Imagicle Call Recording for Cisco Webex Calling MT
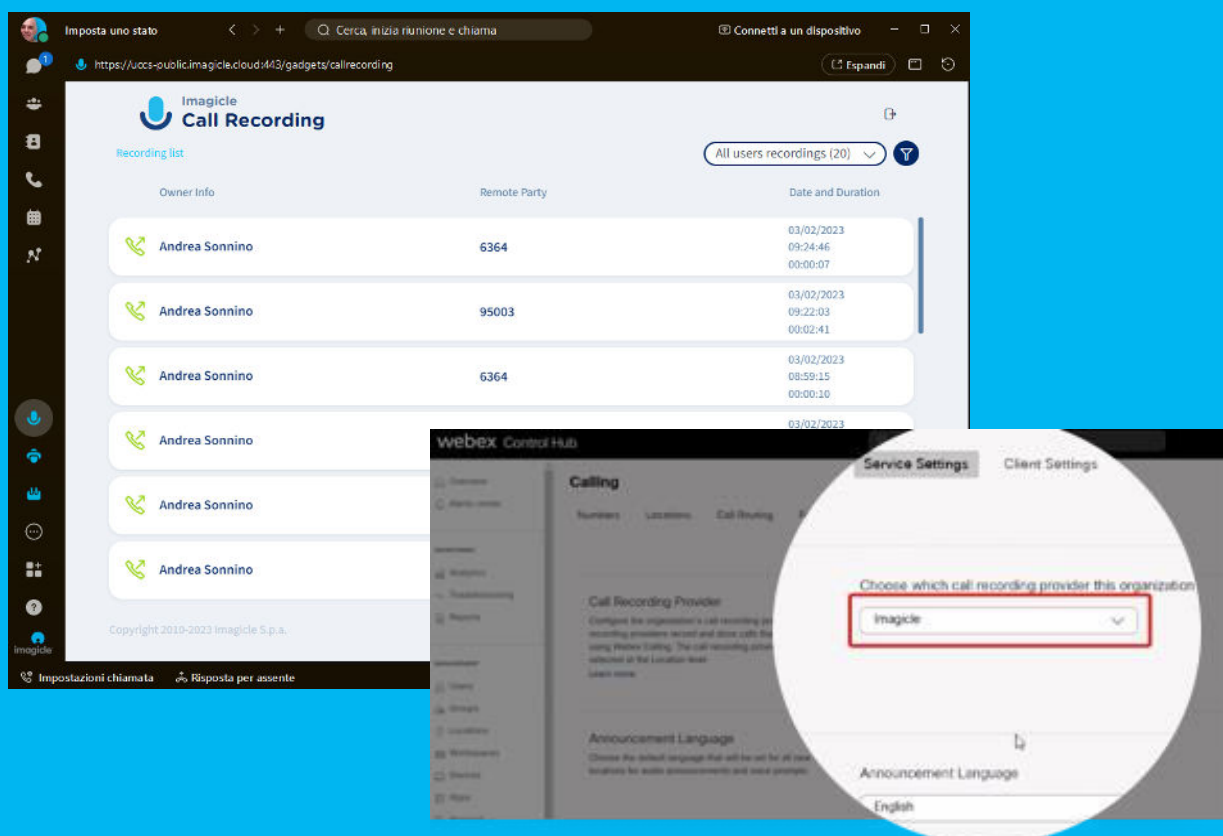
Complete configuration and Admin Guide

INDEX

1 Customer onboarding

Imagicle Cloud Services allows customer and partners to self-onboard a new Imagicle UCX Cloud Suite instance in our Cloud, for both production environments and testing purposes.

To initiate the onboarding process, please access to this web portal:
https://www.imagicle.com/en/webexcallingrecording, click on the "GET STARTED" button. You'll be redirected to a landing page where you have to **request a trial** and enter your data.

Once the form has been filled, you will have to authorize Imagicle Cloud Suite to **synchronize users against Webex Control Hub**. For the same, you are invited to login to Webex with a Full Admin user from the customer's organization which, through own Webex account, authorizes Imagicle Integration. The authorization may automatically expire as soon as the authorizing user changes own password. Once the authorization is removed, UCX Suite won't be able to retrieve events related to that authorization (Webex users data). To recover the feature, a new authorization process must be executed. This limitation does not apply if Webex SSO (Single Sign On) is enabled.

