CLOUD Recording Service

User Guide

(Version 2.0.1)

CLOUD RECORDING SERVICE

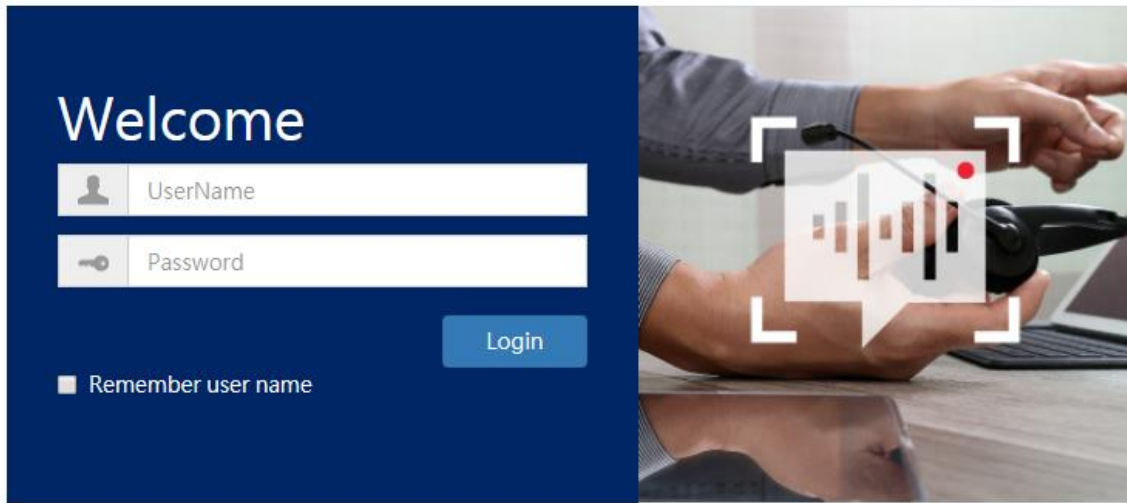Table of Contents

1   Login Web Portal

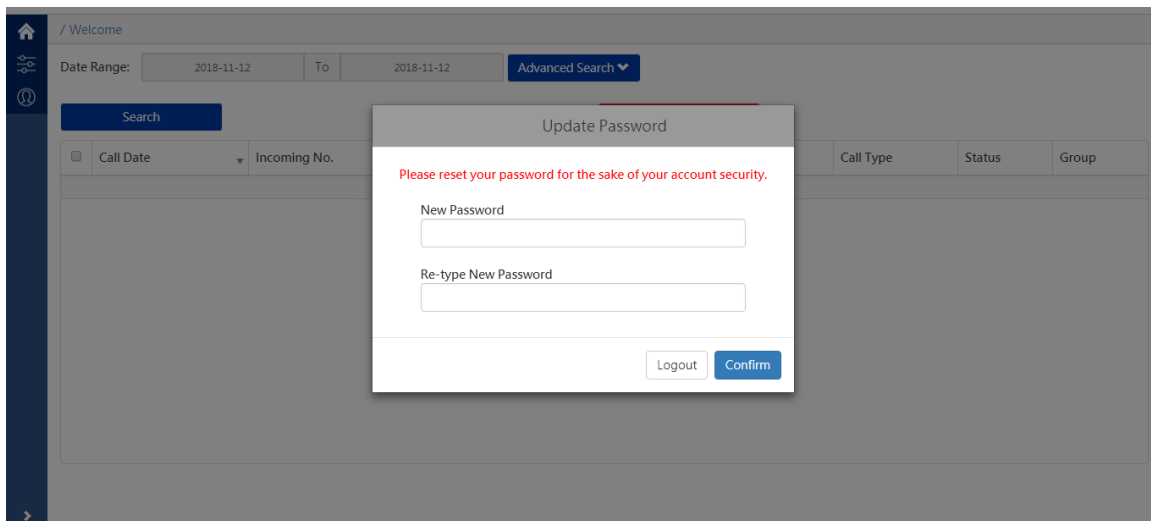| User	Login
Admin	√
Manager	√
Supervisor	√
Agent	√

Go to the web portal login page https://cloud-recording.hkbnes.net

Enter the web login ID and web login password according to the Welcome Letter, and click Login.

Password Changing

For security reason, users are required to change password if it is the first time login or the password has been reset. Password should contain alphanumeric with minimum 8 characters.

2   Search Call Records

Under "Service → Records"

User	Search Records
Admin	√
Manager	√
Supervisor	√
Agent	√

User call records will be shown automatically after login their web portal.

User can search by date range. User can search 1 month records for maximum.

Simply select the data range and click "Search" to retrieve the result.

Result will be returned in terms of table format.

Column	Description
Call Date	Call connected time
Incoming No.	Incoming calling number (if any)
Outgoing No.	Outgoing calling number (if any)
User No.	User DN
Duration	Call total duration
Call Type	Incoming / Outgoing
Status	Download - Already downloaded by user Listen - Already listened by user
Group	The recording belongs which group
Locked	Admin has right to unlock the record to let HKBNES to listen/download it <only admin can see this>

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Service / Records

	Call Date	Incoming No.	Outgoing No.	User No.	Duration	Call Type	Status	Group	Locked
☐	2018-11-12 10:57:52		98808586	37584818	00:00:22	Outgoing	New	Default Group	🔒
☐	2018-11-12 09:18:04		21122452	37584818	00:00:07	Outgoing	New	Default Group	🔒

Showing 1 to 2 of 2 rows

3 Search Call Records – Advanced

Under "Service → Records"

User	Search Records
Admin	√
Manager	√
Supervisor	√
Agent	√

User can click "Advanced Search" button in order to have for search criteria. User can specify below:

Additional search criteria:
- "Group"
  - ■ Group assigned for the number subscribed Cloud Recording
- "User No"
  - ■ Number subscribed Cloud Recording
- "Caller/Called"
  - ■ Incoming or Outgoing Call Number
- "Call Type"
  - ■ Incoming or Outgoing
- "Label"
  - ■ Label selected by user
- "Remarks"
  - ■ Remarks inputted by user
- "Call ID"
  - ■ Unique ID of a call record

4   Download Call Records

Under "Service → Records"

User	Download
Admin	√
Manager	√
Supervisor	√
Agent	✗

User can select records that would like to download by selecting the checkboxes, and clicks "Download". Records will be downloaded in mp3 format.

5   Export CDR

Under "Service → Records"

User	Export CDR
Admin	√
Manager	✗
Supervisor	✗
Agent	✗

User can select records that would like to export the CDR by selecting the checkboxes, and clicks "Export CDR". CDR will be downloaded in csv format.

CDR sample:

Below is the description of major fields that can be retrieved from the CDR

Field	Description
Call ID	Call Record Identity
Call Date	Call connected time
User No.	User DN
Group ID	The recording belongs which group
Inbound / Outbound No.	Incoming / Outgoing Call Number
Call Type	e.g. Incoming / Outgoing
Duration	Call total duration
Signature	It is for file verification if it is modified or not (Recording Verification)

6   Manage Call Record (Locked / Unlocked)

Under "Service → Records"

User	Lock / unlock records
Admin	√
Manager	✕
Supervisor	✕
Agent	✕

Admin can unlock a record if he intends to let HKBNES to listen/download it.

Admin can anytime unlock/lock any record under his company.

7   Listen Call Record

Under "Service → Records"

User	Listen records
Admin	√
Manager	√
Supervisor	√
Agent	√

For call records, only users in that company can access according to corresponding access right. If company admin wants to share the records to HKBNES, he can unlock that file and allow HKBNES to listen to that record.

User can click one of the records in the "Call records" page. "Details Call Record" window will be pop-up.

Simply click the "Play" button ▶ to listen
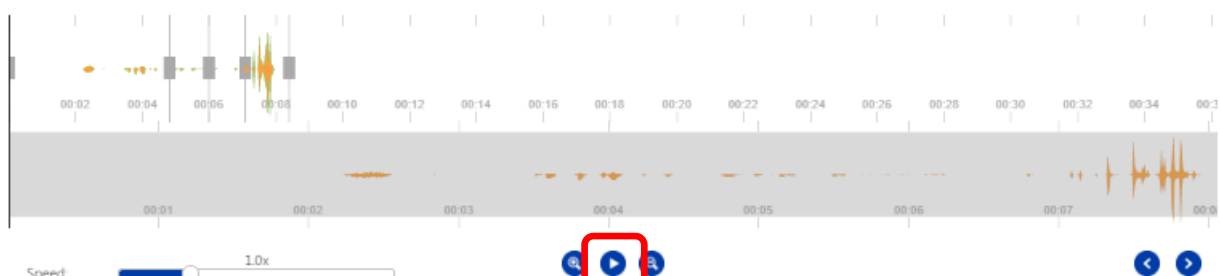
8   Label Call Record

Under "Service → Records"

User	Label Records
Admin	√
Manager	√
Supervisor	√
Agent	√

User can click one of the records in the "Call records" page. "Details Call Record" window will be pop-up.

Simply select the "label" dropdown list for future reference.

9   Bookmark Call Record

Under "Service → Records"

User	Bookmark Records
Admin	√
Manager	√
Supervisor	√
Agent	√

User can click one of the records in the "Call records" page. "Details Call Record" window will be pop-up.

You can input the description of selected period.

10   User Greeting Management

Under "Service → User Greeting"

User	User Greeting Management
Admin	√ Edit all users greeting
Manager	√ Edit all users greeting
Supervisor	√ Edit all users greeting under his group
Agent	√ Edit agent greeting himself

Customized announcement is supported. Customer simply uploads the file via the web portal.

