User Guide

3CX Recording Manager

Version 14

Version 14.0 – Last updated March 23, 2016

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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

1 Download software

You can download 3CX Exporter from http://www.voiptools.com. 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.

2 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: support@voiptools.com, or by adding 3CX Recording Manager to your shopping cart on the VoIP tools website.

3 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.

4 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.

5 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.

6 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 **VoIPTools Installer (3CX Recording Manager) Setup Wizard**, click **Next**
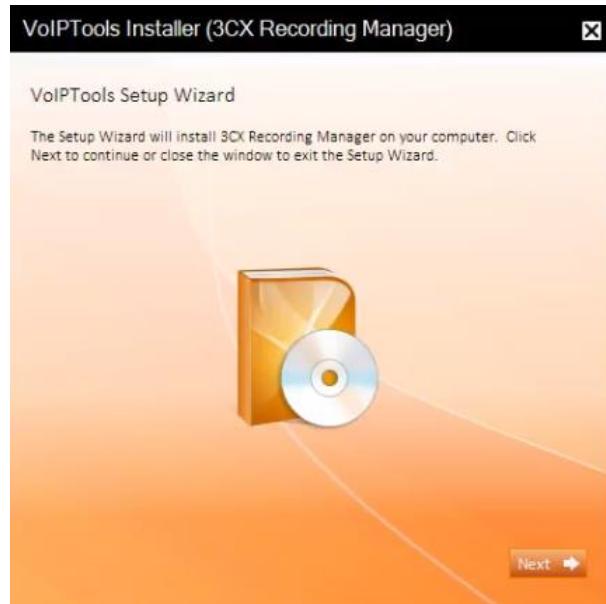
Step: 2 - Download Relay (if required)

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.

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.

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**

3. Confirmation message box appears. Click **OK**.
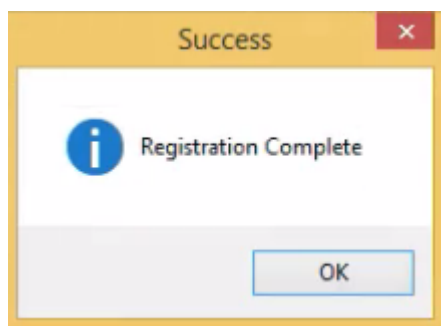
Step: 7 – SQL Server Configuration

