

simplifi[®]



Simplifi Contact

Core: Call Recording

Account Add/Edit Page

Call recording is enabled on an account by a global admin only at Accounts > Edit Account

Once call recording is enabled by a global admin user, you can see the status of the feature at the Accounts > Edit Account page, and toggle the type of call recording they want enabled on the account.

The screenshot displays the 'EDIT ACCOUNT - ABSOLUTE HVAC' page. At the top, there's a breadcrumb 'JUNTS > EDIT ACCOUNT'. The main title is 'EDIT ACCOUNT - ABSOLUTE HVAC'. Below this, there are two tabs: 'ACCOUNT STATUS' and 'PROVISIONING MODE'. The 'ACCOUNT STATUS' tab is active, showing an 'ACTIVATE ACCOUNT' button. The 'PROVISIONING MODE' tab is also visible. Below the tabs, there's a 'GENERAL' section. The 'PROVISIONING' section shows fields for '*Realm:', 'FTP Host:', 'FTP Username:', and 'FTP Password:', along with a 'RESET PASSWORD' button. The 'VOIP FEATURES' section is expanded, showing a list of features with toggle switches: Call Center (DISABLED), Call Recording (DISABLED), Company Contacts (ENABLED), Dynamic CID (ENABLED), Fax Boxes (DISABLED), Mobile App (DISABLED), SMS (DISABLED), and Webphone (ENABLED).

CALL RECORDING PERMISSIONS (ACCOUNT LEVEL PORTAL USERS)

Call recording is a user permission at the account portal level.

None Permission

The left hand "Call Recording" Navigation is hidden under VoIP

In the call history report, there are no red dots presented to the user even if there is a recording for the call

On the edit device user screen, no information about enabled/disabled recording types is displayed

On the add/edit group screen, no information about enabled/disabled recording types is displayed

On the edit PBX screen, no information about enabled/disabled recording types is displayed

Read Only Permission

Makes the portal user eligible for additional call recording permissions

portal user is visible in the call recording permissions 'portal users' list

Portal user will have the permissions defined in the call recording permissions for the device users selected.

In the call history report, there are red dots presented to the user indicating that a specific call was recorded

Only shows the red dot if the portal user has permission to that device user's call recordings

Left hand navigation of Call Recording under VoIP is visible

Sub page File Access is Visible

On the add/edit device user screen, the call recording toggles will be hidden

On the add/edit group screen, the inbound call recording toggle will be hidden

On the add/edit PBX screen, the call recording toggles will be hidden

Full Permission

Left hand navigation of Call Recording under VoIP is visible

Sub page File Access is Visible

Sub page device user status is visible

Unable to be edited - informational only

Sub Page Recording Permissions left hand navigation under account level > VoIP > call recording > Recording Permissions will be visible to this user, and they will be able to edit all portal users' call recording permissions

In the call history report, there are red dots next to all recorded calls that the user has access to

On the add/edit group screen, the inbound call recording toggle will be visible

On the add PBX screen, the call recording toggles will be hidden

The add/edit device user screen does not display the call recording toggles

Device Users

Call recording can be enabled and disabled at the device user. There will be three potential toggles dependent on what types of call recording are enabled on the account.

1. Record Outbound Calls

Disabled by default.

When enabled, any outbound calls made by this device user are recorded.

2. Record Inbound Calls.

Disabled by default.

When enabled, any inbound calls made to this device user are recorded.

3. Dynamic Call Recording.

Disabled by default.

When enabled, a dynaflow will be added to the device user that allows them to start and stop a call recording whenever they want.

*1 - During an active call, a user can dial *1 and call recording will start.

*2 - During an active, recorded call, a user can dial *2 and call recording will stop.

WELCOME MIKE HALEY

HOME > VOIP > DEVICE USERS > EDIT DEVICE USERS

VOIP FINANCE REPORTS SI

EDIT DEVICE USER - MIKE HALEY

USER INFORMATION

*First Name: Mike
 *Last Name: Haley
 *Email Address: [redacted]
 *Timezone: (UTC-05:00) Eastern Time
 *Extension Number: [redacted]
 Enable Agent Status: NO

ID: 106162
 Modified: 01/15/2021 @ 1:21 PM
 Created: 12/09/2020 @ 3:54 PM

FEATURES

VOICEMAIL
 Voicemail: ON Mike Haley
 Voicemail to Email: ON
 Additional Emails: [redacted]

COMPANY DIRECTORY
 Add to Company Directory: YES
 *When Found: Device User Mike Haley

MISCELLANEOUS
 Add Conference: NO
 SMS: ON
 Mobile App: ENABLED
 Mobile Presence: YES
 Web Phone: ON

HOT DESKING
 Hot Desking: DISABLED

CALL RECORDING
 Inbound Call Recording: ENABLED
 Outbound Call Recording: DISABLED

CALL LOGIC

INBOUND CALLS
 Reset Caller ID: NO

OUTBOUND CALLS
 No special characters are permitted.

