AudioCodes Voice.AI

Interaction Insights

Enterprise Service





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Documentation Revision Record

LTRT	Description
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LTRT- 27608	Update to Section Managing Users; syntax corrections.

LTRT	Description
LTRT- 27609	Update for Unlimited Retention (Recording Profile); Update for SOD and ROD (Recording Profile). Removed section "Monitoring Onboarding Process in Live Platform". Update to Section Bring-Your-Own-Storage, Update for product name change to Interaction Insights.

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1 About Interaction Insights

- Compliance, Quality, Malicious and other use cases for Call Recording: Interaction Insights is a fully secured, intelligent enterprise compliance-recording solution that empowers organizations to effortlessly capture, index and ensure the quality of all customer and internal interactions, spanning external and internal communication channels. For Microsoft Teams users, seamlessly records voice interactions to meet regulatory compliance requirements. This comprehensive solution provides organizations with the assurance of both compliance and the highest standards of communication quality.
- Interaction Insights Recordings make it easier for your organization to meet and maintain compliance standards such as MiFID II, GDPR, PCI DSS, HIPAA and E-Discovery. An intelligent, cloud-based recording solution ensures that you capture and manage communications seamlessly, so you can focus on what matters most your business. Stay compliant effortlessly with our real-time monitoring solution.
 - Automatic recording notifications for compliance with regulations.
 - Roles and permissions-based access controls.
 - Flexible retention policies with local (national) storage capabilities for GDPR Compliance.

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Audit trail of user activities and encrypted media.

Figure 1-1: Interaction Insights Page

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Figure 1-2: Media Player Time lines

Benefits

Interaction Insights captures voice interactions that enables organizations to meet compliance regulations, and at the same time acquire business insights for measuring performance of customer interactions. Intelligence acquired through the product can be used as follows:

- Facilitates corporate strategy decision making process.
- Serves as the basis for enhancing customer satisfaction and loyalty.
- Minimizes exposure to disputes and mitigates the risk of reputation damage.
- Secures access for Interaction Insights operators and Interaction Insights operators with Single Sign-on using Microsoft 365 Multifactor authentication.
- Compliance-grade recording and regulation-specialized features.

Interaction Insights is a value-added service that is provided as part of AudioCodes Interaction Insights, whose core interface is used for remote monitoring of the service. Interaction Insights customer operators can manage the service alongside other service types in the same core interface, as well as connect to other Web interfaces used by the other service types.

Features Overview

The table below lists and describes the Interaction Insights features.

Feature	Details				
Quick Start	User-friendly Onboarding wizard that lets you do the following:				
	Click to consent for all connections to your M365 platform.				
	Automation script for creating Recording and Access profiles.				
Compliance Recording Policy	Create recording policies for the users in the recording group on the customer's Azure tenant.				
Role and permission-based access control	Role-based Single-Sign On access control based on Interaction Insights roles: Sysadmin, Service Provider, Channel and Customer operator.				
Full time recording	Full-time audio recording				
Record on Demand (ROD)	Record on Demand (ROD): Recording contains audio from the point network administrator decides to record the call.				
and Save on Demand (SOD)	Save on Demand (SOD): Recording contains audio from the beginning of the call.				
Recording Profiles	Define Recording Profiles for Peer-to-Peer calls, user calls with Meetings and user Queue calls				
	Define Retention period and Blob Storage account				
	Full Time Recording – Automatic audio recording.				
	Filter for PSTN, internal and external calls. Filter for Internal and External meetings.				
	Filter calls according to numbers and regular expressions.				
	Specify a time range for call recording, which includes the option to choose specific days of the week and time ranges based on the location of the server for the region.				
Access Profiles	Configure call access for performing actions on media, such as Playing or Downloading media related to a call or viewing emails				

