apply Changes**.



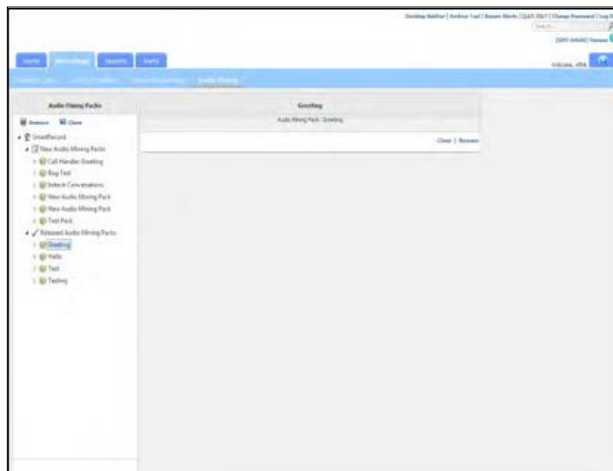
Example: Deleting an audio mining pack

1. Click the **Recordings** tab and select **Audio Mining** to ensure that you are looking at the list of audio mining packs.

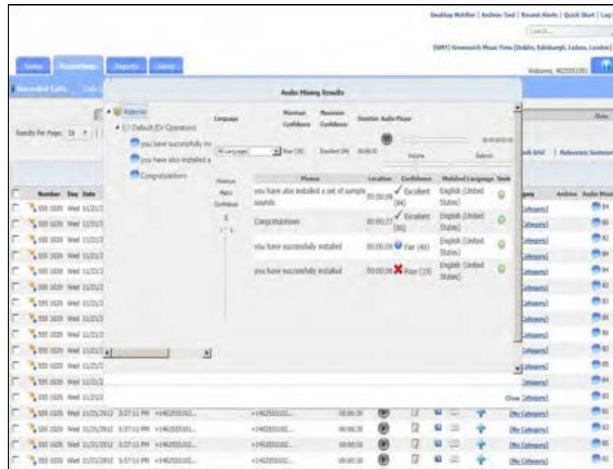


2. Select the audio mining pack that you want to delete by clicking on it in the hierarchy tree.

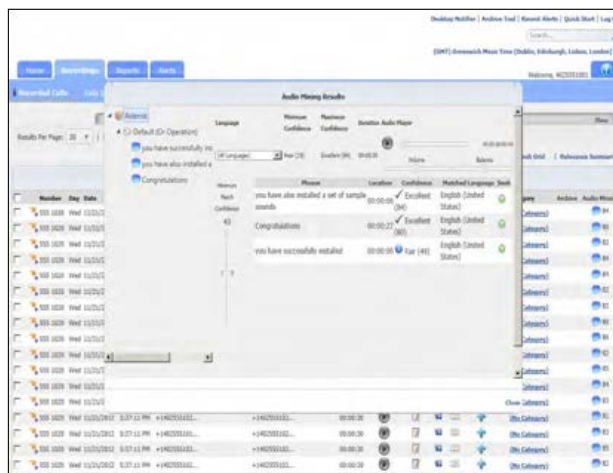
Note: Both new and released audio mining packs can be deleted from the hierarchy tree.



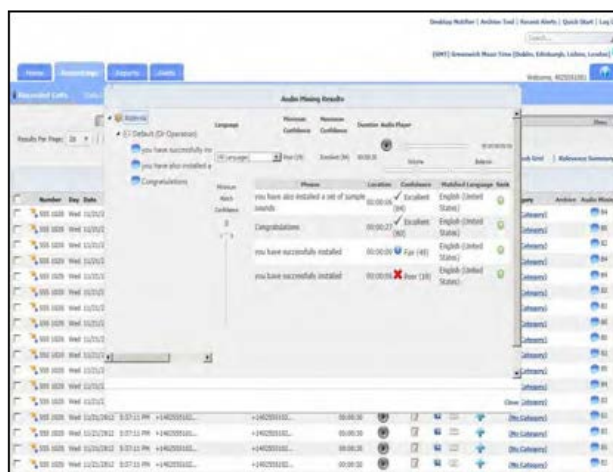
- Click the **Seek** button that corresponds to a specific audio mining pack to jump to the point where the audio mining pack is mentioned in the recorded call.



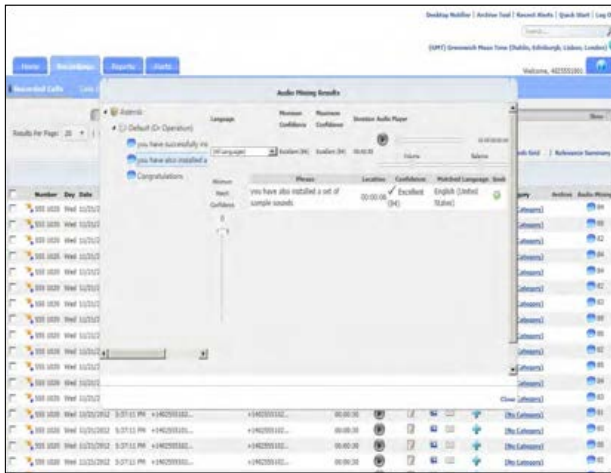
- Filter the results by Confidence Level by clicking on the **Minimum Match Confidence** control and sliding it down.



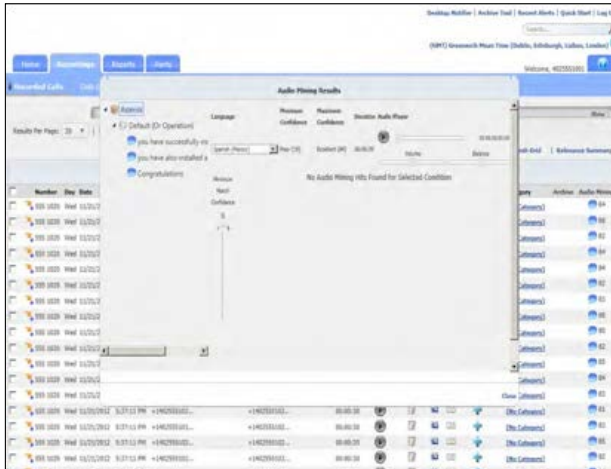
- Return the **Minimum Match Confidence** control back to its original level by sliding it up until it reaches 0.



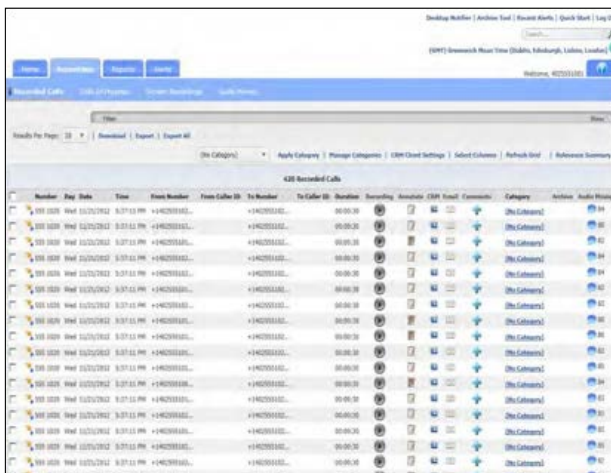
6. If there are multiple audio mining pack operations, select one by clicking on it.



7. If applicable, select a specific language from the Language drop-down list.

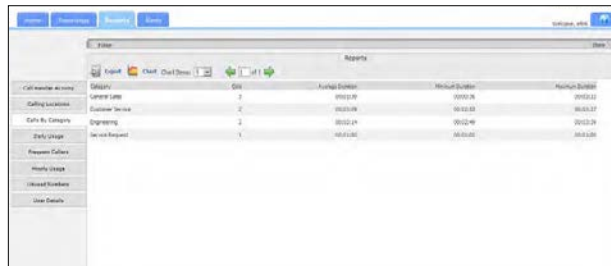


8. Click **Close**.



Example: Calls by Category

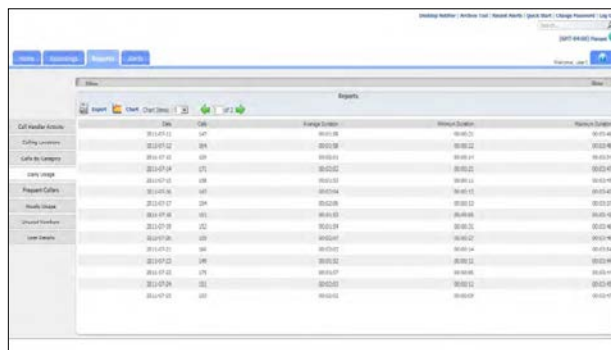
The Calls by Category report displays total calls by custom category for the last 30 days. The Calls by Category report can be displayed as text or as a pie chart by clicking on the Chart button found on the report toolbar. The report displays total number of calls, average call duration, minimum duration, and maximum duration by category.



Category	Calls	Average Duration	Minimum Duration	Maximum Duration
Customer Support	2	00:02:30	00:00:20	00:03:00
Customer Service	2	00:02:00	00:01:00	00:03:00
Engineering	2	00:02:00	00:02:00	00:02:00
Product Support	1	00:02:00	00:02:00	00:02:00

Example: Daily Usage

The Daily Usage report displays the activity totals for the day in the application. The Daily Usage report can be displayed as text or as a column chart by clicking on the Chart button found on the report toolbar. The report displays the date, total number of calls, average call duration, minimum duration, and maximum duration for the day.

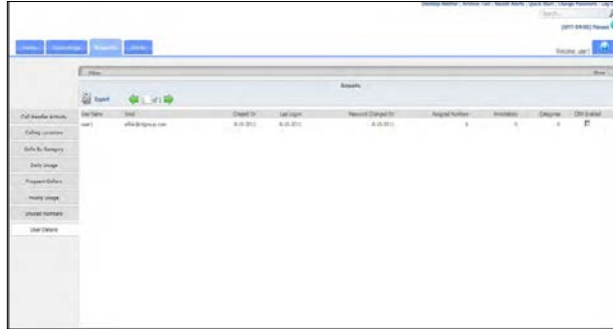


Date	Calls	Average Duration	Minimum Duration	Maximum Duration
2011-07-01	207	00:01:38	00:00:20	00:01:44
2011-07-02	204	00:01:38	00:00:20	00:01:44
2011-07-03	209	00:01:31	00:00:20	00:01:41
2011-07-04	275	00:01:22	00:00:20	00:01:47
2011-07-05	208	00:01:22	00:00:20	00:01:41
2011-07-06	167	00:01:24	00:00:20	00:01:43
2011-07-07	204	00:01:28	00:00:20	00:01:37
2011-07-08	191	00:01:22	00:00:20	00:01:32
2011-07-09	222	00:01:29	00:00:20	00:01:44
2011-07-10	220	00:01:27	00:00:20	00:01:44
2011-07-11	248	00:01:22	00:00:20	00:01:34
2011-07-12	246	00:01:22	00:00:20	00:01:34
2011-07-13	278	00:01:27	00:00:20	00:01:41
2011-07-14	281	00:01:22	00:00:20	00:01:35
2011-07-15	200	00:01:22	00:00:20	00:01:37



Example: User Details

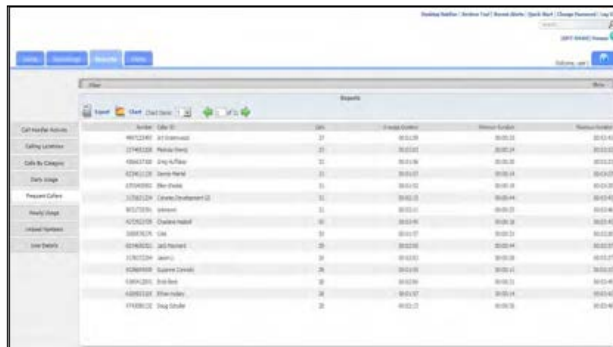
The User Details report identifies information about each user of the application. The User Details report is text format only. The report displays the username, email address, the date the user was created, the date the user last logged on to the application, the date the user's password was last changed, the total amount of numbers assigned to the user, total number of annotations and categories created by the user, and whether or not the user has permission to upload recorded calls to a CRM application.



Call Number Activity	From	Display To	Last Login	Password Change To	Assigned Number	Annotations	Categories	CRM Upload
Call Number Activity	2484	2484@primus.com	8/20/2011	8/20/2011	8/20/2011	0	0	0

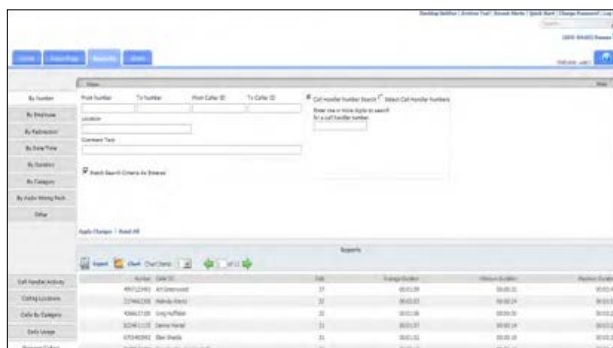
Example: Filtering a report

1. Click on the **Frequent Callers** tab.



Call Number Activity	From	To	Frequent Caller	Creation Date	Modification Date	Deletion Date
Call Number Activity	487123456	487123456	37	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	371945234	371945234	25	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	423456789	423456789	22	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	21	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	20	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	371945234	371945234	12	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	11	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	10	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	9	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	8	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	7	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	6	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	5	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	4	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	3	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	2	8/22/2011	8/22/2011	8/22/2011
Call Number Activity	478901234	478901234	1	8/22/2011	8/22/2011	8/22/2011

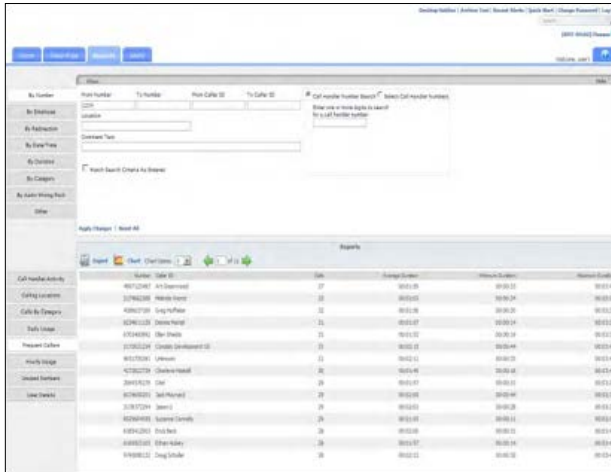
2. Click on the **Filter** toolbar to expand it.
3. If it isn't already selected, select the **By Number** tab.



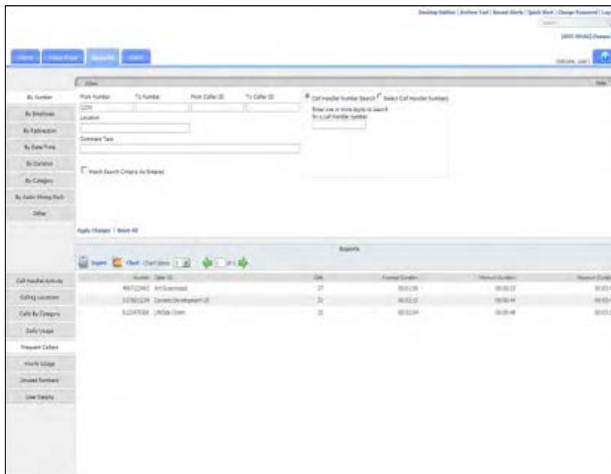
Filter toolbar showing the 'By Number' tab selected. The filter criteria are: From: 487123456, To: 487123456, From Caller ID: 487123456, To Caller ID: 487123456. The 'By Number' tab is selected, and the 'Filter' toolbar is expanded.

4. Enter the following information:

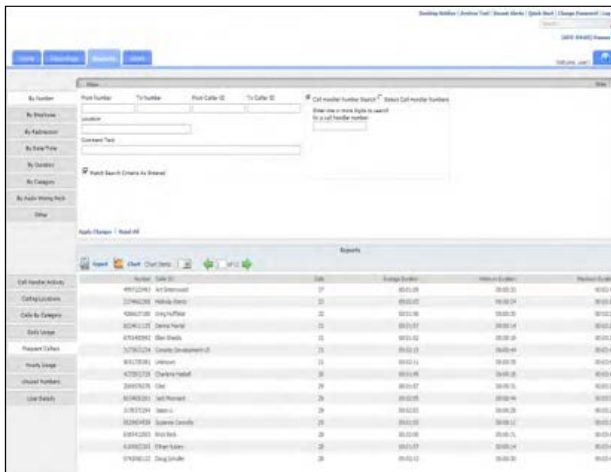
- From Number – enter a number that appears under the From Number column of the list of Recorded Calls.