Groups

1. Toggle for inbound call recording.
2. When Call Recording is enabled the only group type available is Device Users.
3. The only available device users are device users that either have inbound call recording enabled, dynamic call recording enabled, or both enabled File Retrieval

File Retrieval

Call recordings are retrieved from the account level > voip > call recording > File Access page. The only calls displayed are calls to/from device users that the current portal user has access to view.

This page has the same searches as the call history report including the device user. The user drop down is only populated with device users to which this portal user has access.

There are 6 possible actions, and their visibility depends on the portal user's call recording permissions for each user.

1. **Bookmarks**
2. **Share** - This will bring you to the sharing page for the call recording. On this page you can set up sharing parameters for various users, each with their own access definitions.
3. **Lock** - When a recording is locked
 - The lock will turn green.
 - You can click the lock icon again to unlock.
 - The delete red ex is hidden.
 - The file purge script will skip these files.
 - The FTP cleanup script will skip these files
4. **Download** - When clicked the user will download the call recording file.
5. **Delete** - Click to delete the recording. A pop up window will appear to confirm deletion, and the user will have to type in the word 'DELETE'. When a call recording is deleted, it will be indicated as such here as well. The user that deleted the recording as well as the time/date of deletion will be tracked in our database. Deleted recordings state that they have been deleted in the list view.

6. Notes - When a recording has a note, the notes icon will display green. When you mouse-over the notes icon (when there are notes associated with the recording), a tool-tip type popup appears showing the note content. When you click notes, you are moved to another page that lists:

- The specific call row.
- The call recording filename.
- Notes text box.

Labels box

- If no label like that has been used before, it will add it when the user saves the note on the recording.
- Each user on each account will have their own set of labels.

E911 Registration

PBX Connector

Device Users

Devices

Virtual Extensions

Voicemail Boxes

Fax Boxes

Time Of Day Routing

Menus

Groups

Media

Conferences

Holiday Routing

Blacklist

DISA

Search:

Direction:

Device User:

Show:

Start:

End:

ALL RECORDINGS

FILTER

Page 1 of 1 (6 Records)

DATE	FROM (CALLER ID)	TO (CALLER ID)	DURATION	USER	ACTIONS
Jan 26 2021 07:27:11 PM	3101 (Jon Whyte)	(586) 298-0193 (5862980193)	00:00:19	Jon Whyte	▶ 0:00 / 0:18
Jan 25 2021 11:59:12 AM	3101 (Jon Whyte)	1001 (Nick Shevillo)	00:00:51	Jon Whyte	▶ 0:00 / 0:51
Jan 25 2021 11:52:24 AM	3101 (Jon Whyte)	(239) 565-3909 (2395653909)	00:01:48	Jon Whyte	▶ 0:00 / 1:47
Jan 25 2021 11:51:04 AM	3101 (Jon Whyte)	(239) 860-4279 (2398604279)	00:02:15	Jon Whyte	▶ 0:00 / 1:59
Jan 22 2021 02:20:27 PM	3101 (Jon Whyte)	1007 (Keith Ellingson)	00:06:13	Jon Whyte	▶ 0:00 / 6:15

ADD NOTES

Date: 05/13/2016 @ 2:43 PM
 From: Awesome Dude - +14848001899
 To: 6103162541 - (610) 316-2541
 File: /call_recording_M2EwZjRmYWQ3ODQ3YmQ3OGRmYTc4ZGRlYzc5YTJkMzI_.mp3
 Duration: 00:00:19

Note:

Labels:

[Cancel](#)

DELETE

SAVE

Account Level Call History Report

1. Calls that are recorded show a red dot in the call history report next to the Details link.
 - Only device users that the portal user has access to their recordings will show the icon on the call history report.
 - The red dot icon will indicate that there is an existing recording of the call.
2. Hovering over the red dot will yield a tool tip stating as much as well.
 - Calls that are not recorded have no red dot icon.

