



# Bell Total Connect Call Recording

Quick reference guide

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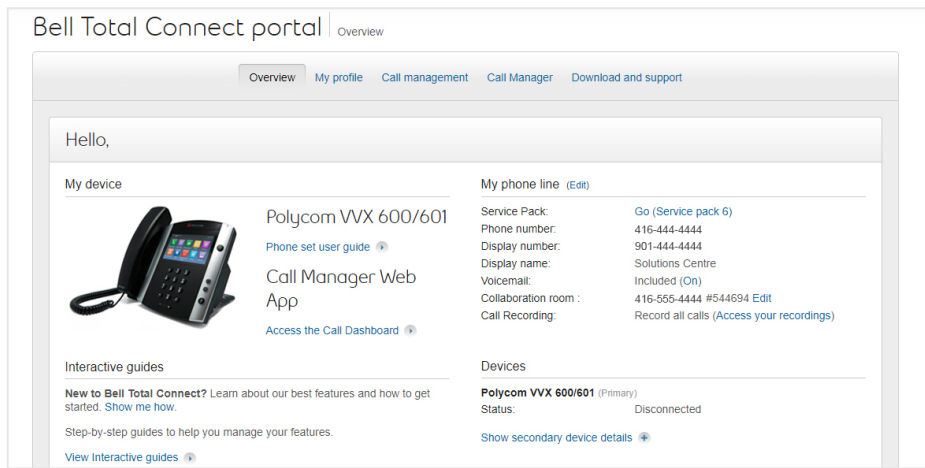
## 1. Introduction

This guide provides information about the features and functions of the Bell Total Connect Call Recording portal.

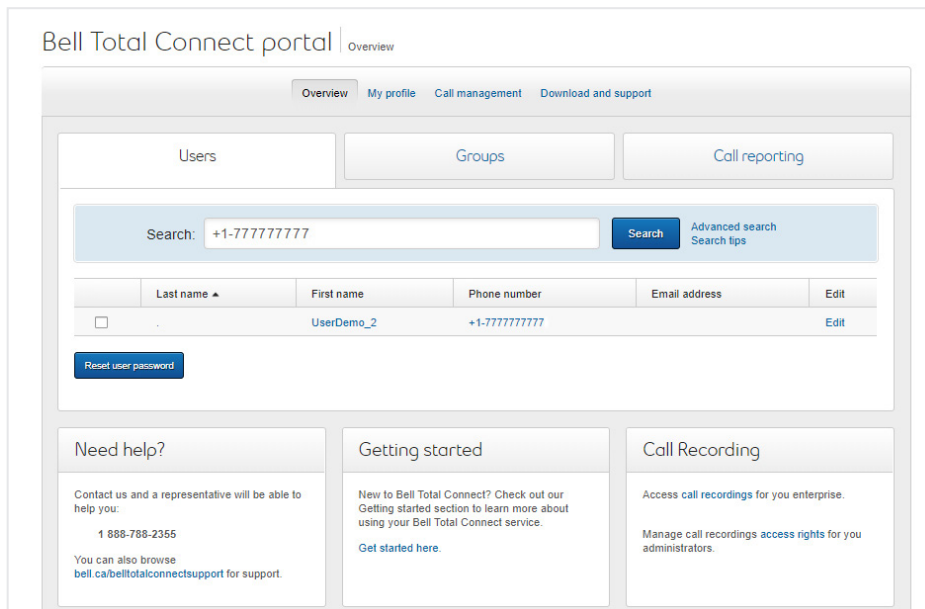
The Call Recording portal allows authorized users of the feature to manage recorded calls. Users are assigned roles within the portal that provide various levels of permissions to both features and functions within the portal and access to recordings through recording permissions.