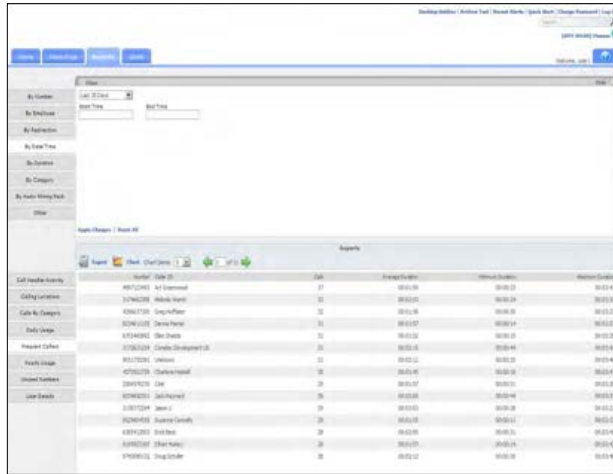
5. Click **Apply Changes** to apply the filter to the report.



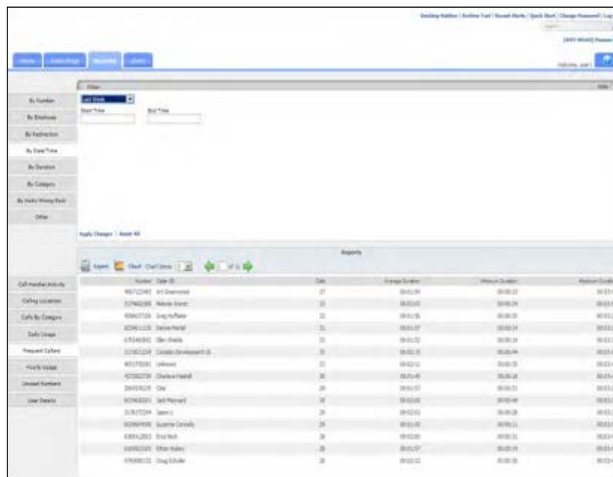
6. Click **Reset All** to remove the filter from the report.



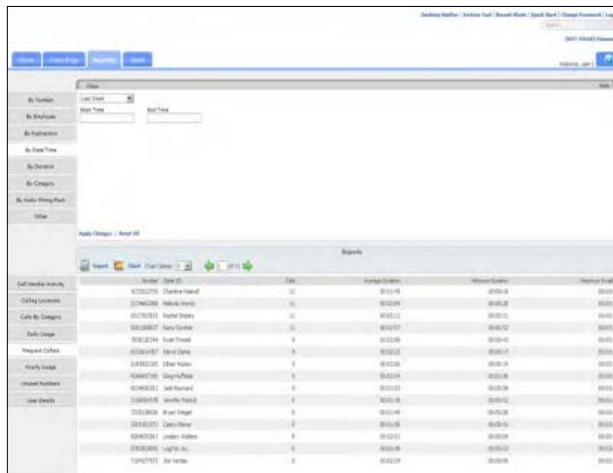
7. Select the **By Date/Time** filter tab.



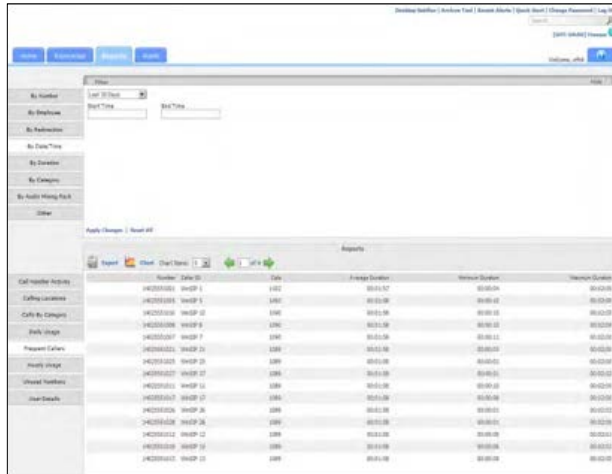
8. Select **Last Week** from the drop-down list.



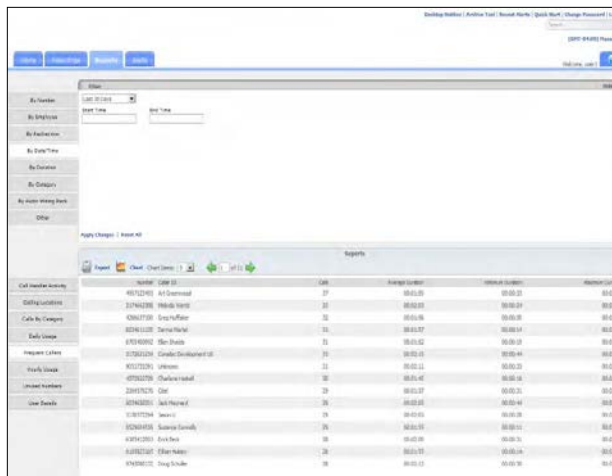
9. Click **Apply Changes** to apply the filter to the report.



10. Click **Reset All** to remove the filter from the report.

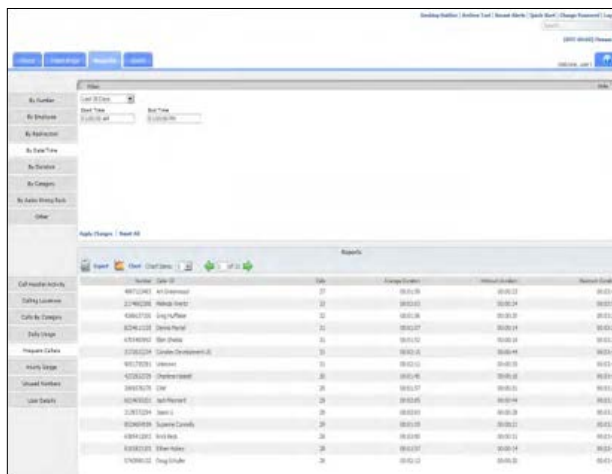


11. Select the **By Time** filter tab.

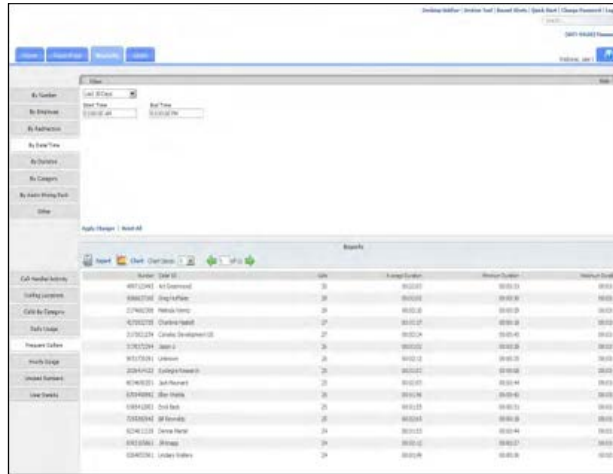


12. Select the following information:

- From – **01:00:00 a.m.**
- To – **01:00:00 p.m.**



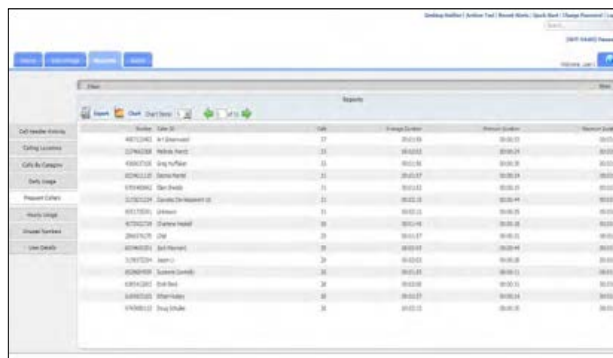
13. Click **Apply Changes** to apply the filter to the report.



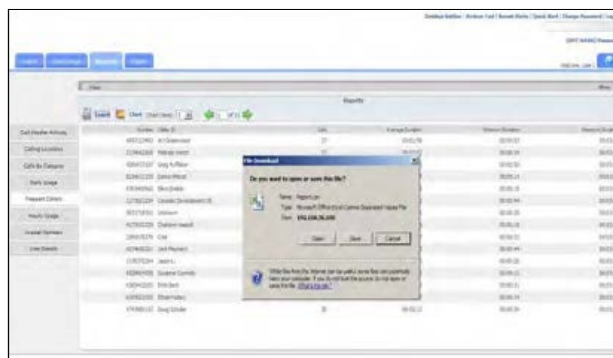
14. Click **Reset All** to remove the filter from the report.

Example: Exporting reports

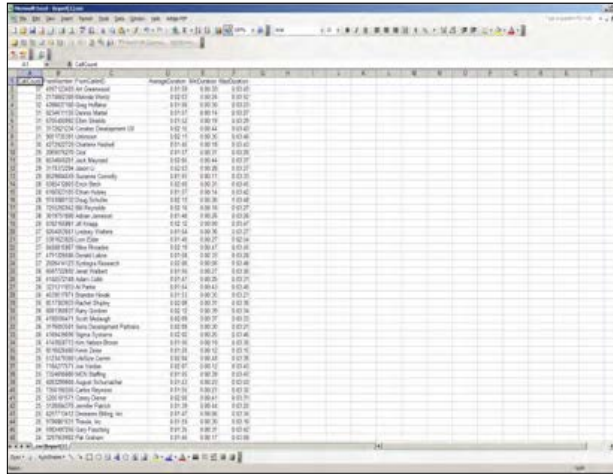
1. Click on the **Frequent Callers** tab.



2. Click the **Export** button.



3. Select **Open**.
4. Click the **X** in the right corner of the Report.csv window to close it.



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. Additionally, a history of the alerts that have executed is available from the Alerts tab. You can also view any recent alerts by clicking on the Recent Alerts link on the top-right side of the End User Interface window.

Note: Alerts will be temporarily disabled if they begin to cause excessive logging/emailing resulting in possible network congestion. In such cases, an email will be sent to the owner of the alert. Excessive logging/emailing is defined as greater than 1000 alerts per second.

To create an alert click New. Enter a name and brief description for the alert. Alert name can be a maximum of 50 characters. Select the following: Event Type, whether or not the alert is enabled/disabled, and when the alert should run. Your input options will vary depending on your selection.

- Alert on any day - the alert will run every day that remains active.
- Days of Week - the options Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday will appear. Select the specific days the alert should run. The alert will run on the selected day(s) as long as it remains active.
- Date - Enter a specific call date. The alert will only run on this call date.
- Date Range - Enter a start and end date. The alert will only run during this date range.

Note: You can select multiple criteria such as Days of the Week and a Date Range.

Enter or select the following:

- Start Time - if applicable, select the start time the Alert should begin running on the selected day(s).
- End Time - if applicable, select the end time that the Alert should stop running on the selected day(s).
- Time Zone - select a time zone that you wish to apply to the alert.
- From Caller ID - defines the originating caller ID or partial originating caller ID on which to alert.
- To Caller ID - defines the terminating caller ID or partial terminating caller ID on which to alert.
- From Number - defines the originating number or partial originating number on which to alert.
- To Number - defines the dialed number or partial dialed number on which to alert.
- Redirected From – defines the number of the person or group transferring the call.
- Redirected To – defines the number to which the call was transferred.
- Location - defines the location or partial location on which to report.
- DTMF Digits – (only appears when Call Terminated event type is selected) defines whether the on demand alert will be a clip alert or will be triggered only when the DTMF digits are entered. Additionally, this field identifies the DTMF digits used to initiate the on demand alert.
- End Clip DTMF Digits – (only appears 1) when Call Terminated event type is selected and 2) when Clip is selected above) identifies the DTMF digits used to end the on demand alert clip.
- DTMF Tolerance - (only appears when Call Terminated event type is selected) identifies the amount of time the user has to complete the entry of the DTMF digits to initiate the on demand alert and, if applicable, end the on demand alert clip.
- Audio Mining Pack - (only appears when Call Terminated event type is selected) allows the user to identify and alert on a specific audio mining pack.
- Minimum Confidence - (only appears when Call Terminated event type is selected) allows the user to identify and alert on the minimum confidence when alerting on audio mining packs.
- Add a Category – allows the user to categorize calls into areas unique to their business (for example: geographic region or customer satisfaction). This category will apply to all calls that fall within the alert criteria and will automatically appear on the Recorded Calls tab when the alert is fired.
- Add a Comment – allows the user to add comments about the call. These comments will apply to all calls that fall within the alert criteria and will automatically appear on the Recorded Calls tab when the alert is fired.

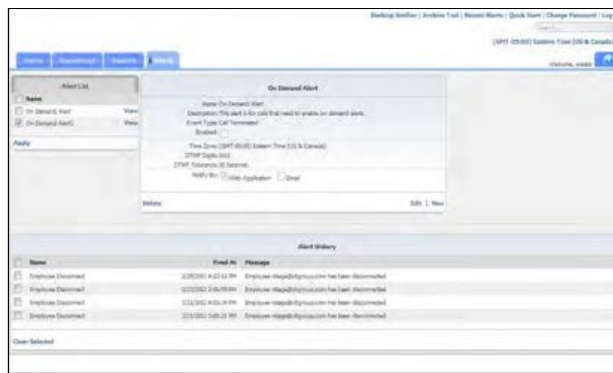
Note: The From Caller ID, To Caller ID, From Number, To Number, and Location fields must be at least 3 characters long.

Select whether or not you want to be notified by email when an alert occurs by clicking in the Email option box. If you selected to be notified by email, enter the To and From email addresses. Click Save to add the alert to the list of Alerts.

The Alerts dialog box displays a list of alerts that have occurred under the Alerts History section. You can clear the Alert History by selecting the alert(s) and clicking the Clear Selected link. You can also view a list of recent alerts by clicking on the Recent Alerts link located at the top of the application page.

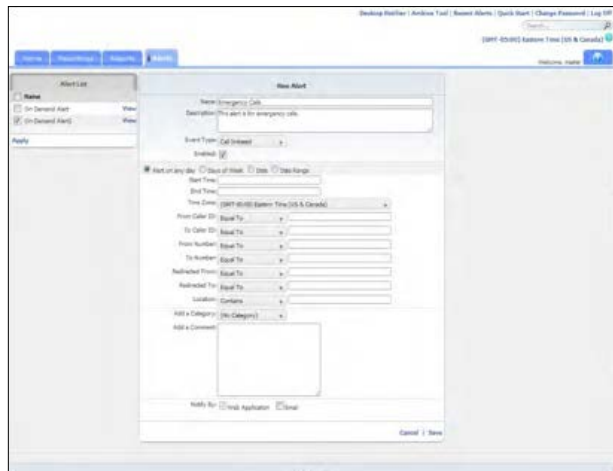
Example: Creating an alert

1. Click the **Alerts** tab.

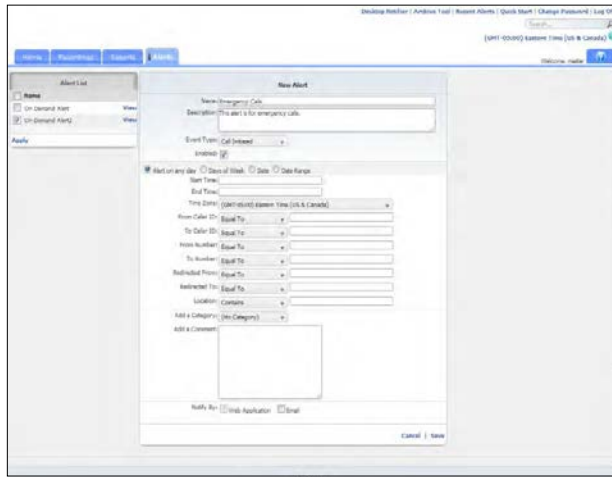


2. If applicable, click **New**. Enter the following information:

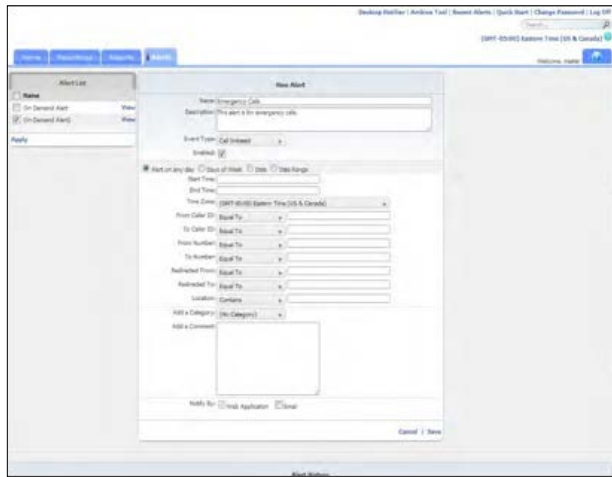
- Name – **Emergency Calls**
- Description – **This alert is for emergency calls.**



- Select the following:
 - Event Type - **Call Initiated**

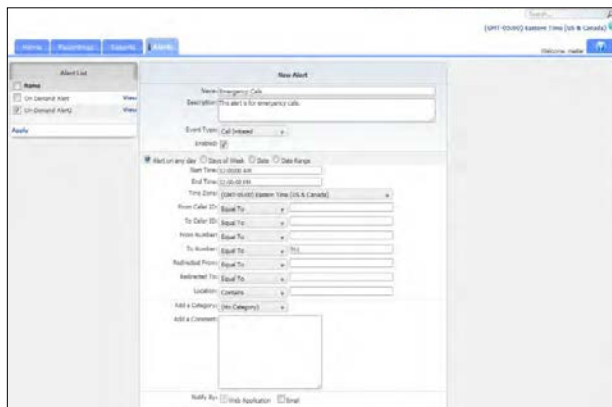


- If it isn't already selected, click in the **Enabled** option box.
- If it isn't already selected, click in the **Alert on any day**.