To authorize the application, the following permissions to the Webex Users Synch Integration application should be granted:

- spark-admin:people_read
- spark-admin:people_write
- spark-admin:organizations_read
- spark-admin:xsi

Once authorized the users' synch application, relax and stay tuned for further notice from Imagicle Cloud Services team.
We are going to deploy the new Imagicle Cloud instance and provision Webex users. Once ready, you are going to receive an email notification including the web URL to connect to Imagicle UCX Cloud Suite web portal:
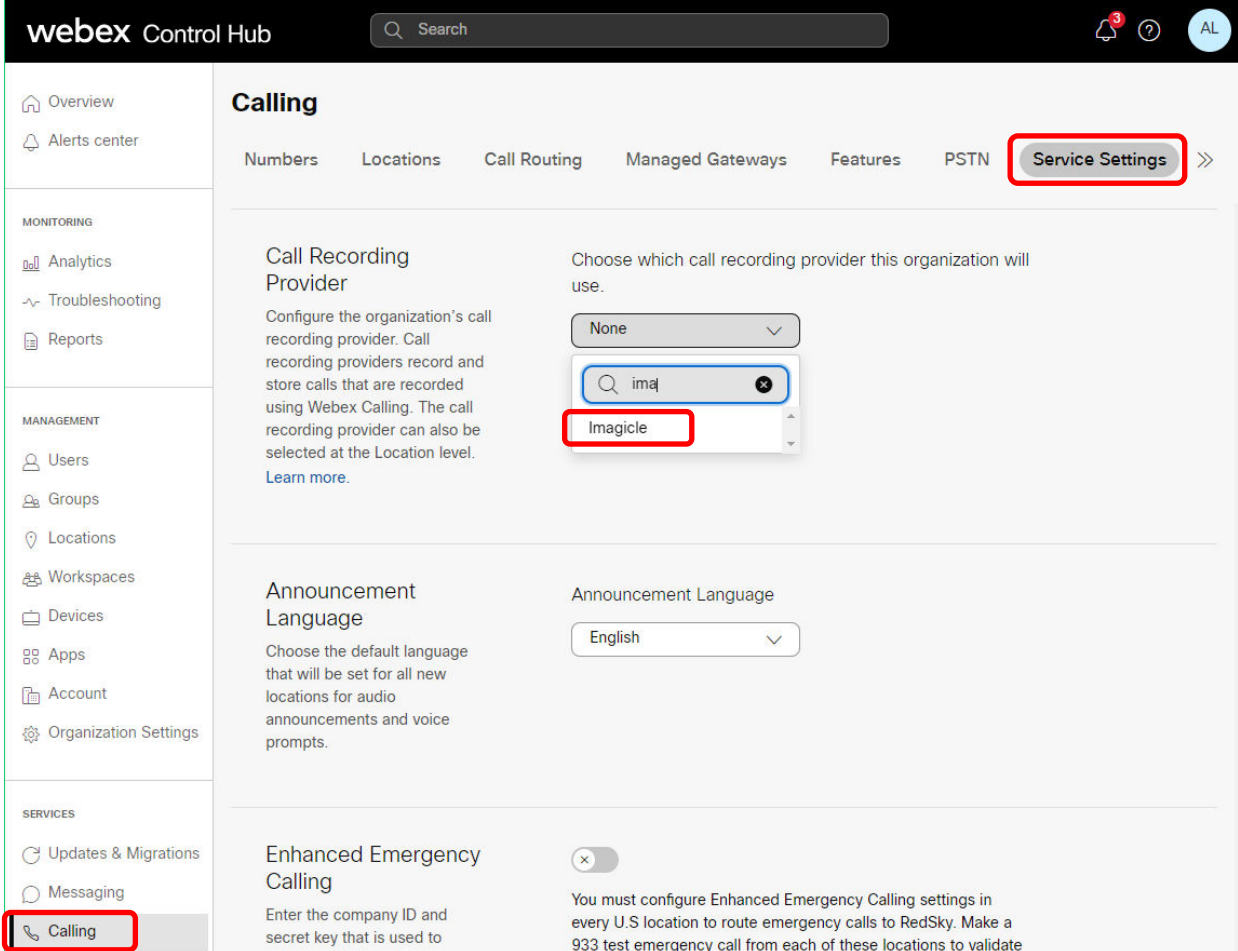https://<customer_name>-public.imagicle.cloud/

<customer_name> is replaced according to Imagicle UCX Cloud Suite instance name.