## 2. Accessing Bell Total Connect Call Recording

1. Log in to the Bell Total Connect portal as an end user (for end users)
2. Select **Access your recordings**

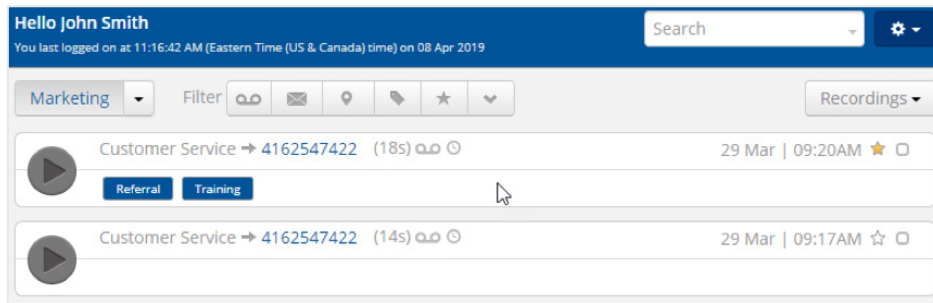


3. Log in to the Bell Total Connect portal as a Call Recording Administrator (for admins)
4. Select **Access call recordings for your enterprise**



### 3. Navigation

The Call Recording portal will allow authorized users to manage and play back their recordings. The image below provides an overview of the various elements within the portal.

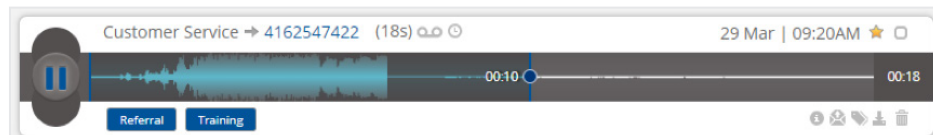


The main page provides users with the ability to complete the following functions associated with the recordings:

1. Playback
2. Recording information
3. Filter
4. Search
5. Tag
6. Star highlight
7. Share

#### 3.1 Playback

The Media Player allows users to play recordings back and manage other elements and functions associated with the recordings. The image below illustrates the layout of the Media Player and provides an overview of the associated buttons and functions.



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

The playback indicator shows the current position in the playback of a recording. By using drag and drop, users can play back any portion of the recording as required.

You can view the call direction between “call party A” and “call party B”. In this example, the Bell Total Connect user called “Customer Service” made an outbound call to party B shown here as the phone number dialed.

You can also see the duration of the recording, and the time and date that the recording was made.

The lower right side of the Media Player is used for managing recordings and accessing additional information. On the lower left side of the Player, any tags associated with the recording are displayed.

## 3.2 Recording information

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.

### Additional function buttons

Along with the “Recording information” button, there are two additional buttons. These are “Share” and “Tags”.

## 3.3 Filtering recordings

In addition to searching for recordings through the search dialog, the portal offers users the ability to quickly filter recordings through various methods, allowing quick access to recordings with specific criteria. The top bar of the user interface shows the quick filter options within the portal.

Calls can be filtered using several different properties. The initial method is the option to quickly change from a view that displays all users to only your recordings or your team’s recordings (teams can be created by administrators to manage user permissions, which allows calls to be easily searchable and accessible by approved team members).

There are two ways of filtering recordings based on the type of users you wish to display: “All” users (if you have access to all recordings for all users in your account) and “My Recordings”. This allows you to quickly filter your own recordings.

### Filter by user

To increase efficiency in finding other users’ or teams’ recordings, the portal allows users to filter the recordings they are viewing based on specific users or teams.

### Filter by tags

If you use tags within the portal, you can also choose to display only those recordings that have tags associated with them. This allows you to focus on recordings that contain information that is more detailed. In order to filter calls by tag, select the “Show tagged” button.

### Filter by star

Another useful feature of the filtering system is the ability to “Star” recordings so that you can easily access recordings. To flag a recording with a star, press the “Star” button. When looking for recordings that have had the star applied, select the “Show starred” filter button from the filter pane as shown below.

