Call Recording

User Guide

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SmartVoice Call Recording

What is Call Recording?

Call Recording allows you to record, store and playback SmartVoice calls for training, compliance or quality purposes. Call content can be captured and accessed now using various features like instant playback or secure share.

Business class recording

- Capture communications from anywhere, any platform, any device*
- Next generation call recording making call content easily accessible through an online portal

Cloud Storage

- Unlimited Cloud Storage and scalability
- Highly secure and rapid deployment

Cloud management

- Easy online management
- Share, download, tag and track recordings

Call Recording Availability

Call Recording is available as an add-on to any SmartVoice package (except Analog):

- SmartVoice
- SmartVoice Plus
- SmartVoice Collaborative
- SmartVoice Collaborative Receptionist
- SmartVoice Mobile
- SmartVoice Mobile App
- SmartVoice Mobile Collaborative
- SmartVoice Hospitality Common line
- SmartVoice Hospitality Collaborative
- SmartVoice Hospitality Mobile

Please contact your Shaw Business Sales Representative at 1-877-742-9249 to get Call Recording added to your account.

*Where Internet connectivity is available.

Call Recording Activation

How to Activate Call Recording

If you want to verify if your account has Call Recording, log into the Shaw Business SmartVoice portal at smartvoice.shawbusiness.ca with your Username and Password.
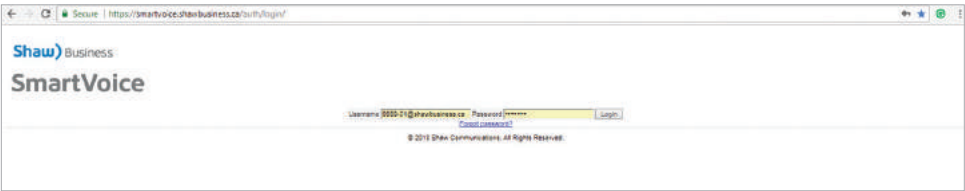
SmartVoice Administrator

Call Recording has to be activated on a per user basis, so if you are the Administrator, you can modify these settings in the drop-down menu. The screenshot below shows how we can modify John Doe's phone line to activate call recording.
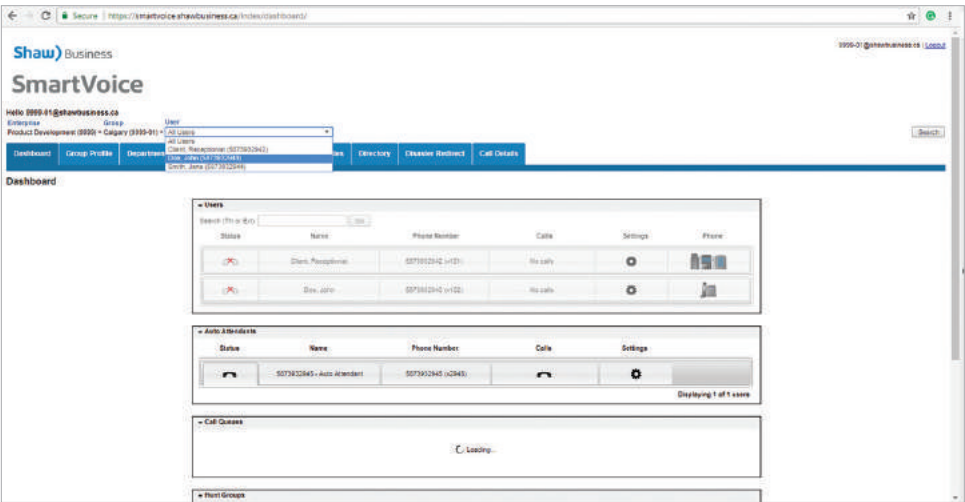
Once you click on John Doe's name, the screen view will then modify and you can adjust the settings on his behalf (or of another chosen specific SmartVoice user).
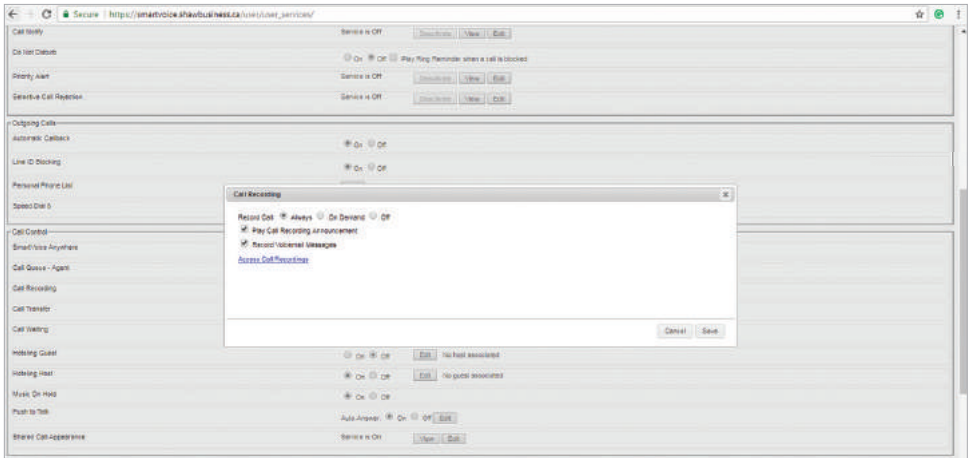
SmartVoice Standard User