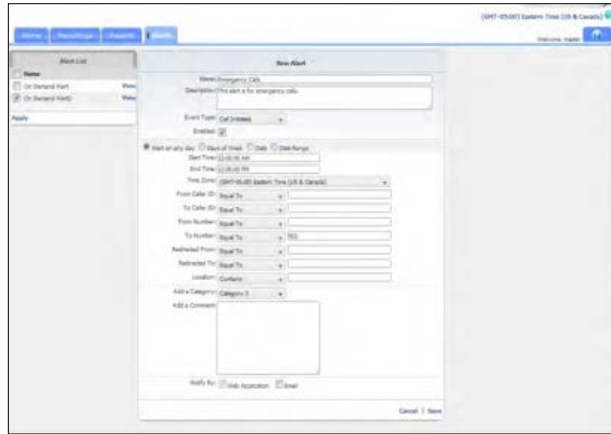


- Enter or select the following information:

- Start Time – **12:00:00 a.m.**
- End Time – **12:00:00 p.m.**
- Time Zone – **(GMT -05:00) Eastern Time (US & Canada)**
- To Number – **Equal To 911**

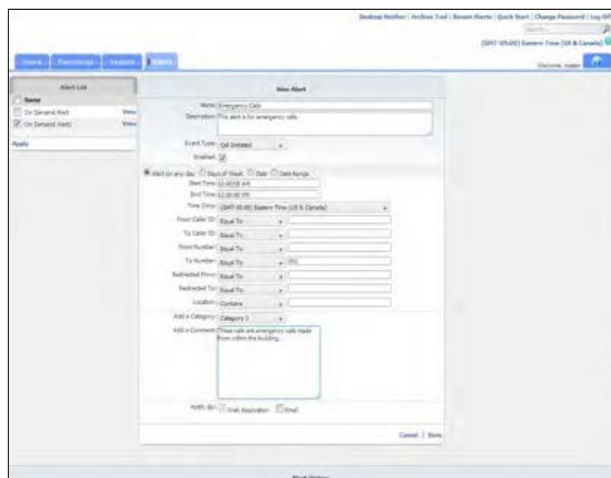


7. Select a category from the **Add a Category** drop-down list.

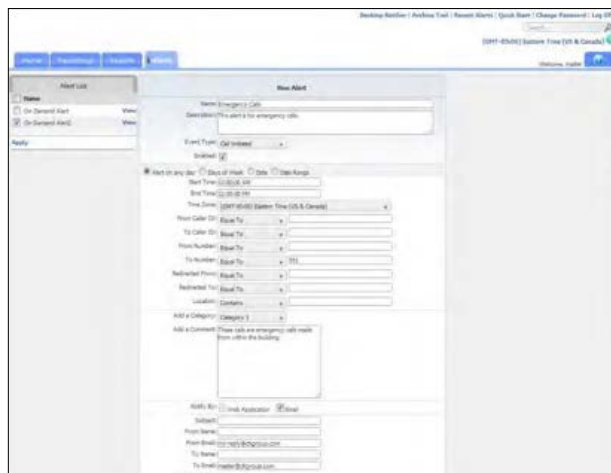


8. Enter the following information:

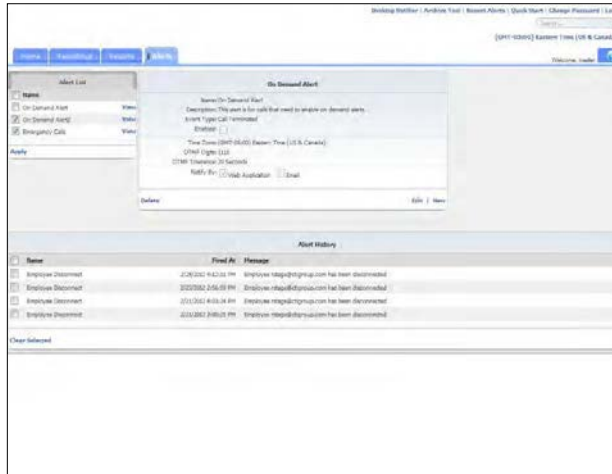
- Add a Comment – **These calls are emergency calls made from within the building**



9. Select **Email** by clicking in the option box.



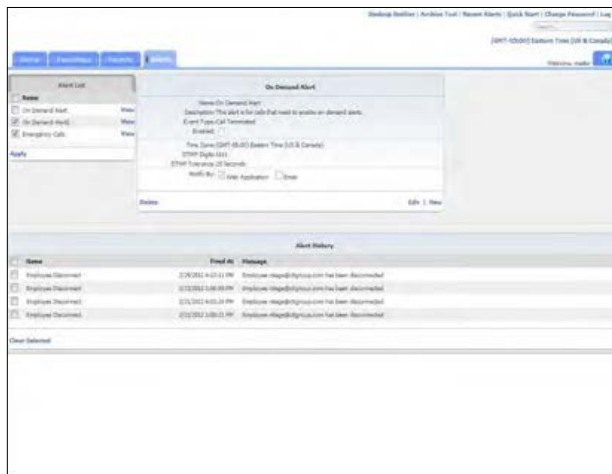
10. Select **Save**.



Example: Creating an on demand alert

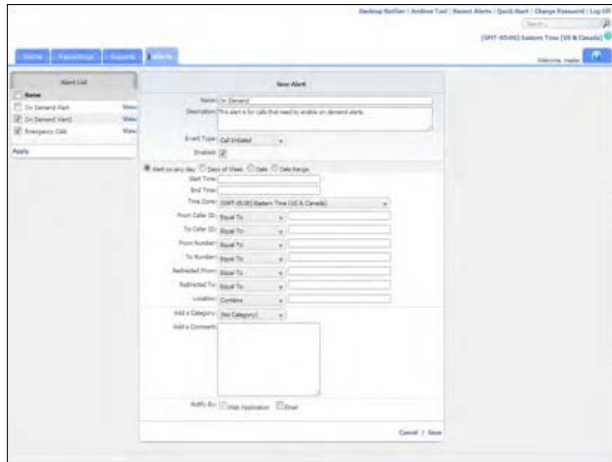
There are two types of on demand alerts: on demand clip alerts and general on demand alerts. Clip alerts will record only a portion of the call identified by the DTMF start and end digits. General on demand alerts record the entire conversation but are initiated when the DTMF digits are entered.

1. Click the **Alerts** tab.



2. If applicable, click **New**. Enter the following information:

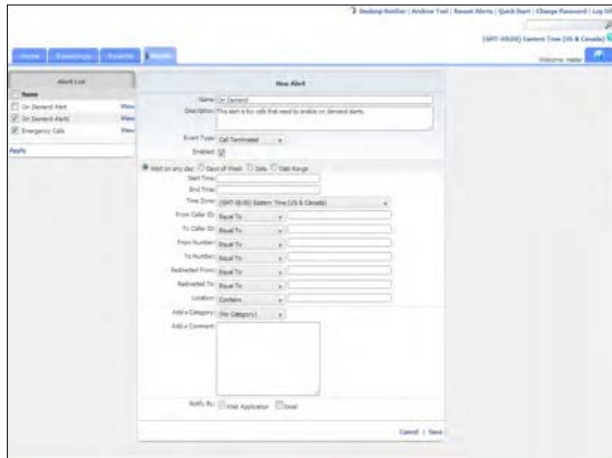
- Name – **On Demand**
- Description – **This alert is for calls that need to enable on demand alerts**



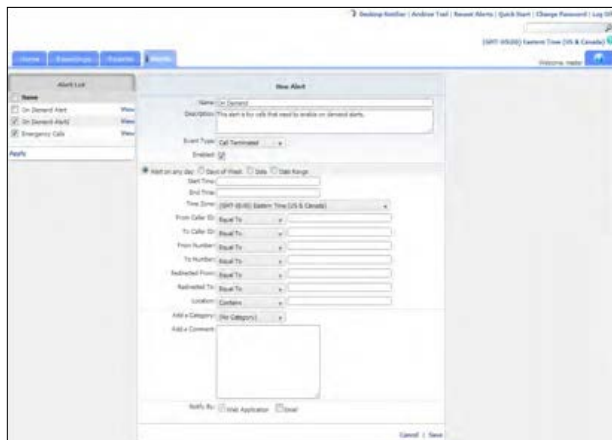
3. Select the following:

- Event Type - **Call Termination**

4. If it isn't already selected, click in the **Enabled** option box.

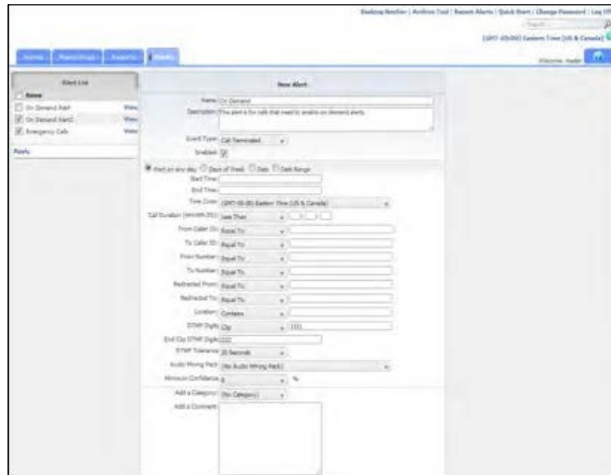


5. If it isn't already selected, click in the **Alert on any day**.

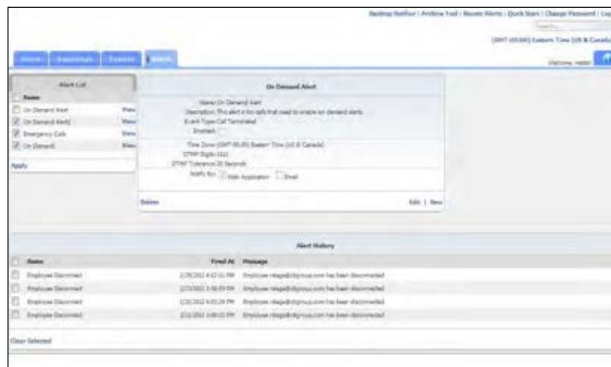


6. Enter or select the following information:

- DTMF Digits – **Clip**
- DTMF Digits – **1111**
- End Clip DTMF Digits – **2222**
- DTMF Tolerance – **20 seconds**

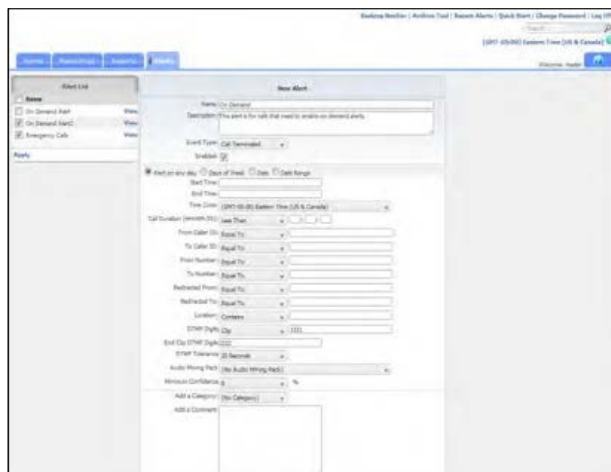


7. Select **Save**.



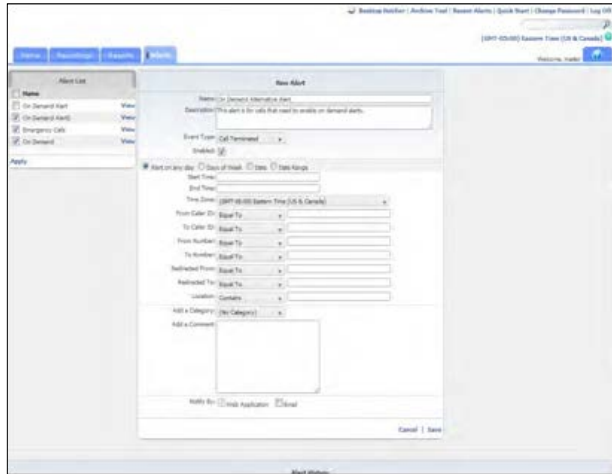
8. Click **New**. Enter the following information:

- Name – **On Demand Alert2**
- Description – **This alert is for calls that need to enable on demand alerts**

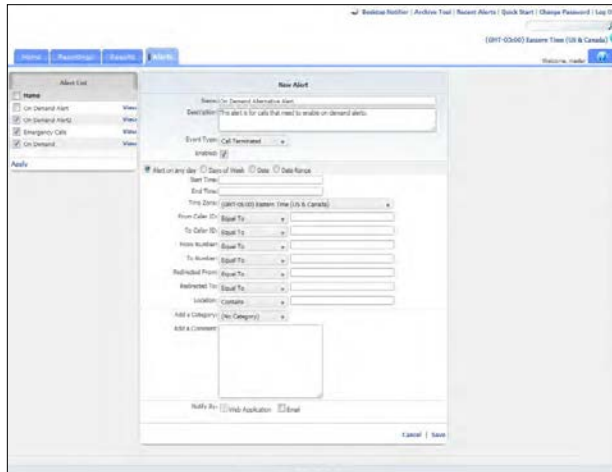


9. Select the following:
 - Event Type - **Call Terminated**

10. If it isn't already selected, click in the **Enabled** option box.

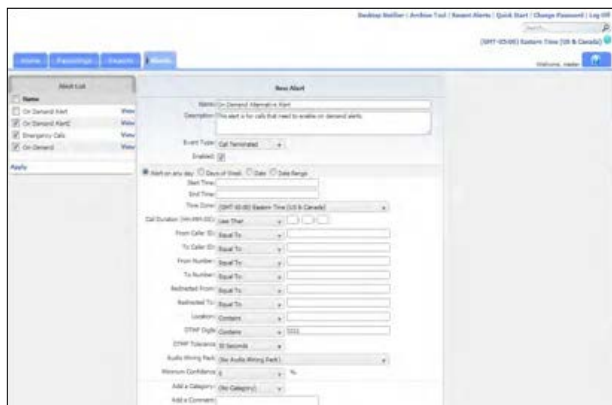


11. If it isn't already selected, click in the **Alert on any day**.

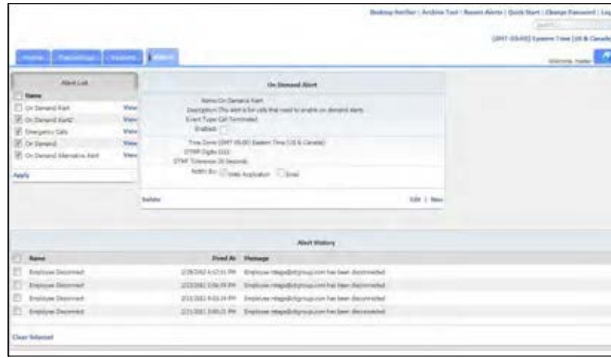


12. Enter or select the following information:

- DTMF Digits – **Contains**
- DTMF Digits – **1111**
- DTMF Tolerance – **30 seconds**

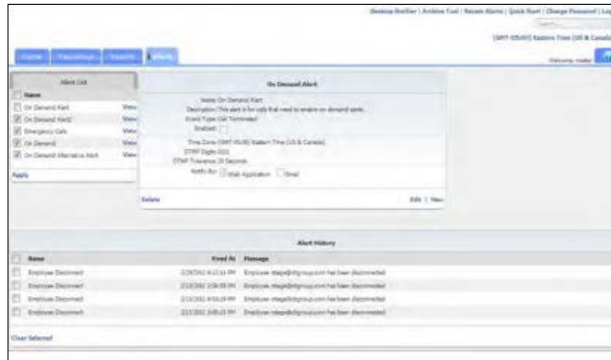


13. Select **Save**.



Example: Editing an alert

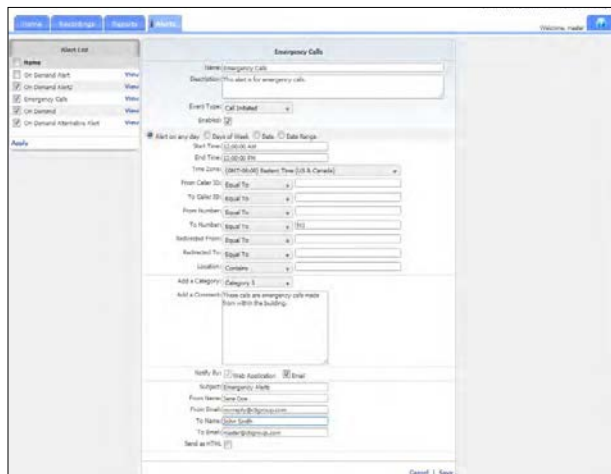
1. Click the **Alerts** tab.



