



EPB HOSTED CALL RECORD User Guide

END USER GUIDE

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INTRODUCTION

This guide provides information about the EPB Hosted Call Record Web Platform features and functions.

The focus of this guide is to enable the end user the ability to successfully navigate, search, playback and manage recordings within the EPB Hosted Call Record Web Portal. Step by step procedures are included to enable users to walkthrough various tasks within EPB Hosted Call Record.

The EPB Hosted Call Record Web Platform allows users of the system to manage calls. Users of the system might be characterized as administrators, supervisors or users. Users are assigned roles within EPB Hosted Call Record that provide various permissions to both features and functions within the platform and also access to recordings through recording permissions.

In addition to this end user guide, on initial login to the system, users are presented with a guided tour of the major features and functions within the system, enabling quick tuition for completing simple tasks within the system.

LOGGING IN

EPB Hosted Call Record is a ‘native cloud’ application. This means that access to the platform is carried out through connecting to the EPB Hosted Call Record web portal through any active internet capable device.

Accessing EPB Hosted Call Record

Access to the EPB Hosted Call Record Portal can be carried out by clicking the “Login” button on the EPB Hosted Call Record Home Page (callrecord.epb.com) as shown below in Figure 1. This will take the user directly to the EPB Hosted Call Record Login page where security credentials may be entered.

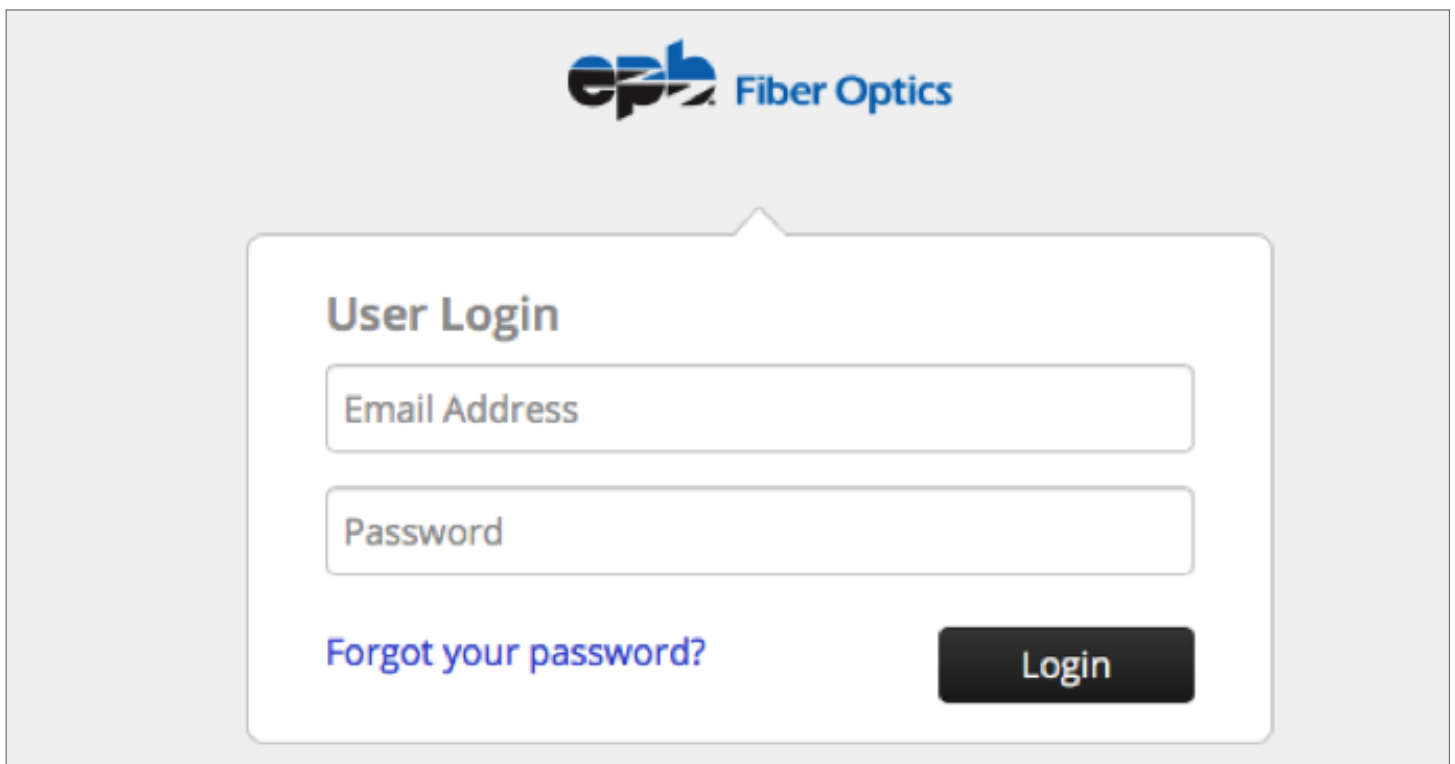
The image shows a screenshot of the EPB Hosted Call Record Login page. At the top center, the EPB Fiber Optics logo is displayed. Below the logo is a white login form with a grey border. The form is titled "User Login" in a bold, dark grey font. It contains two input fields: "Email Address" and "Password", both with light grey placeholder text. Below the "Password" field, there is a blue link that says "Forgot your password?". To the right of the form is a black button with the word "Login" in white text.

Figure 1 EPB Hosted Call Record Website – Main Page

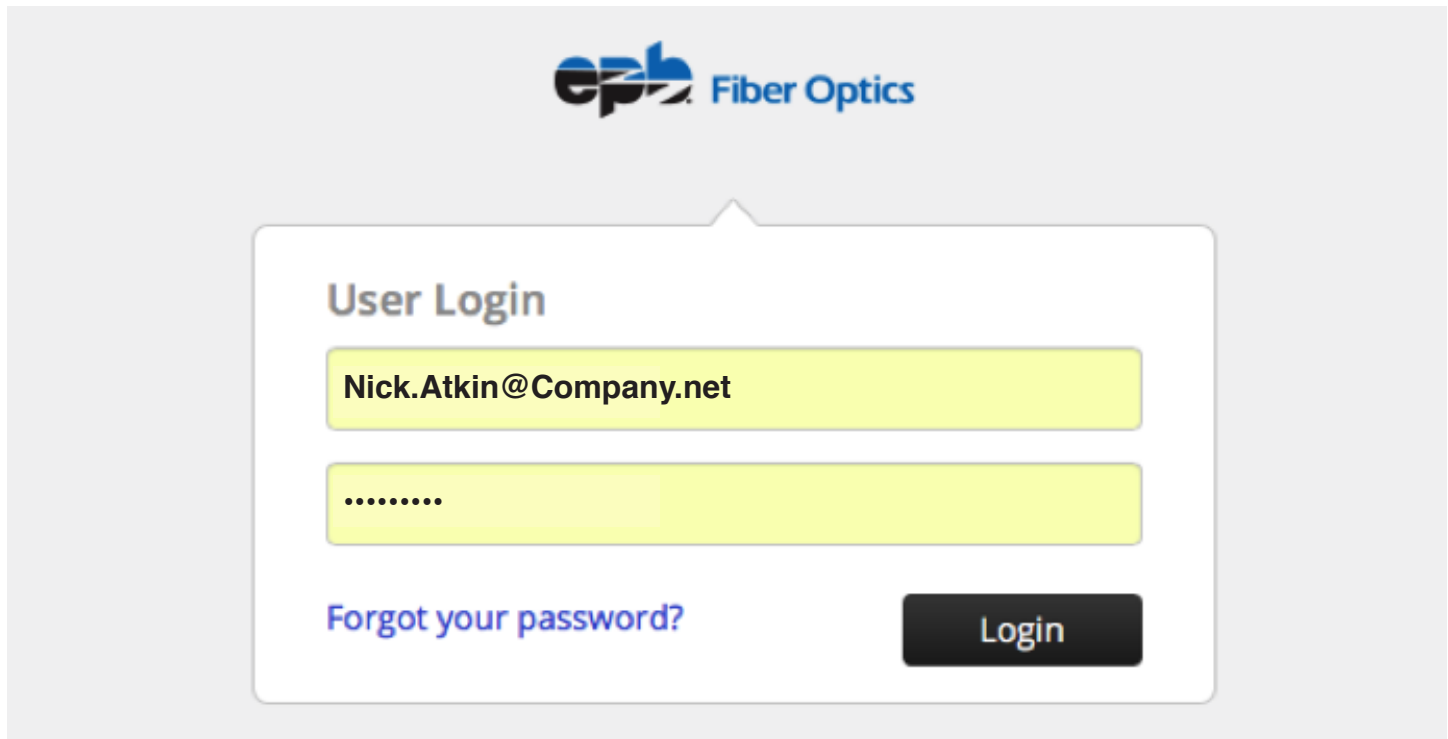
Frequent users of the EPB Hosted Call Record portal may also access the actual Login page directly by using the URL below.