Feature	Details
	 and notes related to a call. Configure and Modify Recording and Access Profiles Configure and modify System Configuration permissions
AudioRecording	 Record calls of Targeted users on different devices, including Teams desktop, web, mobile applications and phones. Record the calls audio Microsoft Azure Active Directory users mapping
Legal Hold of Agent recordings	Users cannot be deleted when placed on Legal Hold and their recording data is preserved.
Audit Trail	Audit trail of user activity and export of call records and audit trail reports.
Flexible and Powerful Call Search Capabilities Flexible retention	 Search criteria based on username, date range, direction, called and calling party, release cause, call type and by defined notes. Easily filter search results, sorting ascending or descending by clicking column header, shortcuts to the beginning page within the results screen. Search for calls based on Calling (Caller ID), Called or Answering Party Search for calls based on assigned Call Tag and whole words appearing in Notes. Export Call metadata to Excel file. Number of retention periods can be added and applied to specific AAD User Groups.
policies	AAD User Groups.Recordings are automatically deleted based on retention period.
Security	Media encryption with HTTPS/TLS/RTP.
Azure Blob Recordings Storage	Configure multiple storage accounts on Microsoft Azure Blob which is used for high-scale and secure object storage for cloud-native workloads, archives, data lakes, high-performance computing, and machine learning. Customize period for data retention with ability to configure unlimited retention period at the service level.
Call Tagging	User definable tags like Customer Name, Account Number, Malicious Call can be easily assigned to the call.

Feature	Details
Personal App in Microsoft Teams	Interaction Insights can be added to Microsoft Teams as a Teams App. Once setup can be uploaded to the customer organization's App Store and run on Teams desktop or Teams mobile clients.

2 Onboarding

- Prerequisites below
- Logging into Interaction Insights Interface on page 9
- Quick Start on page 18
- Add and Pin Interaction Insights Teams App on page 36

Prerequisites

The following are the prerequisites for deploying the Interaction Insights service:

Create AAD Recording Groups below

Create AAD Recording Groups

You need to create recording groups including targeted users for whom you wish to record. You then attach these groups to Recording Profiles in the Quick start wizard and in Day Two. Users may belong to multiple groups; however they can only be attached to a single Recording profile.

> To create a recording group:

= Microsoft Azure	م	Search resources, services, and docs (G+/)			도 다 @ Ø 永 admin@M365x25192 сонтозо (M365x25192844	208 .on 🙆
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> nousestooring r support	All Company	3cf8088e+80a6+478f+b921+909d66d6fbcd	Microsoft 365	Assigned	allcompany@M365x25192084.onmicrosoft.com	
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	C Communications	db917438-9ab9-435e-ab13-a0b0caf50d0a	Microsoft 365	Assigned	Communications@M365x25192084.onmicrosoft.com	- 1
	Contoso	74ca9006-9232-4a6d-bd9b-fd7573c9aeb3	Microsoft 365	Assigned	Contoso@M365x25192084.onmicrosoft.com	
	Cm Contoso marketing	27387f31-5822-4f4d-b243-825557791a24	Microsoft 365	Assigned	Contosomarketing@M365x25192084.onmicrosoft.com	
	CT Contoso Team	0d5d101b-c512-4fd0-9b00-a2f83419fd3d	Microsoft 365	Assigned	contosoteam@M365x25192084.onmicrosoft.com	
	Design	5d7e0b5f-5022-4575-bf1f-a16e14a13fa3	Microsoft 365	Assigned	Design@M365x25192084.onmicrosoft.com	
	Digital Initiative Public Relations	c1094460-66af-4c65-b1c1-a339ca182955	Microsoft 365	Assigned	DigitalInitiativePublicRelations@M365x25192084.onmicrosof	ft.com
	E Executives	974175cc-dd6f-4878-aa9b-7f182be952a9	Distribution	Assigned	Executives@M365x25192084.OnMicrosoft.com	
	FT Finance Team	4110ade0-18a4-49cb-aab3-b6069eca9def	Distribution	Assigned	FinanceTeam@M365x25192084.OnMicrosoft.com	
	Leadership	d5c01766-e725-4b46-acd0-175f25a1422a	Microsoft 365	Assigned	Leadership@M365x25192084.onmicrosoft.com	~

1. In the customer Azure portal Navigation pane, select Groups.

- 2. Click New group.
- **3.** Enter the group details:
 - Group type: Security (default)
 - Group name: for example, Rec-Group
 - Assign AD roles: No (default)

• Membership type: Assigned (default)

E Microsoft Azure	$\mathcal O$. Search resources, services, and docs (G+/)	[2	o @	0	R	admin@M365x2519208 сонтосо (м365x25192084.0N
Home > Contoso Groups > Groups All groups >							
New Group							×
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Group type * ①							
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Group description							
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Yes No							
Membership type * ①							
Assigned	\checkmark						
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No owners selected							
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No members selected							

Create

4. Click Create.

The new group is created.