Now you are ready to start configuring your Webex environment, as explained in the next chapter.

2 Webex Control Hub configurations

Please access to [Webex Control Hub](#) with admin credentials and go to Calling → Service Settings
Scroll down to "Call Recording Provider" section and select **Imagicle** as recording provider. Hit Save.

2.1 Enabling users for Imagicle Call Recording

Please go to Users menu and select the user you wish to enable for Imagicle Call Recording:

Within user's details, please select "Calling" section and scroll down to "User call experience". Click on "Call recording" to access the relevant configuration.

A screen pop-up appears, where you can enable Call recording (toggle switch) and select relevant recording mode:
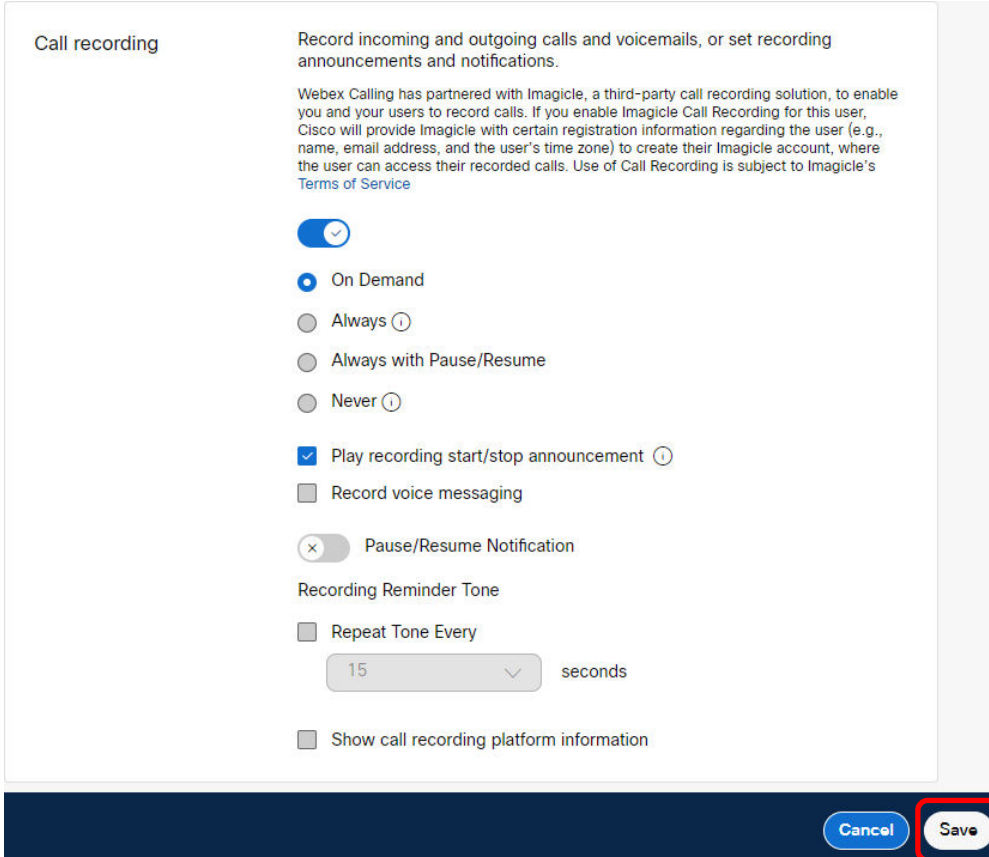
- On Demand: recording is triggered by pushing a button on Webex client or IP Phone
- Always: recording is automatically triggered for each call performed by user.
- Always with Pause/Resume: recording is automatic, but the user can temporarily pause the recording to acquire sensitive information. An additional toggle button is added in Webex client or IP Phone
- Never: recording is disabled for this user.