callrecord.epb.com/login

This URL should be added to your browsers bookmarks for easy access to the EPB Hosted Call Record Portal.

Login Page

Once on the login page, you must enter your username and password to access the EPB Hosted Call Record Portal.



The screenshot shows the EPB Fiber Optics login page. At the top center is the EPB Fiber Optics logo. Below it is a white login box with a light gray border. Inside the box, the text "User Login" is displayed in a bold, dark blue font. Below this text are two yellow input fields. The first field contains the email address "Nick.Atkin@Company.net". The second field contains a series of dots representing a masked password. Below the input fields, there is a blue link that says "Forgot your password?". To the right of this link is a black button with the word "Login" in white text.

Figure 2 EPB Hosted Call Record Login Page

Password Criteria

EPB Hosted Call Record applies password policies to users of the EPB Hosted Call Record Portal to enforce security within the system.

All passwords should be reasonably complex and difficult for unauthorized people to guess.

Users should choose passwords that are at least eight characters long and contain a combination of upper- and lower-case letters, numbers, and punctuation marks and other special characters.

These requirements will be enforced within the EPB Hosted Call Record application when setting the password.

In addition to meeting those requirements, users should also use common sense when choosing passwords. Avoid basic combinations that are easy to guess. For instance, choices like “password”, “password1” and “Pa\$\$w0rd” are ‘weak’ from a security perspective.

All passwords must be changed regularly. This requirement will be enforced by EPB Hosted Call Record within automated resetting of passwords at regular intervals.

If the security of a password is in doubt— for example, if it appears that an unauthorized person has logged into the account — the password must be changed immediately.

Resetting Password

If a user is unable to remember their password or enters an invalid username or password, the system will display a message at the top of the login page, as shown in Figure 3 below.

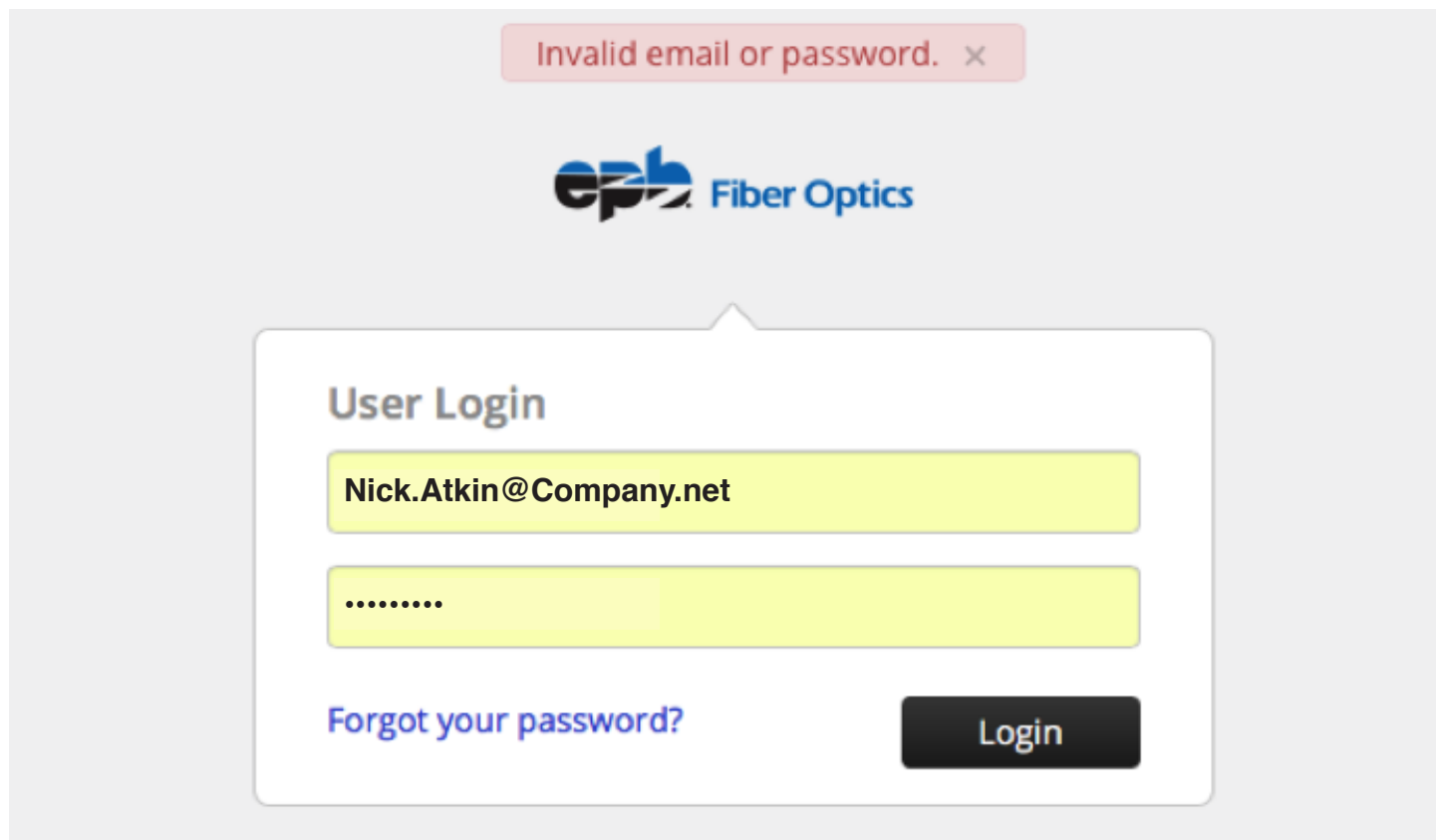
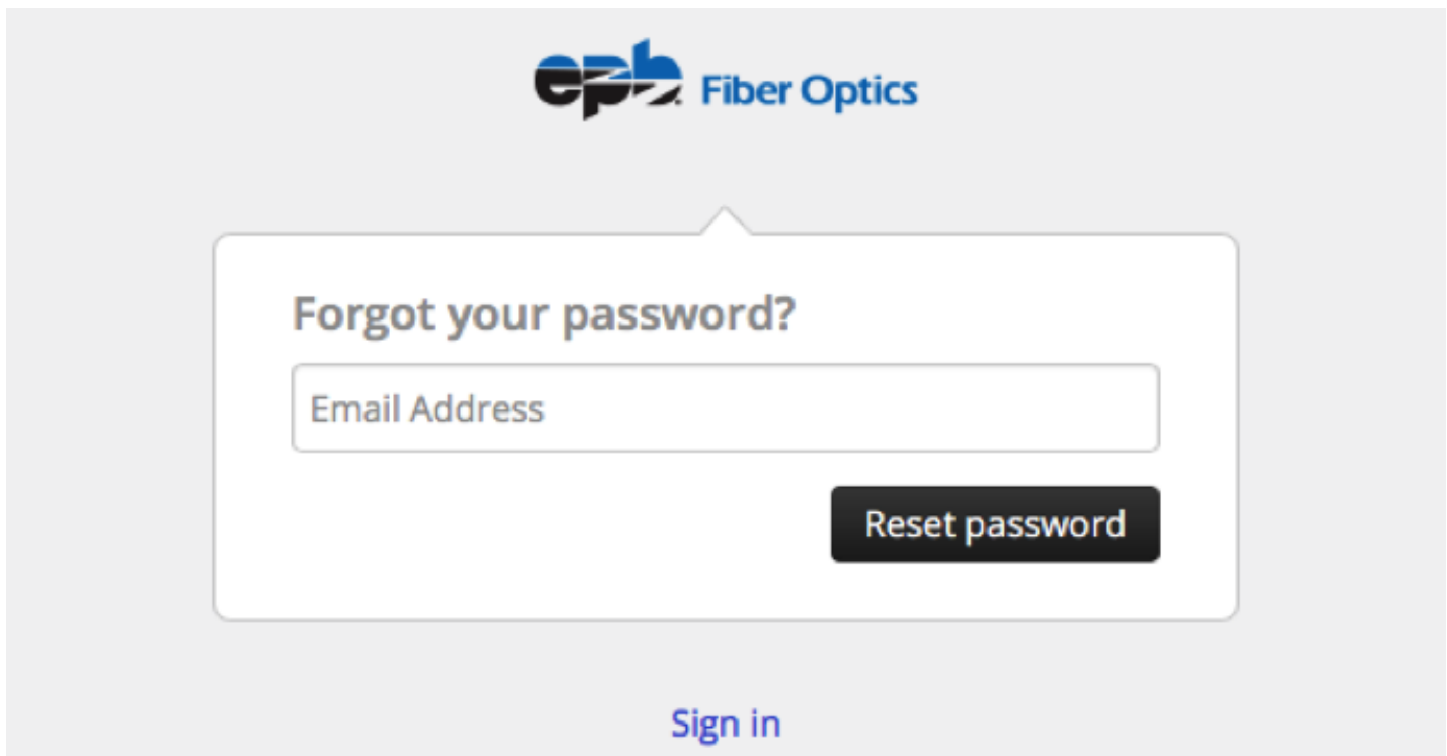