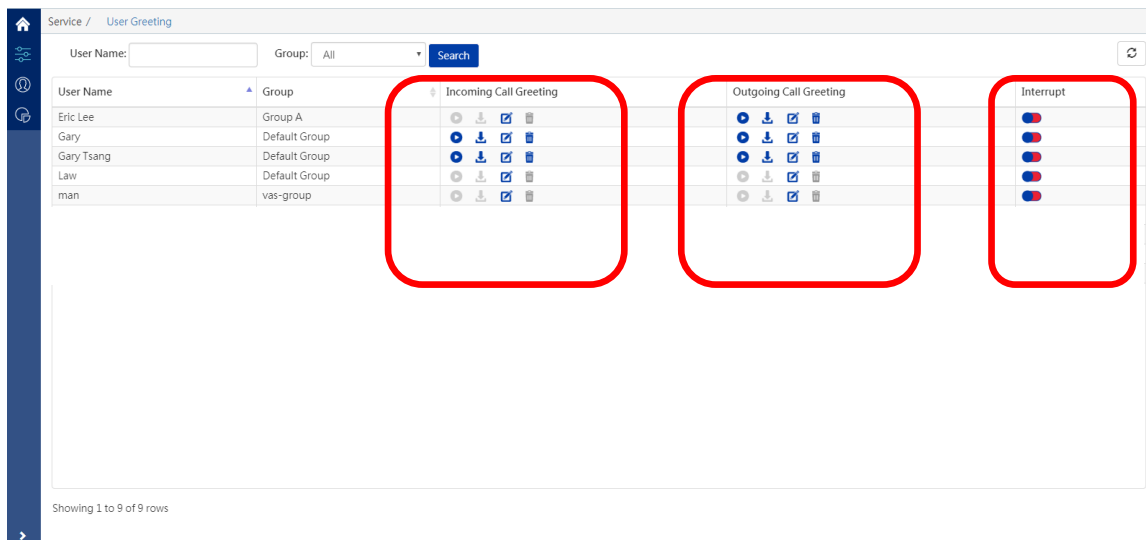Incoming and outgoing announcement can be configured separately.

Click [icon] to upload the file (mp3 with maximum 10MB)
Click [icon] to download the file
Click [icon] to play the file
Click [icon] to delete the file

If interrupt is selected, user can stop the announcement anytime once play by pressing '0'.
For outgoing call, user can press '*6' to play the announcement after call is connected

11   Group Greeting Management

Under "Service → Group Greeting"

User	Group Greeting Management
Admin	√ Edit greeting of all groups
Manager	√ Edit greeting of all groups
Supervisor	√ Edit greeting of all groups under his supervision
Agent	×

Customized announcement is supported. Customer simply uploads the file via the web portal.

Incoming and outgoing announcement can be configured separately.

Click ☑ to upload the file (mp3 with maximum 10MB)
Click ⬇ to download the file
Click ▶ to play the file
Click 🗑 to delete the file

If interrupt is selected, user can stop the announcement anytime once play by pressing '0'.
For outgoing call, user can press '*6' to play the announcement after call is connected

** Group announcement will override user announcement
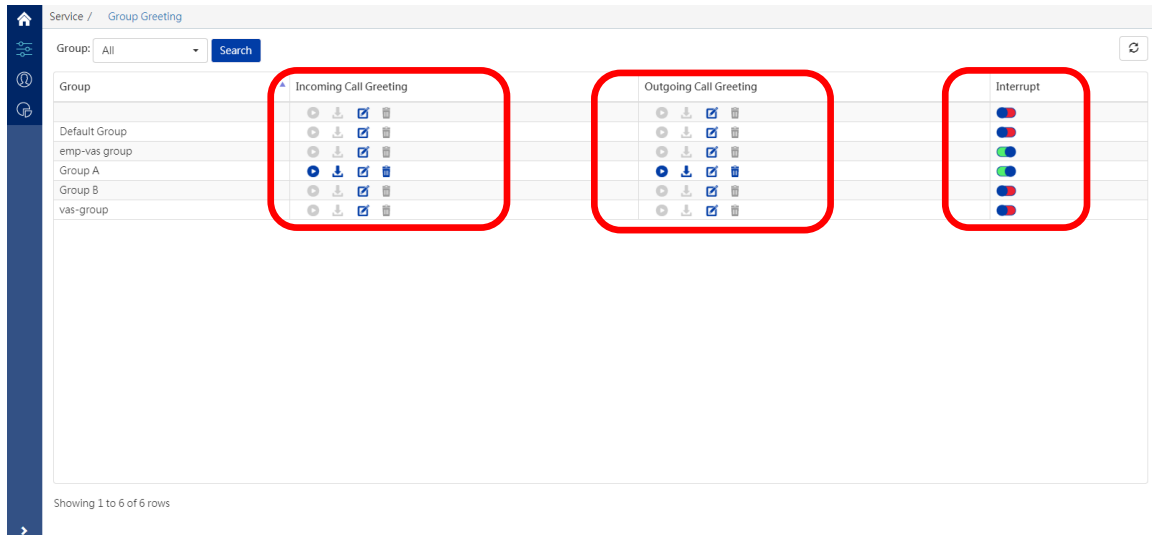
12   User Account Management

Under "Service → User Info"

User	User Account Management
Admin	√ Edit, reset password
Manager	√ View
Supervisor	√ View
Agent	✗

Admin can edit following user information:
- User Name
- Group
- Role
- Email
- Record Access Date
- Notification
- Web Login

Moreover, admin can reset user password by clicking **"Reset Password"** button. Email will be sent to user accordingly for latest login details.

13 Audit Trail

Under "Report → Audit Trail"

User	Audit Trail
Admin	√ View
Manager	✗
Supervisor	✗
Agent	✗

Admin can search the user activities by:
- Date range
- Audit user
- Action

The result should be returned in table format
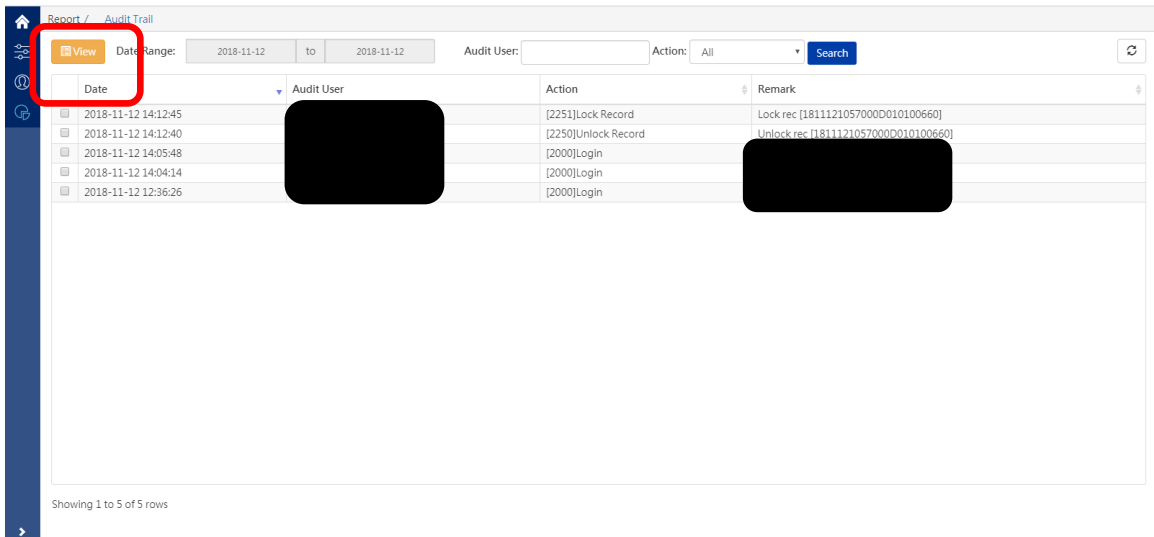
By select a record and click the "View", it will show more details about that record.
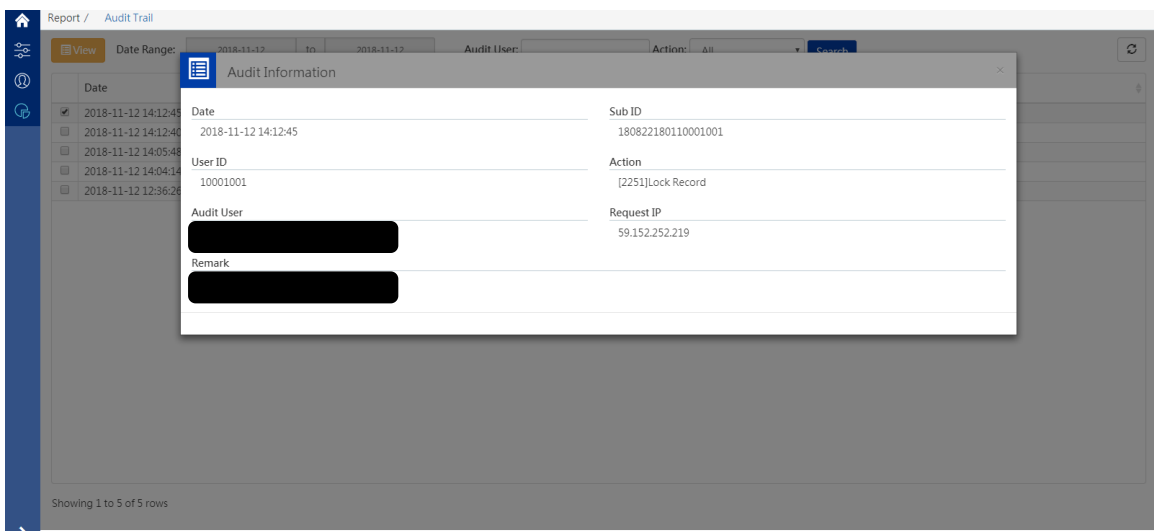
14 Recording Verification

Under "Service → Recording Verification"

User	Recording Verification
Admin	√
Manager	✕
Supervisor	✕
Agent	✕

Admin can verify the recording if it is being changed.

Admin needs to upload the recording file (mp3 format) and also provide the signature.

The signature can be found in the CDR. (Please refer to section 5 – "Export CDR")

If the file is modified after the file is downloaded:

File signature is not matched for the file.

Close

If the file is not modified after the file is downloaded:

File signature is matched for the file.

Close
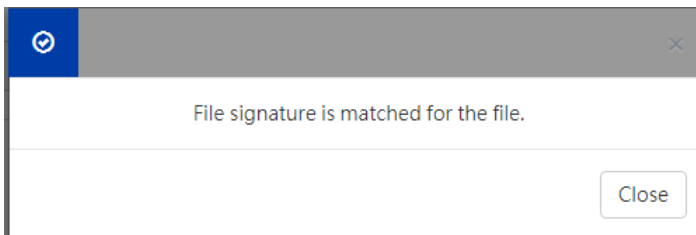
15 Recording Assignment

Under "Service → Recording Assignment"

User	Recording Assignment
Admin	√
Manager	×
Supervisor	×
Agent	×

Admin can re-assignment call records from one "group" to another "group"
Admin needs to select call records based on
- "Date Range" (maximum 1 month)
- "User number" (multiple selection is supported)

Furthermore, Admin needs to select what "group" (e.g. sales) will be re-assigned to, then click "Re-assign to Different Group".