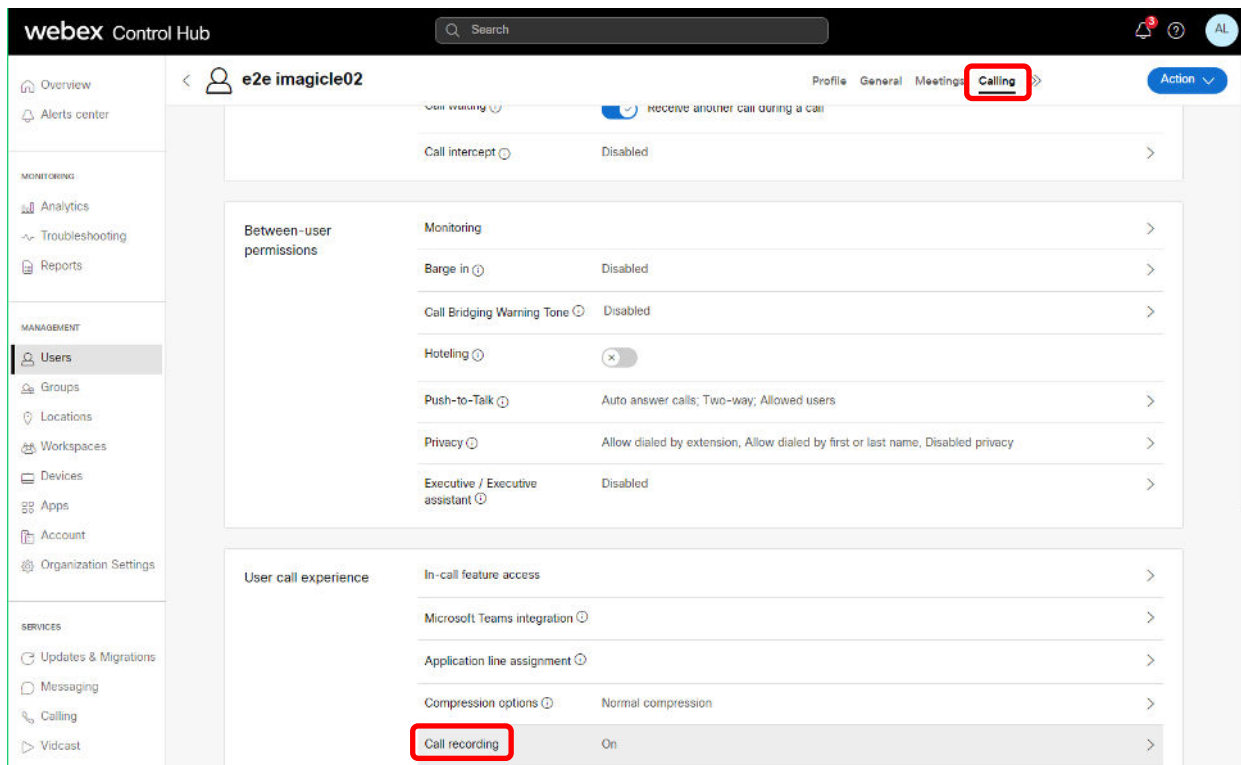On the same window, you an enable an announcement (privacy statement) to be automatically played before starting the recording. The announcement can be customized.

It is also possible to play another announcement while pausing/resuming the recording.

Finally, you can enable a recording-awareness periodical tone (beep) to be played during the recording.

All above announcements and tones are audible by both local and remote party.

If you need to enable additional users, please repeat the steps highlighted in this paragraph.