Figure 3 EPB Hosted Call Record Login –Invalid Username or Password

If you are unable to remember your password, you may click the “Forgot your password?” link and this will take you to the EPB Hosted Call Record Password Retrieval process.

Clicking the “Forgot your password?” link brings you to a dialogue box that allows you to enter your registered email address for password retrieval.



The image shows a web interface for password reset. At the top center is the EPB Fiber Optics logo. Below it is a white dialog box with a light gray border. Inside the dialog box, the text "Forgot your password?" is displayed in a bold, dark gray font. Below this text is a white input field with the placeholder text "Email Address". To the right of the input field is a dark gray button with the text "Reset password" in white. Below the dialog box, centered, is a blue link that says "Sign in".

Figure 4 EPB Hosted Call Record Password Reset Dialog Box

Simply enter your registered email address and the EPB Hosted Call Record Portal will email you a link that will enable you to reset your password as shown in the email below:

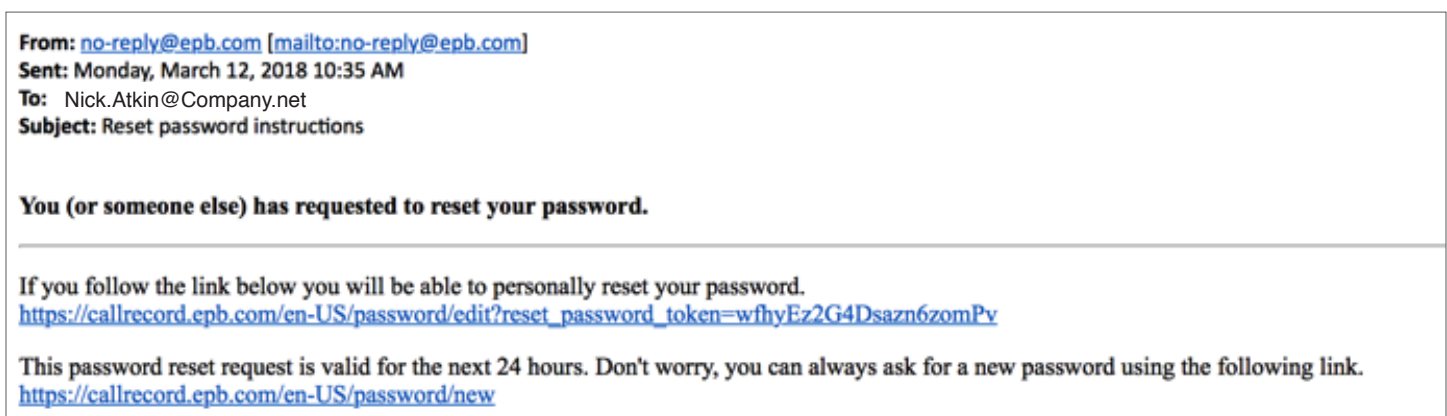
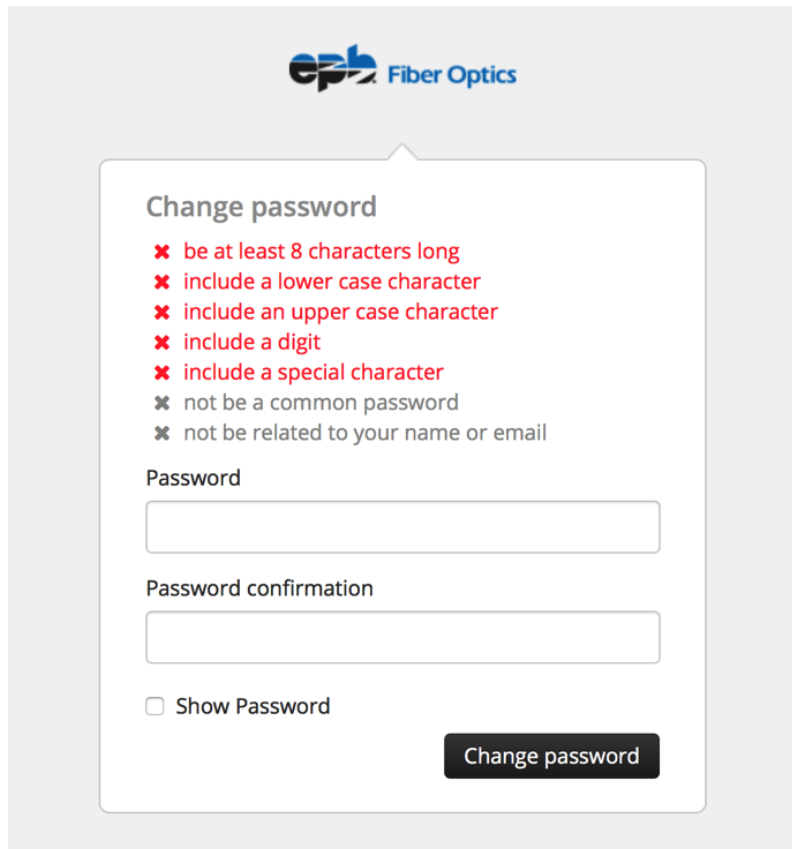


Figure 5 EPB Hosted Call Record Password Reset Email

Once you have received the reset email from EPB Hosted Call Record, follow the link. This link will take you to the Change Password page as shown below. Enter a new password and then confirm the password in the Password Confirmation entry. Once you have entered your new password click on the “Change Password” button. Ensure your new password meets the minimum password security restrictions.