After re-assignement, "Supervisor" should be able to view those call records which under his managed "Group" (e.g. sales)

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16   Label Management

Under "Service → Label"

User	Label Management
Admin	√ Add/Edit/Delete
Manager	√ View Only
Supervisor	√ View Only
Agent	√ View Only
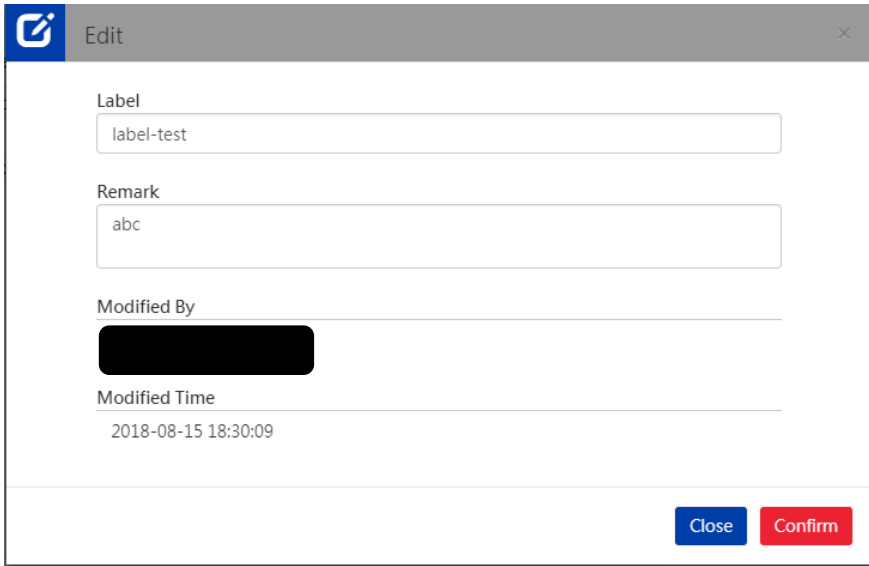
Admin can see the existing "Label" that can be used for his company
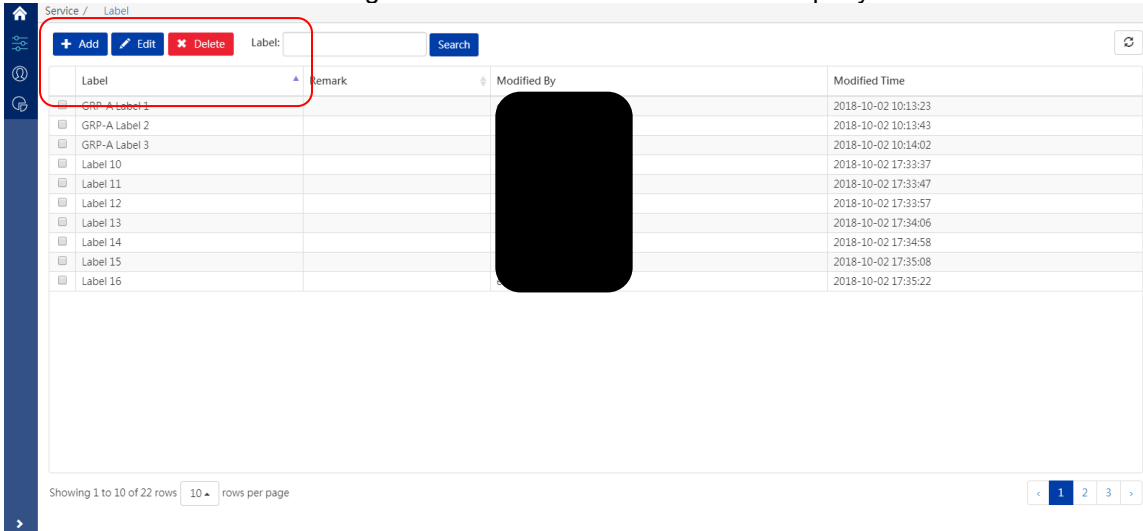
Admin can click the "Add" button to add new "Label"
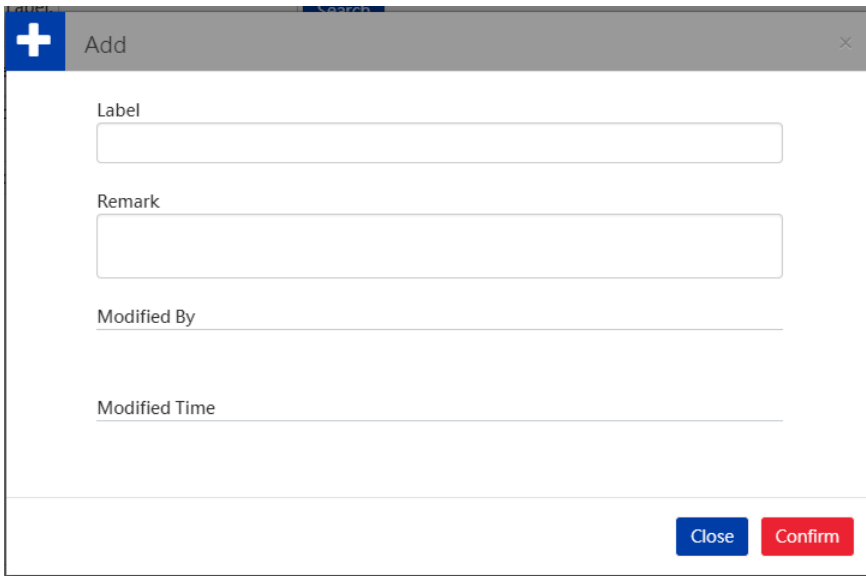
Admin can edit the "Add" button to edit existing "Label"
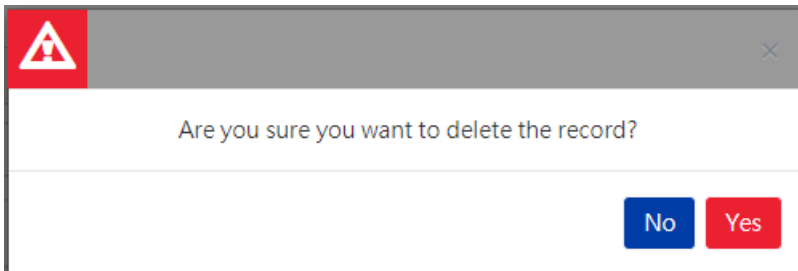
Admin can click the "Delete" button to delete the existing "Label"

17 Group Management

Under "User Management → User Group"

User	Group Management
Admin	√ Add/Edit/Delete
Manager	√ View Only
Supervisor	√ View Only
Agent	✕

Admin can see the existing "Group" that can be used for his company
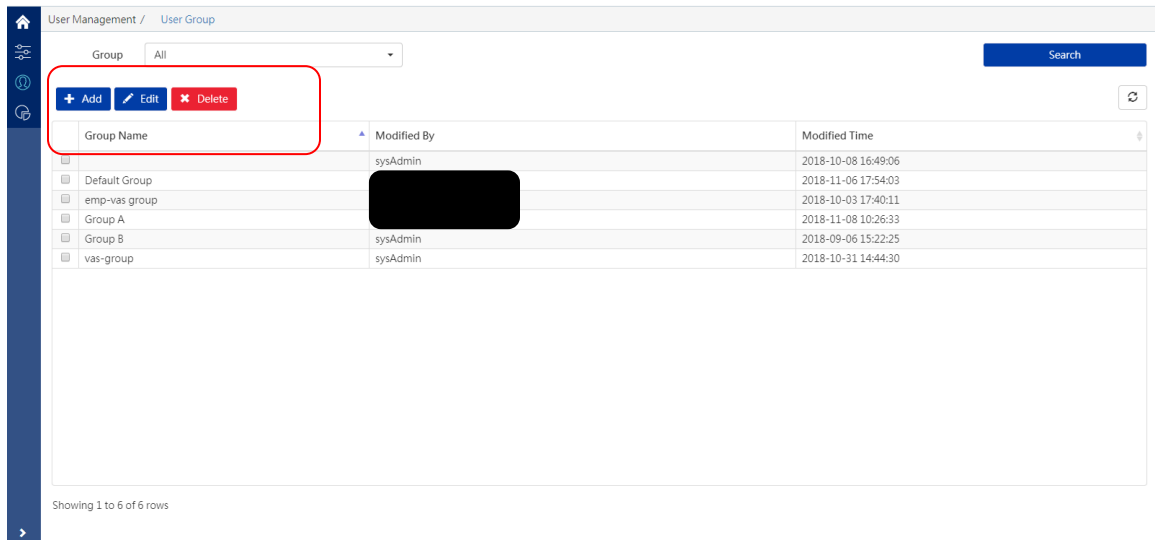
Admin can click the "Add" button to add new "Group"
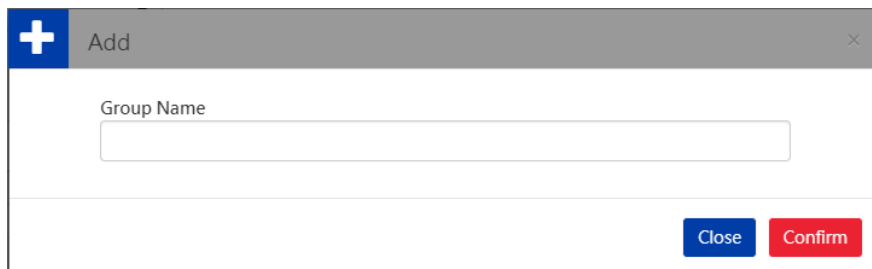
Admin can click the "Edit" button to edit an existing "Group"

Admin can click the "Delete" button to delete and existing "Group"
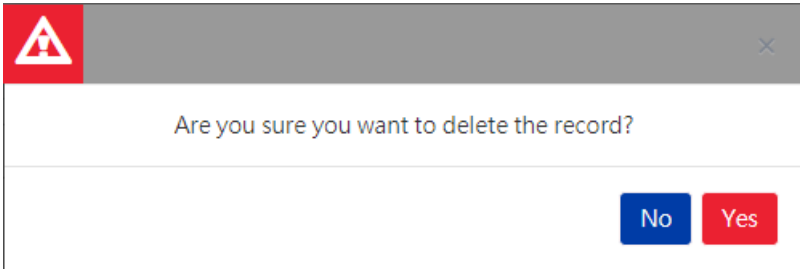
18   User Number