2.2 Enabling Call Recording gadget on Webex Desktop clients

Please be aware about the following limitations:

- Gadget doesn't work if the Imagicle UCX Suite has a self-signed certificate and secure connection is used, this is because Webex only admits trusted sites/gadgets
- Certificate must be trusted by a public authority, local trusted certificates are not accepted by Webex
- Webex Mobile app and Webex web version are still not supporting this feature
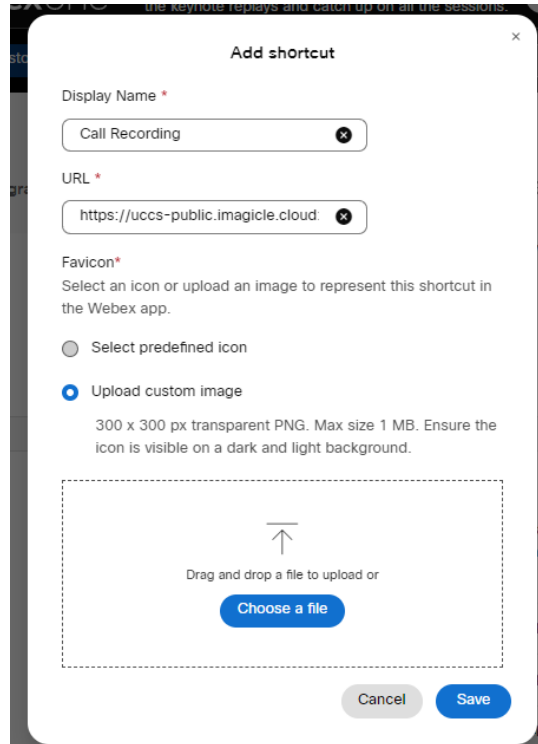
To replace the self-signed certificate with a trusted one, please follow this KB article.

Sign in to Webex Control Hub as Administrator and open the Apps page.
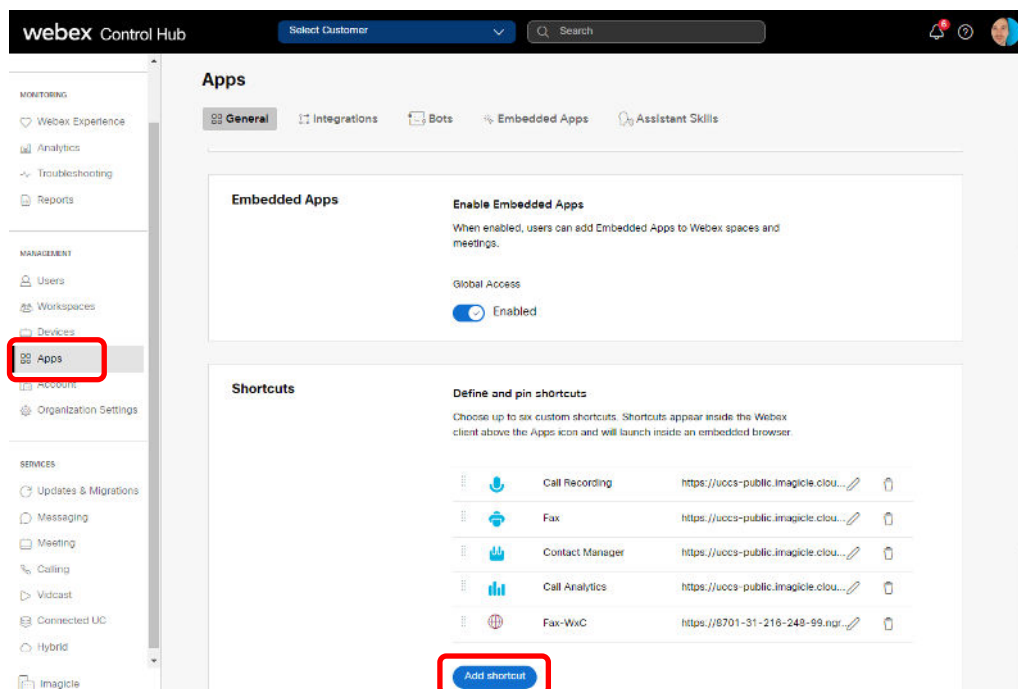
Scroll down to "Shortcuts" section and click on **Add shortcut**.

The following window pops-up, to be filled with gadget details:

- Enter the "Display Name" and the following "URL":
  `https://<customer_name>-public.imagicle.cloud/gadgets/CallRecording`

  <customer_name> must be replaced according to Imagicle UCX Cloud Suite instance name, as explained in Chapter 1.

