

# User Guide

**3CX Recording Manager** 

Version 14

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Introduction
What is 3CX Recording Manager?
Why 3CX Recording Manager?
How to use 3CX Recording Manager?
3CX Recording Manager as a Remote Server Support4
Prerequisites4
Installation5
Download software5
Obtain license key5
Register your product
Configure SQL Server
Configure Email Server Settings5
Set Retention Policy
Step by step Installation Procedure
Support

### Introduction

Disk space management is one of the real challenges in organizations that are legally mandated to save phone conversation recordings. 3CX Recording Manager is a 3CX/ PBX plugin, that makes the job easy for you by enabling you to archive 3CX recordings as MP3 files to an alternate location (on a Network Attached Storage (NAS) device for example), or to an alternate email address. MP3 files require a fraction of the space needed compared to WAV files (approximately 1/7 the original size).

Providing an automated method of reducing the file size, and making an archive copy of the recording to an alternate location, will help reduce storage requirements and ensure a permanent copy of the recording is saved. The retention policy will automatically delete old recordings that are older than the specified date.

# What is 3CX Recording Manager?

3CX Recording Manager is a 3CX/PBX plugin that allows you to easily manage (archive, compress, purge) your call recordings using simple web portal. You can record individual calls on an ad-hoc basis, record all calls made by a specific extension(s), or record all calls on the entire phone system.

# Why 3CX Recording Manager?

3CX Recording Manager makes everything EASY!

- Easy to find, listen, and manage 3CX Recordings
- Easy to install/update
- Easy to use with standard browsers (Internet Explorer, Google Chrome, Firefox, Safari)
- Easy access via PC, MAC, or Smart Phone
- Easy to delete old recordings that take up lots of space on the server
- Easy to administer using the built-in 3CX login database
- Easy to manage which extensions are recorded right from the web portal
- Easy to purchase (uses free tools from Microsoft)

### How to use 3CX Recording Manager?

3CX Recording Manager is a one-time installation process. Once you install it, the recordings can be maintained based on the **Delete Policy** and **Archive Policy** that you set at the time of installation.

# 3CX Recording Manager as a Remote Server Support

3CX Recording Manager can be installed either directly on the 3CX server, or on a remote server. Installing on a remote server requires installation of the 3CX Relay Agent on the 3CX Server, but the Windows service, SQL Server, and web portal can all be installed on separate servers.

### Prerequisites

Before you begin with the installation steps mentioned in this guide, you need to ensure that your computer meets the minimum requirements mentioned below for installing 3CX Recording Manager.

- 3CX Version 11 14
- Windows 7 10 Pro, Windows Server 2008 R2 2016 64 bit
- Microsoft SQL Server 2008 2014 Express (Recommend 2014)
- To play recordings within browser requires HTML5 audio support
- .Net 4.5 or above
- Installation on a Domain Controller is possible but will require VoIPTools technical assistance @ \$115 per hour

### Installation

### Download software

You can download 3CX Exporter from <u>http://www.voiptools.com</u>. You will find a link right below the "**Add to Cart**" button labeled "**Download Sample**." This link will download a fully functional, non-expiring version of 3CX Recording Manager.

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### Obtain license key

To install 3CX Recording Manager, you will need to request a license key by calling us at our toll-free number +1 877-235-4236, by emailing our support: <a href="mailto:support@voiptools.com">support@voiptools.com</a>, or by adding 3CX Recording Manager to your shopping cart on the VoIP tools website.

### **Register your product**

You need to register your product to activate your license key. In case you lose your key, we are always there to provide you a new one if you provide us your contact information. Also, we can notify you of latest product updates.

To install 3CX Recording Manager, run the setup program that you downloaded in step 1. The setup program is named **3CXRecordingManagerInstaller.exe**. The default settings should be fine for most installations.



### **Configure SQL Server**

3CX Recording Manager can optionally save recording information in Microsoft SQL Server. You can access this information using the 3CX Recording Manager web portal. You will need to utilize an existing SQL Server, or install Microsoft SQL Server 2008 (or newer). The free Express edition is usually sufficient.