If you are a standard SmartVoice user, your view will be different than the Administrator's and will be similar to the screenshot below:
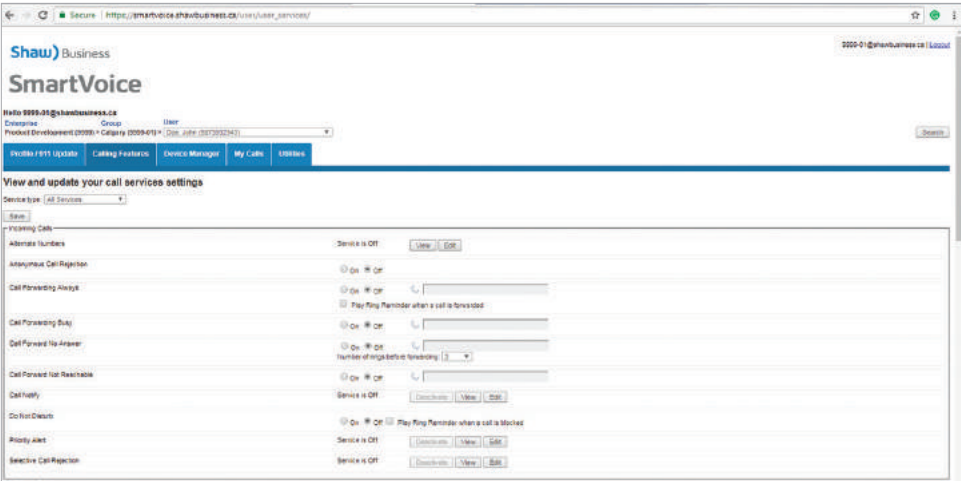
Scroll down until you see Call Control and then Call Recording will be part of your options.
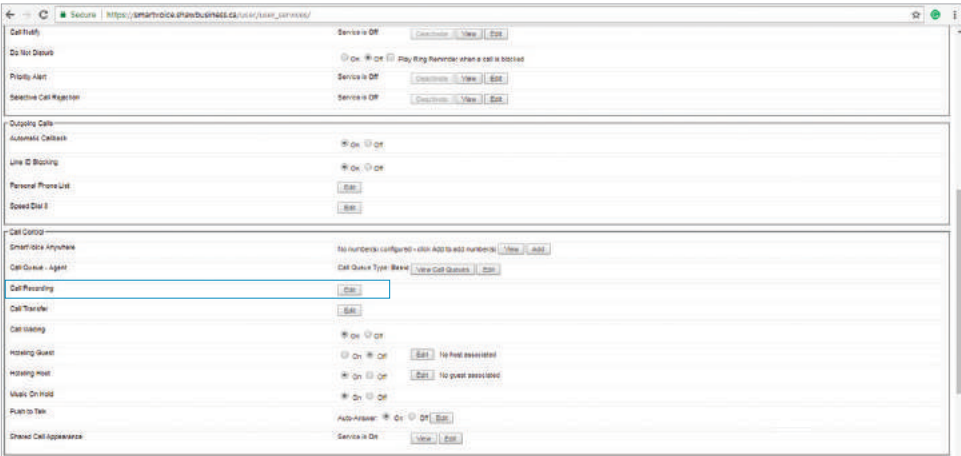
Clicking Edit will bring up another menu for you to update your Call Recording settings.

Accessing your Call Recordings

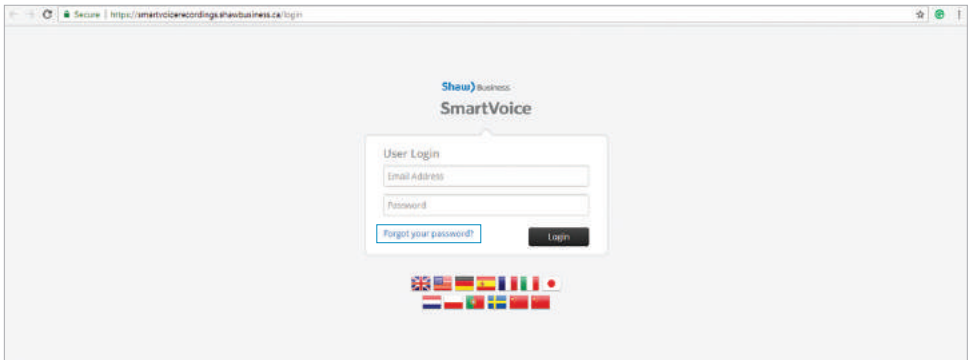You can access your call recordings and the associated settings in two ways:

1. SmartVoice portal re-direct
2. SmartVoice Call Recording Portal

1. SmartVoice Portal Re-direct
You can access your recordings by clicking on 'Access Call Recordings' in the SmartVoice portal found at smartvoice.shawbusiness.ca. You can use the same login credentials as you have for your SmartVoice service.

2. SmartVoice Call Recording Portal
You can access your call recording settings by visiting the SmartVoice Call Recording Portal found at smartvoicerecordings.shawbusiness.ca/login . You can use the same login credentials as you have for your SmartVoice service.
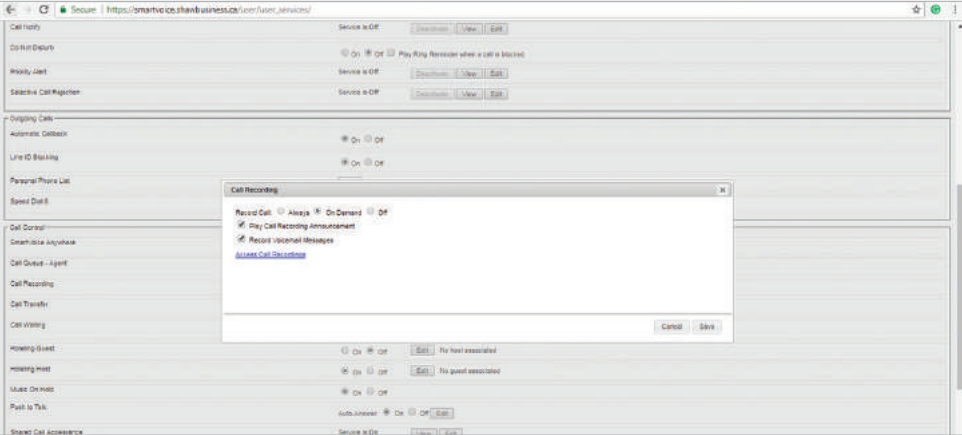

If you forget your SmartVoice Call Recording Portal password, your password reset must be done via the SmartVoice Portal.

SmartVoice Portal Configuration

SmartVoice Portal Configuration

You can access your recording settings by clicking on Access Call Recordings in the SmartVoice Portal.
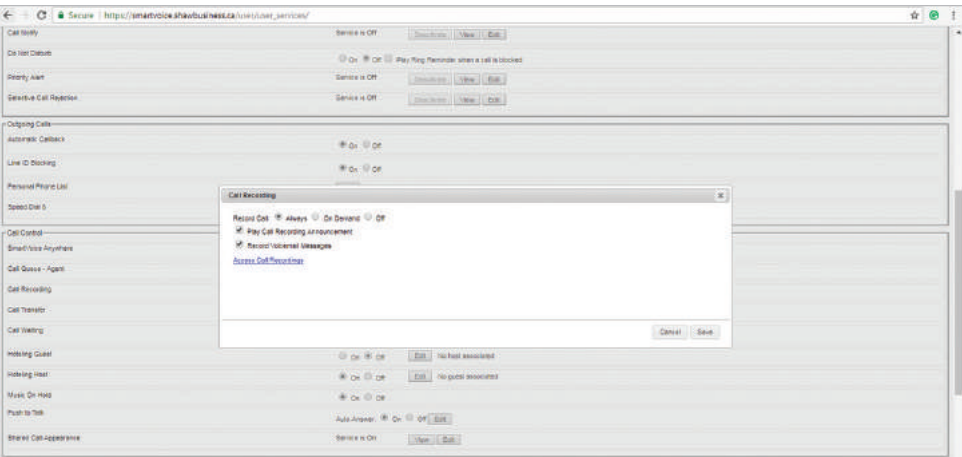