The image shows a 'Change password' dialog box from the EPB Fiber Optics portal. At the top, the EPB Fiber Optics logo is displayed. The dialog box contains a list of password requirements, each preceded by a red 'x' icon. Below the requirements are two text input fields: 'Password' and 'Password confirmation'. There is also a checkbox labeled 'Show Password' and a dark button labeled 'Change password'.

Change password

- ✘ be at least 8 characters long
- ✘ include a lower case character
- ✘ include an upper case character
- ✘ include a digit
- ✘ include a special character
- ✘ not be a common password
- ✘ not be related to your name or email

Password

Password confirmation

Show Password

Change password

Figure 6 EPB Hosted Call Record Change Password Dialogue

Successful completion of the password reset will take you directly into the EPB Hosted Call Record Portal.

NAVIGATION

Once logged into EPB Hosted Call Record, you will be taken to the EPB Hosted Call Record Portal. This Portal will allow the user to complete all functions within EPB Hosted Call Record relating to recording management and playback.

Figure 7 demonstrates an overview of the various elements within the portal.

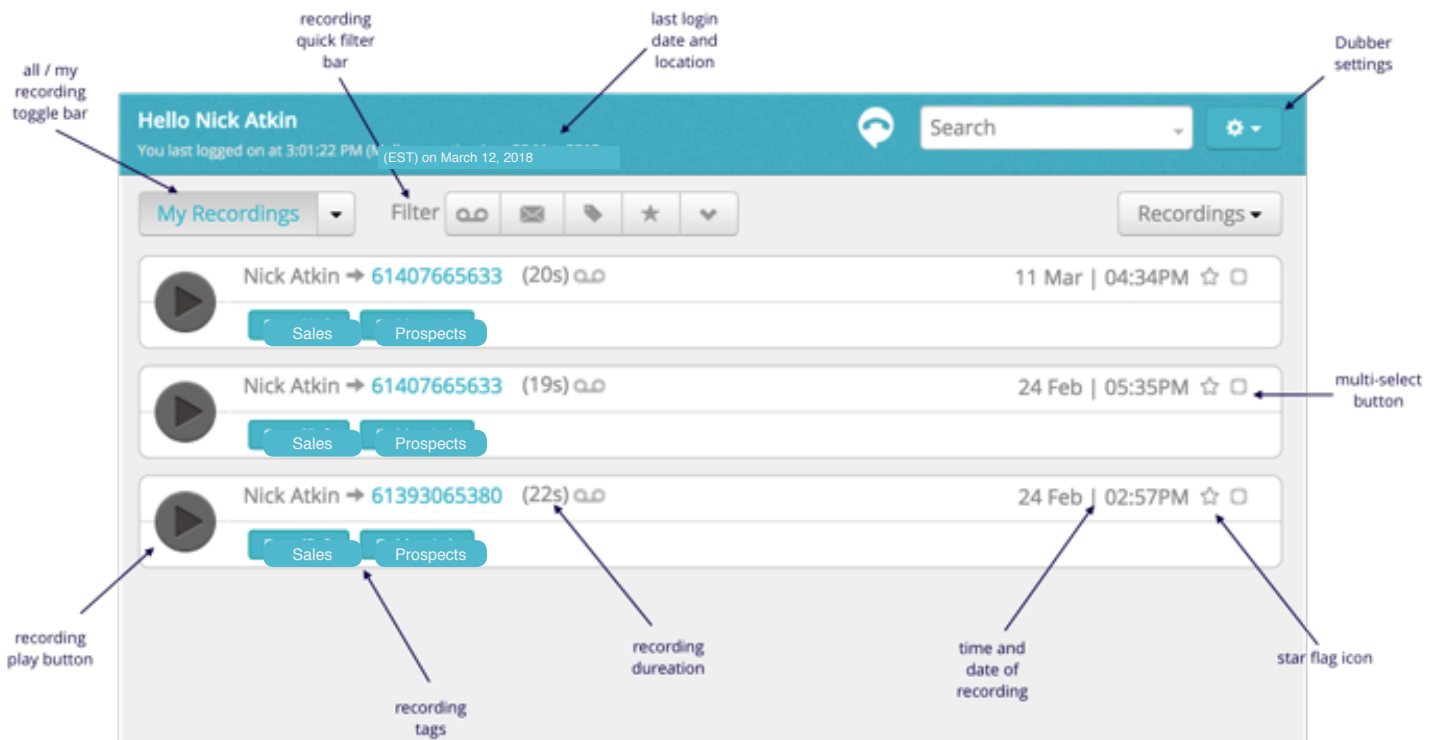


Figure 7 EPB Hosted Call Record Main Page – Elements

The EPB Hosted Call Record Portal page allows the users the ability to complete all functions associated to the recordings. Within this page, the users may complete the following tasks associated with recordings:

- Retrieve Metadata
- Filter
- Search
- Tag
- Star Highlight
- Playback
- Share
- Access Settings

EPB HOSTED CALL RECORD MEDIA PLAYER

The EPB Hosted Call Record Media Player allows users to both play recordings back and also manage other elements and functions associated with the recording.

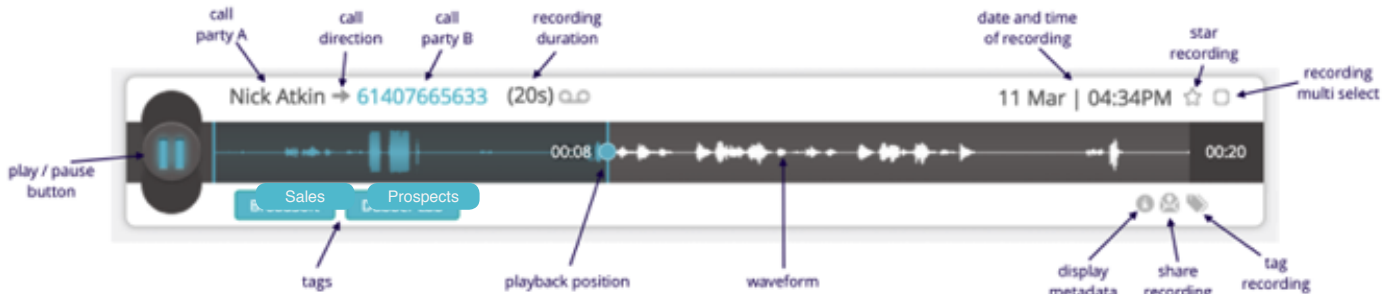


Figure 8 EPB Hosted Call Record Media Player Overview

Within the EPB Hosted Call Record Media Player, the player is broken into 3 sections.



Figure 9 EPB Hosted Call Record Media Player Top Section

The top section (shown above in Figure 9), displays information associated with the recording. Here we can see, Call Party A and Call Party B. The position of Party A and Party B demonstrates the call direction. In this example, EPB Hosted Call Record user ‘Nick’ made an outbound call to party B shown here as the phone number dialed.

We can further see the duration of the recording, and the time and date, that the recording was made.