= Microsoft Azure	,P Search	resources, services, and docs (G+/)			[고 다 @ @ 윤 admin@M365x251920 соктово (изебх2519284.0	8 🔕
Home > Groups						
Groups All groups						×
o «	🕫 New group 🞍 Download groups 💍 Refresh 🛞 Manage	view 🖂 📋 Delete 🛛 👰 Got feedback	?			
Overview (Preview)	Azure Active Directory is now Microsoft Entra ID. Learn more					×
All groups	Search	Add filter				
Deleted groups	Search mode Contains					
Diagnose and solve problems Settings	37 groups found					
> Activity	Name 1	Object Id	Group type	Membership type	Email	^
> Troubleshooting + Support	S sg-Legal	195a50b9-cf83-461e-8956-5ee1f03a38e6	Security	Assigned		
	S sg-Operations	66e00f72-8e35-45a6-a350-fe36f7139178	Security	Assigned		
	sg-Retail	a23a3c45-3fc8-4dad+b396-f63d7bac2f14	Security	Assigned		
	SA sg-Sales and Marketing	4478ad97-a97d-44d5-9fc1-93283260652a	Security	Assigned		
	ST SOC Team	cdb23fdb-2127-4d45-a731-ef1fa0c7905f	Microsoft 365	Assigned	SOCTeam@M365x25192084.onmicrosoft.com	
	SA ssg-Contoso Ambassadors	5347c6e0-8b5d-4bb7-80b0-08bf879f44b7	Security	Assigned		
	S8 ssg-Contoso Bug Bashers	1cabbb9a-1ed4-4de3-9da0-10c2e8c6acf5	Security	Assigned		
	SSPRSecurityGroupUsers	477a7e57-3c08-458b-98c9-ee7bf84d7ff9	Security	Assigned		
	Support-RecGroup	9e8b39f3-b64e-49ca-859e-719abba6c416	Security	Assigned		
	TT Tailspin Toys	6560a4bb-2559-4830-a5cd-07f24c533d97	Distribution	Assigned	Tailspin@M365x25192084.OnMicrosoft.com	
	U.S. Sales	13adbab4-db61-4374-8d39-274b2d3de5b6	Microsoft 365	Assigned	USSales@M365x25192084.onmicrosoft.com	~
	<					>

5. Select the new group and click to open it.

Microsoft Azure		,P Search res	sources, services, and docs	(G+/)					
Home > Groups All groups >									
Support-RecGroup									
0 ««	📋 Delete 🛛 🖗 Got fee	dback?							
0verview	Overview								
Diagnose and solve problems									
Manage	Basic information								
Properties									
2 Members	Support-R	ecGroup 🗈							
Sources 200	S Customer Su	pport Recording Group							
Roles and administrators									
Administrative units	Membership type	Assigned		Total direct members	0				
Group memberships	Source	Cloud		User(s)	0				
Applications	Туре	Security		Group(s)	0				
🔓 Licenses	Object ID	9e8b39f3-b6de-d9ca-859e-719abba6cd	16	Device(s)	0				
Azure role assignments	objectio			benee(b)					
Activity	Created on	7/23/2024, 10:19 AM		Other(s)	U				
Privileged Identity Management	Feed								
š⊟ Access reviews	Group membersh	ips	Owners			•••	Total members		
Audit logs		····				~	0		
🚴 Bulk operation results	View group membr	wrhine	View group own				View aroup members		
Troubleshooting + Support	view group memore	esubs	view group own	ers.			view group members		