Under "User Management → User Number"

User	User Number
Admin	√ View Only
Manager	√ View Only
Supervisor	√ View Only
Agent	√ View Only

Admin can see the existing user and number mapping for his company.
Also, the "Effective Date" and "Status" of the user number can be seen
For "Status", there are "Normal", "Wait for effective date" and "Wait for activation"

19   On-demand T&C

Under "Service → On-demand T&C"

User	On-demand T&C
Admin	√ Add/Edit/Delete T&C of all groups
Manager	√ Add/Edit/Delete T&C of all groups
Supervisor	√ View Only
Agent	√ View Only

Admin can see the existing uploaded T&C.
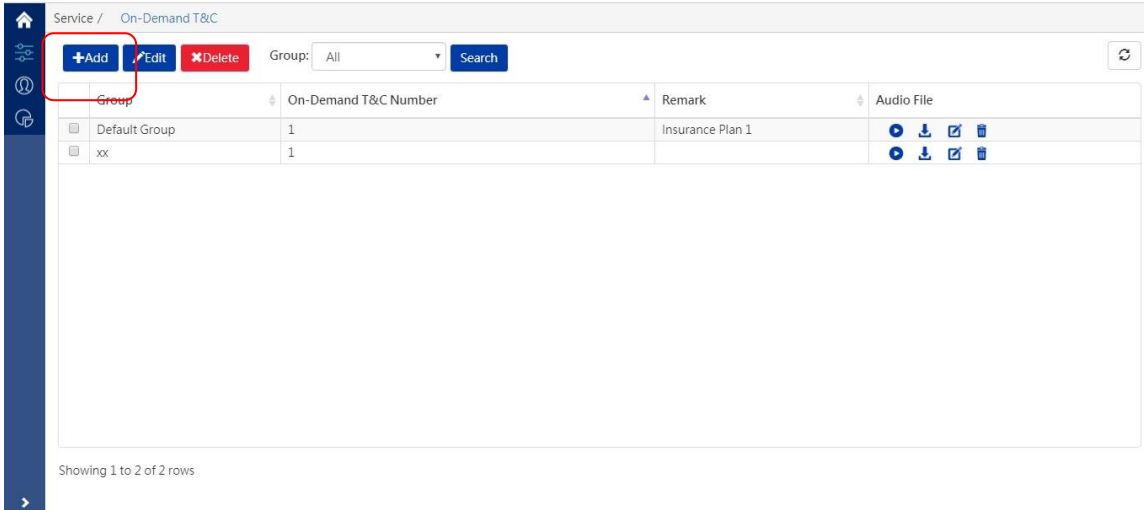
Admin can click "Add" button and below window should pop-up.
Admin needs to input below:

Field / Selection	Mandatory / Optional
Group	Mandatory
ODA Content Number	Mandatory
File	Mandatory
Remark	Optional
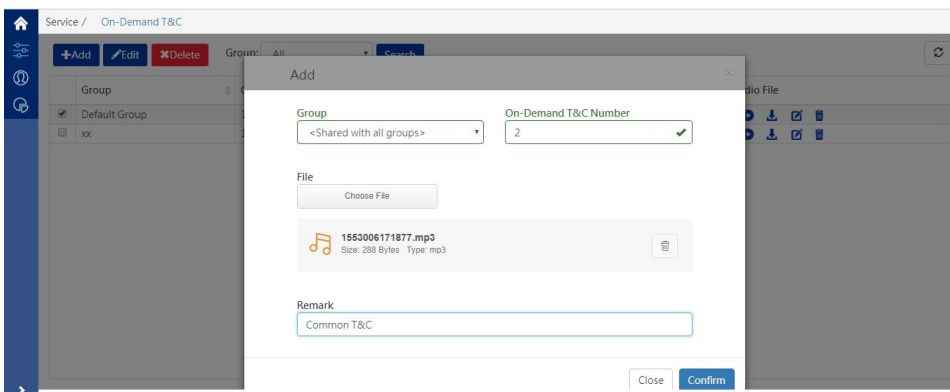
Once On-Demand T&C created, admin should able to see the new entry in the table.

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User flow of "On-demand" T&C:
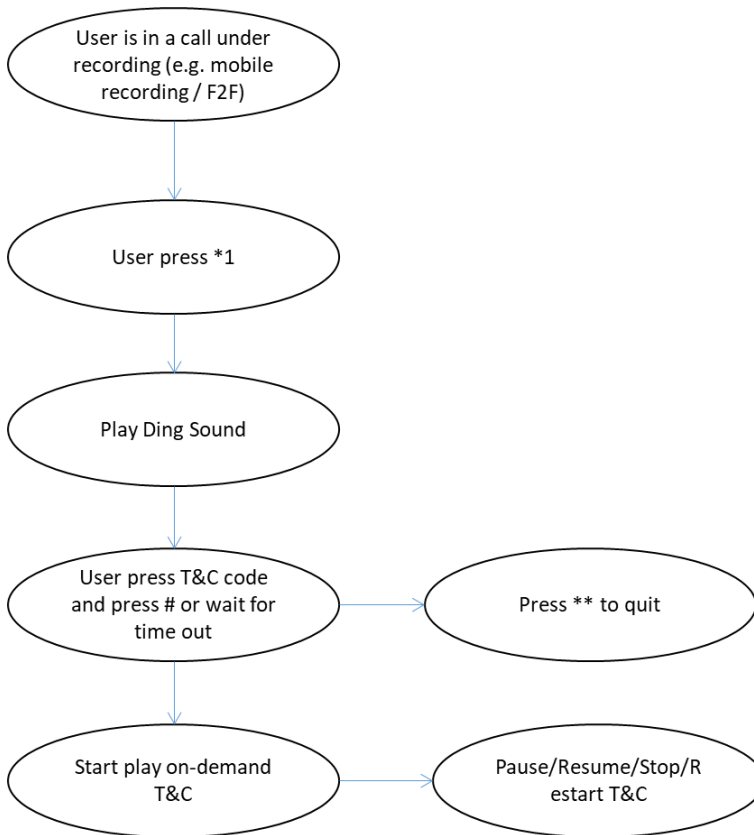
20   2 Factor Authentication

Under "User Management → User Info"

User	2 Factor Authentication
Admin	√ Edit
Manager	√ View
Supervisor	√ View
Agent	✕

Admin needs to select which user can enjoy this feature
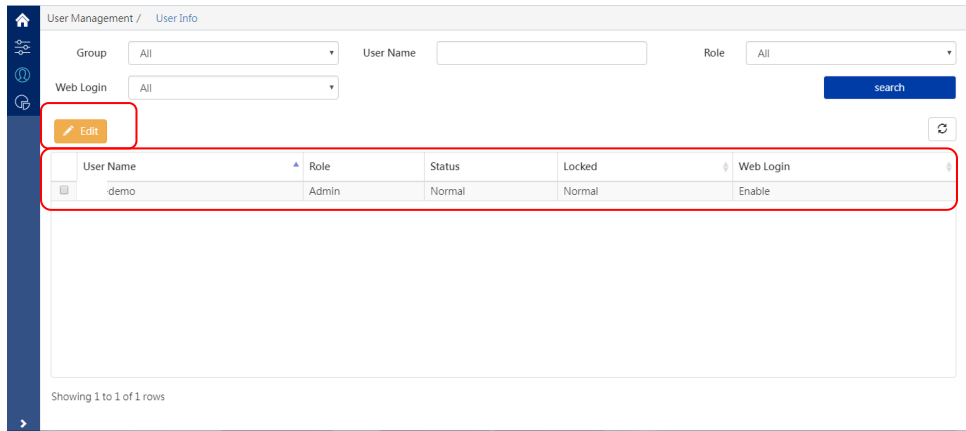
Admin needs input the 2-Factor Authentication Phone Number and click "Confirm" to save
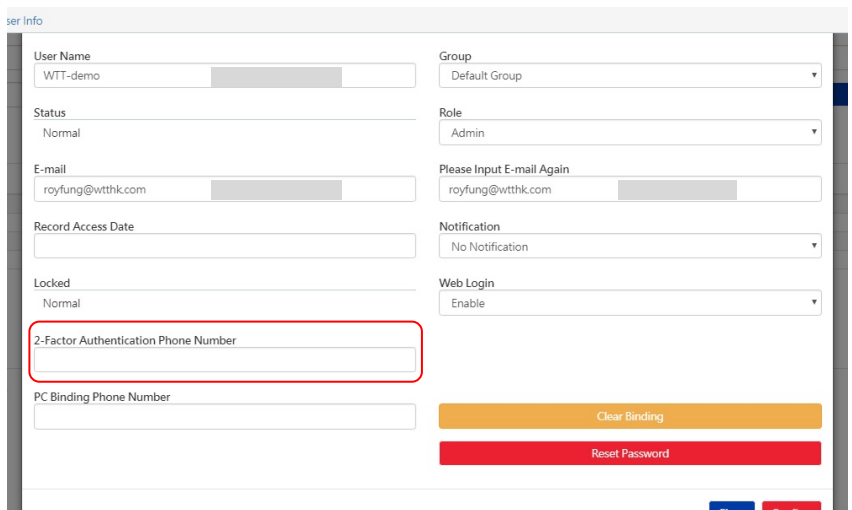
User flow for "2 Factor Authentication"

```
        ┌─────────────────────┐
        │   User login in the │
        │       portal        │
        └─────────────────────┘
                   │
                   ▼
        ┌─────────────────────┐
        │ System make a call to│
        │      user's DN      │
        └─────────────────────┘
                   │
                   ▼
  ┌ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ┐
        多謝使用雲端電話錄音服務.
  │        請按*號 確認登錄         │
      Thank you for using Cloud Recording
  │           Service.             │
      Please press the asterisk key (*) to
  │        confirm your login.     │
  └ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ┘
                   │
                   ▼
        ┌─────────────────────┐
        │  User press a key to│
        │     confirmation    │
        └─────────────────────┘
```

21 PC Binding

Under "User Management → User Info"