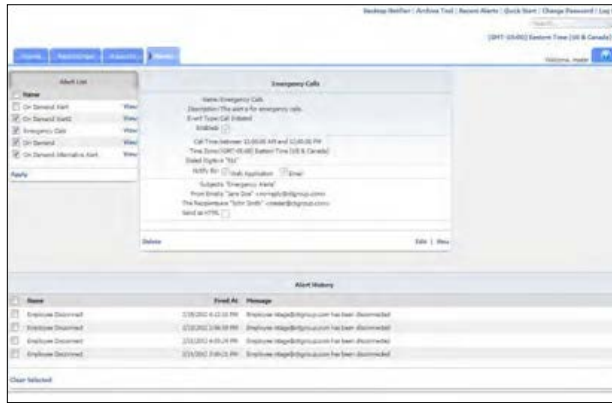
2. Select the **Edit** link.

3. Enter the following information:

- Subject – **Emergency Alerts**
- From Name – **enter your name**
- To Name – **Andrea**
- To Email – **ahash@abccompany.com**



4. Select **Save**.

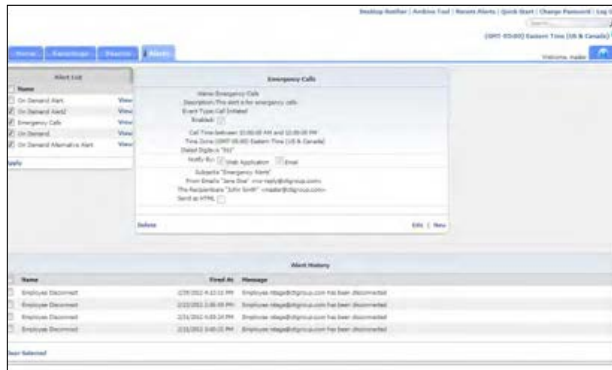


Example: Enabling and disabling an alert

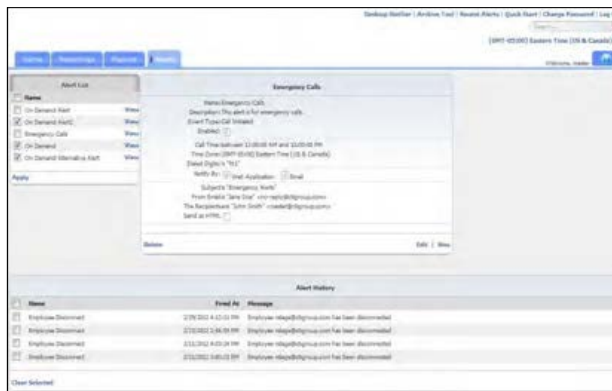
An alert may be inactive because it is no longer being used (and disabled by the administrator), or because it was causing too many emails to be sent out, potentially causing congestion on the email server. Alerts can be reused, so it is typically best to disable an unused alert rather than deleting it.

Note: If an alert was temporarily inactivated because too many emails were being generated, the alert should be edited before is reactivated.

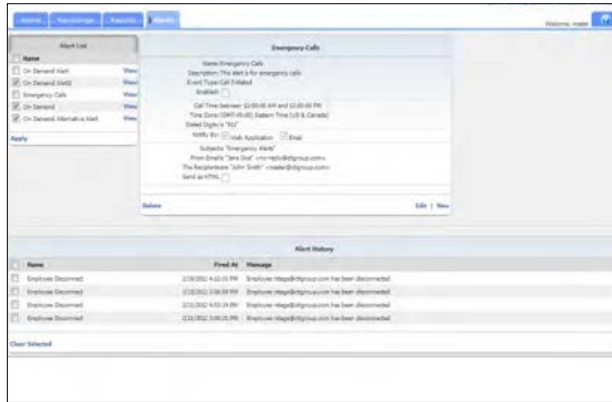
1. Click the **Alerts** tab.



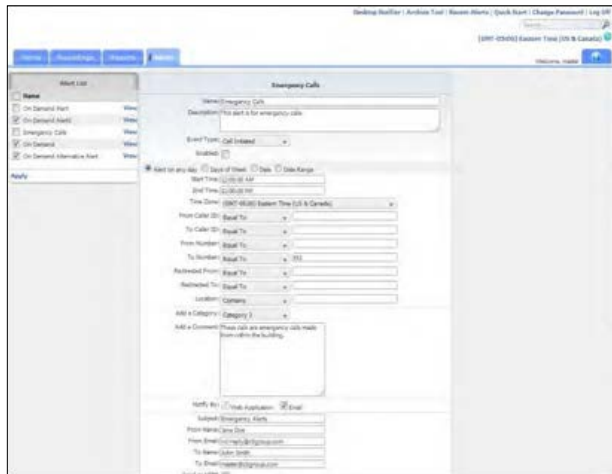
2. Click in the option box that corresponds to the Emergency Calls alert found under the **Alerts List**.



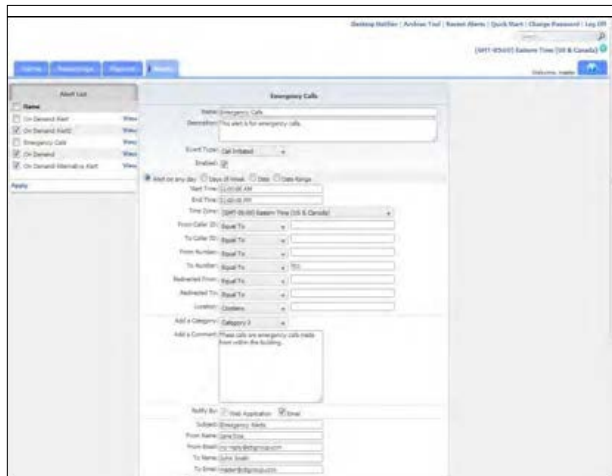
3. Select **Apply**.



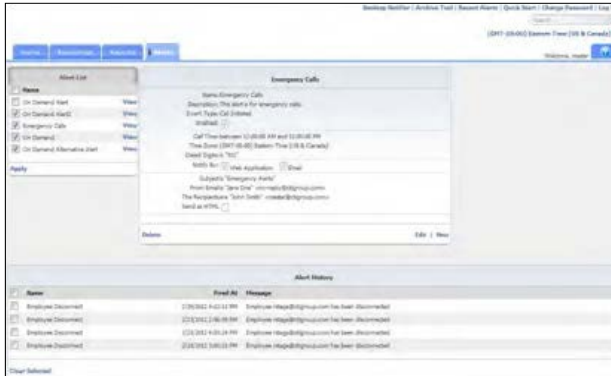
4. Select **Edit**.



5. Click in the **Enabled** option box.

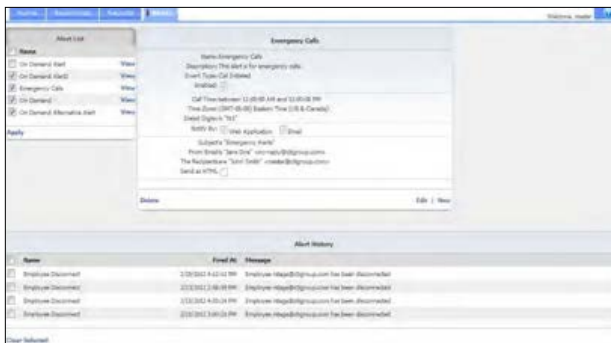


6. Select **Save**.

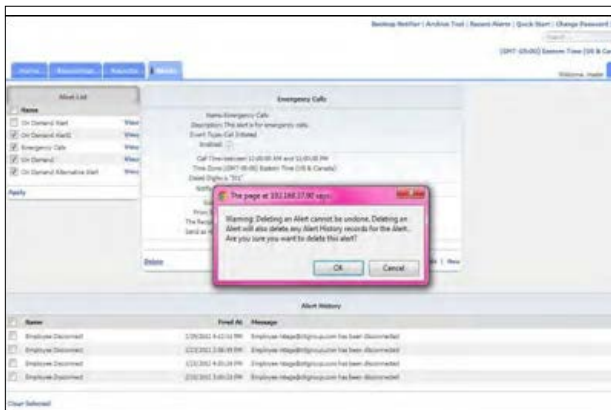


Example: Deleting an alert

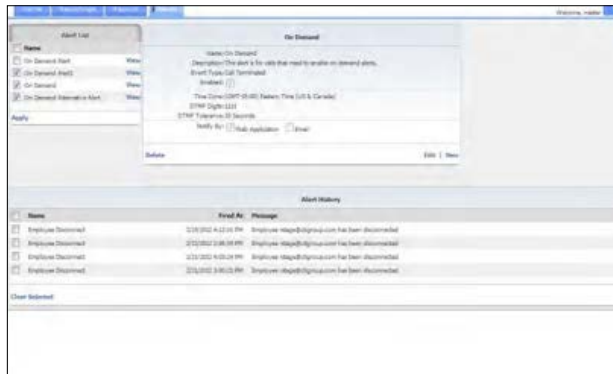
1. Click the **Alerts** tab.



2. Select **Delete**.



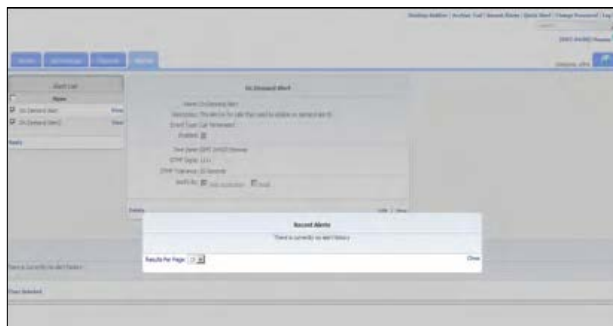
3. Select **OK**.



Example: Recent alerts

You can view up to 20 of the most recent alerts by clicking on the Recent Alerts link on the top-right side of the End User Interface window. The default view is to show 15 recent alerts, however, you can change the default by clicking on the Results Per Page drop-down and selecting from the available options. While you have this dialog box open, you will be notified of any new alerts. New alerts will first appear at the bottom of the dialog box and if you are using IE you will also hear a chime.

1. Select the **Recent Alerts** link.



2. Select **Close**.



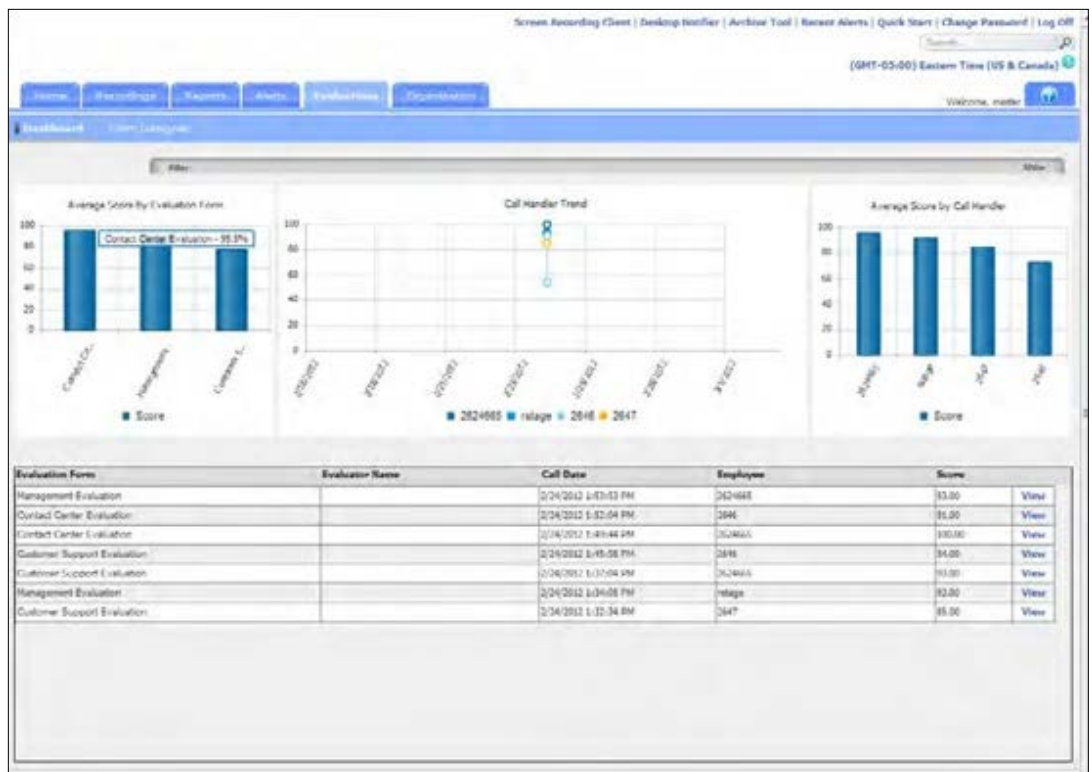
Evaluations

The Evaluations tab provides managers of phone based teams with the functionality to easily create evaluations that can be applied to recordings and to quickly view statistics based upon the created evaluations. Evaluations can be created for a multitude of business reasons including the following:

- Training
- Performance monitoring
- Script development and adherence monitoring
- Process adherence

The Evaluations Dashboard provides you with a real-time view of evaluations data including information about the most frequently used evaluations, which call handlers are being evaluated, the call handlers average confidence score, the average confidence score of the evaluations being used, etc. The dashboard is divided into the following four charts that give you a pictorial and data overview of how the evaluations are being used:

- Average Score by Evaluation Form - displays the top 5 most used evaluation forms sorted by average score
- Call Handler Trend - displays the top 10 most evaluated call handlers over time
- Call Handler Average - displays the average score, by call handler, over the selected date range
- Call Evaluation Grid - displays information for each completed evaluation, by call handler. The grid is sortable by clicking on the headings. The default sort order is by evaluation date/time. The name of the evaluation, the evaluator, the date the evaluation was completed, and the call handler that was evaluated, and the overall score they received, are all displayed in the Call Evaluation Grid. The View link takes you to the completed evaluation to view the results.



An unlimited number of evaluations can be created with an unlimited number of questions. Evaluations should be carefully thought out prior to creation. Once an evaluation is released, it cannot be changed or deleted. It can, however, be cloned and the information in the cloned evaluation can be updated. Additionally, each question in an evaluation is assigned a weight or level of importance in relation to other questions in the evaluation. The questions that make up an evaluation must equal 100% before it can be released.

Note: The overall weight of an evaluation must equal 100% before it can be released and used in the application.

To begin the process of creating an evaluation, select the Form Designer tab and click New. Enter the appropriate information such as Evaluation Name, Type, Description, and whether or not the evaluation is active. Click Save to add the evaluation to the list of Evaluations. Once it is saved, you are now ready to begin adding categories and questions. Select Add Category, enter a descriptive name, and click Save. Select Add Question and enter the question as you want it to appear on the evaluation. Determine and enter the weight or level of importance in relation to the other questions for this question. You must enter or select at least one option to apply to the question. Options are essentially the evaluator's choices to the question.

Note: There cannot be more than five options under a question.

To select a predetermined option, hover the mouse over the Add Option link and select an option by clicking on the applicable Add link. To create your own list of options, click Add Option, enter the Option information (for example: very polite, extremely polite, etc.), and assign a score to the option. Save your work and continue adding questions and options as necessary to finish creating the evaluation.

Since creating an evaluation from “scratch” can be a tedious process, you can select from predefined templates and apply them “as is” or edit the categories and questions to better suit your needs. To create an evaluation using a template, select the applicable template from under the Evaluations Form Templates heading. If necessary, make any necessary additions or deletions to the template, including giving it a more meaningful name, and click Save.

