



IP Communications Applications for Business Advantage

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# ***Metreos Record Agent® User Guide***

***Metreos Communications Environment 2.1***

Proprietary and confidential  
For release under NDA only

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## Preface

This manual describes the installation and usage of the *Beta 1 release* of the Metreos Record Agent® application for Cisco IP telephones and the Metreos Communication Environment.

## Intended Audience

This manual is intended for use by anyone wishing to install and/or use the Metreos Record Agent application to record telephone conversations occurring on their Cisco 7940, 7960, or 7970 IP telephone.

## Content of This Document

This manual describes:

- Installation and setup procedures for the Record Agent application.
- Operation of the Record Agent application.

## Style and Formatting Conventions

The following typographical components are used for defining special terms and command syntax:

Convention	Description
<b>Bold</b> typeface	Represents literal information such as <ul style="list-style-type: none"><li>• Information and controls displayed on screen, including menu options, windows dialogs and field names</li><li>• Commands, file names, and directories</li><li>• In-line programming elements, such as class names and XML elements when referenced in the main text</li></ul>
<i>Italic</i> typeface	Italics typeface is used to denote <ul style="list-style-type: none"><li>• A new concept</li><li>• A variable element such as <i>filename.mca</i>. In this example, <i>filename</i> represents the filename and <b>.mca</b> is the extension.</li><li>• A reference to a chapter or section heading</li></ul>
<code>Sans serif</code> typeface	Denotes code or code fragments
... (ellipsis)	Denotes omitted material
UPPERCASE	Denotes keys and keystroke combinations such as CTRL+ALT+DEL.

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# Metreos Record Agent

The Metreos Record Agent® solution for agent call recording permits secure network-independent recording, annotation, and playback of calls to and from your Cisco IP telephone.

## Background

Until now, most recording solutions for Cisco CallManager have been based on capturing network traffic within the network core. Such solutions require SPAN ports to be created on core network switches, a less than ideal deployment model, particularly within networks where SPAN port availability is limited. Even those solutions which may not require the use of SPAN ports will typically require significant and complex call routing configuration.

A less intrusive solution is needed, for those environments that

- Require user- controlled and maintained call recordings.
- Do not wish to reconfigure CallManager call routing.
- Do not have SPAN ports free to dedicate to recording.
- Require silent, background recording of calls on a per-phone basis.

Metreos has met this need with a solution deployed on the PC located next to your IP phone, capturing the audio at the phone rather than from within the network. Benefits of this solution include:

- No network configuration required.
- The only physical setup required is to connect the PC to the back of the IP phone.
- Recording is always on; saving of recordings is user initiated and controlled.
- Annotations can be attached to recordings supplying contextual information for each call.
- Significant reduction in network administration effort -- no network changes are required to add additional Metreos Record Agent users.

## Telephony Requirements

In order to use Metreos Record Agent, the following conditions are assumed.

- RTP traffic is unencrypted G.711 u-Law.
- SCCP sessions are unencrypted.
- Your IP phone is a Cisco 7940, 7960, or 7970 model.
- Your IP phone is physically connected to your computer.
- Your IP phone device has CallManager *PC Voice VLAN Access* enabled.

## Computer System Requirements

The following minimum requirements should exist for any computer running the software.

- Windows XP or 2000 (latest service packs recommended)
- Microsoft .NET framework 1.1
- 500 MHz Pentium class processor or better
- Windows Media Player 9.0 or above



- 256MB RAM
- Approximately 30MB hard drive space per hour of recording time, for recorded files.
- WinPCap 3.1 or above installed. *This component is offered as part of the Record Agent installation package.*
- A network interface card compatible with WinPCap. *A list of such adapters can be found at <http://www.micro-logix.com/WinPcap/Supported.asp>.*

# Installation and Configuration

This section describes the simple procedures for installing the software on your PC, and for configuration of the phone and software.

## Configuring Metreos Record Agent

To set up the phone and software to use Metreos Record Agent you need only:

- Configure one setting for the phone with CallManager. Since the value for this setting is likely to be the installation default, this step will often be unnecessary.
- Plug the phone into the PC.
- For agent PCs with multiple network cards, identify to the application the network card to which the phone is connected. A wizard will guide you through this process during installation of the software, described in the next section.