## 3.4 Searching for recordings

Bell Call Recording provides very simple yet incredibly powerful search capabilities within the Portal.

To find recordings, simply type in any keyword in the Search window and press Enter. The portal will immediately display any recording that matches the specified query. You can also write Boolean search strings to find targeted information, e.g. “Sales + Nick” would return all recordings that contain Sales and Nick.

If you require more advanced search functionality, select “expand icon” on the search bar. The search bar will expand to offer you more selections for your search. In the Search dialog box, additional criteria can be applied to your searches. The “Search in” dialog box allows you to narrow your search from all recordings that you have access to (if you have access to all recordings for all users in your account) to only your own recordings.

If you are looking to search for a recording of a specific person, you can either use a search string to find their recordings or you can choose to do an advanced search and select the “Filter by” option. “Filter by” allows you to narrow down your search to specific users or teams, particularly 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.

## Search by date

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 Search dialog box presents you with “date periods” to amend your search. Selecting one of these date periods narrows down any other search to include only the results from the date period specified. Selecting “Custom” allows you to specify an exact date range through the use of a calendar entry system.

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.

## 3.5 Recordings tags

Recording tags are used for classifying recordings to allow advanced searching and grouping.

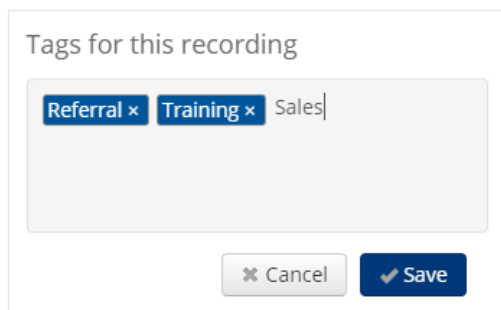
Tags can be used for any number of purposes. Some typical examples of these uses include “Tagging” call types (e.g. sales, support, complaint) and adding account numbers to recordings to allow searching the recordings for a specific customer.

When tags have been added to a recording, they will be visible in the bottom left side of the Media Player.

A user wishing to search for calls relating to a tag would be able to type the “Tag” value into the search window to find all recordings with that tag.

To add tags to a recording, simply click the “Add Tag” button:

This will open a dialog 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, it will provide the option to automatically populate.



### 3.6 Star and multi-select

At the right side of the Media Player there are two buttons: “star” and “multi-select”. To highlight the recording for easy searching, select the “star” button. The “multi-select” button is used in context to the display of all the recordings, allowing users to select multiple recordings in order to apply similar tags or delete multiple recordings (deleting is available only to administrators).

### 3.7 Managing recordings and accessing additional functions

This section of the Media Player is used for managing recordings and accessing additional functions. On the left side of the player, any tags associated with the recording are displayed.

The right side of the player shows icons for carrying out actions on the recording.

### 3.8 Sharing recordings

The Bell Total Connect Call Recording feature offers additional security to users by providing the option to share recordings. A secure link is sent to a recipient, offering them the ability to connect to the portal and listen to the recording. The recipient does not need to have a Bell Total Connect Call Recording account to listen to the recording. For enhanced security of this sharing method, links sent to third parties are available only for a fixed duration, after which the secure link ceases to work.

To share recordings, click the “Share” button under the recording in the Media Player.

Within the dialog box, add the recipient’s email address. You can also change the Subject and Description of the message. Once you have filled in the details, check the confirmation box at the bottom of the dialog box to confirm that you understand you are sharing this recording and press “Share”.

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

Once the recipient clicks on the “Listen Now” button in the email, they are automatically directed to the recording portal, where they can immediately play the shared recording.

## 4. Additional administrator user permissions

### 4.1 Download recordings

Account administrators have additional privileges within the recording portal enabling them to perform specific administrative duties, including being able to download recordings to their local device or server.


This temporary link is valid for only 30 seconds, ensuring security of the download link.

### 4.2 Delete recordings

Account administrators are able to delete recordings from their account. An additional icon is available to account administrators, to enable deletion.