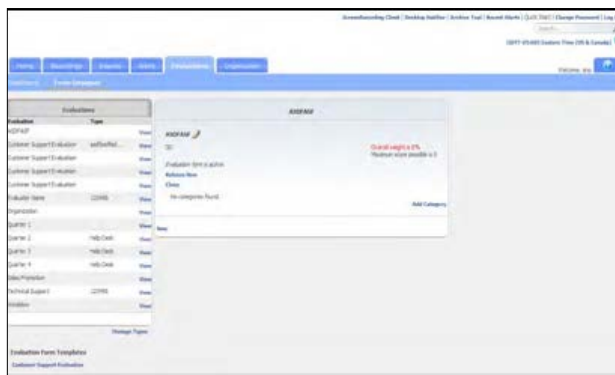
If there isn’t a template that meets your needs, odds are that one of the already created evaluations could. In that case, you can clone that evaluation and then make the necessary changes. Select the specific evaluation you wish to clone and select Clone. Make any necessary additions or deletions, including giving it a more meaningful name and click Save.

An evaluation will not be available for use from the Recorded Calls screen until it has been released. However, an evaluation cannot be released until it is complete and the overall weight is 100%. Once an evaluation is released, it cannot be edited. Evaluations are released from the Form Designer tab. Select the evaluation you wish to release by clicking the View link. Select Release Now and OK to the confirmation message.

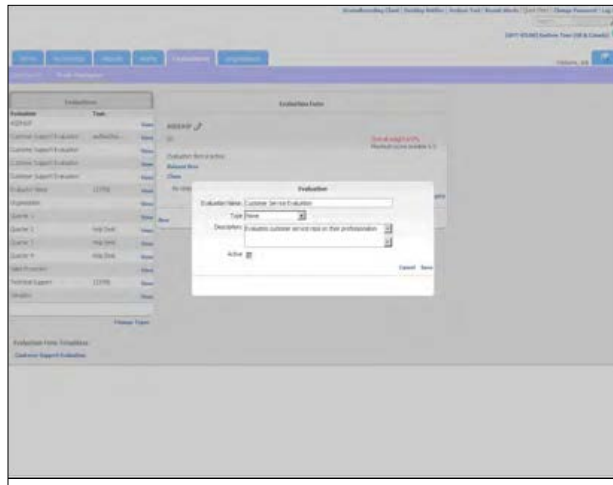
Since the list of evaluations can potentially get very large, you have the ability to apply an evaluation type to specific or all evaluations to essentially “categorize” them. To create a new evaluation type, click on the Form Designer tab and select the Manage Types link. Simply enter the name of the new evaluation type and select Add Type. Click on the Type heading to sort the evaluations in alphabetical order by type to make it easier to find what you are looking for.

Example: Creating a new evaluation

1. Click the **Evaluations** tab and select **Form Designer**.



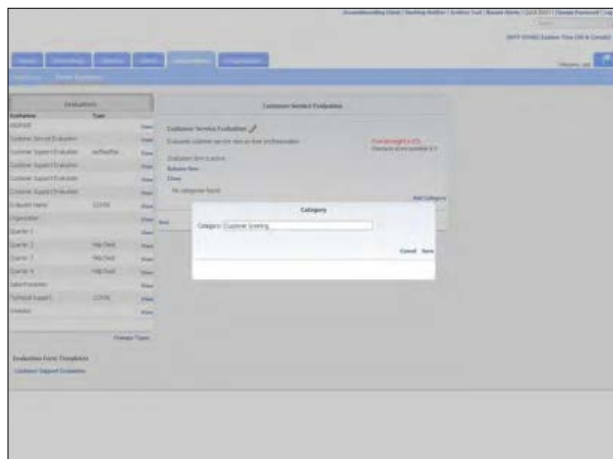
2. Select **New**.
3. Enter or select the following information:
 - Evaluation Name – **Customer Service Evaluation**
 - Description – **Evaluates customer service reps on their professionalism**



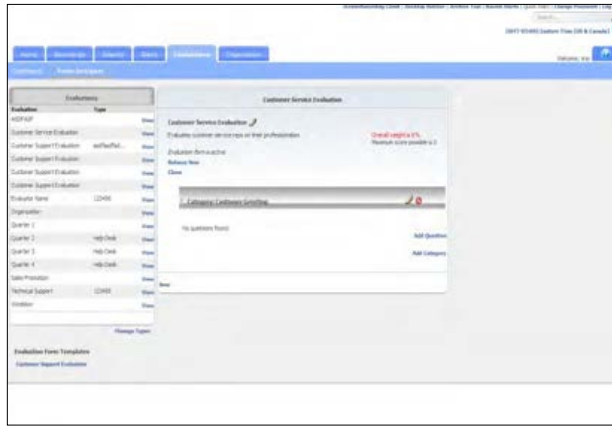
4. Click **Save**.



5. Select **Add Category**.
6. Enter or select the following information:
 - Category – **Customer Greeting**



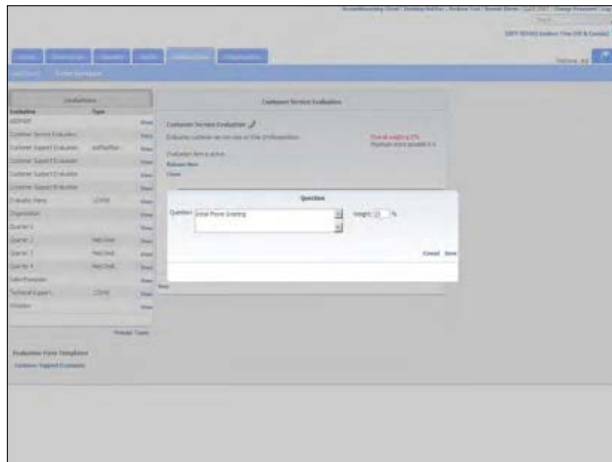
7. Click **Save**.



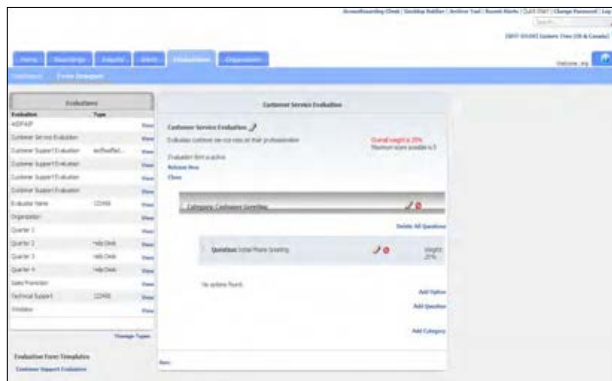
8. Select **Add Question**.

9. Enter or select the following information:

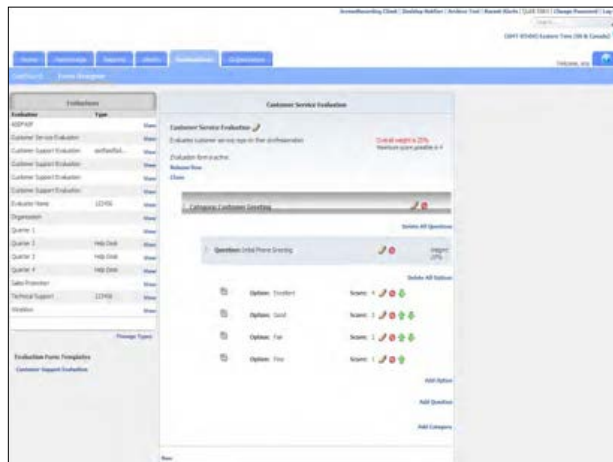
- Question – **Initial Phone Greeting**
- Weight –**25**



10. Click **Save**.



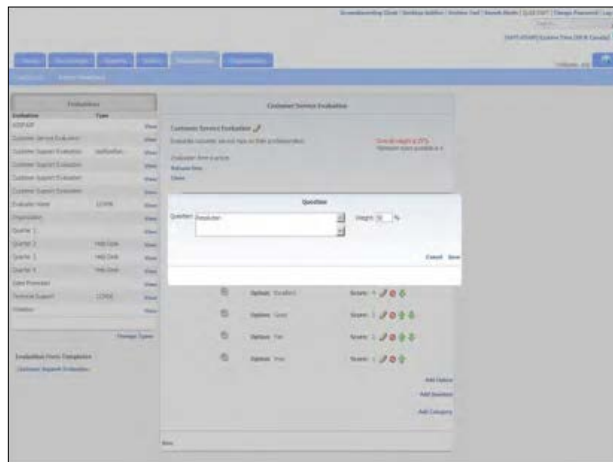
11. Hover over the **Add Option** link and select the **Add Quality Options** option.



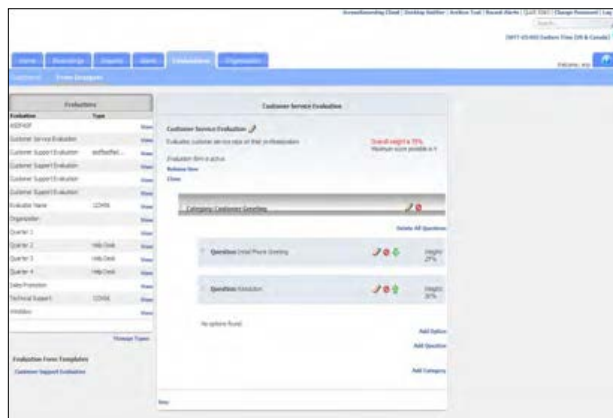
12. Select **Add Question**.

13. Enter or select the following information:

- Question – **Resolution**
- Weight – **50**



14. Click **Save**.

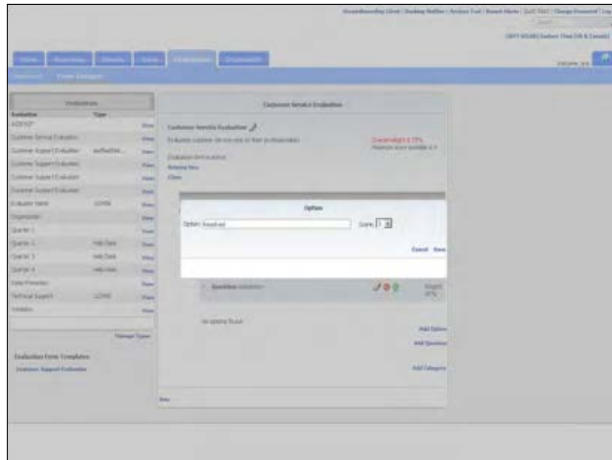


15. Click **Add Option** to create your own options.

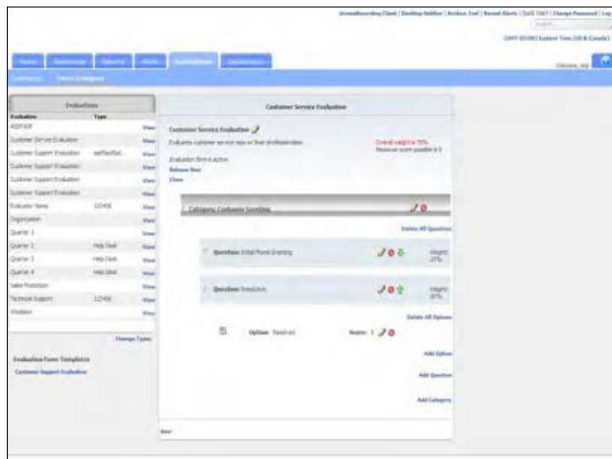
Note: There cannot be more than five options under a question.

16. Enter or select the following information:

- Option – **Resolved**
- Score - **5**



17. Click **Save**.

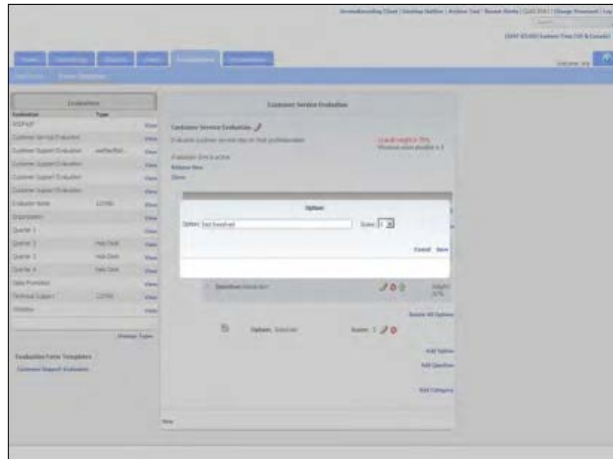


18. Click **Add Option** to create your own options.

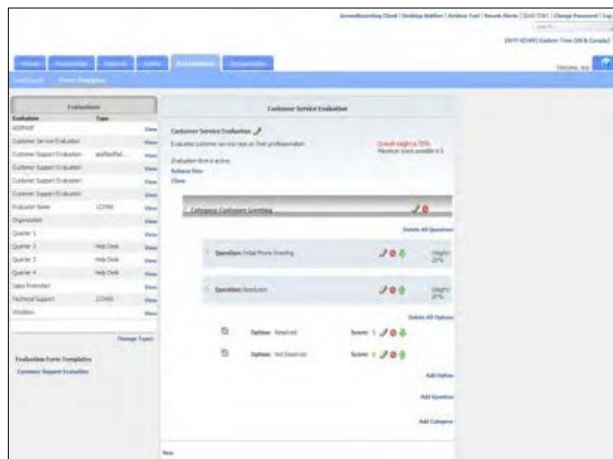
Note: There cannot be more than five options under a question.

19. Enter or select the following information:

- Option – **Not Resolved**
- Score - **0**

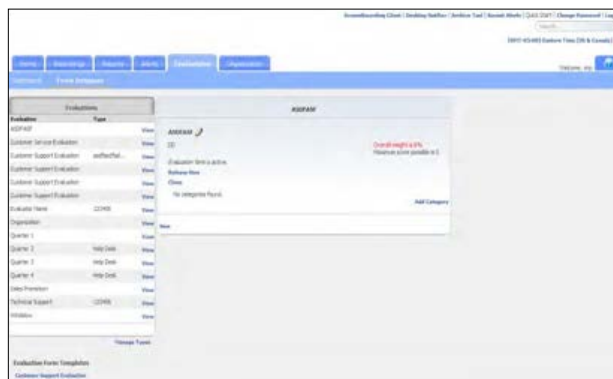


20. Click **Save**.

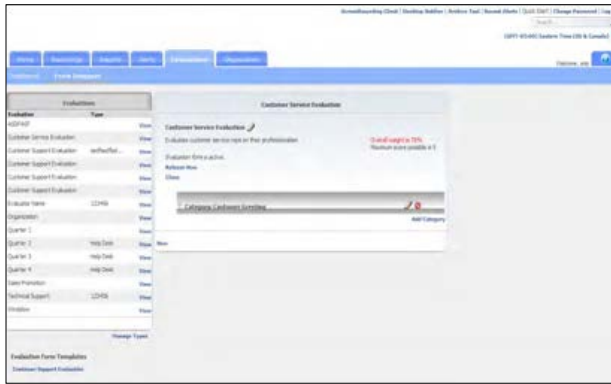


Example: Editing categories, questions, and options

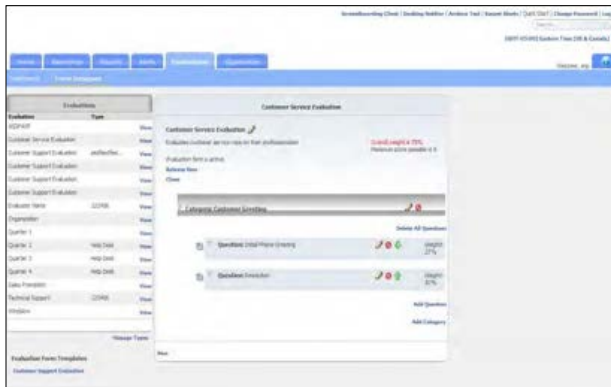
1. Click the **Evaluations** tab and select **Form Designer**.



2. Select **Customer Service Evaluation** from the Evaluations list and click **View**.



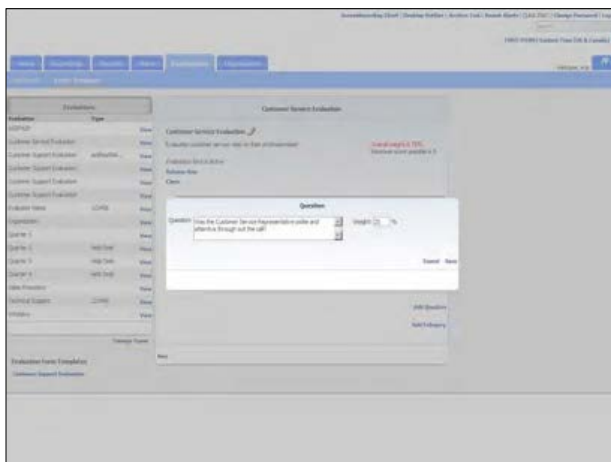
3. Click on the **Customer Greeting** category heading.