### Configuring the Phone with Cisco CallManager

Each phone device to be recorded using Metreos Record Agent must be configured as **PC Voice VLAN Enabled** in CallManager. If, as is often the case, this is the default setting for all applicable IP phone devices, *no CallManager setup will be required*, and you can skip to the next section of this document.

To configure a 7940, 7960, or 7970 phone for recording:

1. Open CallManager administration console (ccmadmin).
2. Using the menus, navigate to *Device: Phone*.
3. Using *Find and List Phones*, locate the phone to be recorded. Click on the phone entry's *Device Name* entry to arrive at the *Phone Configuration* page for the device.
4. Scroll down to the *Product Specific Configuration* section of the page, and locate the *PC Voice VLAN Access* entry in this section.
5. Ensure that the dropdown list box corresponding to *PC Voice VLAN Access* is set to *Enabled*.
6. If you made any changes to phone configuration as a result of the above, navigate to the top of the page and click *Update*, then click *Reset Phone*.

### Connecting the Agent Phone to the Agent PC

To connect your IP phone to your PC, connect a standard category 5 network patch cable from the desired network interface on the back of the PC, to the port labeled **10 100 PC** on the bottom of the Cisco IP phone.

### Configuring the Record Agent Software

The only application configuration required is to identify to the application the network card to which the phone is connected. A wizard will guide you through this process during software installation, described in the next section.

## Installing Metreos Record Agent

To install the software double click on the installer file, RecordAgentSetup.exe. The installation wizard guides you through the following screen panels to complete the installation.

### 1. Welcome

- a. Press *Next*.

### 2. Licensing Terms

- a. Click *I Agree*, if you agree to the licensing terms.

### 3. Components

- a. Accept all defaults and press *Next*.

### 4. Choose Install Location

- a. Accept the default, or enter a directory, and press *Next*.

### 5. Installing

- a. Installation begins. Installation progress is displayed on this panel.
- b. When installation is complete, the *Next* button is enabled. Press *Next*.

### 6. Network Adapter Selector

- a. **Select adapter.** All network cards on your computer are displayed here.
  - i. If you know which card your phone is plugged into:
    1. Select the adapter entry with the mouse or keyboard.
    2. Click the *I am sure my selection is correct* radio button.
    3. Click *Next* to proceed to the Verify panel.
  - ii. If you are not sure which card your phone is plugged into:
    1. Click the *Please make a selection for me* radio button.
    2. Click *Next* to proceed to the Verify panel.
- b. **Verify.** Here you will test phone connectivity to the network adapter you have selected, or to each adapter on your system if you have not selected an adapter. *If you have selected an adapter and you do not wish to test connectivity, click the Skip verification check box and press Next to skip the verification steps following.*
  - i. Click *Verify*. For each adapter for which connectivity is to be tested:
    1. Lift your phone handset when prompted to do so.
    2. If the system determines that your phone is connected to this network card, the message, *The selected adapter is connected to the Cisco IP Phone* is displayed. Hang up the handset and press *Finish* to complete the selection process.
    3. If instead the system cannot verify connectivity to this network card, the message *The selected adapter is invalid, please choose another* appears. Hang up the handset. If you are cycling through all network cards, these steps will be repeated for the next card. Otherwise press *Back* and pick another network card.

### 7. Installation Complete

- a. If you wish to start Record Agent now, click the checkbox so indicating.
- b. Click *Finish* to complete the installation.

## Using Metreos Record Agent

Once installed, Metreos Record Agent provides always-on recording of all voice traffic to and from the configured IP phone. Conversations are saved to disk only if you take appropriate action via the Record Agent user interface on a per-call basis.

### The System Tray

Once installed, Metreos Record Agent recording is always on. The presence of the Record Agent icon in the system tray indicates that Record Agent application is running. If the tray image is in the normal state, as shown in Figure 1.a, the software is ready to capture all calls to and from the configured phone.<sup>1</sup>

Right-clicking on the tray image elicits a menu as shown in Figure 1.c. Clicking on *Open Metreos Record Agent* on this menu will cause the main application screen to be displayed, described later in this section.