Call Recording Settings

1. Various Ways of Recording a Call

    a. Always

    b. On Demand

    c. Off

a. Always

Selecting Always means that every time you make or receive a call, whenever the call starts, the Call Recording feature will automatically be activated:

b. On Demand

Selecting On Demand means that you have to manually start a call recording by initiating an action either in your SmartVoice phone handset or your SmartVoice Mobile app.
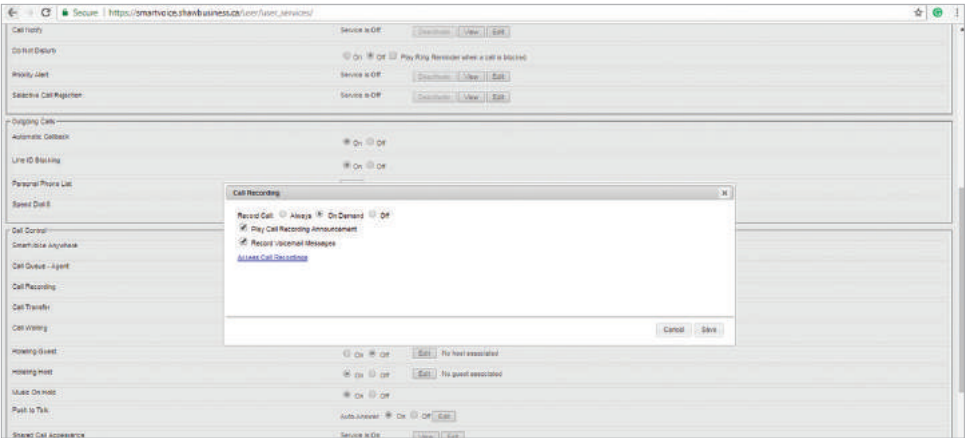
Please note: Within SmartVoice, you can conduct a blind transfer, which transfers a call to another line or agent. If you select On Demand and conduct a blind transfer to another agent, the call recording ends and the receiving agent needs to re-initiate the recording.
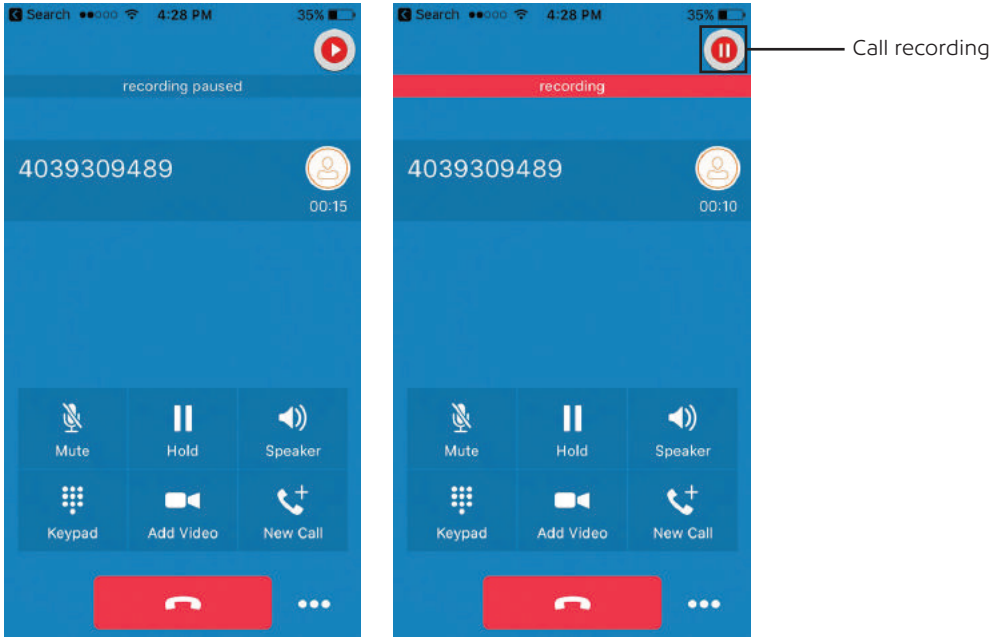
c. Off

Selecting 'Off' means that you have deactivated Call Recording for your specific phone line.
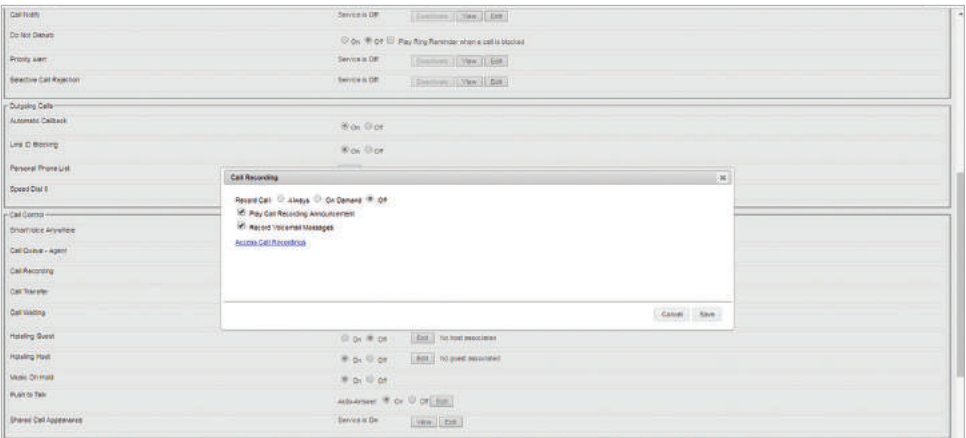
2. Using the SmartVoice Mobile App

You can record the call on the SmartVoice Mobile App via a button found at the top right corner. You can also pause the recording if needed.

Call recording

3. Other Call Recording Features

a. Play Call Recording Announcement - Adding a checkmark in this box will activate or deactivate a generic recording to inform call participants that the call is being recorded. This generic recording cannot be customized at the moment.

b. Record Voicemail Messages - Adding a checkmark in this box will activate voicemail recordings for your SmartVoice line. Please note that this feature is independent of the SmartVoice voicemail feature that exists natively on your line and poses a risk that you will have voicemail recordings in two separate platforms.

4. Storage and Deletion of Recordings (Automated or Manual)

Any recorded calls can be stored for a period of 90 days only. If a recording is left past this time period, it will be automatically deleted and cannot be recovered. If you require storage or archiving longer than 90 days, it's recommended that you download the recording(s) to a local computer, which can be done by an Administrator.