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.
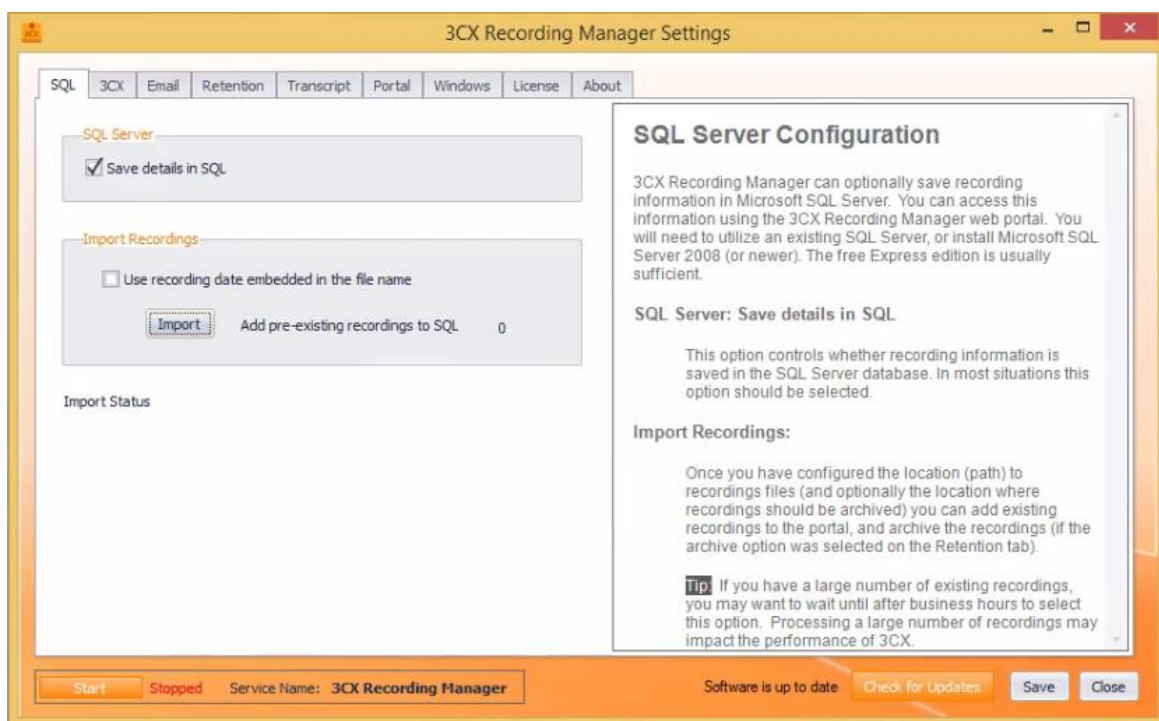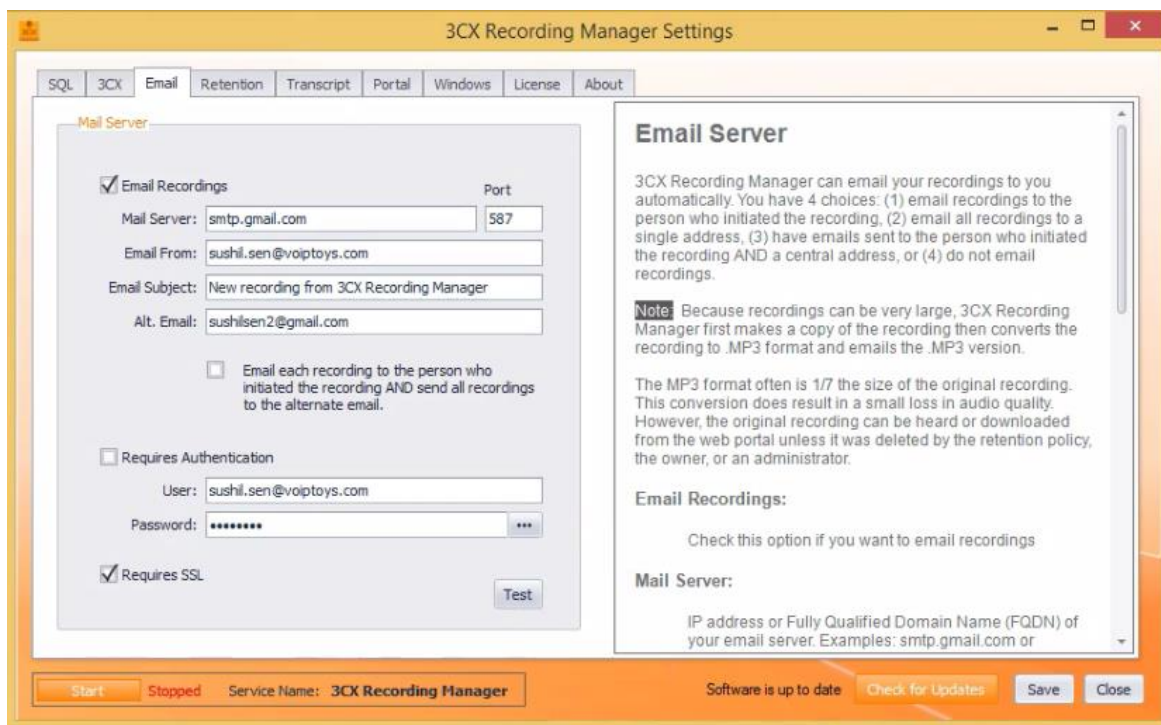