To the right side of the Media Player we can see two buttons, ‘star’ and ‘multi-select’. The ‘star’ button allows the users to highlight the recording for easy searching. The ‘multi-select’ button is used in context to the whole display of recordings, allowing the user to select multiple recordings so as to apply a similar function to, e.g. adding tags to a group of recordings.



Figure 10 EPB Hosted Call Record Media Player Recording Control Section

The center section of the Media Player displays the waveform of recording along with the play / pause button.

The playback indicator (blue vertical line with circle in the middle) shows the current position in the playback of a recording. Using drag and drop, the user may move this play line to any position within the recording to playback any portion of the recording as required.



Figure 11 EPB Hosted Call Record Media Player Functional Control Section

The lower third of the Media Player is used to manage recordings and access additional functions.

On the left side of the Player, any ‘Tags’ associated to the recording are displayed. These ‘Tags’ may be ‘Tags’ that have been captured automatically or added by a user.

The right side of the player shows icons for carrying out actions against the recording. These actions are as follows:

Display Recording Information

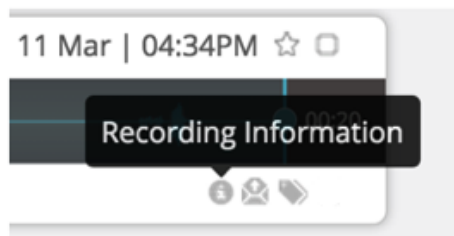


Figure 12 EPB Hosted Call Record Media Player Recording Information Button

The Recording Information button allows the user to display additional metadata that is associated with the recording. Any metadata collected with the recording will be displayed as shown in Figure 13.

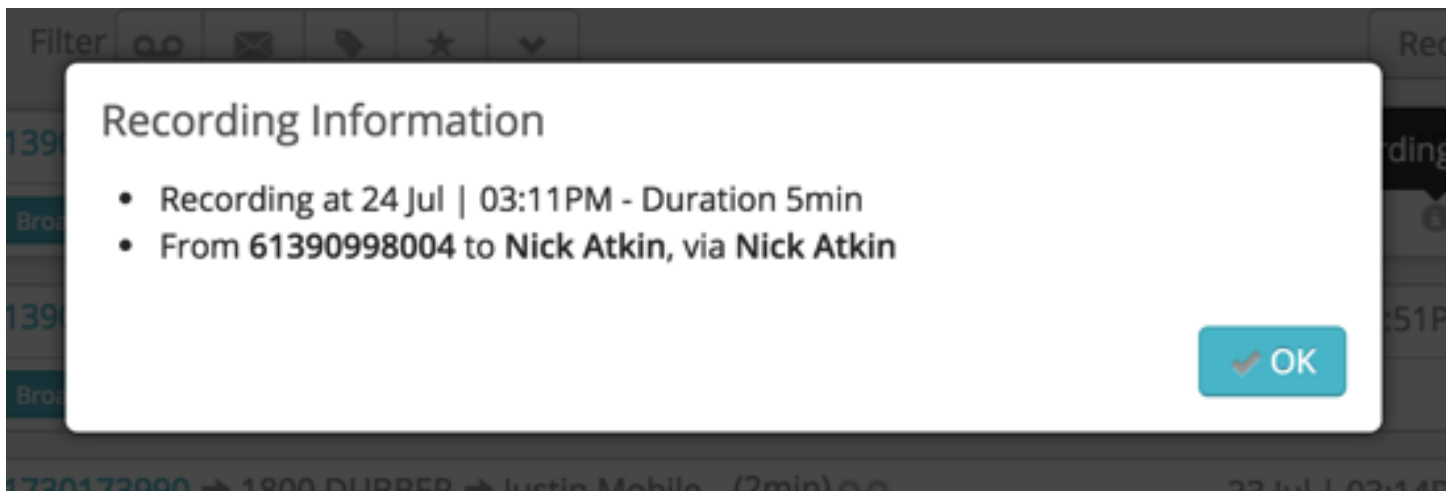


Figure 13 EPB Hosted Call Record Media Player Recording Information Button

Additional Function Buttons



Figure 14 EPB Hosted Call Record Media Player Additional Function Button

Along with the Recording Information button, there are two additional buttons. These are “Share” and “Tags”. Further information on these functions can be found in the appropriate sections of this guide.

RECORDINGS TAGS

Recording 'Tags' are used for classifying recordings within EPB Hosted Call Record. In order to allow advanced searching and grouping of recordings, EPB Hosted Call Record enables the addition of 'Tags' to recordings.

'Tags' may be used for any number of purposes. Some typical examples of these uses include, 'Tagging' call types, (e.g. sales, prospects, support, complaint) and adding account numbers to recordings to allow search of recordings for a specific customer.

When 'Tags' have been added to a recording, they will be visible in the bottom left side of the Media Player as shown below:

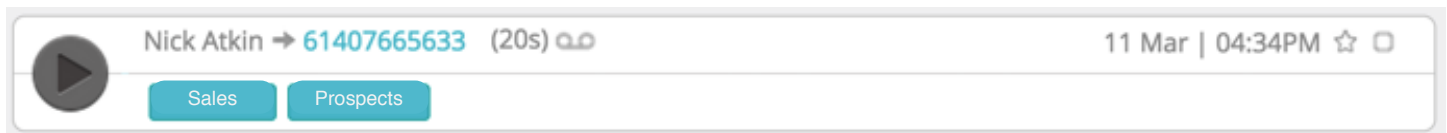
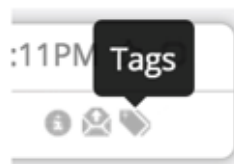


Figure 15 EPB Hosted Call Record Media Player Tags

In this example the recording has two 'Tags', "Sales" and "Prospects". A user wanting to search for calls relating to either of these two 'Tags' would be able to type the 'Tag' value into the search window to find all recording with this 'Tag' (the user will only be able to see recordings with this tag that they have permission to view).

To add 'Tags' to a recording, simple click the 'Add Tag' button as shown below:



This will open a dialogue box that will allow you to add 'Tags'. Simply type the name of the 'Tag' you wish to apply to the recording and press 'enter'. If the 'Tag' has been previously used, once you start typing the dialog box will give the option to automatically populate.

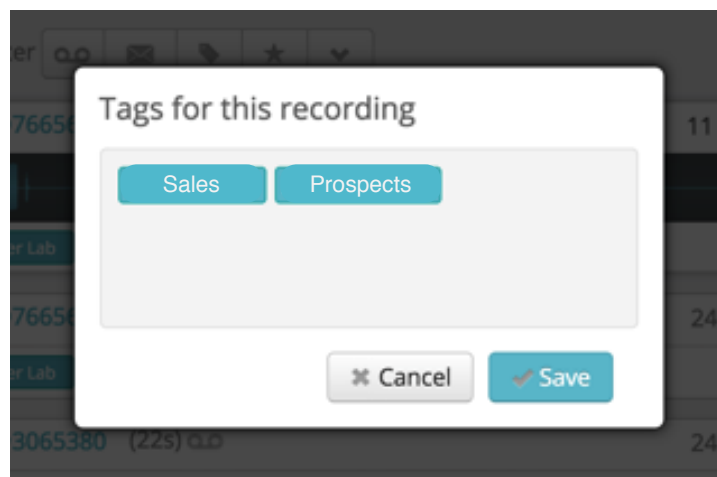


Figure 16 EPB Hosted Call Record Adding Tags to Recording

SEARCHING FOR RECORDINGS

EPB Hosted Call Record provides very simple yet incredibly powerful search capabilities within the EPB Hosted Call Record Portal. As a ‘native cloud’ application, web search utilities have been utilized to provide a sophisticated search tool.