Call Recording Portal Navigation

Navigating the Call Recording Portal

Once you're in the Call Recording Portal (found at smartvoicerecordings.shawbusiness.ca/login), you'll be greeted with the main page that will contain your recordings. The screenshot below shows that there is one recording for that line.
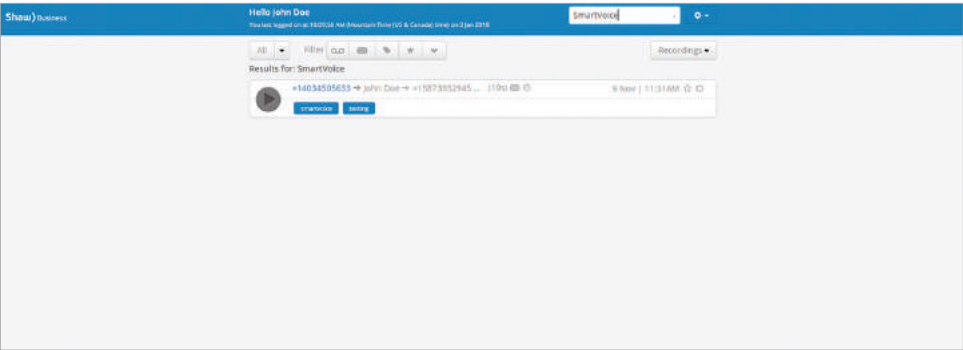
Portal Account Administration

If you are an Administrator, you will have the right to modify account information/settings in the Portal.

Within Account, there are several settings options:
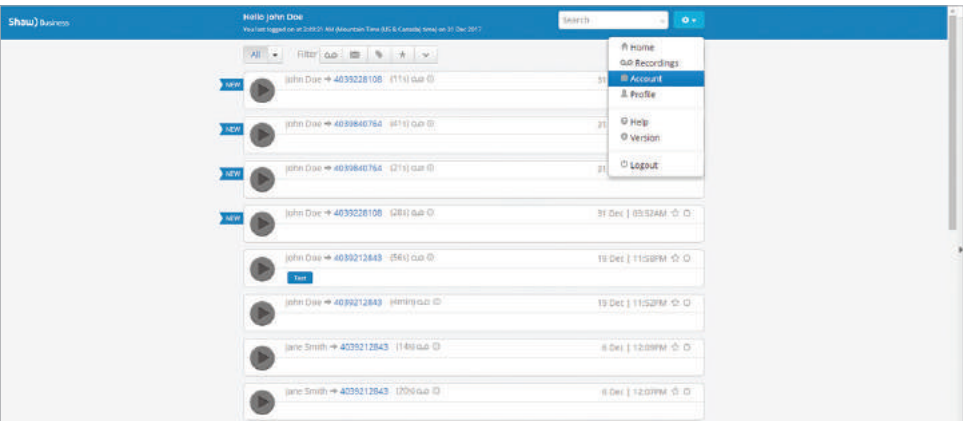
1. **General** – this tab contains general information about your organization.
2. **People** – within this tab, the various users within your organization and the type of users will be listed.
3. **Teams** – within this tab, you will have the ability to add other users in a team to manage access within your Call Recording Account. Team members can either be a Contributor, a Listener, or both. If a user is a contributor to a team, their recordings are accessible by the listeners of the team.

1. General

The General tab is where you can edit your account name, time zone and address.

2. Other Call Recording Features

a. Account names

b. User types

c. Dub points - this icon indicates that a particular line has a purchased Call Recording (a recording license).
Other standard users/administrators with access and not recording capabilities can be added and they will not be charged for Call Recording capabilities.

d. Account options

User Types

Account Names

Dub Points

Account Options

3. Teams

a. User types

When you utilize Call Recording, you will be one of two types of users, a Standard User or an Administrator. The chart below outlines the activities of both:

User can...	Standard User	Administrator
Listen to recordings for entire organization		√
Listen to their own recordings	√	√
Listen to 'Team' recordings if assigned the 'Team Listener' profile	√	√
Share Recordings	√	√
Delete Recordings		√
Tag Recordings	√	√
Create Account Users		√
Modify Account Users		√
Delete Account Users		√
Create Teams		√
Modify Teams		√
Delete Teams		√

b. Setting up Teams

The Teams tab gives you (the Administrator) the ability to create additional permission-based settings, called Teams, for account users. It's meant for user security, advanced filter, and searching functionality.

Standard Users only have playback capabilities of their own recordings, but if you create a Team, you can provide users in the group access to other users' recordings, depending on security settings.

A user/administrator can be either:

• Contributor

• Listener

• Or Both

If a user is then added to a team as a contributor, their recordings are also accessible by the other listeners of the team.

For example, Jack, Emily and Jennifer comprise three users in a team:

Jack – He is the Receptionist who receives calls. Jack receives calls all day so he's a contributor to the team.

Emily – She is Jack's Supervisor. Emily receives calls as well, but needs to track Jack's progress so she's both a contributor and a listener.

Jennifer – She is the HR manager. She doesn't want her calls to be recorded, but wants to hear how her company handles calls, so she's a listener to the other users, Jack and Emily, who are on the team.

To illustrate how the team settings work, here are three scenarios to illustrate:

a. If Jack receives or initiates a call, his conversations are recorded and gets added into the portal. Since it's his recording, the recording can be listened by Jack, Emily and Jennifer.
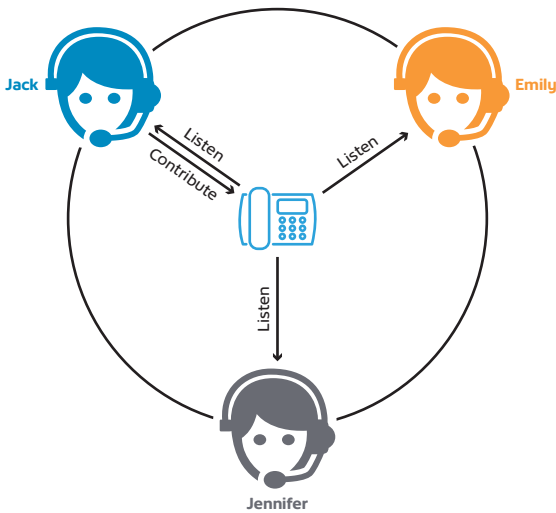
b. If Emily receives or initiates a call, her conversations are recorded and gets added into the portal. Since it's her recording, the recording can be listened by Emily and Jennifer, but not by Jack since he doesn't have listening rights in the team.
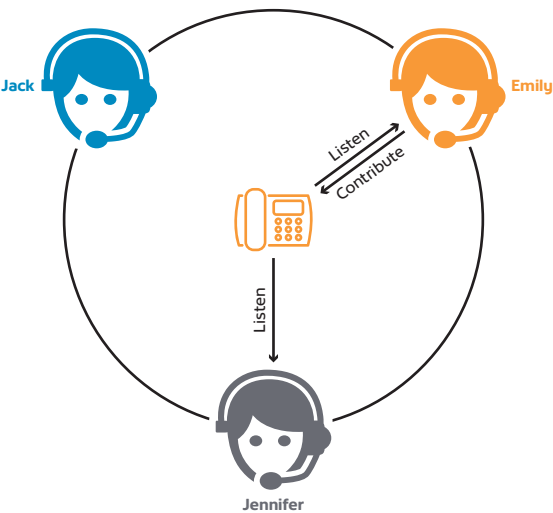