User	PC Binding
Admin	√ Edit
Manager	√ View
Supervisor	√ View
Agent	✕

Admin needs to select which user can enjoy this feature
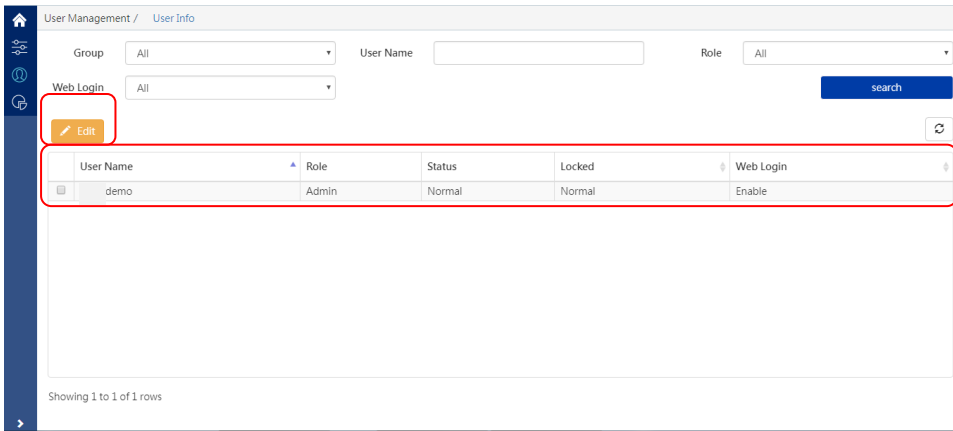
Admin needs input the "Bind PC Number" and click "Confirm" to save
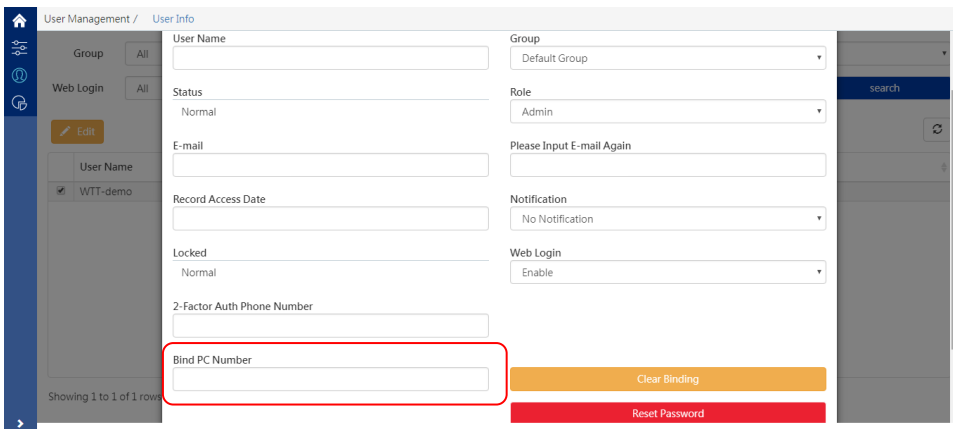
Admins can clear the binding by clicking "Clear binding" button

User flow for "PC Binding"

```
        ┌──────────────────────┐
        │   User login in the  │
        │        portal        │
        └──────────────────────┘
                   │
                   ▼
        ┌──────────────────────┐
        │  System make a call to│
        │  user's DN (First time)│
        └──────────────────────┘
                   │
                   ▼
```

多謝使用雲端電話錄音服務. 閣下既
驗證碼係
Thank you for using Cloud Recording
Service.
Your verification code is
(digits) 0,1,2,3,4,5...9

```
                   │
                   ▼
        ┌──────────────────────┐
        │   User needs to input │
        │   the verification code│
        └──────────────────────┘
```
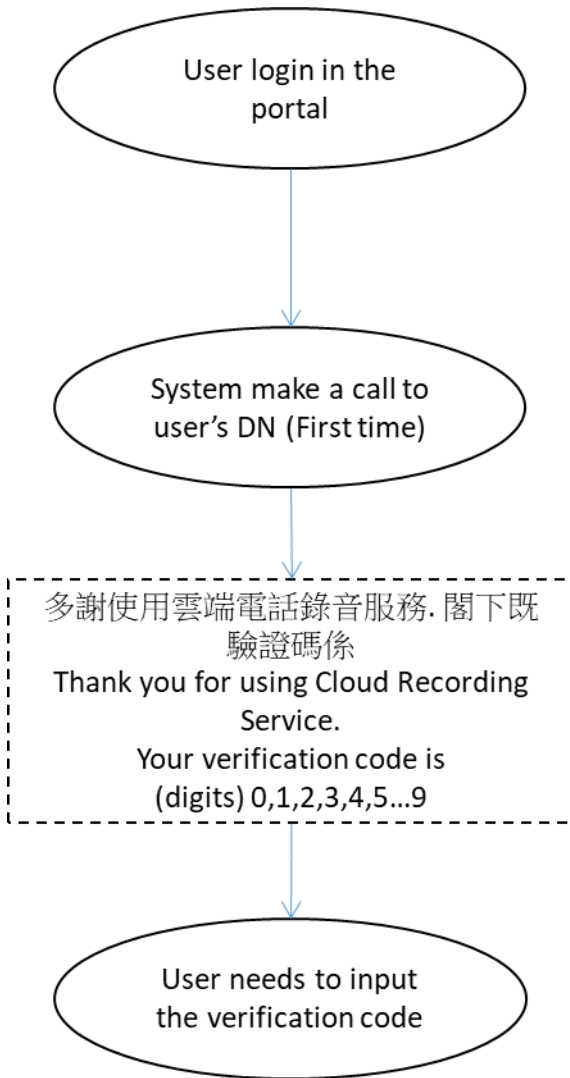
22 Face-To-Face Recording / Mobile Recording

Under "User Management → User Number"

User	Set up PIN
Admin	√ Edit PIN of all users
Manager	√ Edit PIN of all users
Supervisor	√ Edit PIN of users under his supervision
Agent	√ Edit PIN of agent himself