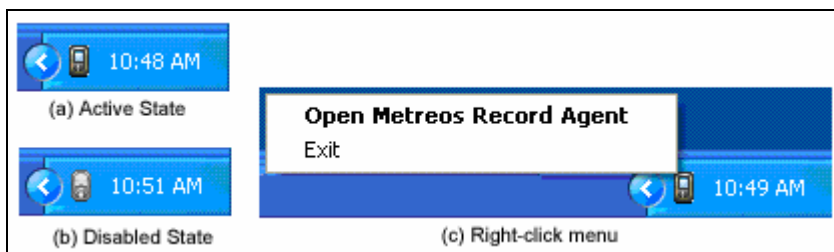


Figure 1: Record Agent System Tray Presence

### Call Notifications

When any new call is initiated, whether incoming or outgoing, Record Agent pops a notification window containing call information and recording controls, as shown in Figure 2.<sup>2</sup>

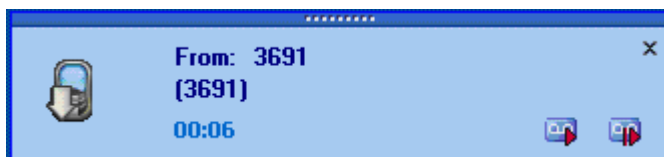


Figure 2: Call Notification Popup

<sup>1</sup> If the tray image is in a disabled state, as in Figure 1.b, Record Agent's packet capture service is not active, and call recording cannot occur.

<sup>2</sup> Record Agent popups are of the disappearing type – the window will fade and disappear unless clicked.

## Recording a Call

As soon as an incoming or outgoing call begins, Recording Agent begins silent background recording of the call. The recording is not saved to disk until you take action to either

- Start Recording; or
- Start Recording Now

When you ask to *Start Recording*, the recording is saved from the start of the call (or from the last stop point, if one exists). When you ask to *Start Recording Now*, the recording is saved beginning at the current point in the conversation. You can initiate recording from any of three places in the user interface:

1. The call notification popup.
2. The system tray image right click menu.
3. The Record Agent main window.

### Recording from the Call Notification Popup

Recording can be initiated from the notification popup window as shown in Figure 2 on page 12. To cause the call to be recorded to disk from the beginning of the call, click on the left image of the pair of icons shown in the lower right of the popup. To cause the call to be recorded beginning now, discarding any prior conversation for the call, press instead the right image of the pair.

### Recording from the System Tray Menu

Recording can be initiated from menu available via right click of the Record Agent icon in the system tray, as shown in Figure 3. Right click on the Record Agent icon. When a call is active, the call dialed number appears on the menu. Mouse over the desired call on the menu, and the recording submenu appears. To begin recording, select *Start Recording*, or *Start Recording Now*, as described above. To stop an ongoing recording, select *Stop Recording* from the same menu.



Figure 3: Recording Options from System Tray

### Stopping and Restarting Recording of a Single Call

As described earlier, silent, unattended background recording of calls is always occurring when Record Agent is active. Stopping of a recording does not stop background recording. When you *Stop Recording*, you cause the current recording segment file to be closed and saved. If you subsequently select *Start Recording*, you ask that a new recording segment file for this call begin from the point at which you previously stopped recording. If you instead select *Start Recording Now*, the new file will start at the current spot in the conversation, and that portion of the conversation between the time you last stopped recording, and now, is discarded. Thus the recording of a single call may consist of multiple files, each associated with that call.