6. In the Navigation pane, select **Manage** > **Members** to add members to the group.

Microsoft Azure		\mathcal{P} Search resources, services, and docs	(G+/)	D		admin@M365x2519208 Oxtoso (M365x25192084.on
Home > Groups All groups > Support	-RecGroup					
Support-RecGroup	Members					×
0 «	+ Add members $ imes$ Remove 👌 Refresh	Bulk operations ∨ 🛛 🗮 Columns	🖗 Got feedback?			
 Overview 	Direct members All members					
X Diagnose and solve problems						
∨ Manage	Search by name	⁺y Add filters				
Properties	Name	↑џ Туре	Email		User type	
A Members	No members have been found					
🍰 Owners						
🔱 Roles and administrators						
Administrative units						
🌞 Group memberships						
Applications						
🔓 Licenses						
📍 Azure role assignments						
✓ Activity						
Privileged Identity Management						
š⊟ Access reviews						
Audit logs						
👶 Bulk operation results						
> Troubleshooting + Support						

- 7. Click Add Members.
- 8. Search for the desired user to record, select them, and then click **Select**.

	2	Search resou	irces, sei	rvices, and docs (G+/)			Σ.	Ω	۲	0	유 a	dmin@M365x251 ontoso (M365x251920	9208 84.0N	0
Home > Groups All groups > Support-R	ecGroup	Add m	nem	bers									;	×
Support-RecGroup Members ····														^
0 ««	+ Add members 🗙 Remove 👌 Refresh 🗋 Bu	 Try dr 	hanging	or adding filters if you don't see what	you're looking for.			Sele	cted (3)				
Overview	Direct members All members	Search ①							Reset					
X Diagnose and solve problems		P							Ad	ele Vance	e		n	
∨ Manage	Search by name	159 results	found					_	Ad	elev@M3	65x251920	84.OnMicrosoft.com		
Properties	Name	All Use	rs (iroups Devices Enterprise a	pplications				Ale	ex Wilber	r 65y2519208	4 OnMicrosoft com		
🍰 Members	No members have been found			Name	Type	Details	î			0				
A Owners									All:	anD@M30	011g 65x2519208	34.OnMicrosoft.com		
& Roles and administrators			•	AAD App Management	Enterprise app	f0ae4899-d877-4d3c-ae25-679e38eea492	2							
Administrative units				AAD Request Verification Service	Enterprise app	c728155f-7b2a-4502-a08b-b8af9b269319	9							
🔅 Group memberships														
Applications				Adele Vance	User	AdeleV@M365x25192084.OnMicrosoft.com	m							
🔓 Licenses			_											
📍 Azure role assignments			X	Alex Wilber	User	AlexW@M365x25192084.UnMicrosoft.com	n							
✓ Activity				Allan Deyoung	User	AllanD@M365x25192084.OnMicrosoft.com	n							
Privileged Identity Management				1010										
- ≶⊟ Access reviews			•	API Connectors 1st Party	criterprise app	21200048-1021-4003-8306-60865767968	0							
Audit logs				Automate Bot	User	AutomateB@M365x25192084.OnMicrosof	ft							
🙏 Bulk operation results														
> Troubleshooting + Support				Azure AD Notification	Enterprise app	fc03f97a-9db0-4627-a216-ec98ce54e018								
				Azure ESTS Service	Enterprise app	00000001-0000-0000-c000-0000000000	0,							
		<				>	>							~
		Select												

The members are added to the group.



Logging into Interaction Insights Interface

Login to the Interaction Insights interface for the first time using your M365 tenant operator with 'Global admin' credentials which are required for onboarding your Enterprise service. Once you have successfully deployed the service, you can add additional Enterprise M365 operators. Once the Interaction Insights Service has been deployed by your Service Provider, Once you have purchased Interaction Insights, you receive a Welcome email including a URL link to the Interaction Insights Web interface.

> To log in for the first time:

1. Click the URL link sent in the Welcome email shown below.

Subject: Welcome! Your Interaction Insights Application is Ready
Dear <end customer="" name=""> Team,</end>
Congratulations! Your application deployment is complete and we're thrilled to inform you that you can now start utilizing Interaction Insights . To get started, follow these steps.
M365 Administrator permissions are required for each step
1. Create 2 AAD Groups in Azure Active Directory
o Create two security groups in AAD.
1. One group for users that will be targeted to be recorded. Assign associated users to this newly created group. You can start by assigning one user to the group as a test user.
2. One group for users that will access the recording. Assign associated users to this newly created group. (This is an optional step as a default administrator will have access to all of the recordings).
2. Access & Configure Application - Follow 'Quick Start' Wizard
<pre>o Access the app at https://qaming.ai-logix.net/.</pre>
o Log in with one of the default administrator UPNs provided before the app was deployed: tania@customername.com.
Step 1: Click 'Connect M365' to Grant admin consent by clicking on each

'Grant Admin Consent' option to ensure proper access and operation of the app. Once completed click 'Finish' to return to Quick Start wizard.