Admin needs to select which "User Number" to set the PIN as authentication
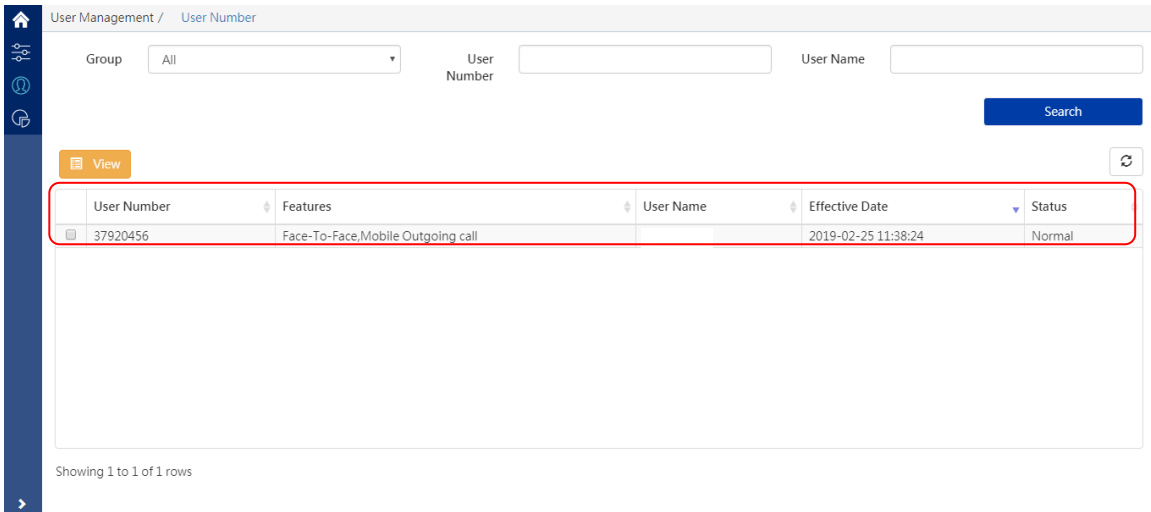
Admin can set the PIN (numbers only – up to 6 digits)
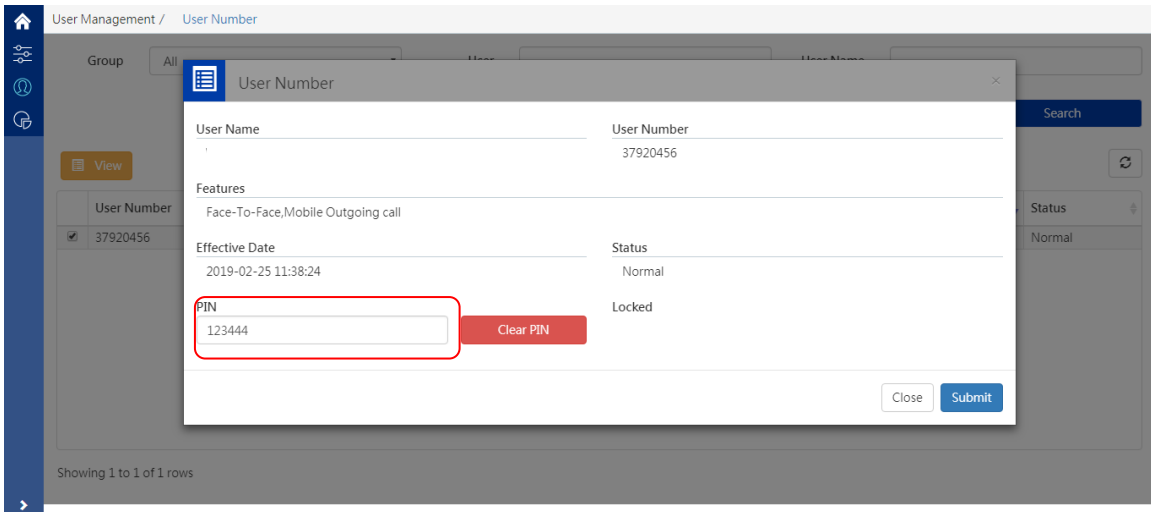
User flow for "Mobile Recording"
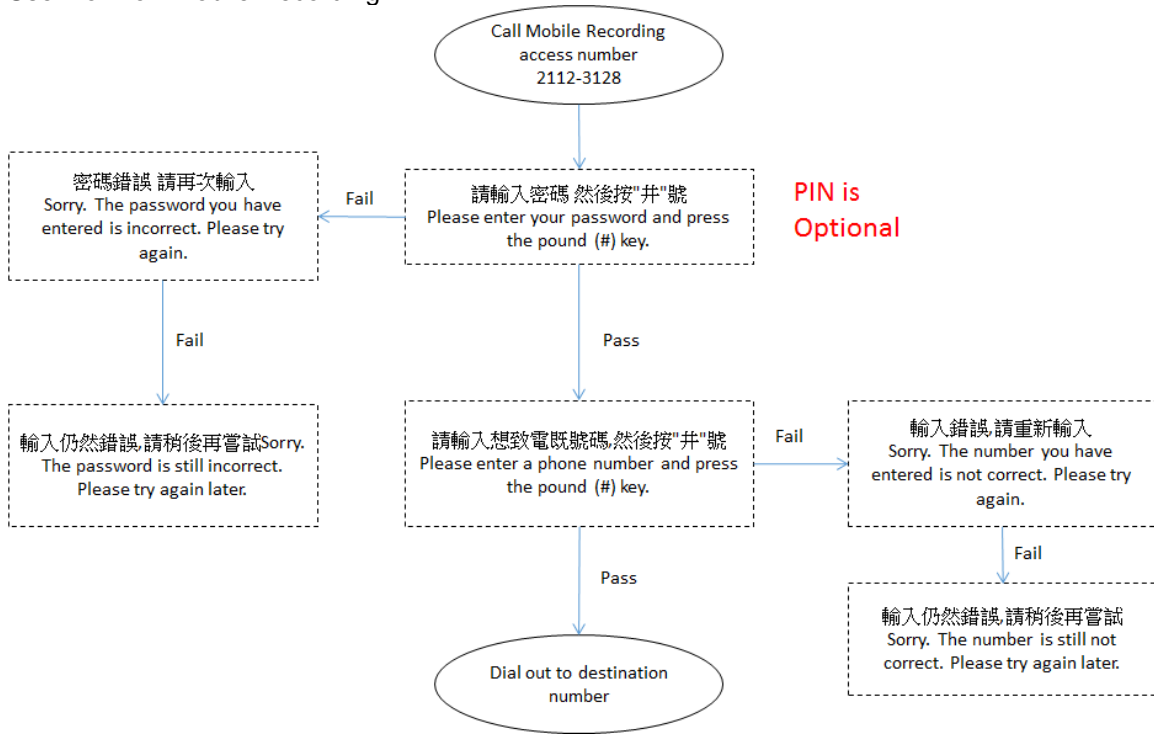
User flow for "Face-To-Face Recording"
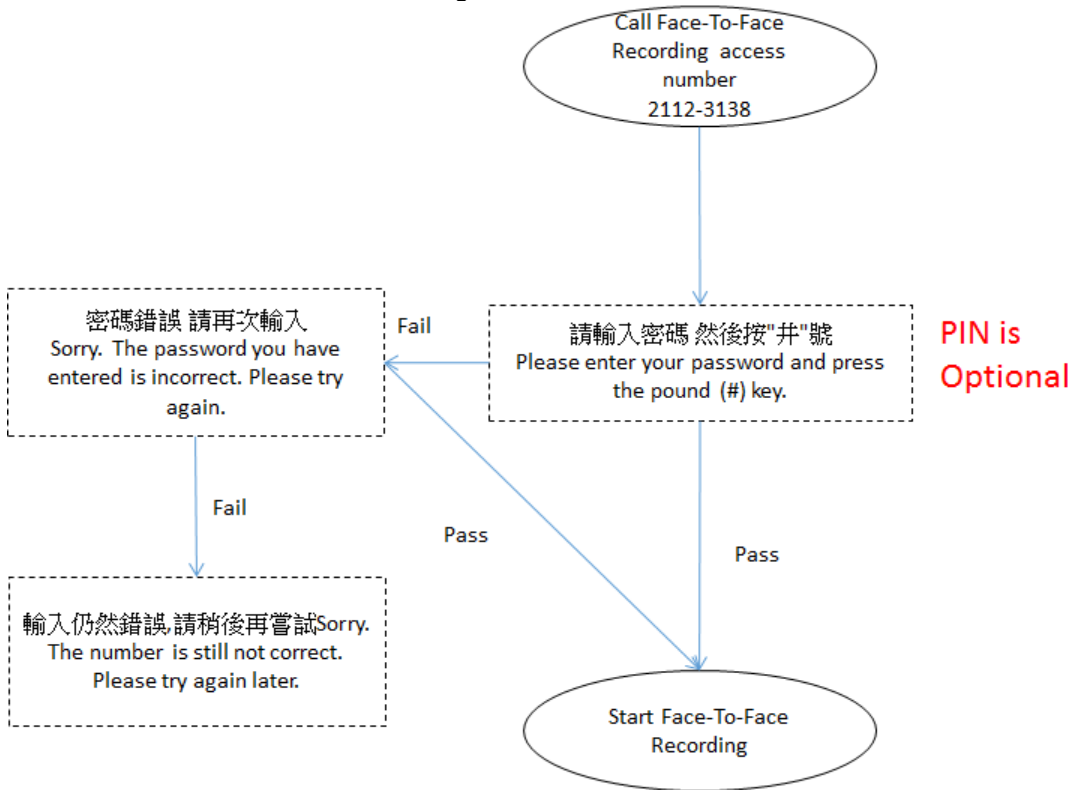
By default, there is only 1 connect call can be made to "Mobile Recording" or "Face-To-Face Recording" platform for a single number. For "Face-To-Face recording", customer may purchase more concurrent call channel based on request.

e.g if number 2112-0000 subscribed Face-To-Face recording, user using 2112-0000 call the access 2112-3128. When user using another phone 2112-0000 (e.g. MADN) and call the access 2112-3128 at the same time, the call cannot be connected and user should hear below prompt:

"Sorry. Your subscribed concurrent call limit on cloud recording service has exceeded. Please call again later."

23   Company Info

Under "Service → Company Info"

User	Company Info
Admin	√ View Only
Manager	√ View Only
Supervisor	√ View Only
Agent	√ View Only

User can view the Record Retention Period to see how far the recording records can be retrieved.

24 Change Language Setting

User can change the language setting based on his choice. The web portal supports English and Traditional Chinese.
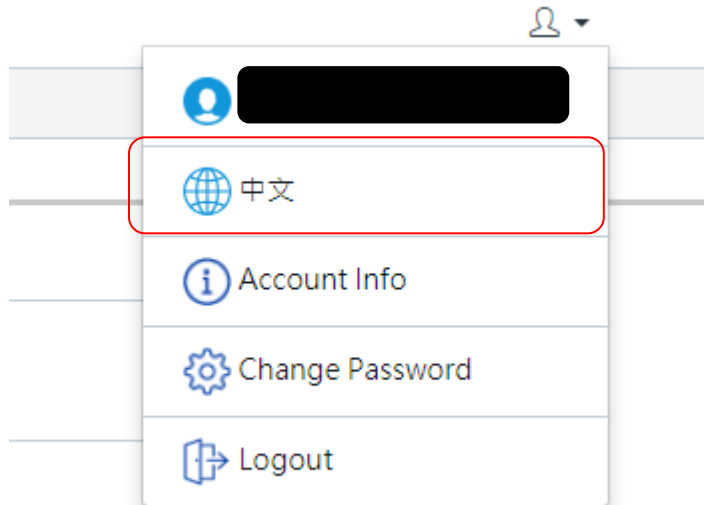
25 Account Info

User can view his account information details
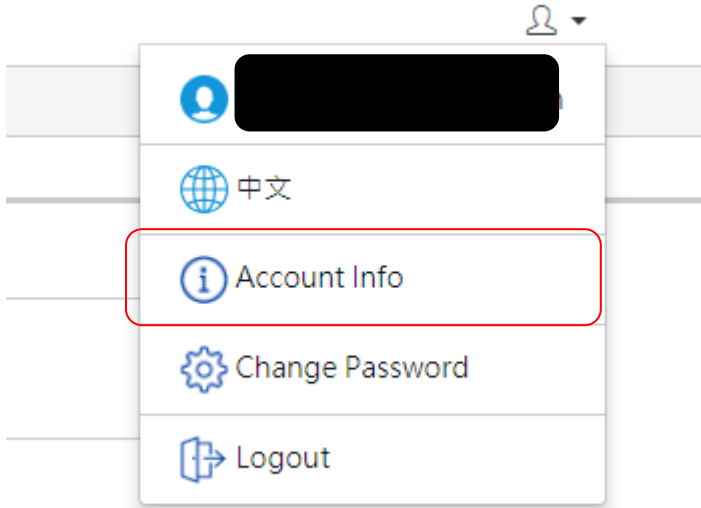
26 Change Password