- Select "Upload custom image" and drag or upload the PNG file coming from the Imagicle set of icons available here.
- Once done, please hit Save.

3 Imagicle UCX Cloud Suite Configurations

This chapter details all configurations to be applied in Imagicle UCX Cloud Suite to enable Call Recording for Webex users, leveraging native integration.

3.1 Users Provisioning

All Webex users who should be already imported into Imagicle UCX Cloud Suite, as this activity is in charge of Imagicle Cloud Services (see chapter 1). User are automatically synchronized **on a daily base**, from Webex Control Hub.

Please access to Imagicle UCX Suite web portal as Administrator and go to ADMIN ⇒ User Management ⇒ Synchronize users with an external data source » ⇒ **Configure Synch Rules >>**

Customized field mapping can be applied during users' synch, only if required. Select "Cisco Webex", as per below screenshot:

ADAPTER'S RULE TYPE	Cisco Webex ▾	
IAS USER PARAMETER NAME	**CONFIGURE RULE**	
Preferred language	⦿ Only when adding, set this value	
Password	⦿ Only when adding, set this value	pass0
Active Directory username	⦿ Import every time from source	

The sync service uses the Webex Calling user's email as primary key. The username included in the email address populates the *Active directory username* field, while the domain (after @) populates the *Domain* field.

All other users' fields are either imported from a fixed Webex field or from a Webex field of your choice. See below table including Webex specific field mapping:

UCX Suite Display Name	Mapping criteria	Synched from	Sample value
Active Directory username	Import every time from source	username coming from Email field	john.smith
Domain	Import every time from source	domain coming from Email field	company.com
First Name	Import every time from source	firstname	John
Last Name	Import every time from source	lastname	Smith
User PIN	Only when adding, set this value		1234
First extension number*	Import every time from: • "Extension or Phone number" • "Phone number or Extension" • Keep existing value	Extension = webexCalling.extension Phone number = webexCalling.number In both cases, webexCalling.countryCode is added to store the extension number in +E164 format	+447259856623
First extension number Alias	Import every time from: • Work phone	Work phone = workPhone Extension = webexCalling.extension Phone number = webexCalling.number	+447259856623 or john.smith@company.com

	• "Extension or Phone number" • "Phone number or Extension" • email address • Keep existing value	webexCalling.countryCode is added to store the extension alias in +E164 format email address = Webex Mail	
Device name	• Import every time from source • Keep existing value	webexCalling.nativeUserId	jsmith
Preferred Device name	• Import every time from source • Keep existing value	webexCalling.nativeUserId	jsmith
Email	• Import every time from source • Keep existing value	Webex Mail	john.smith@company.com
Department	Import every time from: • "Organization Name" • "Location Name" • Keep existing value	Organization Name = organization.name Location Name = location.name	ACME Inc.
Cost Center	Import every time from: • "Organization Name" • "Location Name" • Keep existing value	Organization Name = organization.name Location Name = location.name	Paris
Office Location	Import every time from: • "Organization Name" • "Location Name" • Keep existing value	Organization Name = organization.name Location Name = location.name	France
Rich Presence SIP URI	• Use the email address field • Keep existing value	Webex Mail	john.smith@company.com
Microsoft URI	• Use the email address field • Keep existing value	Webex Mail	john.smith@company.com
Webex URI	• Use the email address field • Keep existing value	Webex Mail	john.smith@company.com
Picture	• Import every time from source • Keep existing value	AvatarURL**	Max 200KBytes size (default)

* Short numbers are supported, only if +E.164 number is missing. If, later on, an +E.164 is added to Webex user, then please remember to amend (manually or through another users' synch) the First Extension Number, to make sure it includes the +E.164 number, while the short number can be moved to Extension Number Alias. If this task is not performed, we lose the call control monitoring and user can't login to Imagicle Attendant Console anymore.

** AvatarURL points to a server on Webex Cloud, which should be reachable by Imagicle UCX Suite to retrieve each picture through a http request. User images can be in the most common formats, e.g. png, jpg, jpeg and bmp.

Note: If Webex user's email is changed, at the next synchronization relevant UCX Suite user is removed and another UCX Suite user is created with the new *Active directory username* and *Domain* values.