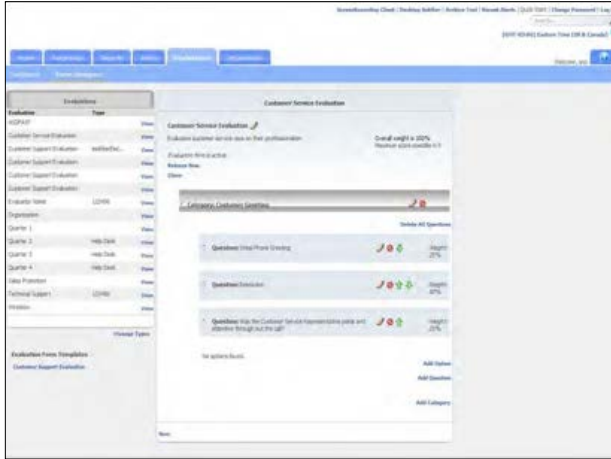
4. Select **Add Question**.

5. Enter or select the following information:

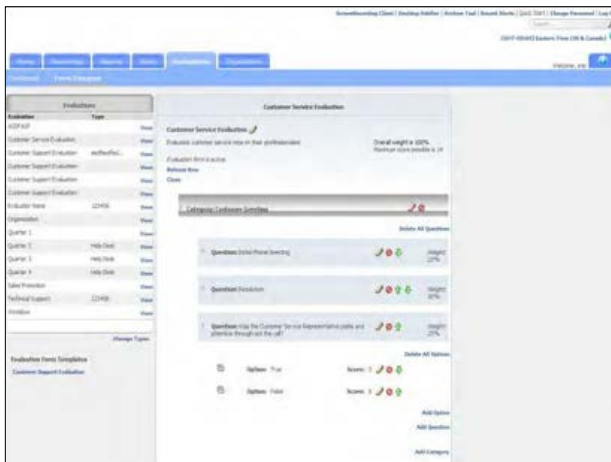
- Question – **Was the Customer Service Representative polite and attentive throughout the call?**
- Weight – 25




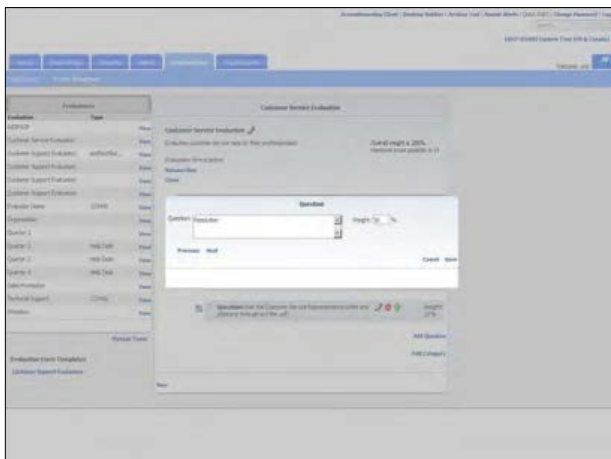
6. Click **Save**.



7. Hover over the **Add Option** link and select the **Add True False Options** option.

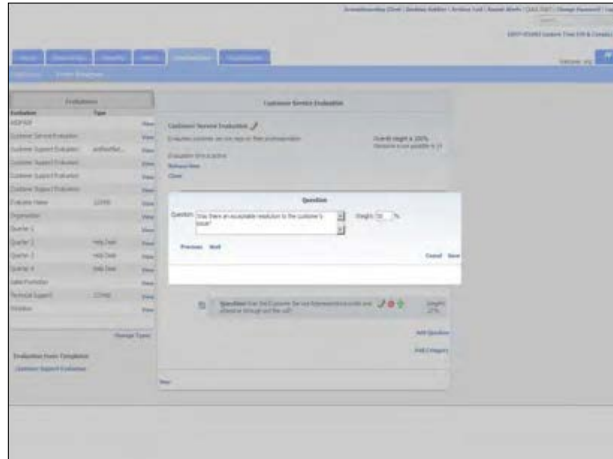


8. Select the  (Edit) button that corresponds to the Resolution question heading.

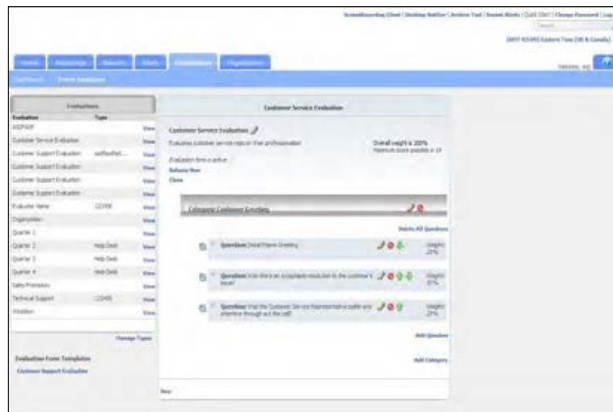


9. Enter or select the following information:

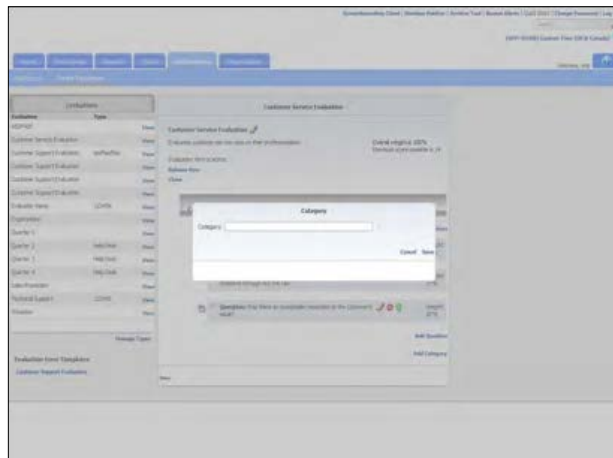
- Question – **Was there an acceptable resolution to the customer's issue?**



10. Click **Save**.

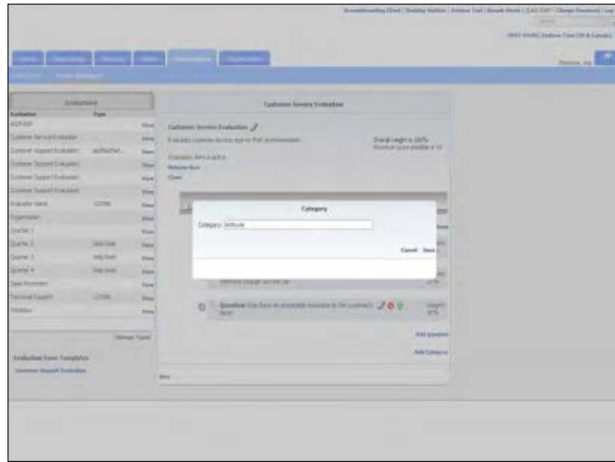


11. Select **Add Category**.



12. Enter or select the following information:

- Category – **Attitude**

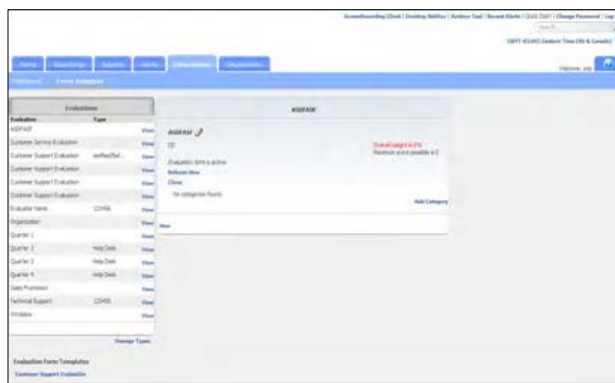


13. Click **Save**.



Example: Moving categories, questions, and options

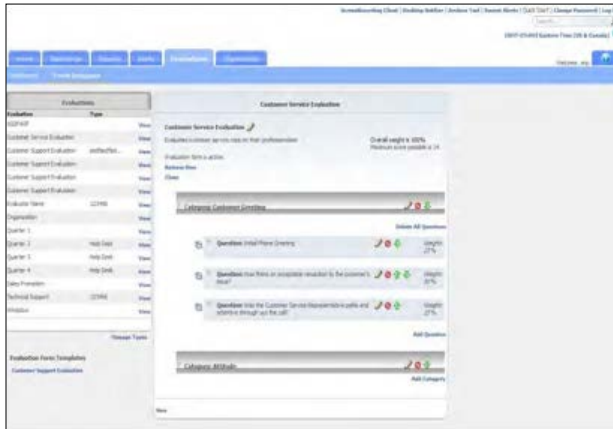
1. Click the **Evaluations** tab and select **Form Designer**.




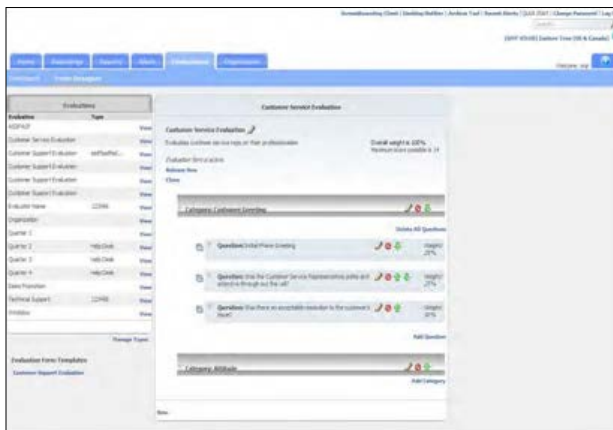
2. Select **Customer Service Evaluation** from the Evaluations list and click **View**.




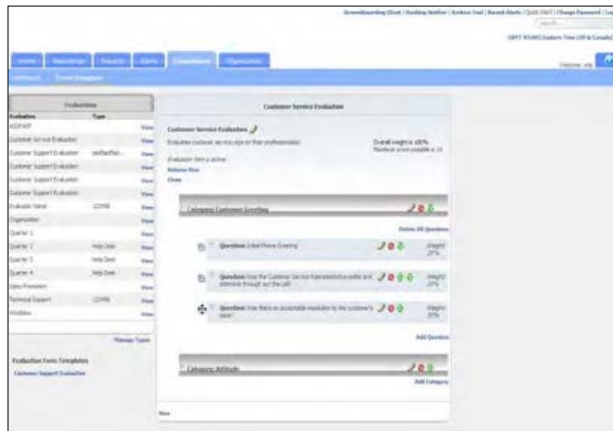
3. Click on the **Customer Greeting** category heading.



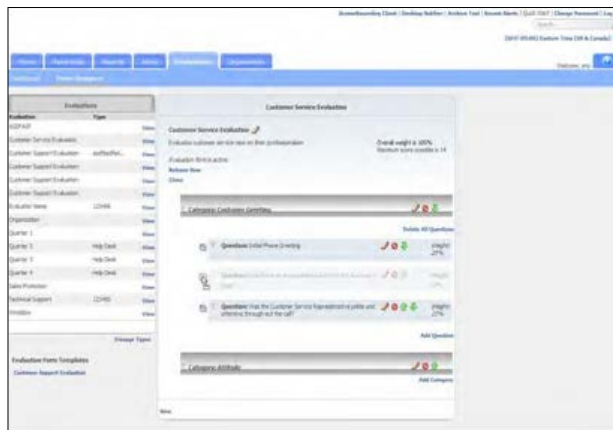
4. Click on the  (Move Down) button that corresponds to the "Was there an acceptable resolution to the customer's issue" question.



5. Hover over the  button that corresponds to the “Was there an acceptable resolution to the customer’s issue” question.

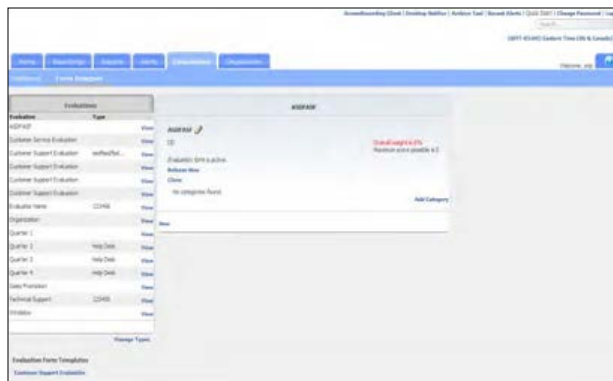


6. While holding the mouse down, drag-and-drop the option back to its original position.

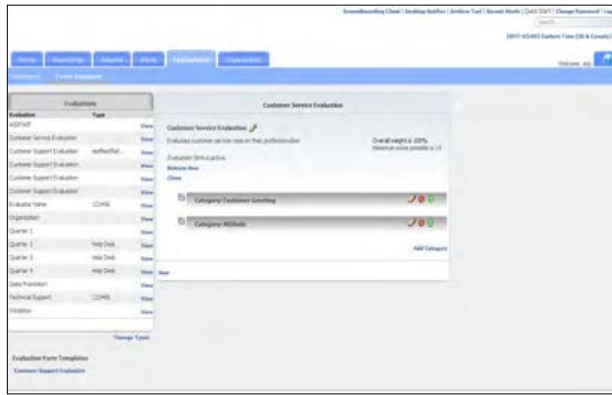


Example: Deleting categories, questions, and options

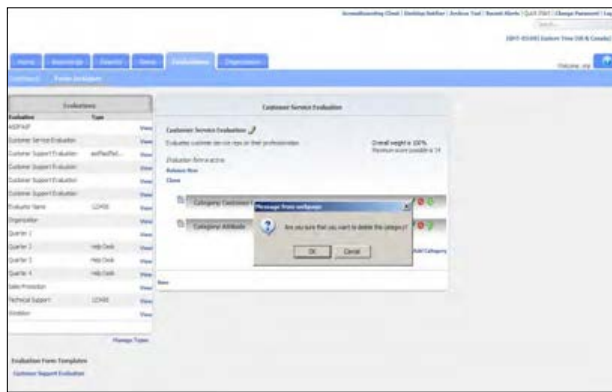
1. Click the **Evaluations** tab and select **Form Designer**.



2. Select **Customer Service Evaluation** from the Evaluations list and click **View**.

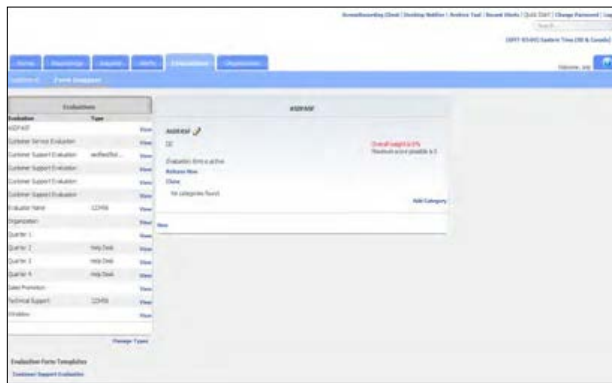


3. Select the (Delete) button that corresponds to the Attitude category.
4. Click **OK** to confirm the deletion.

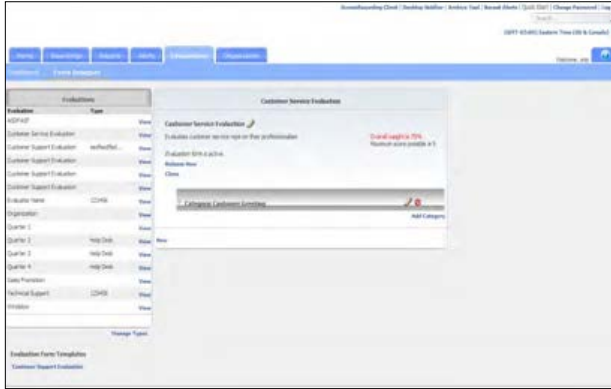


Example: Activating/Inactivating evaluations

1. Click the **Evaluations** tab and select **Form Designer**.

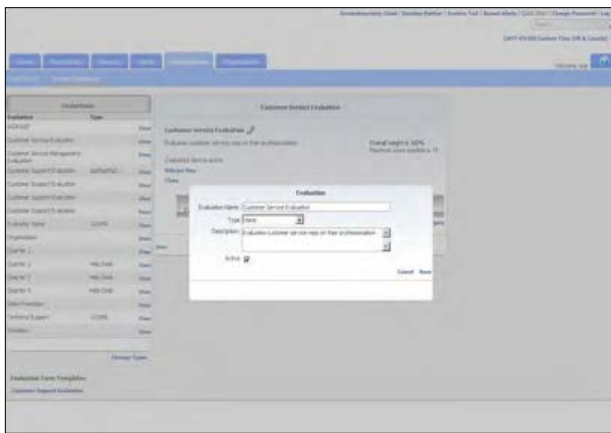


2. Select an evaluation from the Evaluations list and click **View**.

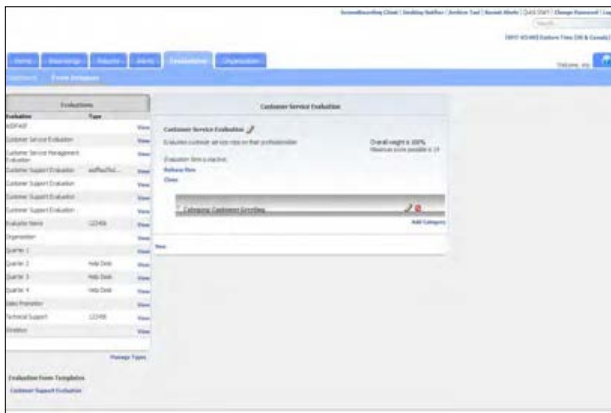



3. Select the  (Edit) button that corresponds to the Evaluation Name.

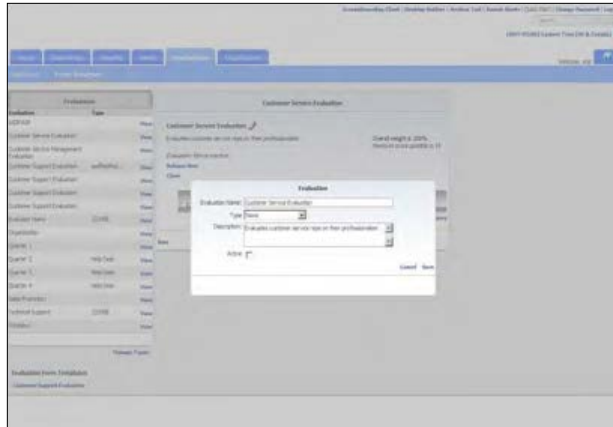
4. The **Active** option box should have a check in it indicating the evaluation is active. Click in the **Active** option box to remove the check.