c. If Jennifer initiates or receives a call, her calls won't be recorded into the portal as she's not a contributor. However, she can listen to Jack's and Emily's recordings as she is a listener.
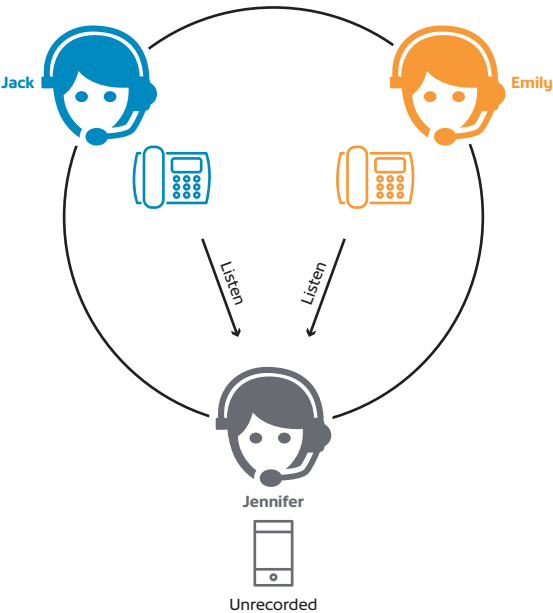
The Call Recording Media Player

Using the Call Recording Media Player

The Call Recording Media Player allows you to review your recorded calls and configure settings related to the recordings.
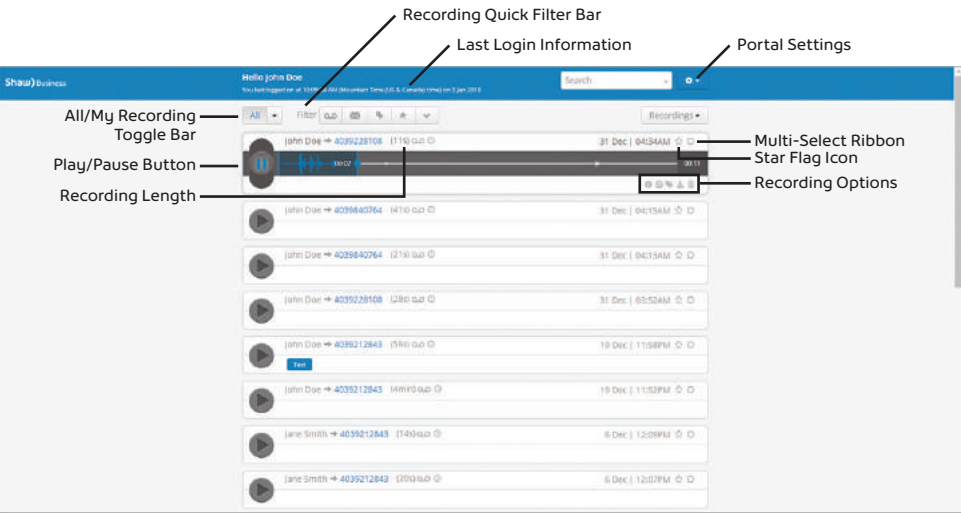

There are various elements within the Call Recording Media Player:

1. **All/My Recording toggle bar** - lets you filter out all recordings to see specifically just recordings within your phone line.

2. **Recording quick filter bar** - can help you filter recordings that are:
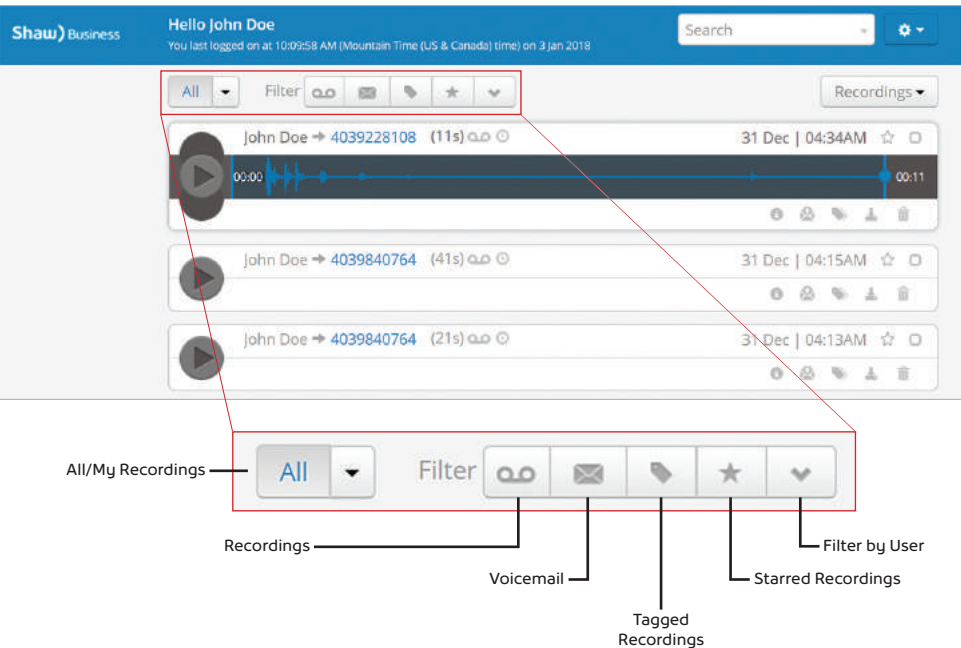
a. All/My Recordings – this provides you a way to filter out specific recordings from either your own line or all recordings within your organization.
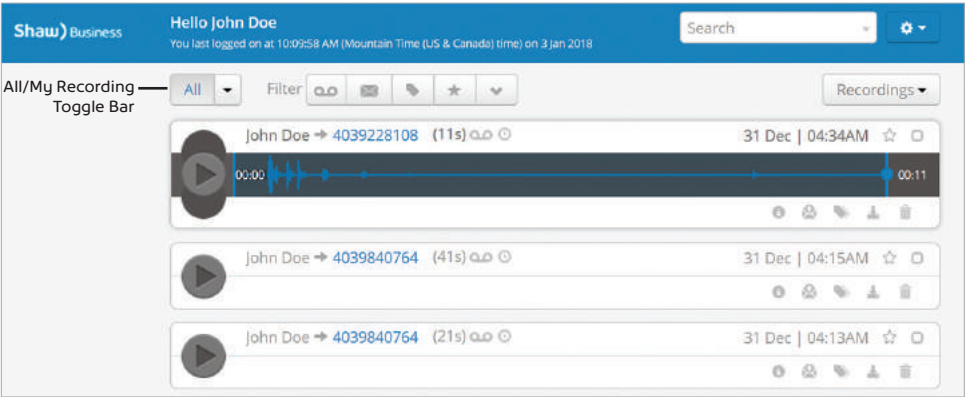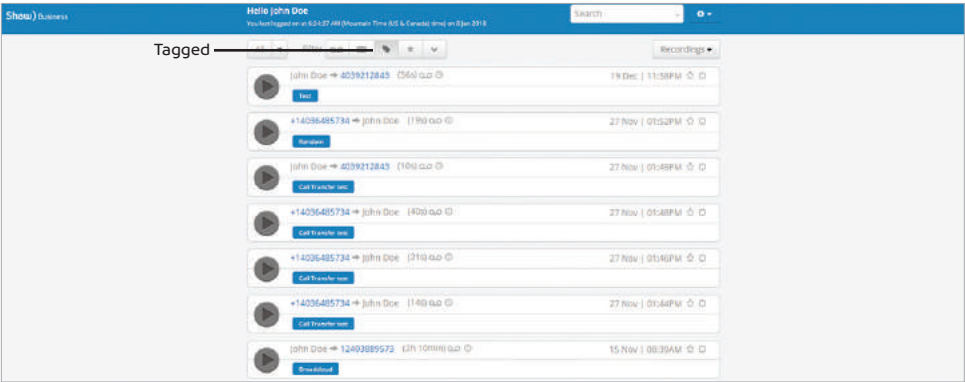