Step 2: Click 'Configure Recording' to determine what calls to record, for how long to keep, and the group of the users to record.

1. Under 'Configuration' tab review and if needed change call types to record or retention period.

2. Under the 'Groups Mapping' tab add the AAD security group you created to be recorded.

3. Under the 'MSFT Policy' tab make sure to download MSFT Compliance Policy script and execute the script. Click 'Finish' to finalize the recording profile and return to Quick Start wizard.

Step 3: Click 'Configure Access' to set access permissions for call recordings and the system commonly known as Roles Based Access Control (RBAC). (Optional step, default administrator has full access).

1. Under 'Permissions' set permissions for call recording access and system configuration.

2. Under the 'Groups Mapping' tab add the AAD security group you created to access the recordings.

3. Click 'Finish' to finalize the Access profile. You will receive confirmation that you are ready to start recording.

That's it! Your application is now set up for use and recording! See the admin guide here.

Test a Call with a Targeted User:

Try out a test call with a targeted user to be recorded.



The Welcome page for the InteractionRecording interface is displayed.



2. Click Sign in with Microsoft 365.

3. Choose the Global admin account of your Interaction Insights tenant.



	8129.onmicrosof	ft.com
Permissions	requested	
stngqa-auth <mark>unverified</mark>		
This application is your organization.	not published b	y Microsoft or
This app would like	to:	
✓ View your basic pr	ofile	
✓ Maintain access to	data you have give	en it access to
Consent on behalf	of your organizatio	on
Accepting these permission your data as specified in the statement. The publisher for you to review. You ca myapps.microsoft.com. Sl	ons means that you a their terms of service r has not provided l an change these perr how details	allow this app to us and privacy l inks to their term s missions at https://

admin@m365x43868	3129.onmicrosof	t.com
Permissions	requested	
stngqa-auth <mark>unverified</mark>		
This application is r your organization.	not published b	y Microsoft or
This app would like t	:0:	
✓ View users' basic p	rofile	
✓ Maintain access to	data you have give	en it access to
✓ Consent on behalf	of your organizatio	n
If you accept, this app will all users in your organizat review these permissions.	l get access to the sp ion. No one else will	ecified resources for be prompted to
Accepting these permission your data as specified in t statement. The publisher for you to review. You ca myapps.microsoft.com. Sh	ons means that you a heir terms of service has not provided l an change these perr now details	allow this app to use and privacy inks to their terms nissions at https://
Does this app look suspic	ious? Report it here	

4. Select the **Consent on behalf of your organization** check box, and then click **Accept**. The Quick Start wizard opens.

E	To get started with Interactic	n Recording, please utilize the the quick start process below in 3 easy steps teams calls.	s to begin recording Microsoft
분 후 	STEP 1	STEP 2	STEP 3
• •	Connect M365 Grant admin consert links to ensure permissions are set to access the tenunt Connect M305	Configure Recording Profile Determine what calls to record, for how long to keep, and the group of the users to record Configure Recording	Configure Access Control permissions on call access commonly known as Roles Based Access Control (RBAC) and system and recording configuration Configure Access
S 		Exit	

5. Proceed to Quick Start on page 18.

Settings Navigation Pane

The navigation pane includes the options described in the table below

Option	Description
System Settings	
Connect to your M365	Connect to M365 on page 142
Tools	Tools on page 144
Storage	Bring-Your-Own-Storage on page 149
Tags	Manage Tags on page 155
Branding	Branding on page 158
Licenses	Licenses on page 160
Recording Settings	
Recording Profiles	Managing Recording Profiles on page 41
Access Profiles	Managing Access Profiles on page 78
Monitoring	
View Users	Managing Users on page 163
Audit Trail	Viewing and Searching an Audit Trail on page 169

Option	Description
System Activity Log	System Activity Log on page 172

Toolbar

The toolbar includes the options described in the table below.