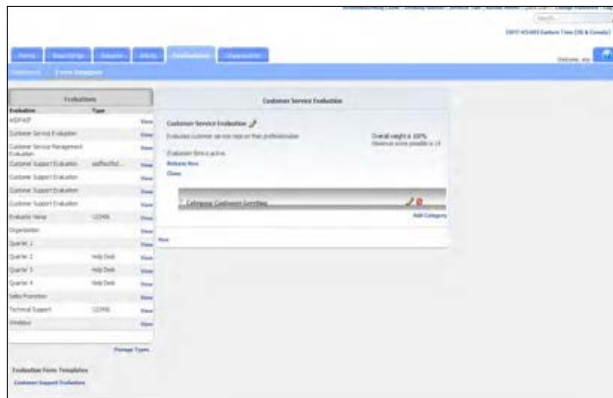
5. Click **Save** to apply the change and deactivate the evaluation.



6. Select the  (Edit) button that corresponds to the Evaluation Name.
7. The **Active** option box should not have a check in it indicating the evaluation is inactive. Click in the **Active** option box to add the check.

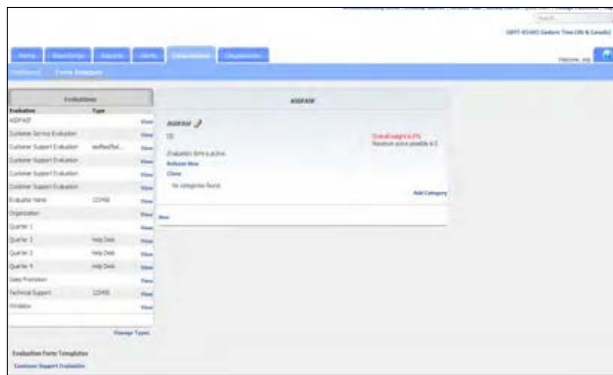


8. Click **Save** to apply the change and activate the evaluation.

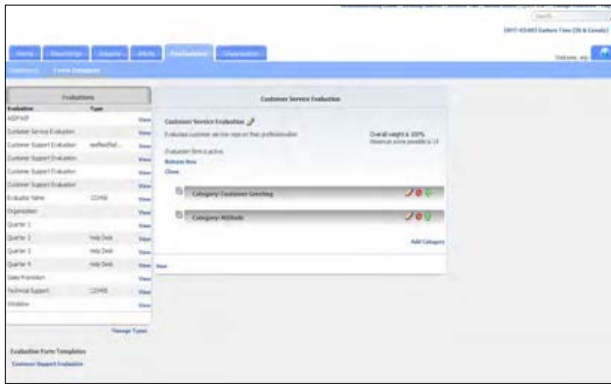


Example: Cloning an evaluation

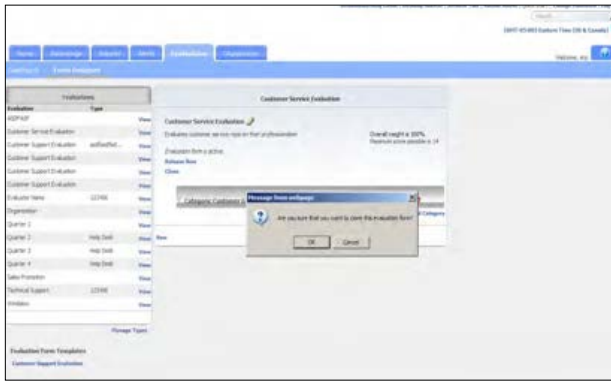
1. Click the **Evaluations** tab and select **Form Designer**.



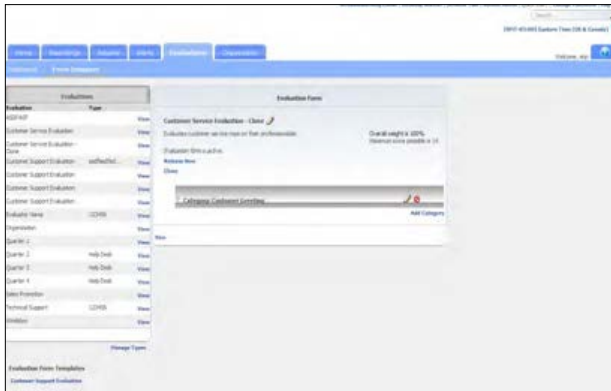
2. Select **Customer Service Evaluation** from the **Evaluations** list and click **View**.



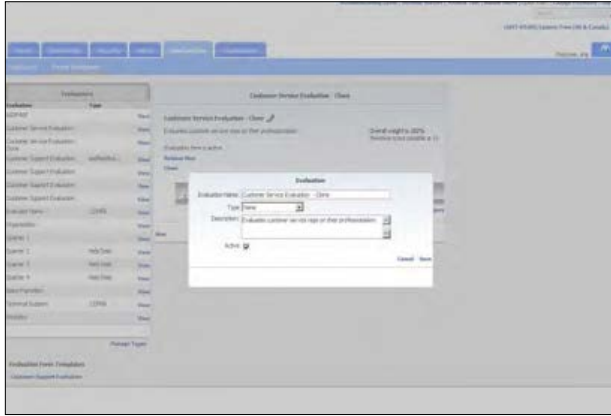
3. Select **Clone**.



4. Click **OK**.



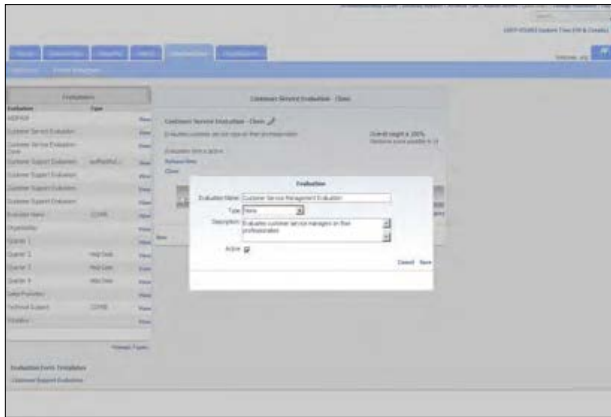
5. Select the  (Edit) button that corresponds to the Evaluation Name.



6. Enter or select the following information:

- Evaluation Name - **Customer Service Management Evaluation**
- Description - **Evaluates customer service managers on their professionalism**

7. Click **Save**.

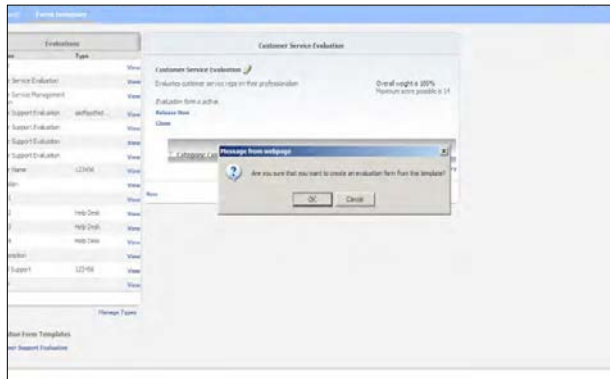


Example: Creating an evaluation from the Evaluation Form Templates

1. Click the **Evaluations** tab and select **Form Designer**.

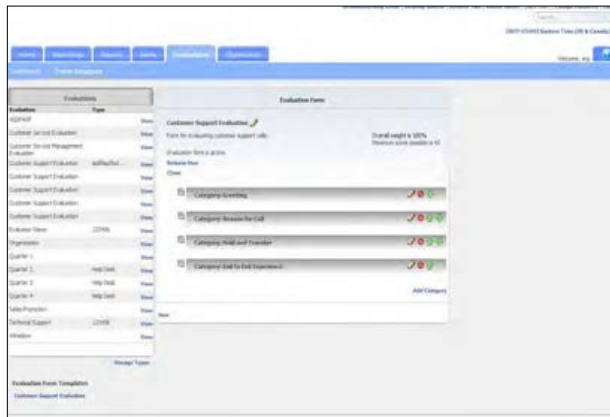


2. Select **Customer Support Evaluation** link from under the Evaluation Form Templates heading.



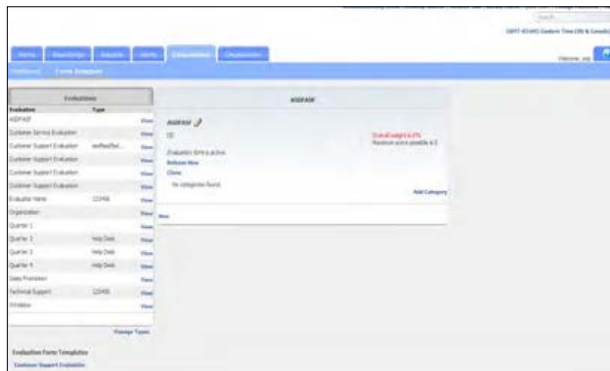
3. Click **OK**.

Note: You can edit, delete, and add to the name, categories, questions and options to suit your needs.

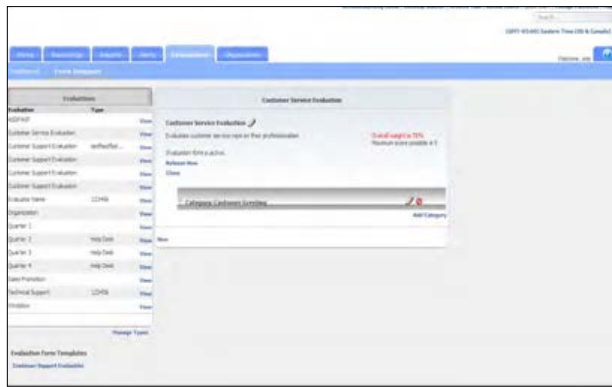


Example: Releasing an evaluation

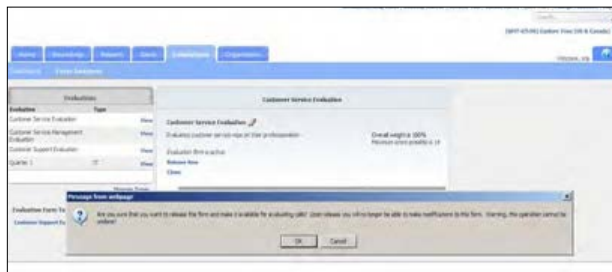
1. Click the **Evaluations** tab and select **Form Designer**.



2. Select **Customer Service Evaluation** from the Evaluations list and click **View**.

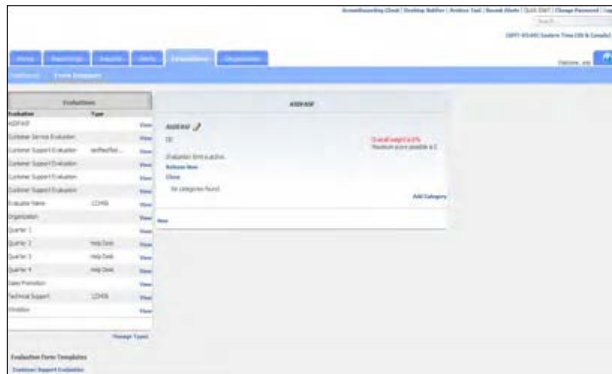


3. Select **Release Now**.
4. Click **OK**.

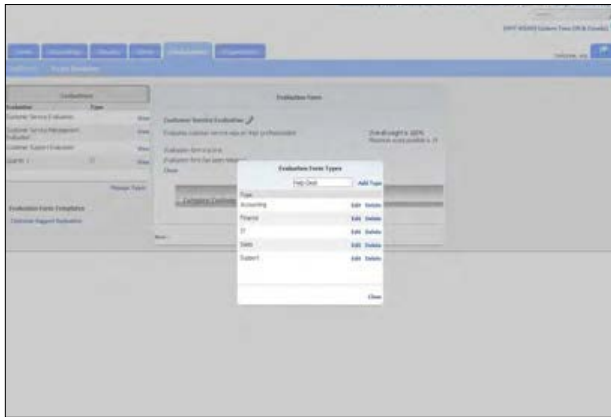


Example: Managing evaluation types

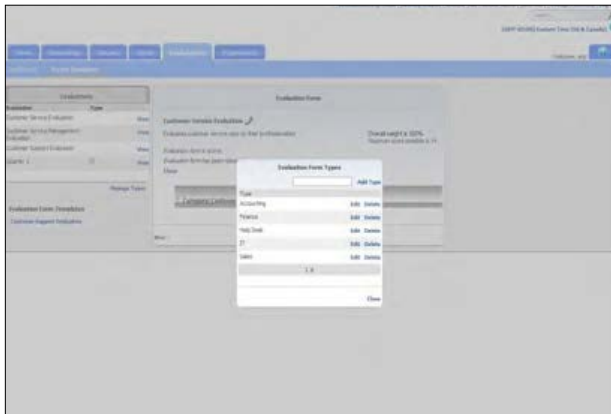
1. Click the **Evaluations** tab and select **Form Designer**.



2. Select **Manage Types**.
3. Enter or select the following information:
 - Type – **Help Desk**

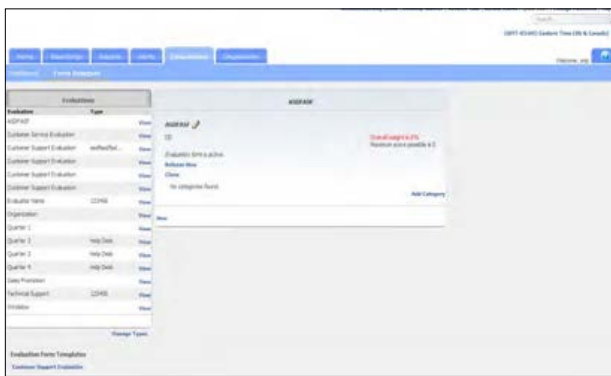


4. Select **Add Type**.
5. Click **Close**.




Example: Assigning evaluation types

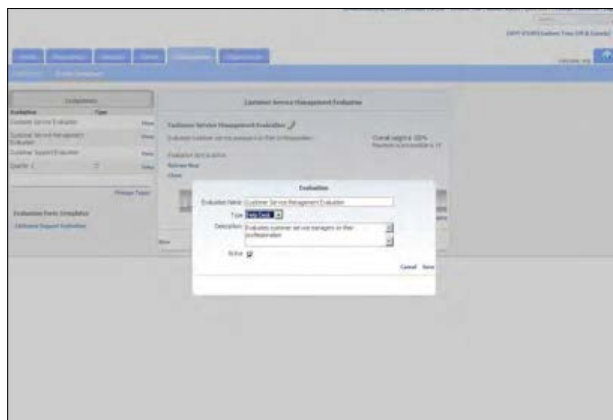
1. Click the **Evaluations** tab and select **Form Designer**.