Call Detail Records

Call Records

Fax Records

Archived Records

Call Center

Registrations

Extensions

Feature Codes

Account Metrics

Path Usage

Call Volume

SMS Usage

Collapse Menu

CALL RECORDS

★ ADVANCED EXPORT

Search: Device User: Direction:

Start: End: Call Type: ☐ EXTERNAL Show Branches: ☐ NO

FILTER

Page 1 of 8 (80 Records)

DATE	FROM (CALLER ID)	TO (DIALED NUMBER)	OWNER	DURATION	HANGUP CAUSE	ACTIONS
Jan 27 2021 04:32:55 PM	(352) 623-2600 (SIMPLIFI)	(239) 919-8551 (2399198551)	Keith Ellingson	00:00:16	NORMAL_CLEARING	
Jan 27 2021 02:51:04 PM	(352) 623-2600 (SIMPLIFI)	(248) 890-0806 (2488900806)	Shane Switzer	00:00:09	ORIGINATOR_CANCEL	
Jan 26 2021 09:59:42 PM	(352) 569-0880 (BICE JANE)	(352) 623-2600	N/A	00:00:07	NORMAL_CLEARING	
Jan 26 2021 07:27:12 PM	(352) 623-2600 (SIMPLIFI)	(586) 298-0193 (5862980193)	Jon Whyte	00:00:18	NORMAL_CLEARING	
Jan 26 2021 07:24:16 PM	(352) 623-2600 (SIMPLIFI)	(352) 623-2672 (3526232672)	Jon Whyte	00:00:00	ORIGINATOR_CANCEL	
Jan 26 2021 07:24:13 PM	(352) 623-2600 (SIMPLIFI)	(352) 623-2672 (3526232672)	Jon Whyte	00:00:03	USER_BUSY	
Jan 26 2021 11:38:31 AM	(352) 623-2600 (SIMPLIFI)	(313) 879-9786 (3138799786)	Jon Whyte	00:00:03	ORIGINATOR_CANCEL	

Call Recording Status Page

Status Page is located at account level > voip > call recording > Device User Status. This page will list all device users as rows. It is a summary of the account's device user's call recording settings.

1. In each you will have an ENABLED/DISABLED slider that will show current status, and you will be able edit all users on one page.
2. There is a potential for 3 toggles per device user dependent on what type of call recording is enabled on the account.

Expect updates to take some time to complete if editing many users at once.

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XIP > CALL RECORDING > DEVICE USER STATUS			
<input type="checkbox"/> Account Settings <input type="checkbox"/> Phone Numbers <input type="checkbox"/> E911 Registration <input type="checkbox"/> PBX Connector <input type="checkbox"/> Device Users <input type="checkbox"/> Devices <input type="checkbox"/> Virtual Extensions <input type="checkbox"/> Voicemail Boxes <input type="checkbox"/> Fax Boxes <input type="checkbox"/> Time Of Day Routing <input type="checkbox"/> Menus		<h3>EDIT DEVICE USER CALL RECORDING STATUS</h3>	
SEARCH <input type="text" value=""/> 10		Page 1 of 2 (12 Records) >	
DEVICE USER	INBOUND CALL RECORDING	OUTBOUND CALL RECORDING	
Jon Whyte	<input checked="" type="checkbox"/> ENABLED	<input checked="" type="checkbox"/> ENABLED	
Keith Ellingson	<input checked="" type="checkbox"/> ENABLED	<input checked="" type="checkbox"/> ENABLED	
Nick Shevillo	<input checked="" type="checkbox"/> ENABLED	<input checked="" type="checkbox"/> ENABLED	
Tod Williams	<input checked="" type="checkbox"/> ENABLED	<input checked="" type="checkbox"/> ENABLED	
Mike Haley	<input checked="" type="checkbox"/> ENABLED	<input type="checkbox"/> DISABLED	
Mark Hedstrom	<input checked="" type="checkbox"/> ENABLED	<input type="checkbox"/> DISABLED	
Matt Miller	<input checked="" type="checkbox"/> ENABLED	<input type="checkbox"/> DISABLED	

Call Recording Permissions

Call Recording Permissions page is located at account level > voip > call recording > Recording Permissions.

It is only visible to portal users with full access to call recording permission.

It lists all portal users who have read-only or full access to any call recording permission.

****NOTE**** Station users who have the call recording permission enabled will be displayed on this list as well, regardless of whether or not Core is enabled for the user.