Step: 8 – Set Recording Path

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

Step: 9 – Configure Email Server Settings

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.
  2. Set **Archive Path** to the location where you want the call recordings to be archived.
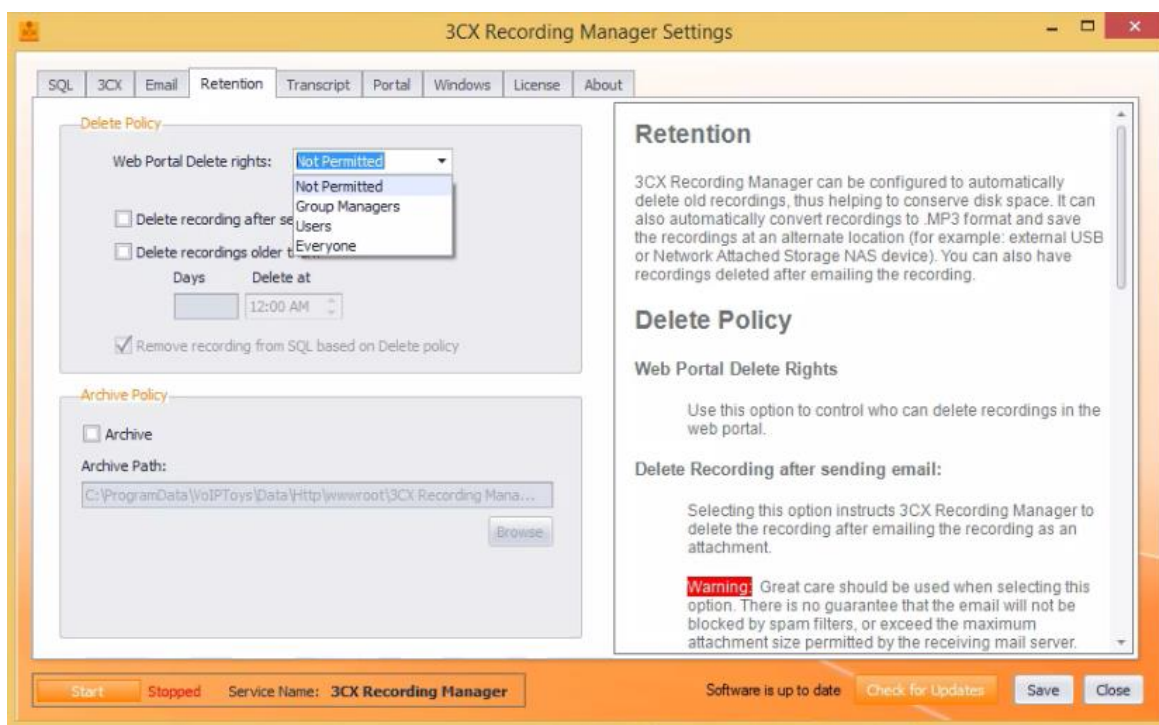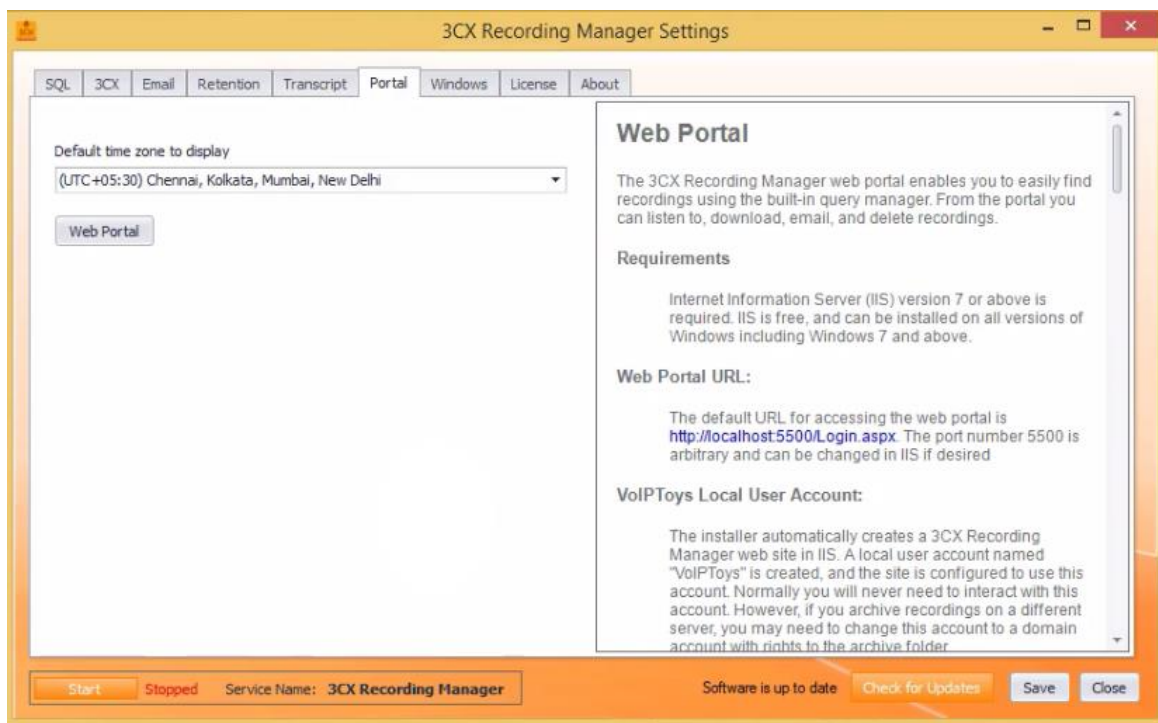
Step: 11 – Recording to Text Transcription