### **Configure Email Server Settings**

3CX Recording Manager can email your recordings to you automatically. You have 4 choices: (1) email recordings to the person who initiated the recording, (2) email all recordings to a single address, (3) have emails sent to the person who initiated the recording and a central address, or (4) do not email recordings.

# Set Retention Policy

3CX Recording Manager can be configured to automatically delete old recordings, thus helping to conserve disk space. It can also automatically convert recordings to .MP3 format and save the recordings at an alternate location. You can also have recordings deleted after emailing the recording.

### Step by step Installation Procedure

The following section guides you through a detailed walk-through of the installation process.

#### Step: 1 - Start with installation process

In the VolPTools Installer (3CX Recording Manager) Setup Wizard, click Next



#### Step: 2 - Download Relay (if required)

If you have not installed Relay previously, you can now download and install it. Click **Download Relay** to download and **Install/ Upgrade Relay** to install or upgrade.

Note: If you have already installed it, you need not install it again unless a newest version is required.

VolPTools Insta	ller (3CX Recording Manager)	×
3CX Relay Service	es	
	acts with 3CX through the VoIPTools 3CX Relay stalled on the server where 3CX is installed.	Service.
unless a newer versio	e and port of the Relay service. In most situatio	-
	locabost	
Relay Services Host:		
Relay Services Port:	8700 ÷ Test Relay Settings	

#### **Step: 3 - Test Relay Settings**

- 1. In the **Relay Services Host** field, mention the computer name in which the Relay exists. If it resides on a different server, then you can mention the IP address of that machine.
- 2. In the Relay Services Port field, enter the value as 8700
- 3. Click Test Relay Settings to test the relay settings.

3CX Relay Servic	es	
	racts with 3CX through the VoIPTools 3CX Relay Service. stalled on the server where 3CX is installed.	
If you have installed unless a newer versio	the Relay previously, you don't need to install it again on is required.	
Do	wnload Relay Install / Upgrade Relay	
	e and port of the Relay service. In most situations you ca s.	n
use the default value		
Relay Services Host:	localhost	
	8700	
Relay Services Host:		
Relay Services Host:	8700	

4. Click Next

#### Step: 4 – Configure the Database

In the SQL Database Connection window, click Configure



#### Step: 5 – Run the Application

Once the installation is complete, click **Run Application** 



#### Step: 6 – Register

- 1. Click License tab and enter registration information.
- 2. Click Register

QL.	3CX	Email	Retention	Transcript	Portal	Windows	License	About				
	Li VoIPToy 3C Simultan	ys Produ CX Produ ieous Cal			Activa	nses: 1 ation: 10/6/: ation: None	2015		your	ation ctivate 3CX Recording Manager, you must register license key. Registering also helps us provide a cement kev if your license key is ever lost, enables		
		ense Key ner Name	10 mm						us to	notify you of product updates, and ensures you		
		ner Name act Name							receive reminders if your key is approaching the rener date. Your license key permits you to install this software on computer. This is not free software. Please help us to continue to develop solutions for you by honoring this agreement.			
		Address	š									
		Address : Address :	3:									
	State /	City Province							Support:			
		stal Code								assistance please contact support at:		
		Phone	:						Toll Free:	+1 877-235-4236		
		Ema	il:				•		Local: +1 801-642-4655			
		Reselle	r:						Skype:	VoIPToys		
• F	equired	:				Registe	er		Email:	Support@VolPTools.com		

3. Confirmation message box appears. Click **OK**.



#### Step: 7 – SQL Server Configuration

In the **SQL** tab, check the checkbox of appropriate option.

- 1. Check **Save details in SQL** checkbox so that you can save the call recordings to the SQL Server database.
- 2. Check **Use recording date embedded in the file name** checkbox so that you can add existing recordings to the portal, and archive the recordings (if the archive option was selected on the Retention tab) to the path that you configure.