In the top right hand corner of the EPB Hosted Call Record Portal is the EPB Hosted Call Record Search window as seen below:



Figure 17 EPB Hosted Call Record Main Page – Search box

To find recordings simply type in any keyword, whether it be a name or a ‘Tag’ value and press ‘enter’. EPB Hosted Call Record will immediately display any recording that match the specified query. You can also write Boolean query strings to find targeted information, e.g. “Sales +Nick” would return all recordings that contain Sales and Nick.



Figure 18 EPB Hosted Call Record Main Page – Search Box

If you require more advanced search functionality, press the ‘expand icon’ on the search bar as shown in Figure 19.



Figure 19 EPB Hosted Call Record Search bar

If you are looking to search for a recording of a specific person, you may either use a query string to find their recordings, or you can choose to advanced search and select the ‘Filter by’ option.

‘Filter by’ allows you to narrow down your search to specific users or teams. This is of great benefit, if you are looking to build complex queries to find recordings in situations where you have a large number of users and high volumes of recordings to search through.

The image in Figure 20 shows the ‘Filter by’ dialogue listing users to search.

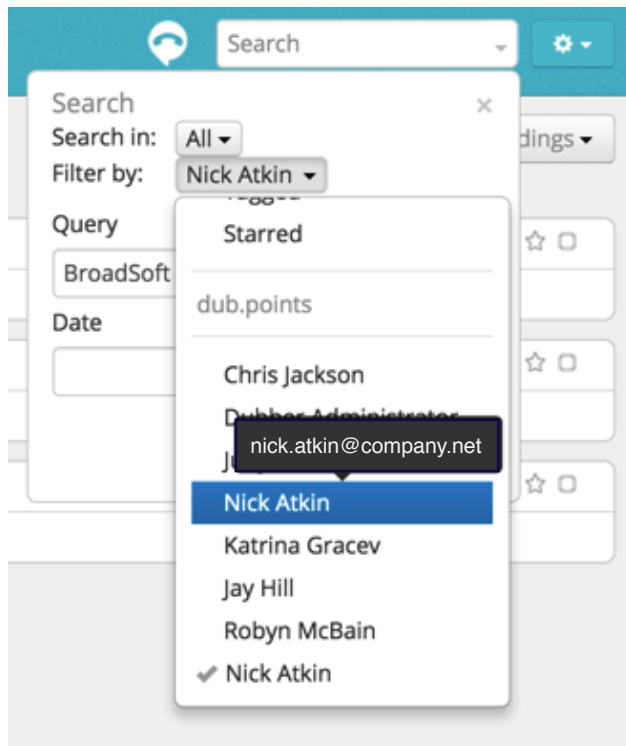


Figure 20 EPB Hosted Call Record Search Dialog – Filter by

Search by Date

In order to narrow search fields further, the 'query', 'search in' and 'filter by' options can also be assisted by the 'Date' search function. Selecting the 'Date' field in the EPB Hosted Call Record Search dialogue presents you with 'date periods' to amend your search, as seen in Figure 21.

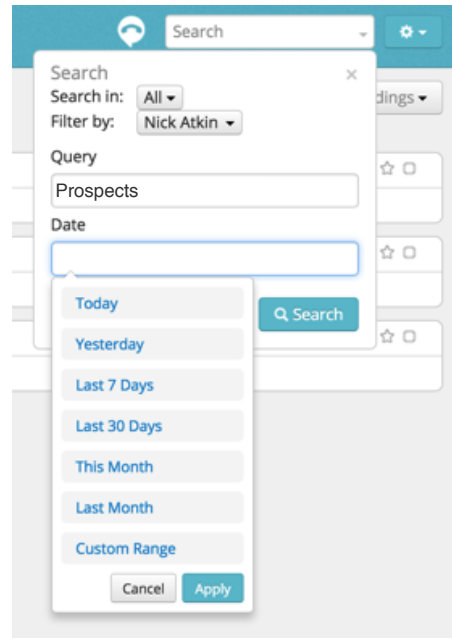


Figure 21 EPB Hosted Call Record Search Dialog – Date Periods

The 'Date' selection allows you to either select predefined date periods:

- Today - today's recordings
- Yesterday - yesterday's recordings
- Last 7 Days - recordings made in the last 7 days
- Last 30 Days - recordings made in the last 30 days
- This Month - recording made in the current calendar month
- Last Month - recording made in the previous calendar month
- Custom Range - allows you to create custom date ranges

Selecting one of these date periods narrows down any other search to only include results from the date period specified.

Select 'Custom Range' allows you to specify an exact date range through use of a calendar entry system. Selecting Custom Range opens the additional dialogue shown in Figure 22.

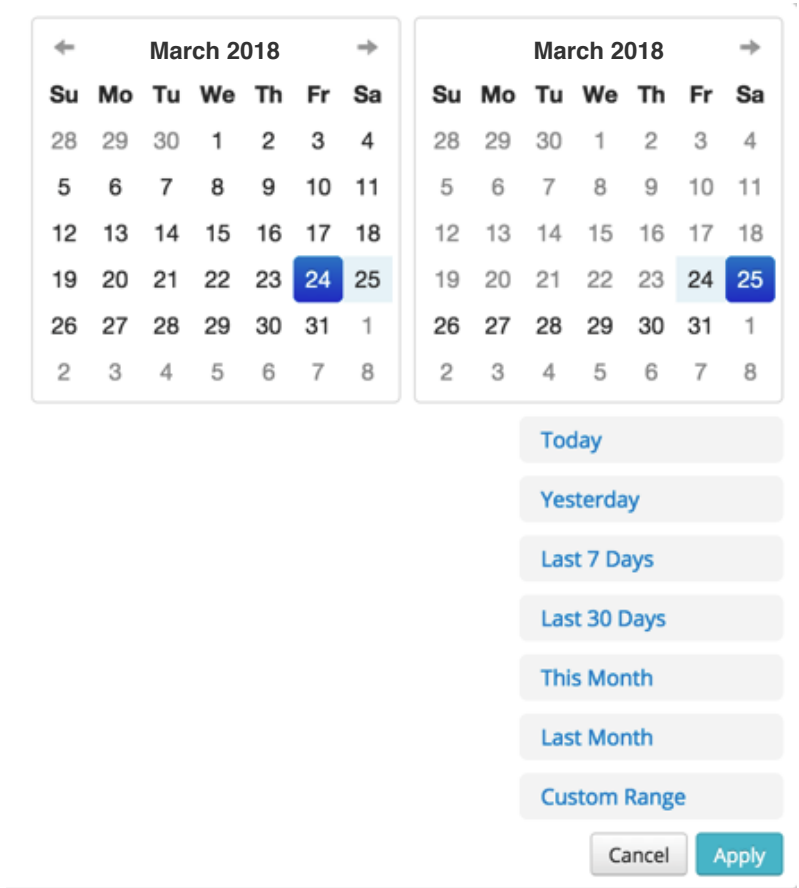


Figure 22 EPB Hosted Call Record Search Dialog – Custom Date Range

In order to choose a date range, select the date from the calendar on the left side for your 'start date' and the date from the calendar on the right for your 'end date'. Once you have completed your selection, press 'apply' and the date range will be added to your search criteria.

FILTERING RECORDINGS

In addition to searching for recordings through the search dialog, EPB Hosted Call Record offers users the ability to quickly ‘filter’ recordings through various methods, allowing quick access to recordings with specific criteria.

In Figure 23, the top bar of the user interface shows the quick filter options within EPB Hosted Call Record.