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.
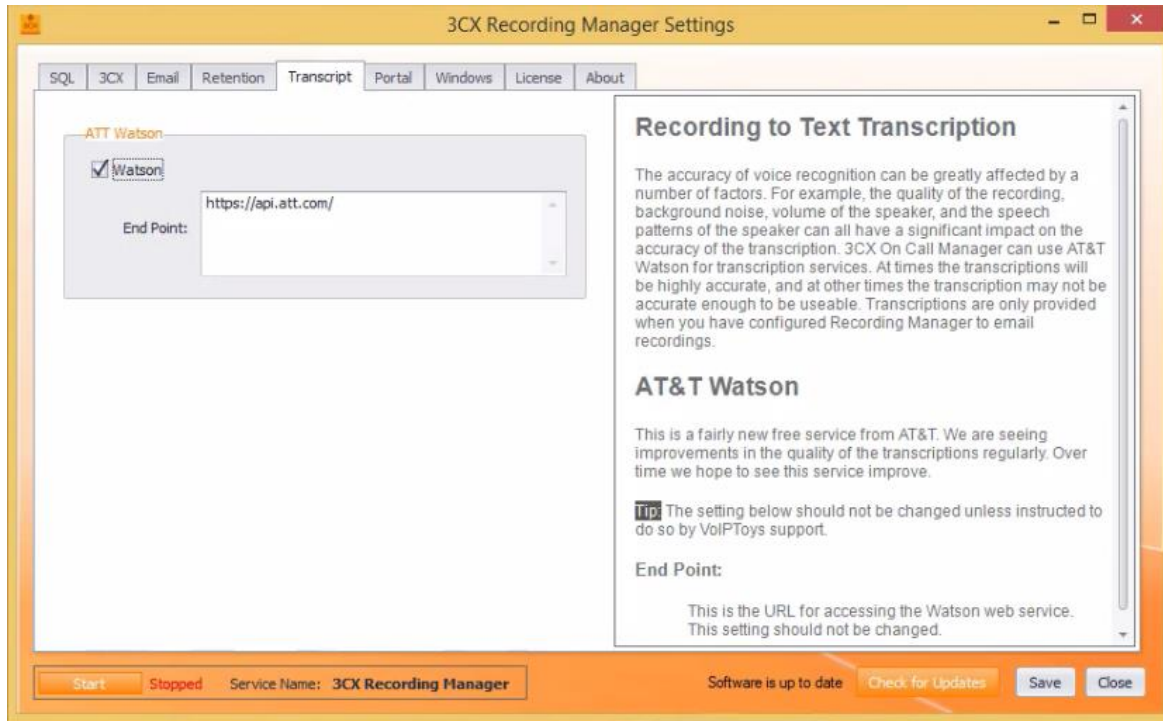
Step: 12 – Configure the Web Portal

In the **Portal** tab, set **Default time zone**

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.

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