QL	3CX	Email	Retention	Transcript	Portal	Windows	License	About	
	Import	e details i Recording Ise record	)s- ling date emb	edded in the t		o SQL	0		SQL Server Configuration 3CX Recording Manager can optionally save recording information in Microsoft SQL Server, You can access this information using the 3CX Recording Manager web portal. You will need to utilize an existing SQL Server, or install Microsoft SQL Server 2008 (or newer). The free Express edition is usually sufficient. SQL Server: Save details in SQL This option controls whether recording information is saved in the SQL Server database. In most situations this option should be selected. Import Recordings: Once you have configured the location (path) to recordings files (and optionally the location where recordings should be archived) you can add existing recordings the portal. and archive the recording if the
S	itart	Stopp	ed Service	Name: 300	Recordi	ng Manage			archive option was selected on the Retention tab).  ID If you have a large number of existing recordings, you may want to wait until after business hours to select this option. Processing a large number of recordings may impact the performance of 3CX.  Software is up to date Creck for Loostes Save Ck

#### Step: 8 – Set Recording Path

- 1. In the **3CX** tab, click **Get Settings**
- 2. If you want to change the default path, click button beside **Recording Path**

3CX Server	
Get Settings       3CX Recording Manager integrates directly with 3C) example, the web portal uses your extension and PI login permissions. Access to recordings, other than 0 we an extension group membership and whean extension group Manager. Also, extension email are used for sending emails.         Recording Path:       Location where the original recordings are st default location is "C:\ProgramData\3CX\Data\Recordings".         Warning:       3CX Recording Manager by default he credentials of a local user (VoIPToys). If y save recordings on a different server, you will adjust permissions on the Recording Manager.         * Windows service       * Windows service	IN number for your own, are ether you are addresses tored. The It runs with rou choose to If need to or change the

#### Step: 9 – Configure Email Server Settings

. 3CX	Email	Retention	Transcript	Portal	Windows	License	About				
Mail Serve	r							Email Server			
🗹 Em	ail Recor	dings			Po	rt		3CX Recording Manager can email your recordings to you automatically, You have 4 choices: (1) email recordings to the			
Ma	il Server	: smtp.gmai	l.com		58	87		person who initiated the recording, (2) email all recordings to a			
Em	nail From	: sushil.sen	@voiptoys.co	m				single address, (3) have emails sent to the person who initiated the recording AND a central address, or (4) do not email			
Email	Subject	New recor	ding from 3CX	Recordin	ig Manager			recordings.			
A	lt. Email	: sushilsen2	@gmail.com					Note: Because recordings can be very large, 3CX Recording Manager first makes a copy of the recording then converts the			
Re	quires Ai	initia	l each recordir ted the record e alternate er	ting AND :		rdings		The MP3 format often is 1/7 the size of the original recording. This conversion does result in a small loss in audio quality. However, the original recording can be heard or downloaded from the web portal unless it was deleted by the retention policy, the owner, or an administrator.			
	User	: sushil.sen	@voiptoys.co	m				Email Recordings:			
P	assword	•••••						Check this option if you want to email recordings			
🗸 Re	quires S	ŞL.				Test		Mail Server:			
							3	IP address or Fully Qualified Domain Name (FQDN) of your email server. Examples: smtp.gmail.com or			

1. In the **Email** tab, check **Email Recordings** checkbox if you want to email call recordings.

2. Enter appropriate details in all the fields.

#### **Step: 10 – Set Retention Policy**

Retention policy allows you to control the storage of call recordings.

- Delete Policy
  - 1. In the **Retention** tab, under **Delete Policy**, from the **Web Portal Delete rights** dropdown, select appropriate option to control who can delete recordings in the web portal.
  - 2. Check **Delete recording after sending email** checkbox if you want to delete the recording as soon as the recording is mailed as an attachment to the email set in Step:9
  - 3. Check **Delete recordings older than** checkbox and set the schedule with appropriate values in **Days** and **Delete at** fields to delete the recordings once they reach the set schedule.
- Archive Policy
  - 1. Under **Archive Policy**, check **Archive** checkbox if you want to archive the recordings to another location.