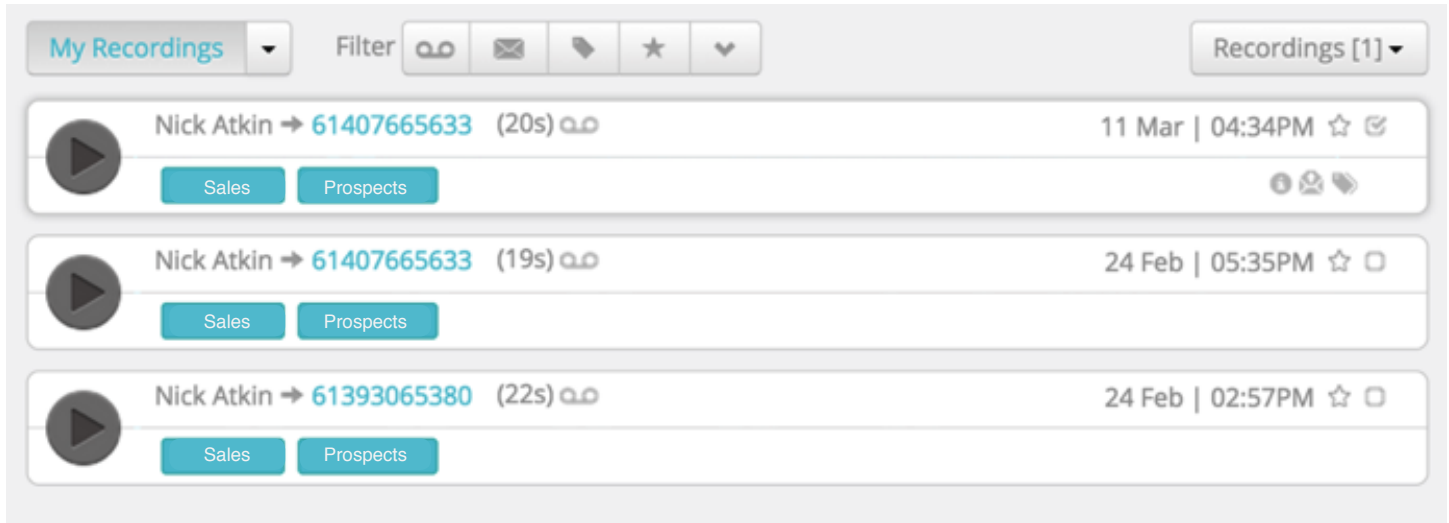


Figure 23 EPB Hosted Call Record Recording Filtering - Overview

Calls may be filtered by several different properties. The initial method is the option to quickly change from a view that displays all users to only your recordings. This is especially useful in organizations where there exists a large numbers of users and high volumes of recordings.

There are two ways of filtering recordings based on the type of users you want to display.

Figure 24 below shows how you can quickly change the displayed recording from ‘All’ users to ‘My Recordings’. This allows you to quickly filter your own recordings.

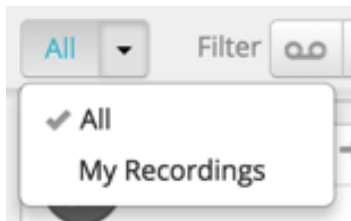


Figure 24 EPB Hosted Call Record Recording Filtering – My Recordings

Filter by User

In order to increase efficiency in finding other users or teams recordings, EPB Hosted Call Record allows users to filter the recordings they are viewing to specific users or teams ('Dub Point').

Figure 25, demonstrates how you can quickly change which user or team recordings are displayed.

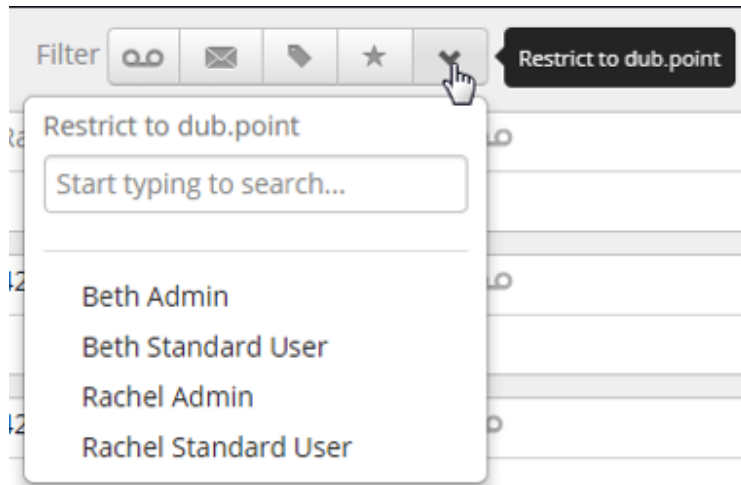


Figure 25 EPB Hosted Call Record Recording Filtering – Restrict to dub point

Filter by Tags

If you use 'Tags' within EPB Hosted Call Record, you may also choose to only display recordings that have 'Tags' associated to them. This allows you to focus on recordings that contain more detailed information. In order to filter calls by 'Tag', select the 'Show tagged' button as in Figure 26.

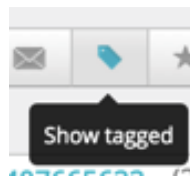


Figure 26 EPB Hosted Call Record Recording Filtering –show tagged

Filter by Star

Another useful feature of the EPB Hosted Call Record filtering system is the ability to 'Star' recordings. As with email and other applications, you may want to classify a document as important, in a way that you can quickly access in the future. EPB Hosted Call Record give this option through the 'Star' button, presented beside the date, on the EPB Hosted Call Record Media Player.

To flag a recording with a 'Star', press the 'Star' button as shown in Figure 27.

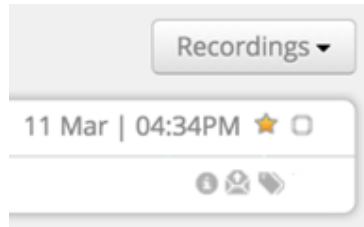


Figure 27 EPB Hosted Call Record Recording Filtering –Star Recording

When looking for recordings that have had the 'Star' applied, select the 'Show starred' filter button from the filter pane as shown in Figure 28. This will display all of the recordings that you have applied the 'Star' to.

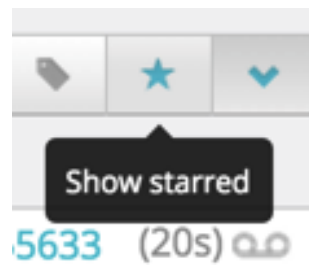


Figure 28 EPB Hosted Call Record Recording Filtering –Show starred

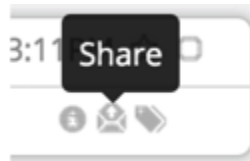
SHARING RECORDINGS

EPB Hosted Call Record offers additional security to users by providing the option to share recordings. Downloading recordings and emailing them reduces the security by allowing others to copy and alter them. To prevent this and enhance security, EPB Hosted Call Record Recording Sharing offers a highly secure way to share recordings without the need to download them.

Through EPB Hosted Call Record Recording Sharing, a secure link is sent to a recipient, offering them the ability to connect to EPB Hosted Call Record and listen to the recording. The user does not need to be hold a EPB Hosted Call Record account.

For enhanced security of this sharing method, links sent to 3rd parties are only available for a fixed duration, after which the secure link ceases to work.