Figure 4: Record Agent Main Screen

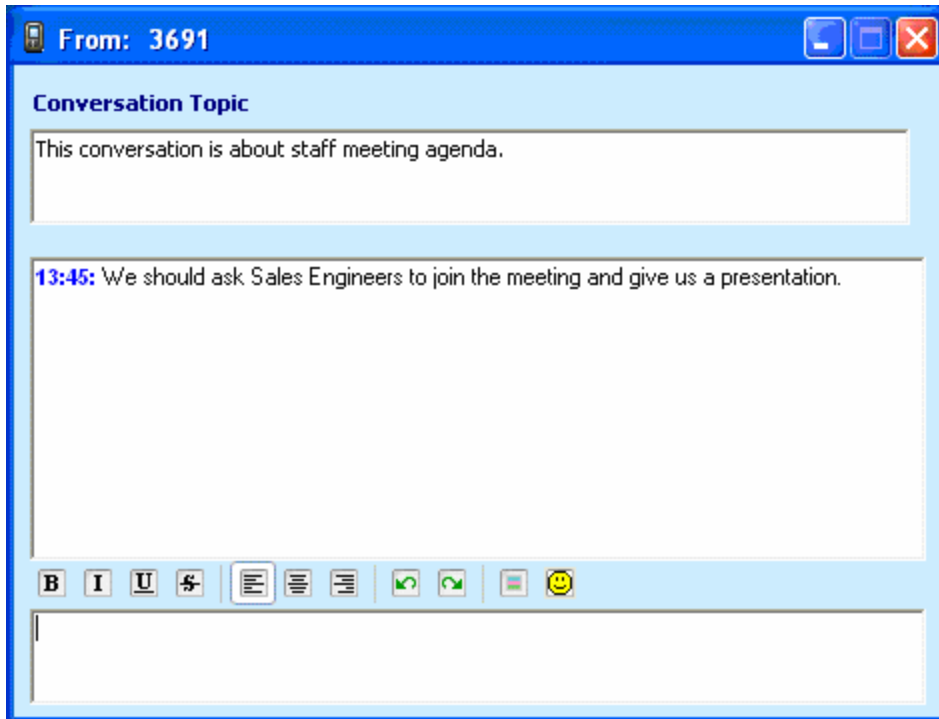
## Recording from the Main Application Screen

Recording can be initiated from the Record Agent application screen. To display the main screen, either double-click on the Record Agent icon in the system tray, or right-click on this icon and select *Open Metreos Record Agent* from the popup menu. The main screen and its *Active Calls* tab will appear, as shown in Figure 4, above. All calls active on your phone are displayed in this window. The familiar *Start Recording*, *Start Recording Now*, and *Stop Recording* options, as described earlier, are available here for each such call.

## Annotating a Call

Each recorded call may be annotated with both a descriptive conversation topic, and with multiple time-stamped notes. To do so, press *Attach Notes* from either the main application screen, as shown above, or from the system tray menu as shown in Figure 3. Pressing *Attach Notes* causes the notes window to appear, as illustrated in Figure 5, following.

To enter or change the searchable conversation topic, do so in the Conversation Topic pane of this window. To supply a time-stamped note to be associated with this point in the conversation, enter the text of the note in the bottom pane of this window.



**Figure 5: Notes Window**

## Managing and Playing Call Recordings

You can review and manage recording files, play back calls, and view call annotations, from the Call Recordings window, as shown in Figure 6 on page 12. To display this window, select the *Recorded Calls* tab near the top of the main application window.

### Reviewing and Playing Back a Call

To play back a call and/or review a call's annotations, click on the speaker icon located to the right of the call's entry in the Call Recordings window, as shown in Figure 6. The Review Recorded Conversation window is displayed, as shown in Figure 7 on page 17. From here you can see the notes you have entered for this conversation, and can play back the call if you so choose.

### Locating Conversations by Annotation Content

You can locate conversations by a keyword or phrase contained in the annotation topic or timestamped notes for a conversation. Pressing *Search* at the top of the Recorded Calls window causes a search box to appear. Enter the word or words you wish to search for, and press *Find Now*.