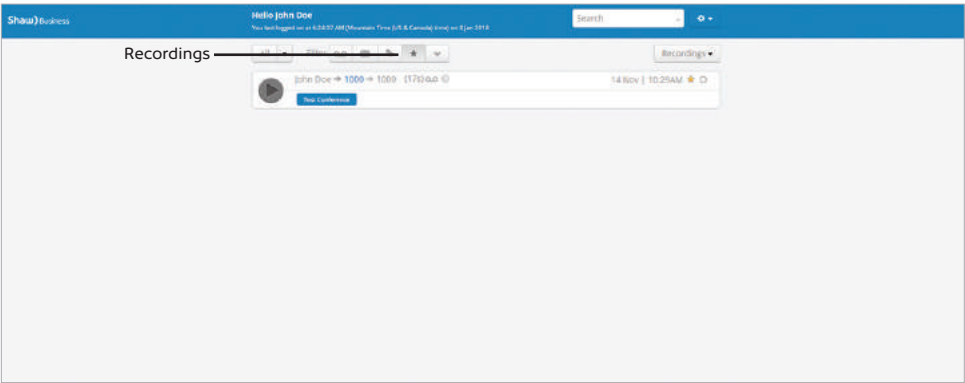**b. Recordings** – this filters out recordings that were recorded on an active call.
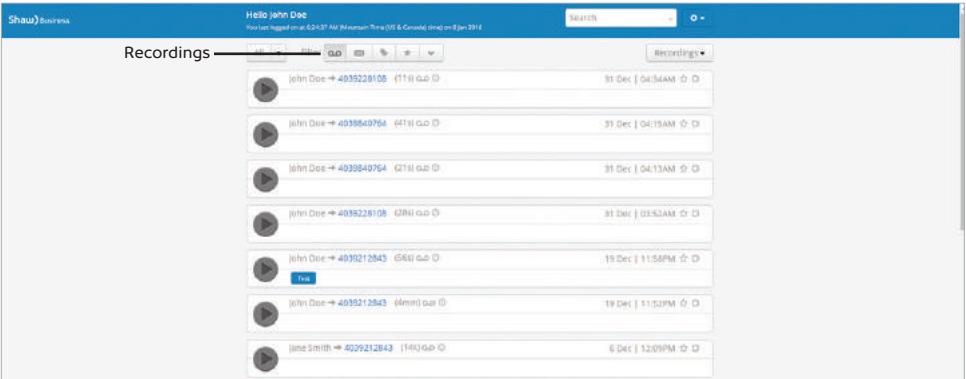
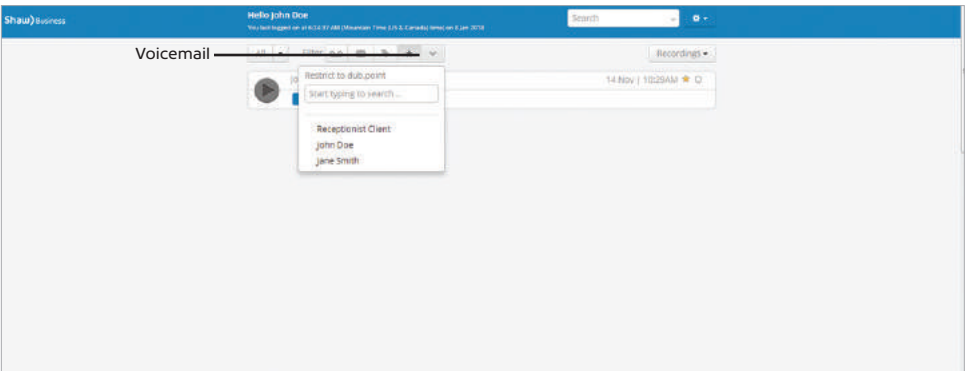**c. Voicemail** – this filters out recordings that were recorded on voicemail.
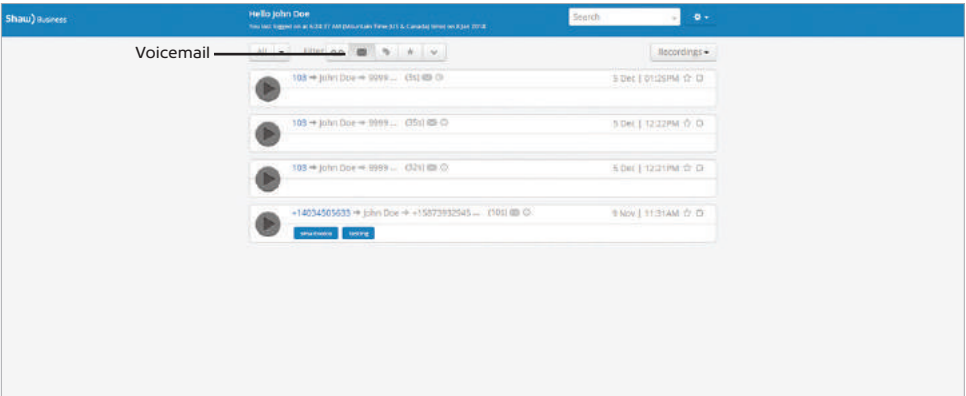
d. Tagged – this filters out recordings that were tagged with keyword(s).


e. Starred – this filters out recordings that were starred for priority/bookmarking.