1. Click on a user to detail their permissions.
 - b. First and last name.
 - c. Portal username.
 - d. Email address.
2. When a portal user name is clicked there will be 5 columns.
 - a. Device user - Lists all device users who currently have call recordings stored, or currently have any one of the call recording toggles enabled.
 - b. Bookmark - Gives the portal user the ability to add/edit bookmarks to the user's call recordings. Defaults to NO.
 - c. Share - Gives the portal user the ability to share the user's call recordings. Defaults to NO.
 - d. Download - Gives the portal user the ability to download that device user's call recordings. Defaults to NO.
 - e. Lock - Gives the portal user the ability to lock that device user's call recordings. Defaults to NO.
 - f. Delete - Gives the portal user the ability to delete that device user's call recordings. Defaults to NO.
 - g. Notes - Gives the portal user the ability to add/edit notes to that device user's call recordings. Defaults to NO.

- Account Settings
- Phone Numbers
- E911 Registration
- PBX Connector
- Device Users
- Devices
- Virtual Extensions
- Voicemail Boxes
- Fax Boxes
- Time Of Day Routing

CALL RECORDING PERMISSIONS

Page 1 of 1 (8 Records)

PORTAL USER	USERNAME	EMAIL
Jason Miller	jml	jml@company.com
Jon Whyte	jwhyte	jwhyte@company.com
Keith Ellingson	kellingson	kellingson@company.com
Mike Haley	mihaley	mihaley@company.com
Nick Shevillo	nshevillo	nshevillo@company.com
Shane Switzer	sswitzer	sswitzer@company.com
Taylor Strooboscher	tstrooboscher	tstrooboscher@company.com

- Account Settings
- Phone Numbers
- E911 Registration
- PBX Connector
- Device Users
- Devices
- Virtual Extensions
- Voicemail Boxes
- Fax Boxes
- Time Of Day Routing
- Menus
- Groups
- Media

EDIT CALL RECORDING PERMISSIONS - MIKE HALEY

DEVICE USER	BOOKMARK?	SHARE	DOWNLOAD?	LOCK?	DELETE?	NOTES?
Jon Whyte	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO
Keith Ellingson	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO
Keith Test	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO
Mark Hedstrom	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO
Matt Miller	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO
Mike Haley	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO
Nick Shevillo	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO
Taylor Strooboscher	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO
Tod Williams	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO
Unknown	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO	<input type="radio"/> NO

CALL RECORD SHARING

Sharing a call recording allows one user to extend the abilities of other users with that recording. The sharing user can not grant privileges beyond their own to any user. To access the share interface for a call recording simply click the share icon for the recording in the File Access list.

The share recordings screen is organized into 3 sections:

1. The share screen will be headed by the file information for the resource.

- Date - The date and time of the recorded call
- From - Origin of the recorded call
- To - Destination of the recorded call.
- Duration - Duration of the recording.
- File - The file name of the recording at its place of residence.

If there are existing shares of the recording, they will be listed in the Currently Shared With table along with details of their scope.

2. Each share will be defined by the following:

- Shared With - The user being granted privileges with the recording.
- Shared By - The user granting Privileges with the recording, and the creator of this specific share.
- Privileges - The privileges are defined by a red 'X' meaning the privilege is denied, and a green 'check mark' meaning that the privilege is granted to the "Shared With" user.
- Lock - The user can or can not lock the file. Locking the file would prevent other users from deleting the recording. In general it prevents the file from being moved from our server.
- Download - The user can or can not download the recording to their computer.
- Delete - The user can or can not delete the recording.
- Notes - The user can or can not add notes to the recording.
- Expires - If the sharer has set an expiration for the share, date and time of expiration will be shown here.
- Stop Sharing - The button is only available to the user that created the share (the "Shared By" user). The effect of this button is to cause immediate expiration of the share. There will be a pop-up prompting for confirmation.

3. Add Share(s) section has the tools necessary to create a share. To create a share you simply need to designate users to be shared with, and define the privilege and expiration of the share.

To designate users for the share simply drag users from the "Available Users" list to the "Selected Users" list.

To define the privileges of the share simply set the toggles on the right to enable/disable each respective privilege for the selected users. YES enables; NO disables.

- Expires: if No, the share will not expire until the share is manually stopped by the share creator. If YES, then input for Date and Time of expiration are revealed and must be provided.

You can define a share parameters for one or many users at a time this way. Once you have the share defined as you wish, click the UPDATE button to create it. A record of the share will be added to the "Currently Shared With" table per user.

SHARE RECORDINGS

Date: 01/26/2021 @ 7:27 PM
 From: Jon Whyte - 3101
 To: 5622980193 - (562) 298-0193
 Duration: 00:00:19
 File: call_recording_1611510416_1611510416_5622980193_from_3101.mp3

ADD SHARE(S)

AVAILABLE USERS

Find...

Jon Whyte

SELECTED USERS

Find...

Lock: ☐ NO
 Download: ☐ NO
 Delete: ☐ NO
 Notes: ☐ NO