2. Select **Customer Service Management Evaluation** from the **Evaluations** list and click **View**.

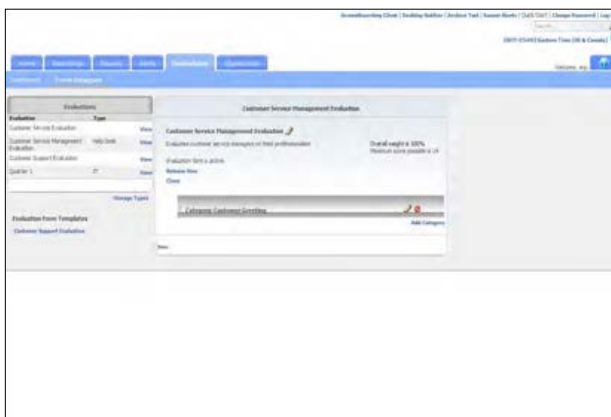


3. Select the  (Edit) button that corresponds to the Evaluation Name.
4. Enter or select the following information:
 - Type – **Help Desk**
5. Click **Save**.

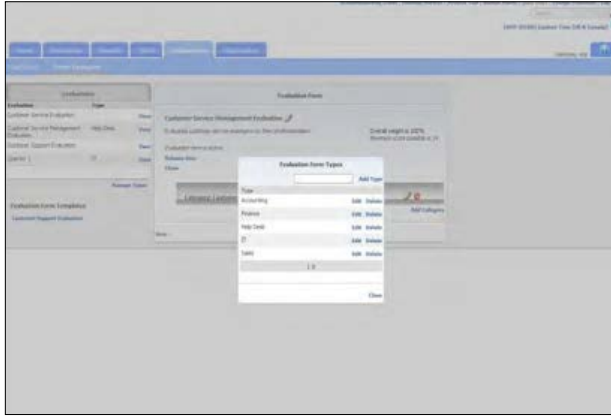


Example: Editing evaluation types

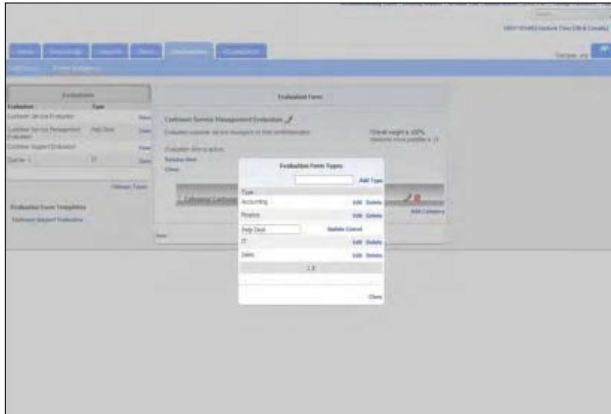
1. Click the **Evaluations** tab and select **Form Designer**.



2. Select **Manage Types**.

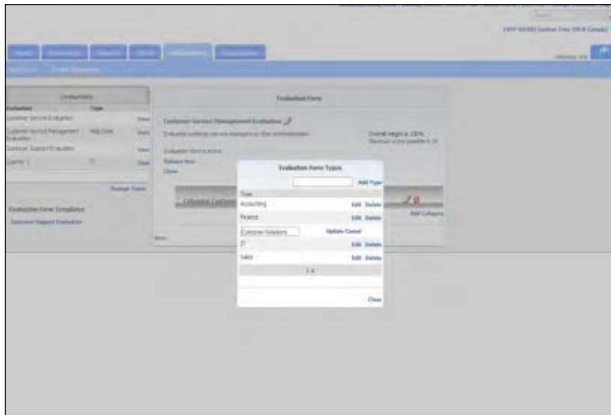


3. Select the Help Desk **Edit** link.

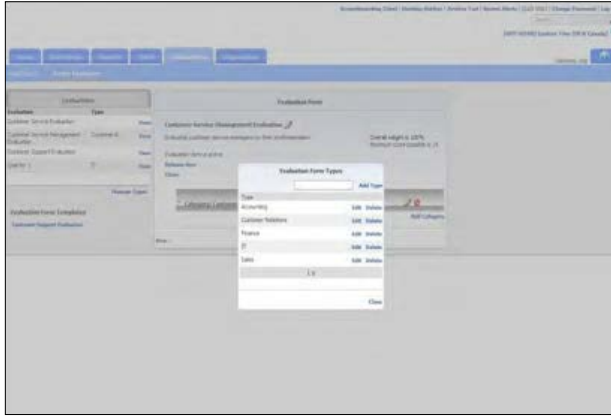


4. Enter or select the following information:

- Type – **Customer Relations**



5. Click **Update**.

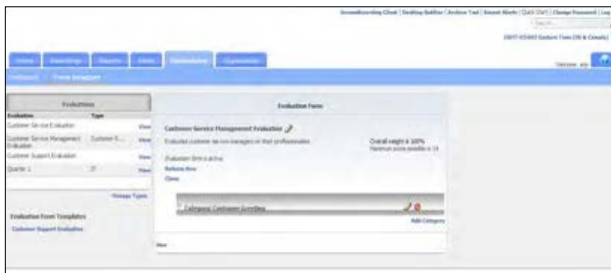


6. Click **Close**.

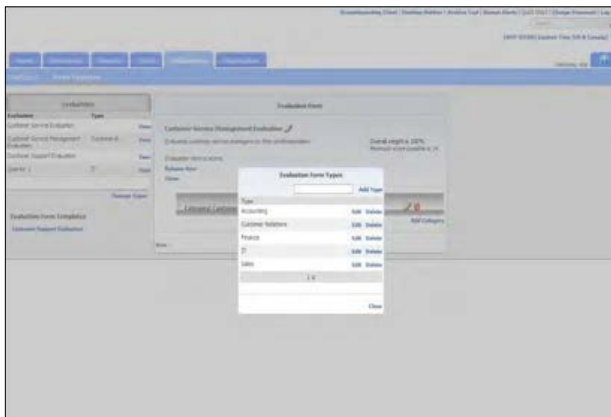


Example: Deleting evaluation types

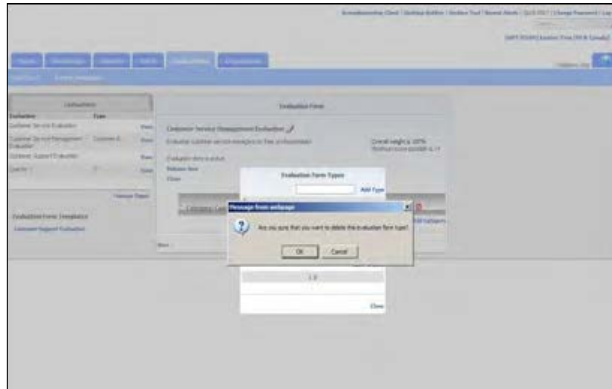
1. Click the **Evaluations** tab and select **Form Designer**.



2. Select **Manage Types**.



3. Select the Customer Relations **Delete** link.
4. Click **OK** to confirm the deletion.
5. Click **Close**.

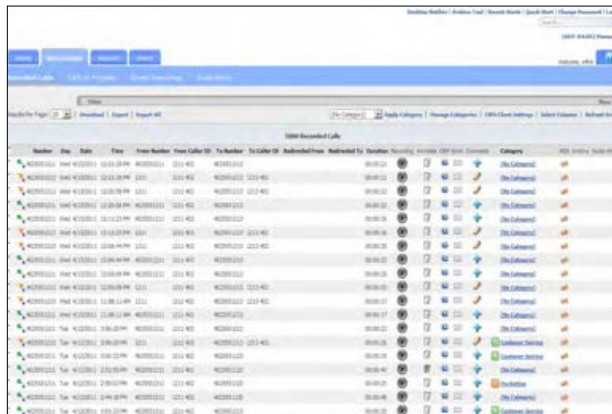


Search

The Search feature allows you to search any part of the call record (Number, Duration, Time, Comments, etc.) on the Recorded Calls screen in order to find a specific call record. For example: if there are 10 pages of recorded call files on the Recorded Calls screen, and you need to find a specific call record that you know has a comment associated with it that has the word training in it, you can search for that word to find that call record.

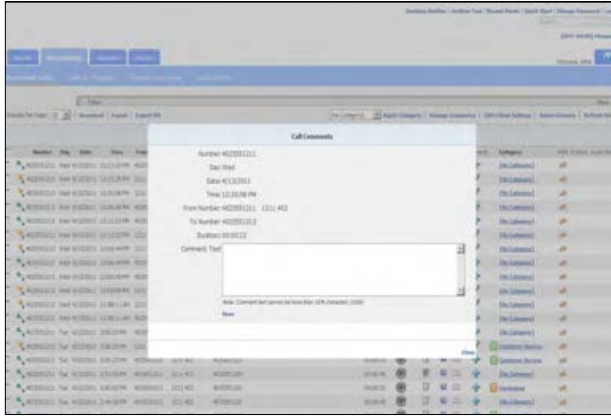
Example: Searching call records

1. Click the **Recorded Calls** button.



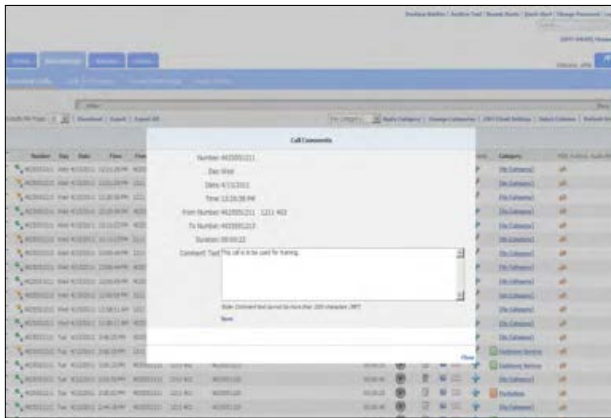
Number	Time	From Number	Area Code	To Number	To Caller ID	Call Status	Call Duration	Call Type	Call Category
416-223-1234	11:00:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:01:23	Outbound	Customer Service
416-223-1234	11:01:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:01:15	Outbound	Customer Service
416-223-1234	11:02:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:01:10	Outbound	Customer Service
416-223-1234	11:03:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:01:05	Outbound	Customer Service
416-223-1234	11:04:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:01:00	Outbound	Customer Service
416-223-1234	11:05:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:00:55	Outbound	Customer Service
416-223-1234	11:06:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:00:50	Outbound	Customer Service
416-223-1234	11:07:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:00:45	Outbound	Customer Service
416-223-1234	11:08:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:00:40	Outbound	Customer Service
416-223-1234	11:09:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:00:35	Outbound	Customer Service
416-223-1234	11:10:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:00:30	Outbound	Customer Service
416-223-1234	11:11:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:00:25	Outbound	Customer Service
416-223-1234	11:12:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:00:20	Outbound	Customer Service
416-223-1234	11:13:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:00:15	Outbound	Customer Service
416-223-1234	11:14:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:00:10	Outbound	Customer Service
416-223-1234	11:15:00	416-223-1234	416	416-223-1234	416-223-1234	Completed	00:00:05	Outbound	Customer Service

2. Select a recorded call file and click on the +



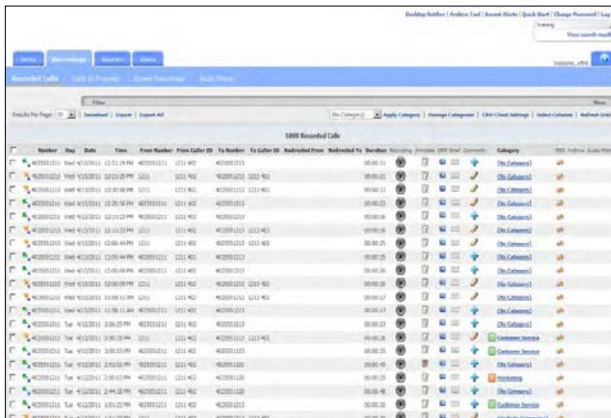
3. Enter the following information:

- Comment – **This call is to be used for training**



4. Click **Save**.

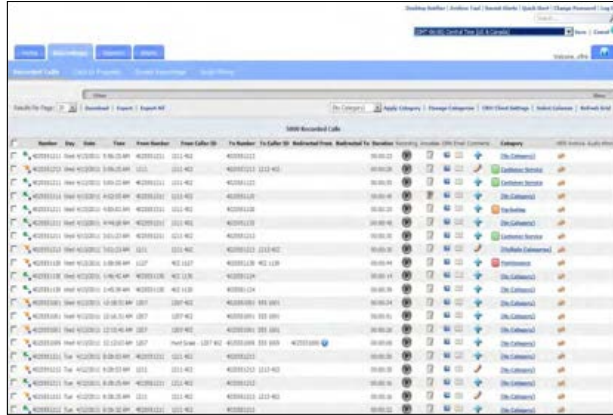
5. Type the word **training** in the Search field.



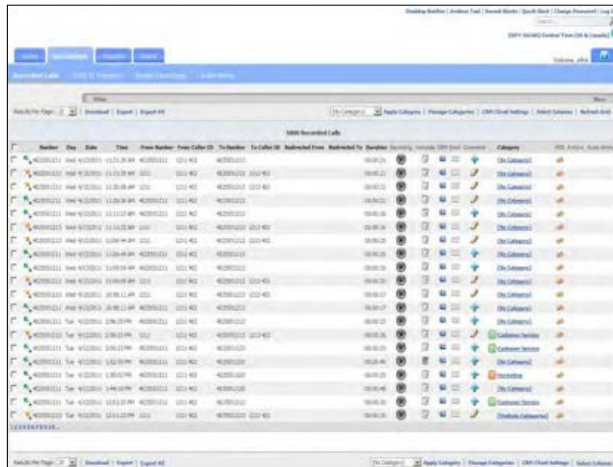
6. Click **View Search Results**.



- Click on the time zone link and select the following from the drop-down menu:
 - Time Zone – (GMT-06:00) Central Time (US & Canada)



- Click **Save**. Notice that the time and date (if applicable) change on the Recorded Calls screen.



Desktop Notifier

The Desktop Notifier is an external application that allows the User to receive automated notifications of new incoming alerts. It then picks up on what call the alert is associated with, and enables you to playback the call, associate a category with the call, save the call (if it is still in progress), and write up comments for the call.

Note: When using Windows 8, you must run Desktop Notifier as an administrator.

The following describes how to download the Desktop Notifier via the End User Interface. For information about how to use the application, refer to the Desktop Notifier Online Help found within the application.

Example: Downloading the Desktop Notifier

1. Click the **Desktop Notifier** link.



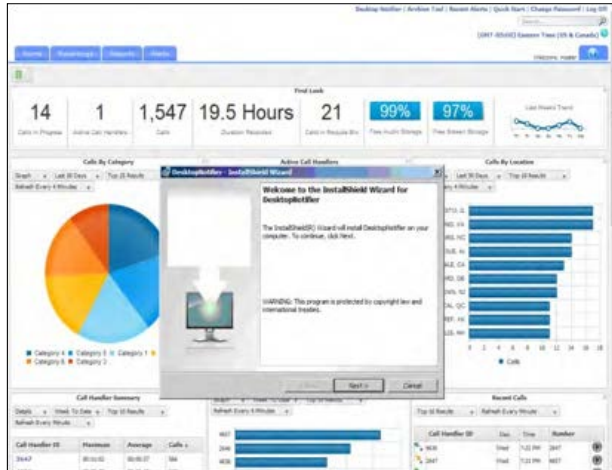
2. Click **Run**.



3. Click **Run**.



4. Select the defaults for each screen in the wizard.



Archive Tool

The Archive Tool allows users to archive call recordings to ISO images. These image files can be burned to CD/DVD at the convenience of the user.

The following describes how to download the Archive Tool via the End User Interface. For information about how to use the application, refer to the *Primus HPBX Call Recording Archive Tool Quick Start Guide*.

Example: Downloading the Archive Tool

1. Click the **Archive Tool** link in the upper-right corner of the screen.



2. Click **Save**.



3. Click **Run**.

4. Select the defaults for each screen in the wizard.

For further details about the Archive tool's installation and use, please refer to the Primus HPBX Call Recording Archive Tool Quick Start Guide.



Screen Recording Client

The Screen Recording Client is an external application that captures the call handler's desktop and records the actions taken by them in order to satisfy their customer call. In order to access the screen recording functionality, the user must first download the client and then must have access, via the screen recording application features license.

Example: Downloading the Screen Recording Client

1. Click the **Screen Recording Client** link. If the link is not available, please contact Primus support to validate if you have subscribed to the appropriate add-on service option and to provide you with a copy of the installation file.



2. Double click on the **ClientRecorderSetupx32.exe** file.



3. Select the defaults for each screen in the wizard.