**f. Filter by User** – this filters out recordings by specific users or teams within your organization.

3. Portal Settings - provides you the ability to modify the SmartVoice Call Recording portal.

4. Multi-select ribbon - gives you the ability to select multiple recordings when needed.

5. Star flag icon - provides you the ability to bookmark recordings by adding a star.

**6. Recording options** - gives you options on how to interact with the recording.

Information ——— Delete

Share ——— Download

Tag
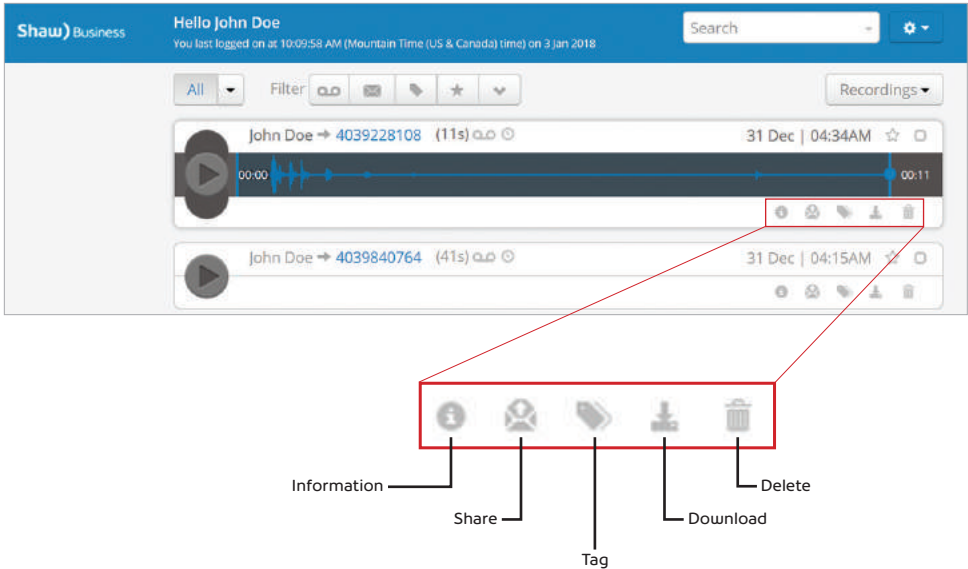
a. Information – provides you recording information such as where the call came from, duration, and transferring path.
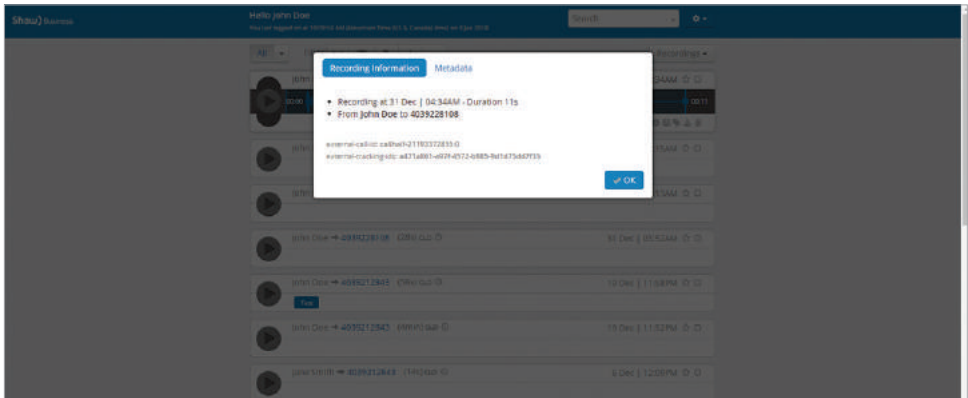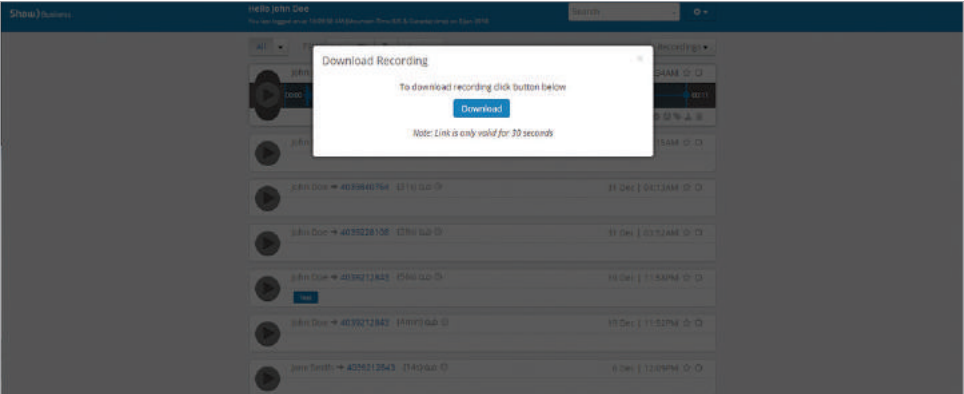
b. Share – gives you an option to share the recording to various email addresses.
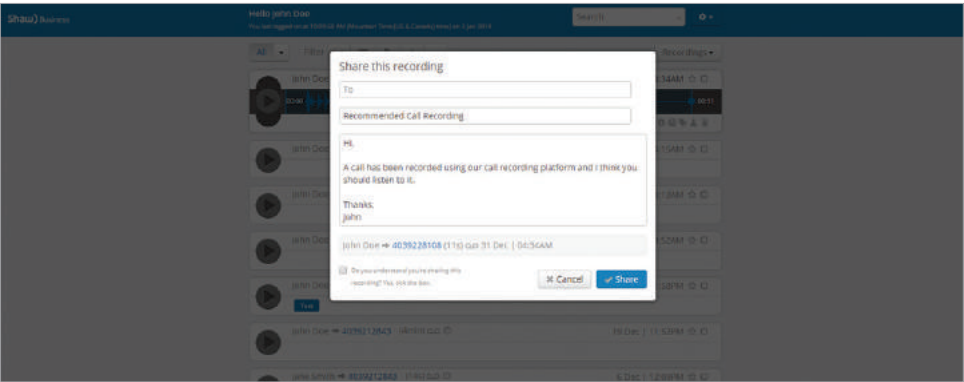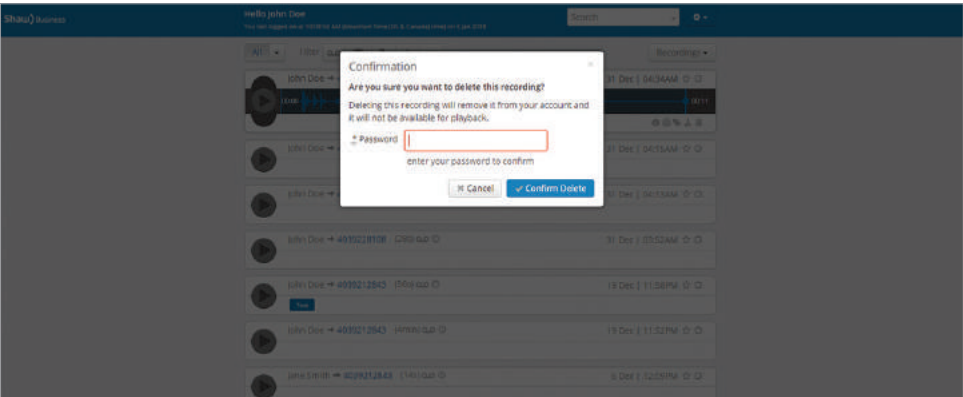