3.1.1 Call Recording-specific user's properties

Other than above fields imported from Webex Control Hub, some Call Recording-related user's parameters might be entered for additional functionalities:

- Group Name: if set, this field defines the recording group the user belongs to. This field can be used to filter/search recordings and to enable a group superuser (see next paragraph).
- List of additional groups: This field allows to configure additional recording groups that a group supervisor is granted to, for managing relevant recordings. You can add here multiple groups, separated by semicolon.
- Send email notifications / Attach recording file to email notifications: These flags enable email notifications to the user, with or without recording audio file attachment.

Call Recording			
Numeric User ID		Numeric Partition ID	
Group Name	Sales	Additional supervised groups (e.g.:Sales;Marketing;Board)	Marketing;Support
Send email notifications	☑	Attach recording file to email notifications	☑

3.1.2 Users' Permissions

Each Imagicle user is configured with a specific permission level by application. For Call Recording, four permission levels are available:

- **Record Only**: This profile enables a user to start/stop, pause and resume a recording and prevents him from accessing recordings (search, listen or download any recordings is forbidden for this user).
- **Base Access:** this is the default access level (simple user) applied to all UCX Suite users. This profile can:
  - Record new conversations
  - Browse, search, play **own recordings only**
  - Download and delete own recordings (if globally enabled by administrator)
  - Tag recordings for a longer retention (if globally enabled by administrator)
  - Add/edit notes attached to each own recording
- **Group Supervisor:** compared to base access, a user with this profile, with a not blank recording group, can also:
  - Browse, search, play all recordings of the recording group he belongs to
  - Download and delete groups' recordings (if globally enabled by administrator)
- **Administrator**: In addition to supervisor access level, a user with this profile can also:
  - Browse, search, play, download and delete any recording, of any user
  - change global settings
  - start/stop Call Recording service

Moreover, following hierarchical rules apply:
- A user cannot delete a recording preserved by a higher level user
- A user cannot delete or amend a note written by a higher level user

Recordings performed by users with a blank recording group can only be seen, played back, deleted by the user himself and by the admin profiles.

3.2 Call Recording Service Settings

All The service settings (*Global Settings*) section is available only to administrative profiles (menu item *Global Settings*).

3.2.1 Settings → Recording Filters

When using the Always-On recording mode, you may need to record only some kind of calls/traffic. For instance, an help desk operator may need to record only incoming calls from the PSTN, not the conversations with other colleagues.
This section allows to define flexible recording filters to decide which type of calls to record or discard. Such filters apply to **all** recording enabled users.
The available options for call filtering are:

- **Call Direction**: setting this option you can decide to record only incoming/outgoing calls (from the user's point of view) or both of them.
- **Traffic Type**: setting this option you can decide to record only internal or external (to/from PSTN) calls. Calls are considered internal if the remote party is included in the UCX Suite users list or if the remote party number matches the Internal number patterns defined in the UCX Suite "Numbering Plans Parameters" section.
- **Black List**: this option allows to define a list of remote party numbers/patterns that you don't want to record. You can specify multiple numbers/patterns, one for each row.
  For instance, you can use this option to avoid to record the operator calls towards voicemail systems or conversations with VIP people who shouldn't be recorded. See the hint on the web page for the available wildcards you can use to build patterns. Some sample patterns:
    - 7100: avoid to record all calls to the Voicemail pilot 7100.
    - 72. : avoid to record all conversations from/to numbers 3-digits long, starting with '73'.
    - 8! : avoid to record all conversations to any number (of any length) starting with '8'.

3.2.2 Settings → Permissions

Use this section to decide which access levels can delete or download recordings. Available options are:

- Nobody: useful to prevent accidental deletions, even by service administrators.
- Administrators
- Group Supervisors
- Simple users

For deletion, if you select "Nobody - Irreversible choice", even administrators won't be able to delete the recordings, and nobody will ever be able to change the setting.

3.2.3 Settings → Pilot Numbers → Actions on recordings without assignees

This feature, only available to customers with a channel-based Call Recording license, allows to specify an Imagicle "Catch-All" user to whom attribute all those recordings not correlated to a named user. By default this feature is disabled, so all recordings not correlated to Imagicle users are discarded.