Recommend user to change his password frequently for security reason. Password should contain alphanumeric with minimum 8 characters
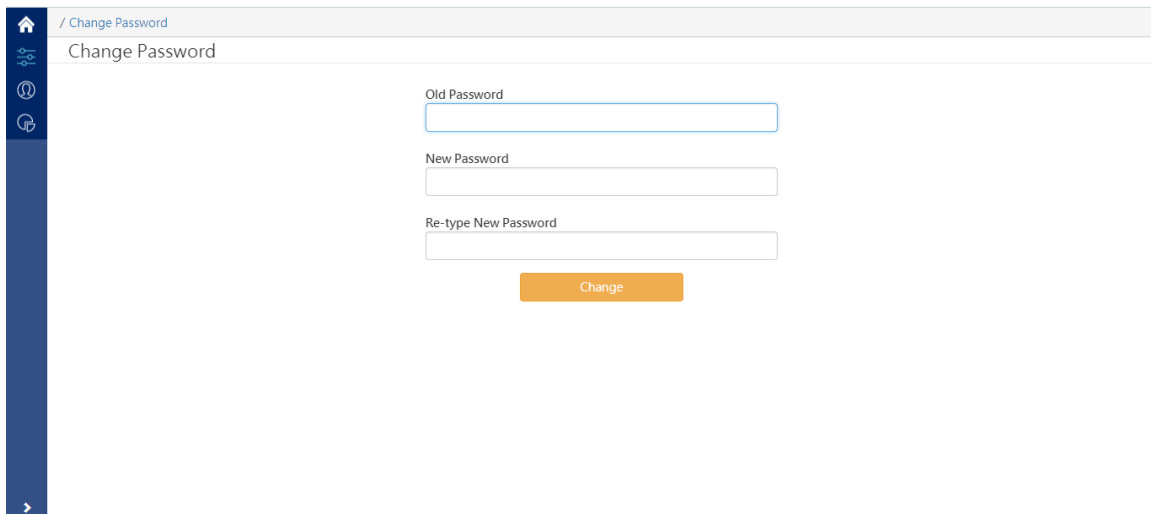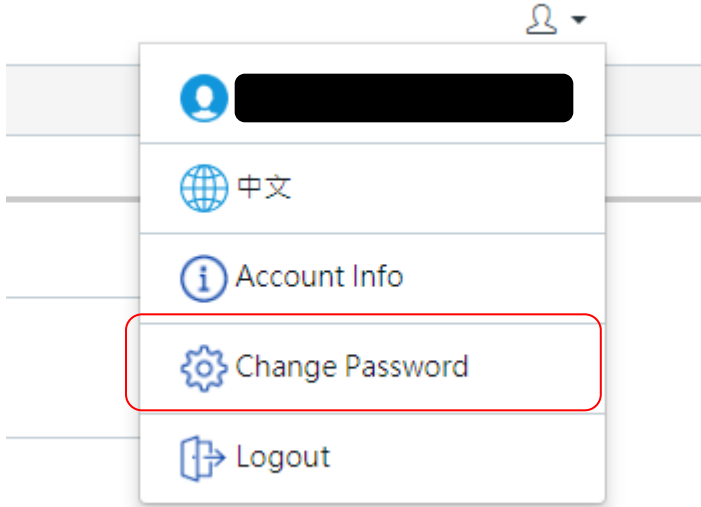
27   Role and Hierarchy
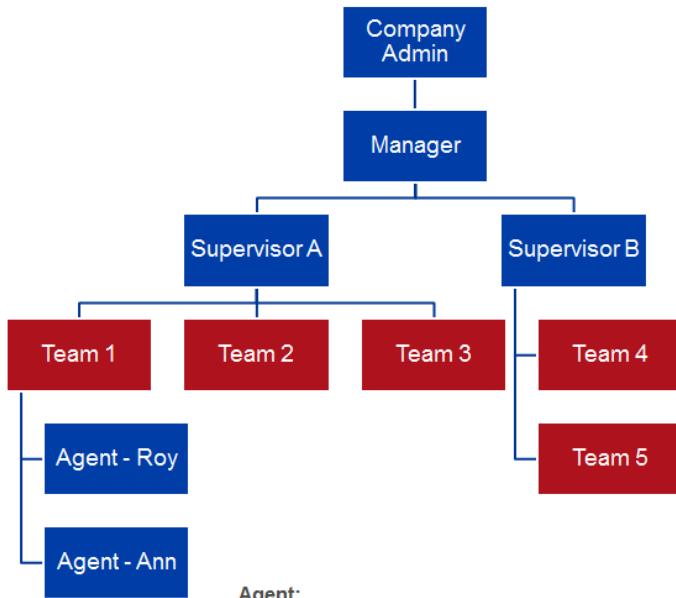
Company Admin:
- User account and access right management
- Able to download and listen records within the company

Manager:
- Able to download and listen records within the company

Supervisor:
- Able to download and listen records under his managed groups

Agent:
- Able to listen records of his account only
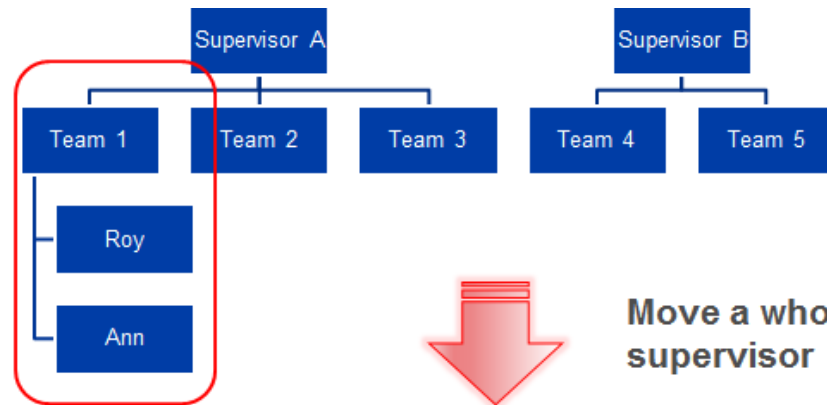
Move a whole team to new supervisor
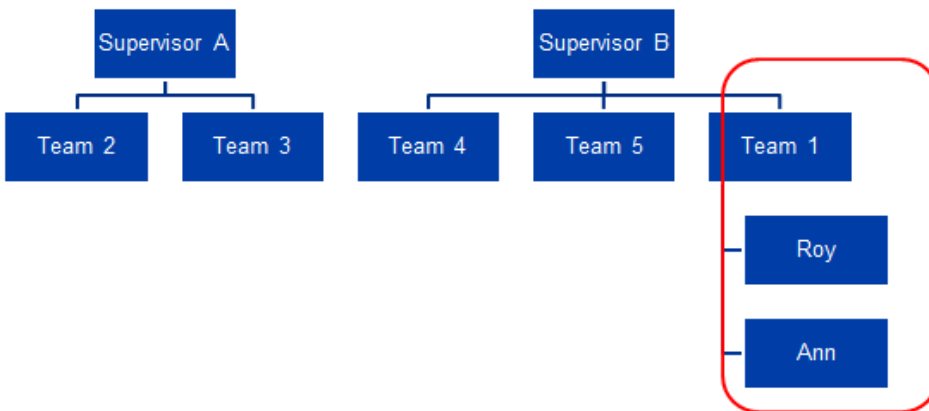
28   Recording Activation

Activation Hotline: 2112-3118 (Only Phone Recording needs to activate the service)

Service effective date

Before Service Activation:
1. Incoming Call (As Normal)
2. Outgoing Call (User will be alerted to activate the service and cannot make outgoing call before activate)

Email Communication:
1. Admin receive email for activation details
2. User receive email on web login account details

Service activation:
User needs to call 2112-3118 to activate the service

29   Call Scenarios

Important Note:
If you are "cloud recording" subscriber, all you calls being forwarded / transferred will still be recorded until the forwarded / transferred call ended.

(1) Cloud Recording Subscriber Already Set Call Forward:

Recording Subscriber

Call Forward

Incoming Call Recorded

* Apply to all numbers that call forwarded to (e.g. mobile, international number, voicemail)

(2) Incoming Caller Dial with 133:
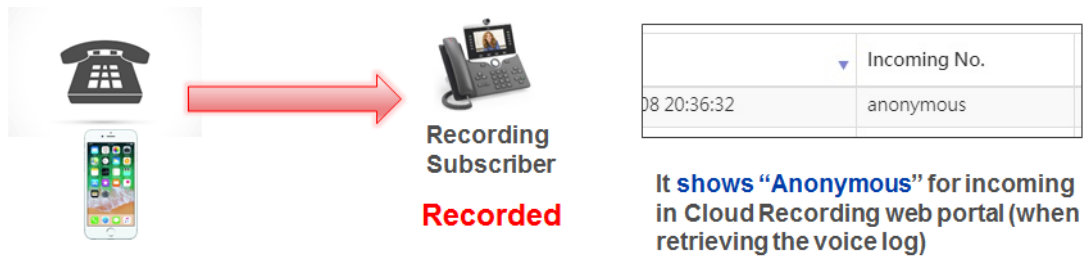
Recording Subscriber

Recorded

	Incoming No.
08 20:36:32	anonymous

It shows "Anonymous" for incoming in Cloud Recording web portal (when retrieving the voice log)

(3) Cloud Recording Subscriber initialized a conference call:

Recording Subscriber A

Recorded

B

C

Then bridge A, B & C
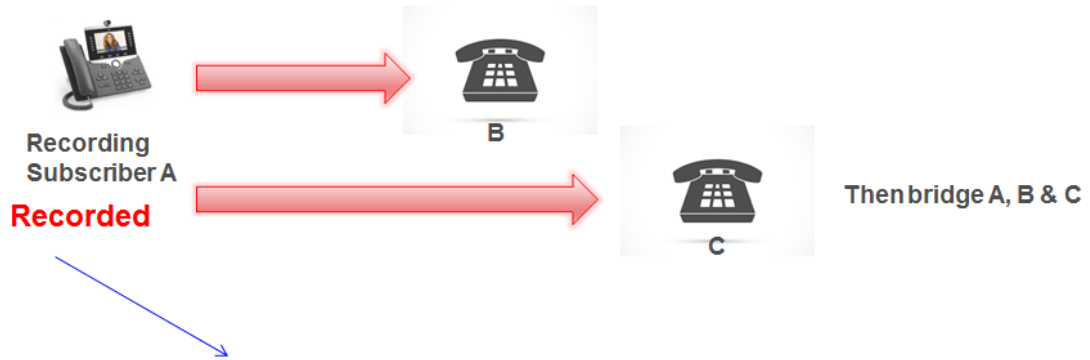
1st record:
Outgoing to B (AB conservation + ABC conservation)

2nd record:
Outgoing to C (AC conservation + ABC conservation)

(4) Cloud Recording Subscriber transfer a call:
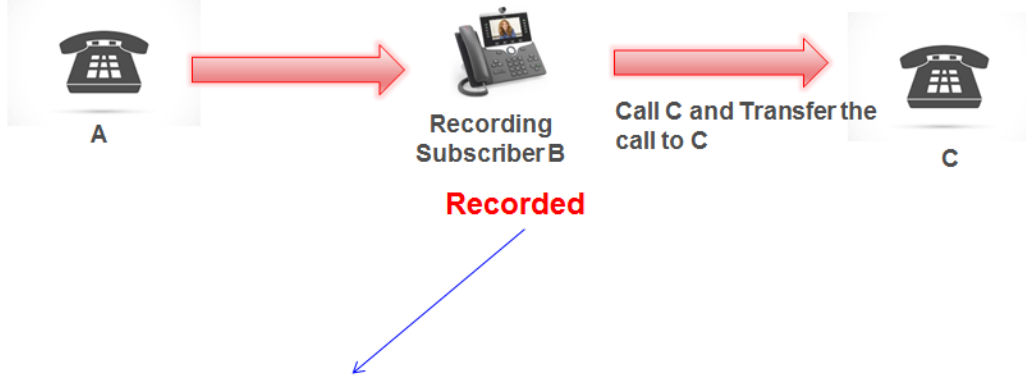
A

Recording Subscriber B

Recorded

Call C and Transfer the call to C

C

1st record:
Incoming from A (AB conservation + AC conservation)