lcon	Item	Description
	Branding on page 158	Lets you upload your corporate logo to the Web interface toolbar.
=	Interactions on page 90	Displays all recorded interactions of targeted users.
***	Managing Active Calls on page 128	Displays the list of active recorded calls for all targeted users attached to recording profile groups of the customer tenant.
-	My Active Call on page 139	Displays the details of the Active call of the logged in Admin user.
0	Quick Start on the next page	 Opens the Onboarding setup wizard which lets you do the following: Consent to all required M365 permissions. Configure Recording profiles Configure Access profiles
\$	System Settings on page 142	Opens the System Settings menu.
?	Help	Opens a link to the Online Help.
5	Logout	Closes the active session.
MA	Logged in user	Details of the logged in user.

Quick Start

Once the Interaction Insights Service has been deployed by your Service Provider, Once you have purchased Interaction Insights, you receive a Welcome email similar to the following including a URL link to the Quick Start wizard.

Subject: Welcome! Your Interaction Recording Application is Ready Dear <End Customer Name> Team, Congratulations! Your application deployment is complete and we're thrilled to inform you that you can now start utilizing Interaction Recording . To get started, follow these steps. *M365 Administrator permissions are required for each step* 1. Create 2 AAD Groups in Azure Active Directory Create two security groups in AAD. 0 One group for users that will be targeted to be recorded. Assign 1. associated users to this newly created group. You can start by assigning one user to the group as a test user. One group for users that will access the recording. Assign associated 2. users to this newly created group. (This is an optional step as a default administrator will have access to all of the recordings). Access & Configure Application - Follow 'Quick Start' Wizard 2. Access the app at https://qaming.ai-logix.net/. 0 Log in with one of the default administrator UPNs provided before the 0

app was deployed: tania@customername.com.

Step 1: Click 'Connect M365' to Grant admin consent by clicking on each 'Grant Admin Consent' option to ensure proper access and operation of the app. Once completed click 'Finish' to return to Quick Start wizard.

Step 2: Click 'Configure Recording' to determine what calls to record, for how long to keep, and the group of the users to record.

1. Under 'Configuration' tab review and if needed change call types to record or retention period.

2. Under the 'Groups Mapping' tab add the AAD security group you created to be recorded.

3. Under the 'MSFT Policy' tab make sure to download MSFT Compliance Policy script and execute the script. Click 'Finish' to finalize the recording profile and return to Quick Start wizard.

Step 3: Click 'Configure Access' to set access permissions for call recordings and the system commonly known as Roles Based Access Control (RBAC). (Optional step, default administrator has full access).

1. Under 'Permissions' set permissions for call recording access and system configuration.

2. Under the 'Groups Mapping' tab add the AAD security group you created to access the recordings.

3. Click 'Finish' to finalize the Access profile. You will receive confirmation that you are ready to start recording.

That's it! Your application is now set up for use and recording! See the admin guide here.

Test a Call with a Targeted User:

• Try out a test call with a targeted user to be recorded.

• Check you have recording notifications with the recording banner presented in Microsoft Team during the call. End the call so the recording can be played back.

• Navigate and click on the 'Interactions' page in top left corner navigation panel in your application to see that the call is successfully recorded and can be played back.

We're excited for you to explore the possibilities of Interaction Recording! If you have any questions or need assistance, feel free to reach out.

Best Regards,

AudioCodes Team

The Quick Start provides a three-step wizard for setting up your Interaction Insights service:

- Step 1: Establishes consents to secure connection with the customer's M365 platform for all managed Azure and Interaction Insights services.
- Step 2: Sets up their Recording profiles including which calls may be recorded, retention and storage period, whether to enable call notifications and call filtering. Profiles are then assigned to one or more of the customers' AAD tenant groups, and in the last stage configure additional Microsoft Teams Call policies. Once you have completed the configuration, you must download and run the Recording Profile PowerShell script.
- Step 3: Setup Role-based Access Control (RBAC) for determining who can access call recordings, create and modify profiles and configure global settings.



• The Quick Start wizard must be performed by the customer M365 Administrator.

• You can also click in the lcon pane to open this wizard (this icon disappears once you have completed the Onboarding). Click Connect to M365 on page 142 to manage the consents.