To share recordings, click the ‘Share’ button under the recording in the EPB Hosted Call Record Media Player as shown below:



Once you click the ‘Share’ button, a sharing dialogue box opens on the page as shown below:

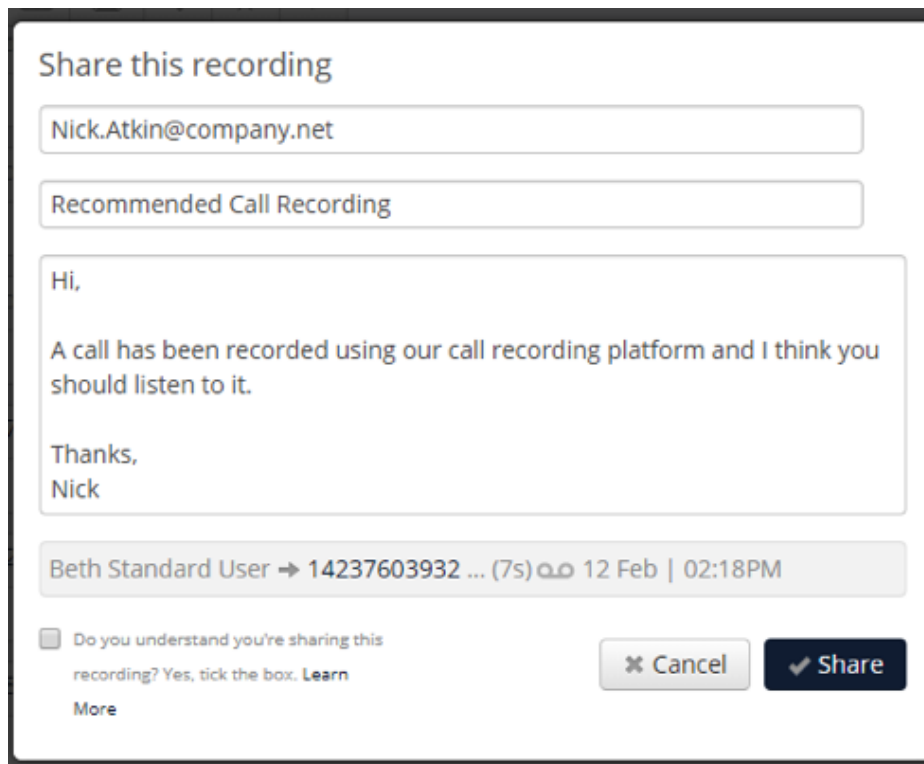


Figure 29 EPB Hosted Call Record Share Recording Dialog

Within the dialogue box, add the recipients email address. If you wish to, you can change the Subject and Description of the message. Once you have filled in the details, check the confirmation box at the bottom of the dialogue box to confirm that you ‘understand you are sharing this recording’ and press ‘share’.

This dialogue will initiate an email to the sharing recipient and provide them with a hyperlink to access the recording.

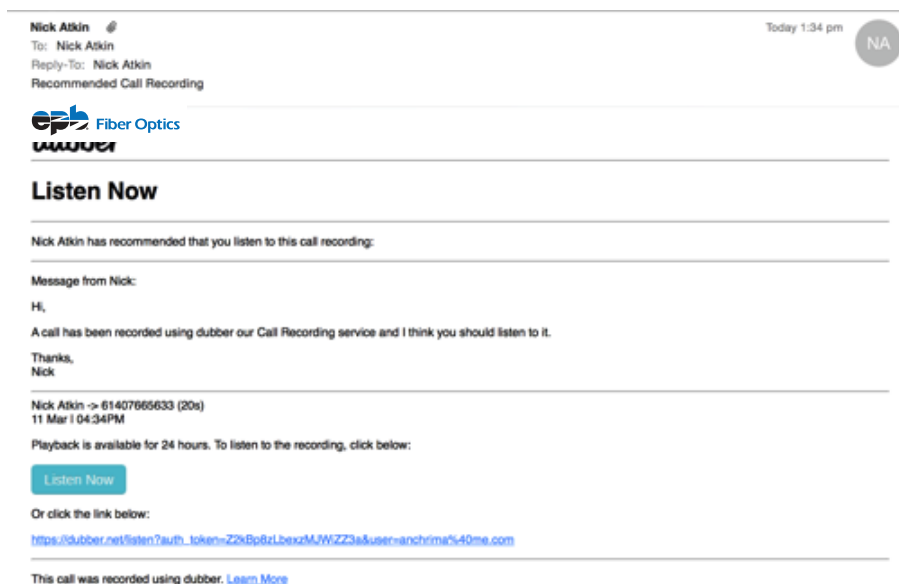


Figure 30 EPB Hosted Call Record Share Recording Dialog

Once the recipient clicks on the ‘Listen Now’ button in the email, they are automatically directed to the EPB Hosted Call Record Portal where they can immediately play the shared recording.

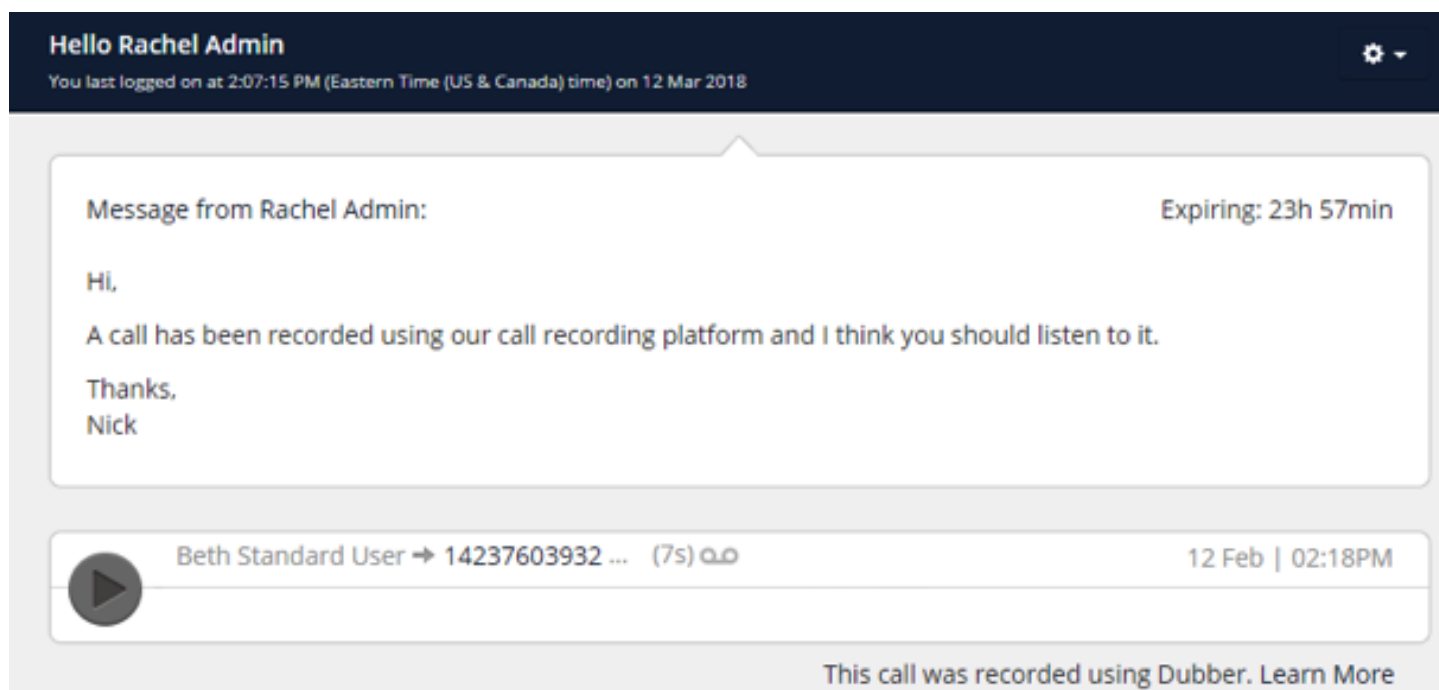


Figure 31 EPB Hosted Call Record Share Recording Dialogue