2nd record:
Outgoing to C (BC conservation + AC conservation)

(5) Cloud Recording Subscriber to handle call waiting
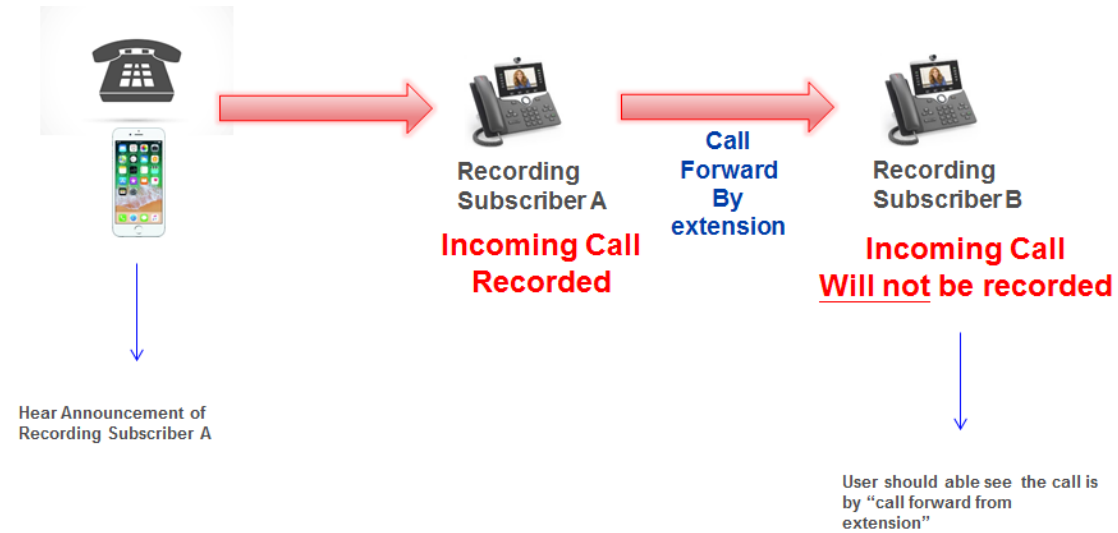
B

C

Recording
Subscriber A

Recorded

1st record:
Incoming from B (AB conservation + music on hold + AB conservation)

2nd record:
Incoming from C (AC conservation)

(6) Cloud Recording Subscriber already set Call Forward

Recording
Subscriber A

**Incoming Call
Recorded**

Call
Forward
By
extension

Recording Subscriber B

**Incoming Call
Will not be recorded**

Hear Announcement of
Recording Subscriber A

User should able see the call is
by "call forward from
extension"

(7) Cloud Recording Subscriber already set Call Forward

Recording
Subscriber A

**Incoming Call
Recorded**

Call
Forward
By 9 +
2112xxxx

Recording
Subscriber B

**Incoming Call
Recorded**
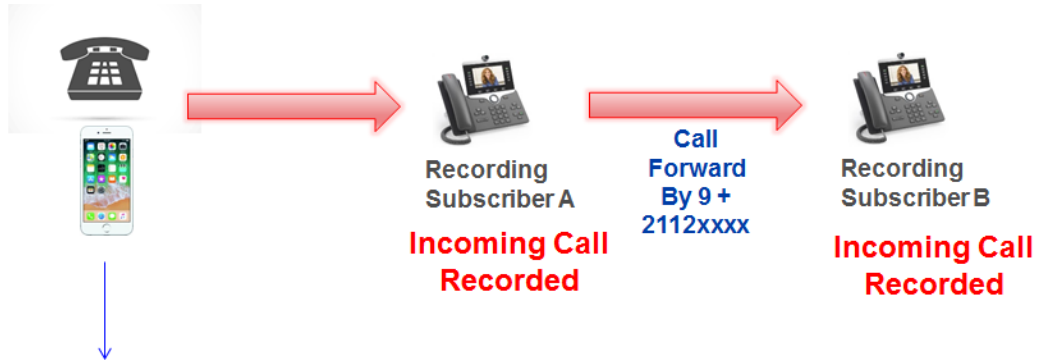
Hear Announcement of
Recording Subscriber A

(8) Cloud Recording Subscriber transfer a call:
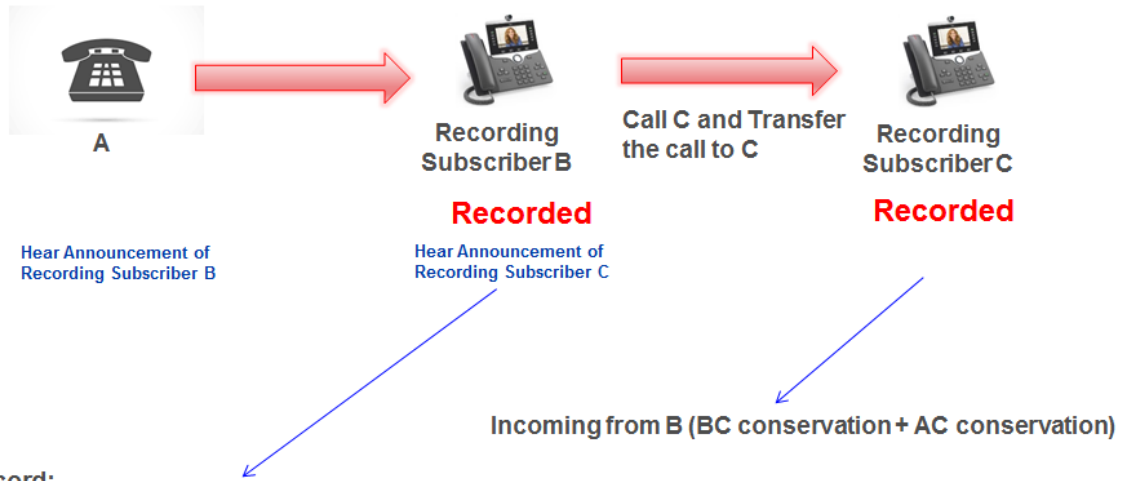
A

Recording
Subscriber B

Recorded

Call C and Transfer
the call to C

Recording
Subscriber C

Recorded

Hear Announcement of
Recording Subscriber B

Hear Announcement of
Recording Subscriber C

Incoming from B (BC conservation + AC conservation)

1st record:
Incoming from A (AB conservation + AC conservation)

2nd record:
Outgoing to C (BC conservation + AC conservation)

(9) Cloud Recording Subscriber initialized a conference call:

B call C and Bridge A
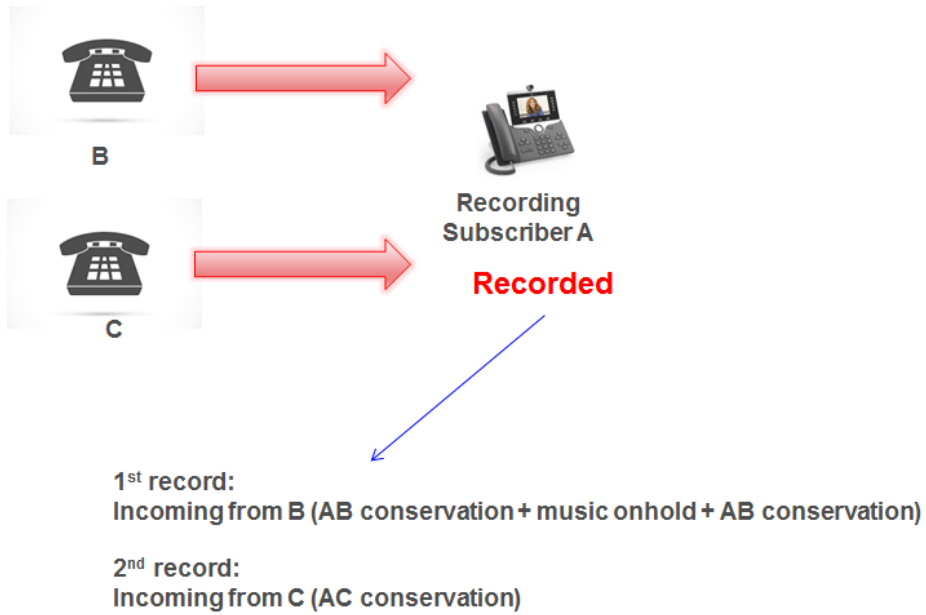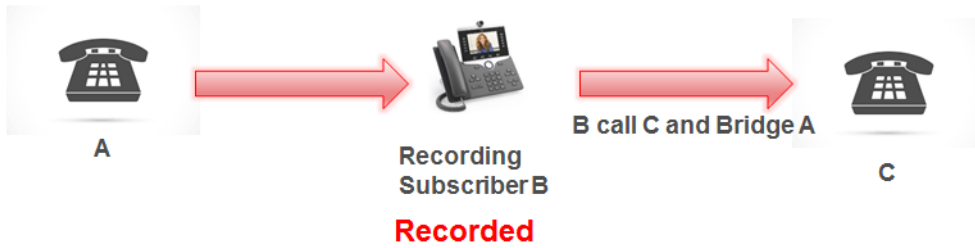
A

Recording
Subscriber B

Recorded

C

1st record:
Incoming from A (AB conservation + ABC conservation)

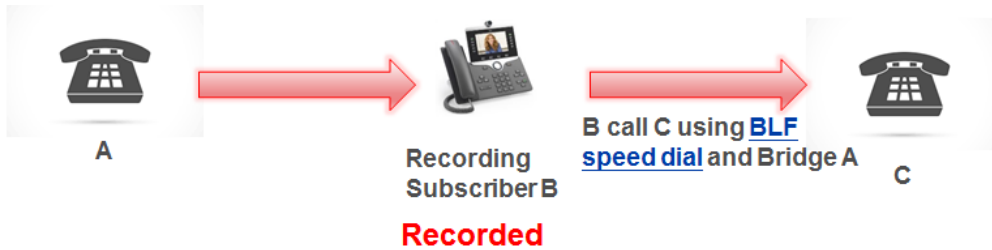2nd record:
Outgoing to C (BC conservation + ABC conservation)

(10) Cloud Recording Subscriber initialized a conference call:

B call C using BLF
speed dial and Bridge A

A

Recording
Subscriber B

Recorded

C

1st record:
Incoming from A (AB conservation + ABC conservation)

For B calls C using BLF speed dial, it will not trigger recording