Note: Imagicle Call Recording Catch-All user must be ad-hoc created for this purpose. You can't use an existing named user.
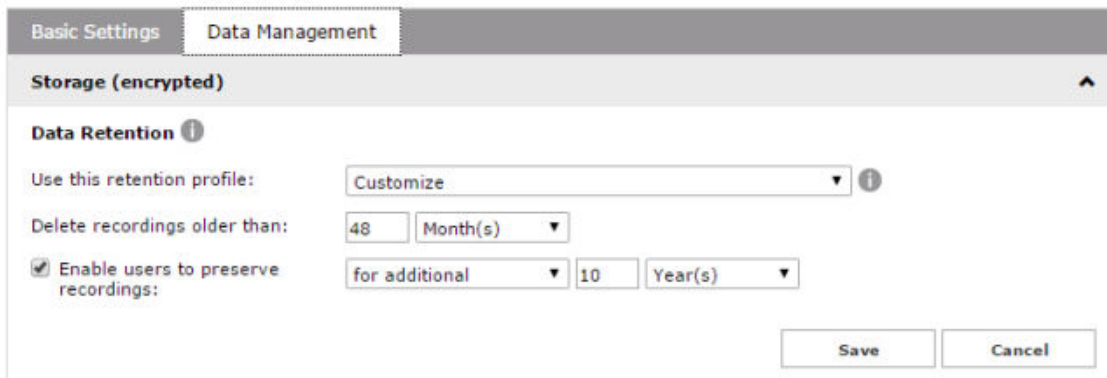
3.2.4 Data Management → Storage (encrypted)

This section allows to choose where to store encrypted audio recording files:

- **Local** - files are stored inside Imagicle Cloud, with unlimited retention.
- **External** – Optionally, it is possible to store recording files into a network shared disk drive, typically provided and installed at customer's premise, mapped into Imagicle Cloud instance. It requires Imagicle UCX Cloud Suite "Dedicated" platform, with private peering.

3.2.4.1 Retention Policy

The service can be configured to automatically delete older recordings in order to free external disk space or to comply with legal or internal requirements.

When the automatic deletion is enabled, users can optionally select single recordings to be **preserved**, accordingly with the system settings. See below sample:

You can choose one of the retention presets or you can define a customized policy based on your needs. The available options are:

- **Keep all recording: no automatic deletion**: recording are never deleted automatically (only manual deletion is possible). Selecting this option, the recording preserve feature is disabled for all users.
- **12 months**: delete automatically all recordings older than 12 months, except the ones explicitly preserved by users.
- **48 months**: delete automatically all recordings older than 48 months, except the ones explicitly preserved by users.
- **Delete after 4 hours, except preserved by users**: this setting is ideal to discard all recordings not explicitly marked by users. This is useful if users are configured for Always-On recording but only a few conversations should be kept.
- **Customize**: you can define you own retention policy, for the specified amount of days/months/years. You can also enable the preserve feature to users, specifying an additional retention period for tagged recordings.

Deletion of older recordings, if enabled, is performed by the service at regular intervals (minutes).

Please, consider that deleted recordings cannot be restored anymore. They won't be available for playback, download and export operations, so be careful when configuring retention policies.

3.2.5 Data Management → Recordings Analysis

If Imagicle Voice Analytics license is in place, customer can decide to automatically upload all audio recordings into relevant VA Cloud web portal. If this option is kept disabled, users or supervisors will have to manually export recordings to unencrypted MP3 and manually upload audio files, one by one, into VA Cloud web portal.

3.2.6 Notifications

Users may receive an email notification whenever their calls have been recorded. You choose which users receive the email by ticking the "Send email notifications" flag (see par. 3.1.1). If you also enable "Attach recording file to email notifications", an **unencrypted copy** of the recorded message will be attached to the email message, in plain .mp3 format.

On the Email notifications setting page, you can set the size limit for the attachment. If the limit is overcome, the email is sent anyway, without attachment. The minimum size limit is 1 MByte. Unchecking the flag, no limit will be applied.

You can also set the email notification sender name. You can set other SMTP properties from Admin → System Parameters → SMTP parameters.