c. Tags – provide you a searching alternative by adding keywords to a recording; adding commas to each keyword will separate it.
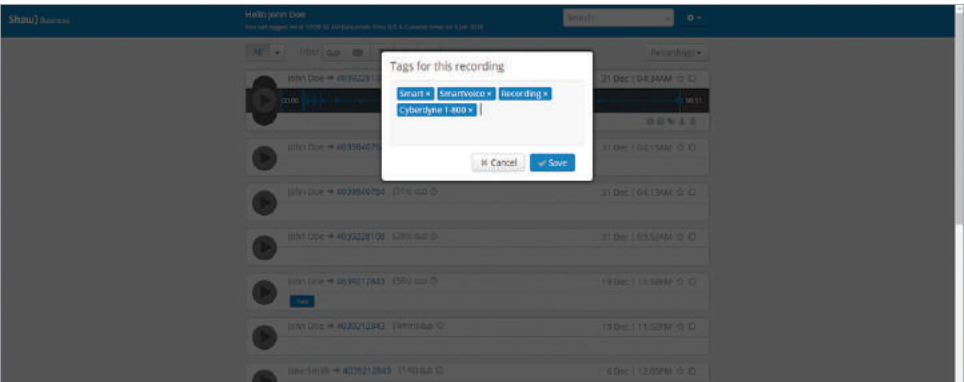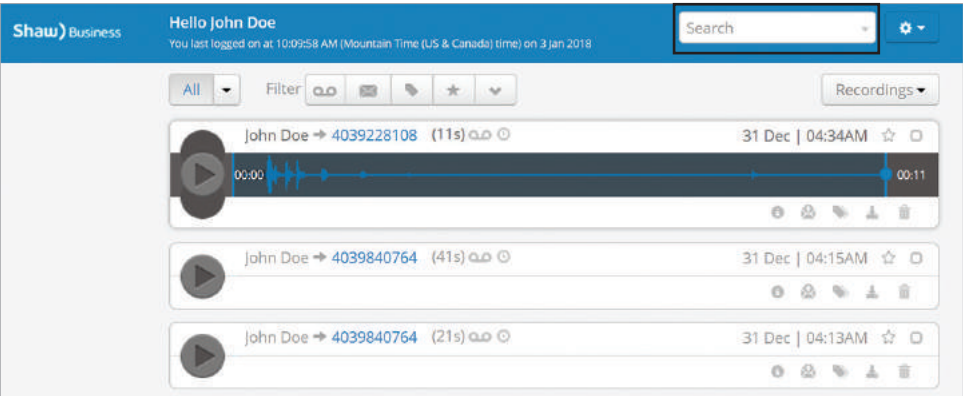

d. Download – will provide you a link to download the recording as an MP3 file.
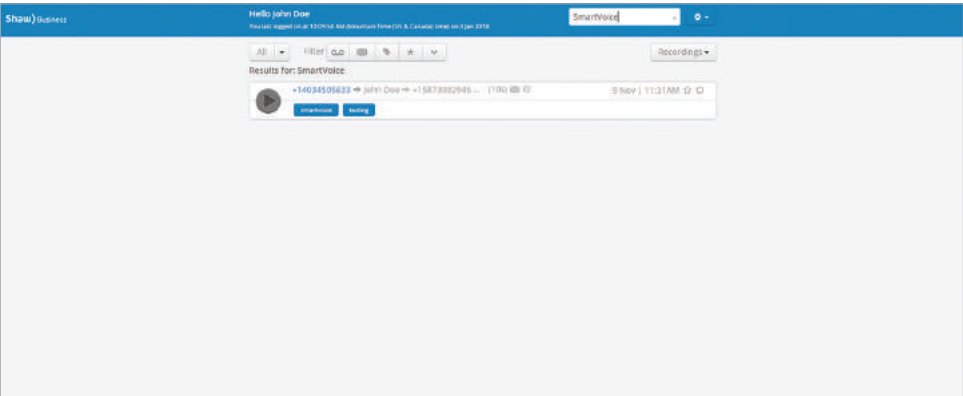
e. Delete – requires you to confirm that you want to delete a recording by entering their password.
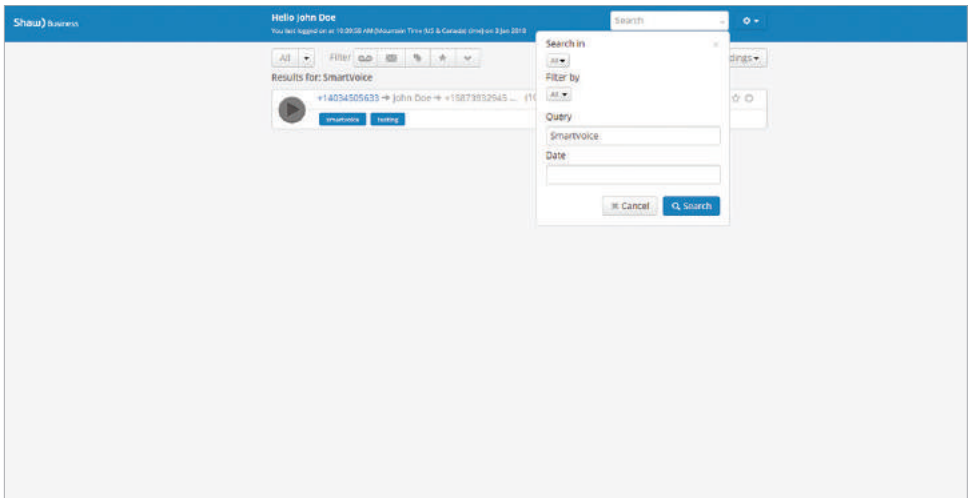

7. Searching for Recordings - You can search for recordings by going to the search bar on the top right-hand corner of the page.

Typing a keyword being utilized as a tag helped filter out untagged recordings (how to tag a recording is shown in 'Recording Options').

Further to that, you can expand your search by clicking the down arrow within the search bar.

- You can expand your search by:
- Searching within your own recordings or all recordings;
- Filtering by certain users within your organization;
- Use more than one tag/keyword; and
- Filtering by certain date/date ranges.

Shaw) Business