Do the following:

1. Click **Connect M365** to start the wizard.





M365 Tenant ID 41747617-089b-4128-a9c8-7c9c2c596c25	Interaction Recordin 3e9652b4-e2fc-4f16-bf	1g Tenant ID 76-cd0f746c4581			
CONSENT NAME		ACTION	COMPLETED	DESCRIPTION	
M365 Login		Grant Admin Consent >	0	Provide the application permissions to authenticate users with your M365 credentials, application reroutes users to M365 for authentication (Azure Active Directory authentication - Microsoft OpenID Connect)	
Read Azure Active Directory Groups and Use	rs	Grant Admin Consent >	0	Provide the application with permissions to read AAD groups and users to enable the groups' users for recording and access to the application	
Recording Calls (Teams Bot consent to join ca	alls)	Grant Admin Consent >	8	Provide the application's Teams Bot with permissions to join your Tenant's Teams calls to record the calls' info and media	
Publish Teams Client App in your Teams Store	9	Publish	0	Add the application to users' Teams Clients for access of the application within Microsoft Teams. Click on the 'Publish' button to publish the app in your Teams store using M365 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups or users	
					Finish

The table below describes the required consents and the Enterprise applications that are created on your M365 tenant.

Consent	Description
M365 Login	Provide the application permissions to authenticate users with your M365 tenant credentials. The application reroutes users to M365 for authentication (Azure Active Directory authentication-Microsoft OpenID Connect-Oauth 2).
	The permissions are required for the SmarTAP application to authenticate users utilizing your tenant AAD authentication, and Microsoft Open ID Connect (Oauth 2) authentication. The permissions enable Interaction Insights to reroute users accessing the Interaction Insights application either from a browser or from the Interaction Insights Teams application (see row below) to be authenticated according to your organizational

Consent	Description
	M365 policy. The Deployment generates the Enterprise application <liveplatformser vername="">- auth. Youconsent to the following permissions:</liveplatformser>
	email – View users; email address (Delegated)
	 offline_access – Maintain access to data you have given it access to (Delegated)
	openid – Sign users in (Delegated)
	profile – View users' basic profile (Delegated)
	User.Read – Sign in and read user profile (Delegated)
	If you published the Teams app, the following permissions are added:
	 AppCatalog.Submit – Submit application packages to the catalog and cancel pending submissions.
	✓ AppCatalog.ReadWrite.All – Read and write to all app catalogs
Publish Teams Client App in your Teams Store (Optional)	Add the application to users Teams Clients for access of the application within Microsoft Teams. Click the publish button to access the app within your Teams store using M365 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups are users.
	Publishing the app makes it available for users in the tenant organization within Teams store. Each user needs to add the application from their Teams admin center in order to access it from Teams.
Read Azure Active Directory Users and Groups	Provide the application permissions to read AAD groups and users from your M365 tenant to enable the groups' targeted users for recording and access to the application. Deployment of Interaction Insights generates the Enterprise application <liveplatformservername>-aad. Youconsent to the following permissions:</liveplatformservername>
	User.Read.All – Read all users' full profiles (Application)
	GroupMember.Read.All – Read all group memberships (Application)
Recording Calls (Teams Bot consent to join calls)	Provide the applications' Teams Bot with permissions to join your Tenant's Teams calls to record the calls' info and media. The calls-app permissions are required for the Interaction Insights Bot application to join your Teams' tenant calls and to receive the media to be recorded. Deployment of Interaction Insights generates the Enterprise application

Consent	Description
	<liveplatformservername>-hue. Youconsent to the following permissions: Calls.JoinGroupCall.All - Join group calls and meetings as an app (Application)</liveplatformservername>
	 Calls.AccessMedia.All - Access media streams in a call as an app (Application)
Redundant Recording Calls (Second Teams Bot consent to join calls)	Provide the application's Redundant Teams Bot with permissions to join your tenant's Teams calls to record the calls' info and media. The calls-app permissions are required for the Interaction Insights Bot application to join your Teams' tenant calls and to receive the media to be recorded. Deployment of Interaction Insights generates the Enterprise application <liveplatformservername>-hue-paired. Youconsent to the following permissions:</liveplatformservername>
	 Calls.JoinGroupCall.All - Join group calls and meetings as an app (Application)
	 Calls.AccessMedia.All - Access media streams in a call as an app (Application)
	This consent is required in the event where a Pro User license has been configured for the service.