QL 3CX Email Retention Transcript Portal Windows License Ab	pout
Delete Policy Web Portal Delete rights: Delete recording after se Delete recordings older t Delete recordings older t Delete at 12:00 AM	Retention 3CX Recording Manager can be configured to automatically delete old recordings, thus helping to conserve disk space. It can also automatically convert recordings to .MP3 format and save the recordings at an alternate location (for example: external USB or Network Attached Storage NAS device). You can also have recordings deleted after emailing the recording. Delete Policy
Remove recording from SQL based on Delete policy  Archive Policy  Archive Archive Path:  C:\ProgramData\VoIPToys\Data\Http\wwwroot\3CX Recording Mana  Browse	Web Portal Delete Rights           Use this option to control who can delete recordings in the web portal.           Delete Recording after sending email:           Selecting this option instructs 3CX Recording Manager to delete the recording after emailing the recording as an attachment.           Warning:         Great care should be used when selecting this option. There is no guarantee that the email will not be blocked by span filters, or exceed the maximum attachment size permitted by the receiving mail server.

2. Set Archive Path to the location where you want the call recordings to be archived.

#### Step: 11 – Recording to Text Transcription

In the **Transcript** tab, under **ATT Watson**, check **Watson** checkbox. Usually, prefer the default **End Point** setting.

**Note:** Transcriptions are only provided when you have configured Recording Manager to email recordings.

L 3CX Email	Retention	Transcript	Portal	Windows	License	About	
ATT Watson							Recording to Text Transcription
End Point:	https://api.	.acc.com/					background noise, volume of the speaker, and the speech patterns of the speaker can all have a significant impact on the accuracy of the transcription. 3CX On Call Manager can use AT&3 Watson for transcription services. At times the transcription may not be accurate enough to be useable. Transcriptions are only provided when you have configured Recording Manager to email recordings. <b>AT&amp;T Watson</b> This is a fairly new free service from AT&T. We are seeing improvements in the quality of the transcriptions regularly. Over time we hope to see this service improve. The setting below should not be changed unless instructed to do so by VolPToys support. <b>End Point:</b> This is the URL for accessing the Watson web service. This setting should not be changed.

#### **Step: 12 – Configure the Web Portal**

In the Portal tab, set Default time zone

QL 3CX	Email	Retention	Transcript	Portal	Windows	License	Abou	t
Default tin (UTC+05 Web Po	30) Chenr	display nai, Kolkata, M	lumbai, New D	Delhi		*		Web Portal         The 3CX Recording Manager web portal enables you to easily find recordings using the built-in query manager. From the portal you can listen to, download, email, and delete recordings.         Requirements         Internet Information Server (IIS) version 7 or above is required. IIS is free, and can be installed on all versions of Windows including Windows 7 and above.         Web Portal URL:         The default URL for accessing the web portal is http://localhost5500/Login.aspx         VolPToys Local User Account:         The installer automatically creates a 3CX Recording Manager web site in IIS. A local user account named "VolPToys" is created, and the site is configured to use this account. Normally you will never need to interact with this account. However, if you archive recordings on a different server, you may need to change this account to a domain accound with rinbts to the archive folder.

#### Step: 13 – Windows Authentication

Enter **Domain Name**, **User Name** and **Password** if the Recording Manager and PBX are on different servers, so that the web server (IIS) can access the recordings and update the database.

QL 3CX Email Retention Transcript Portal Windows Lice	nse About	t
Windows Authentication		<ul> <li>SCX Recording Manager Windows User</li> <li>If you wish to run 3CX Recording Manager as a user other than the default local VolPToys user, you can specify the desired user account if you are saving recordings or archives on remote storage (another server or NAS). Applying this change will errorn several tasks.</li> <li>Change the 3CX Recording Manager IIS Application pool login user</li> <li>Recycle the IIS Application Pool and Website</li> <li>Change the 3CX Recording Manager Windows Service login user</li> <li>Restart the 3CX Recording Manager service</li> <li>Restart the 3CX Recording Manager service</li> <li>Mindows Domain Name</li> <li>Velwork (domain) User Name</li> </ul>

# Support

If you need support, would like to request an enhancement to 3CX Holiday Importer, or are interested in discussing a custom solution, you can contact as at the following:

Address:	2306 Shimmering Bay Lane
	Cincinnati, OH 45244-2760
Hours:	Monday – Friday
	8:00 A.M. – 5:00 P.M. Central Standard Time
Phone:	USA Tool Free: +1 801-642-4655
Skype:	VoIPToys
Email:	info@VoIPTools.com
Web:	http://www.VoIPTools.com