Once the administrator has selected the trash icon, a warning prompt is displayed to confirm the deletion of the recording. Once the administrator enters their password and “Confirm Delete” is selected, the recording is permanently deleted from the portal.

### 4.3 View user account details

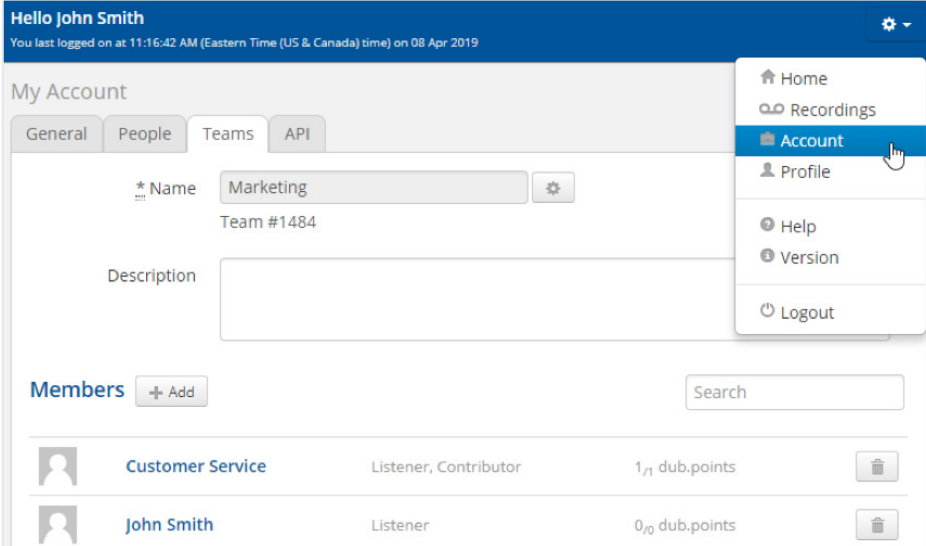
Account administrators are able to view every Call Recording standard users and administrators associated with their account. To view standard users and administrators, an administrator selects the “Account” option from the settings drop-down menu on the main page. From the “My Account” page, the administrator selects the “People” tab and then selects a standard user or administrator to view the details. For standard users, they can select the contact card icon  to view the recording package they are subscribed to. Please note, administrators should not delete standard users via the Recording Portal. Please contact your Bell representative to delete any call recording accounts.



## 4.4 Teams

Bell Total Connect Call Recording allows administrators to manage user permissions to listen to recordings for other team members for coaching and other purposes. A Teams hierarchy allows calls to be easily searchable and accessible by approved team members.

To create a new team, an administrator selects the “Account” option from the settings drop-down menu on the main page. On the “My Account” page, the administrator selects the “Teams” tab and “Add team”. Once a team name has been entered, the administrator can add team members accordingly. An administrator can set the user permissions per team member (i.e., listener, recorder or both).



The screenshot displays the 'My Account' interface. At the top, a blue header shows 'Hello John Smith' and a settings gear icon. Below the header, the page title 'My Account' is followed by tabs for 'General', 'People', 'Teams', and 'API'. The 'Teams' tab is active, showing a form with a text input for '\* Name' containing 'Marketing' and a gear icon, and a label 'Team #1484' below it. A 'Description' text area is empty. A dropdown menu is open on the right, listing 'Home', 'Recordings', 'Account' (highlighted with a mouse cursor), 'Profile', 'Help', 'Version', and 'Logout'. Below the form, a 'Members' section features an '+ Add' button and a search input. A table lists team members:

| Profile Icon | Name             | Permissions           | Points          | Remove Icon |
|--------------|------------------|-----------------------|-----------------|-------------|
|              | Customer Service | Listener, Contributor | 1,71 dub.points |             |
|              | John Smith       | Listener              | 0,0 dub.points  |             |