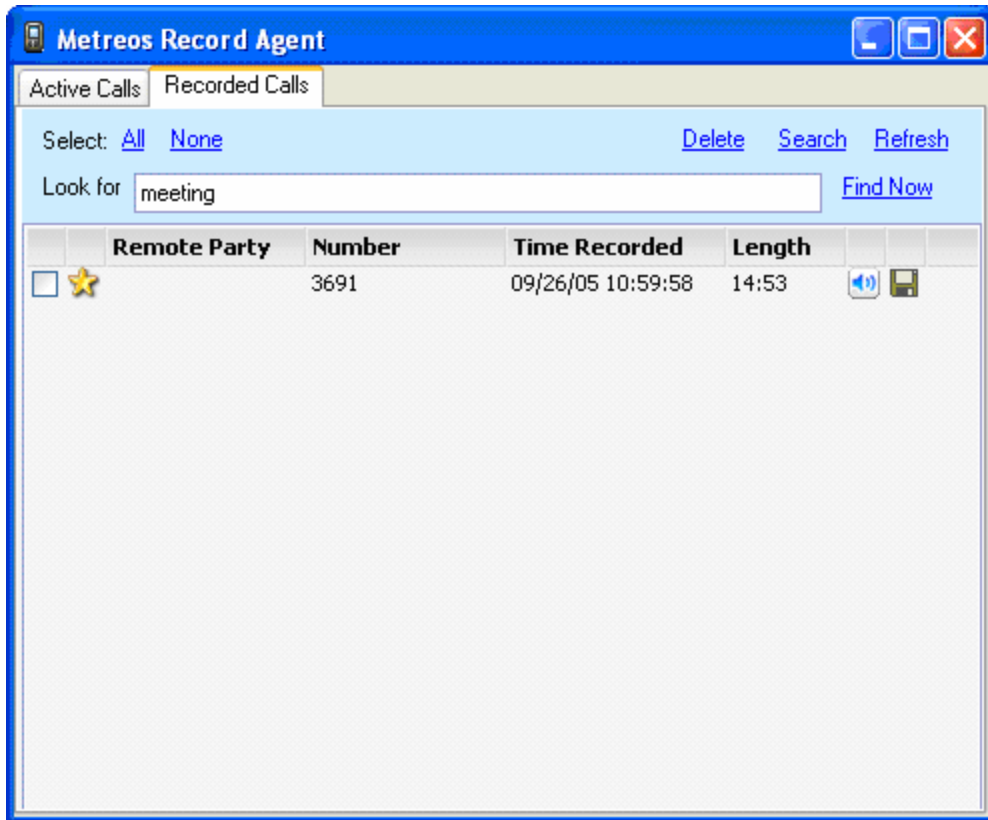


Figure 6: Recorded Calls Window

## Bookmarking a Call

You can bookmark calls such that important calls can be grouped together. To do so, click in column 2 of the call entry in the Recorded Calls window (Figure 6). A bookmark icon will appear in this column. You can remove the bookmark by clicking again in the same manner. Clicking on the column 2 *heading* will cause this bookmark column to be ordered such that bookmarked calls are grouped together.

## Saving a Call

Also from the Recorded Calls window (Figure 6), you can save the call and its associated annotations and metadata to a directory you specify. To do so, click the diskette icon located to the right of the desired call entry in this window. You will be prompted for a location to which to save the recording. Note that the call's voice file or files will be saved in *.au* format, an audio format which is playable in any modern media player, including Windows Media Player, QuickTime, RealPlayer, and more.



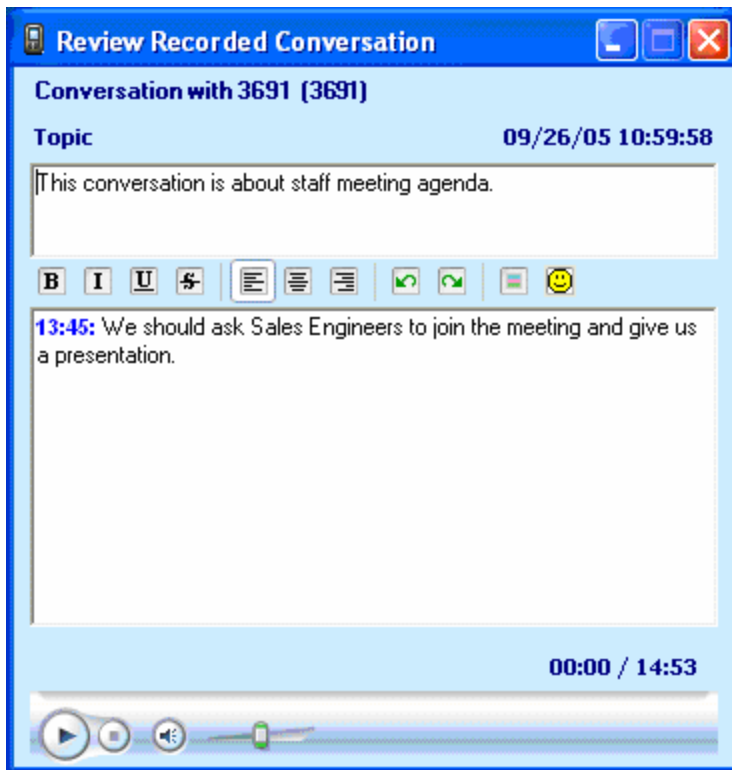


Figure 7: Review Recorded Conversation Window