- 1. Click the Grant Admin Consent link for the M365 login.
- 2. Choose the Global admin account of your Interaction Insights tenant.



3. Click Accept.

Microsoft

admin@m365x43868129.onmicrosoft.com

Permissions requested

Review for your organization

stngqa-auth <mark>unverified</mark>

This application is not published by Microsoft or your organization.

This app would like to:

- Maintain access to data you have given it access to
- Sign in and read user profile

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

Accepting these permissions means that you allow this app to use your data as specified in their terms of service and privacy statement. **The publisher has not provided links to their terms for you to review.** You can change these permissions at https://myapps.microsoft.com. Show details

Does this app look suspicious? Report it here

	Cancel	Accept		
				~
< Comparison of the second sec			>	

4. Repeat the process for each permission.

The final action to publish the Teams Client App in your Teams Store is optional.

M365 Tenant ID 41747617-089b-4128-a9c8-7c9c2c596c25	Interaction Recording Tenant ID 3e9652b4-e2tc-4t16-bt76-cd0f746c4581			
CONSENT NAME	ACTION	COMPLETED	DESCRIPTION	
M365 Login	Grant Admin Cons	sent > 📀	Provide the application permissions to authenticate users with your M365 credentials, application reroutes users to M365 for authentication (Azure Active Directory authentication - Microsoft OpenID Connect)	
Read Azure Active Directory Groups and User	rs <u>Grant Admin Cons</u>	sent >	Provide the application with permissions to read AAD groups and users to enable the groups' users for recording and access to the application	
Recording Calls (Teams Bot consent to join ca	alls) Grant Admin Cons	sent > 📀	Provide the application's Teams Bot with permissions to join your Tenant's Teams calls to record the calls' info and media	
Publish Teams Client App in your Teams Store	e Publish	٥	Add the application to users' Teams Clients for access of the application within Microsoft Teams. Click on the 'Publish' button to publish the app in your Teams store using M365 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups or users	
				Finish

Figure 2-2: Tenant with Essentials license

For Pro Users with capabilities for Double Recording with Paired Bot users, an additional consent is required for the Second Teams Bot.

Figure 2-3: Tenant with Pro License

M365 Tenant ID Sn 194238e5-4f2c-4e1b-8125-2d27122ca75f 5f4	nartTap Tenant ID le3129-dd39-4ccd-bc41-98423bee2c1b		
CONSENT NAME	ACTION	COMPLETED	DESCRIPTION
M365 Login	Grant Admin Consent >	0	Provide the application permissions to authenticate users with your M365 credentials, application reroutes users to M365 for authentication (Azure Active Directory authentication - Microsoft OpenID Connect)
Read Azure Active Directory Groups and Users	Grant Admin Consent >	0	Provide the application with permissions to read AAD groups and users to enable the groups' users for recording and access to the application
Recording Calls (Teams Bot consent to join calls)	Grant Admin Consent >	•	Provide the application's Teams Bot with permissions to join your Tenant's Teams calls to record the calls' info and media
Redundant Recording Calls (Second Teams Bot c	consent to join calls) Grant Admin Consent >	0	Provide the application's redundant Teams Bot with permissions to join your Tenant's Teams calls to record the calls' info and media
Publish Teams Client App in your Teams Store	Publish	0	Add the application to users' Teams Clients for access of the application within Microsoft Teams. Click on the 'Publish' button to publish the app in your Teams store using M365 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups or users

5. Click Configure Recording Profile.

Welcor To get started with Interactic	me to Interaction Recording Quic n Recording, please utilize the the quick start process below in 3 easy steps teams calls.	ck Start to begin recording Microsoft
STEP 1	STEP 2	STEP 3
Hicrosoft 365		
Connect M365 Grant admin consent links to ensure permissions are set to access the lenant	Configure Recording Profile Determine what calls to record, for how long to keep, and the group of the users to record Configure Recording	Configure Access Control permissions on call access commonly known as Roles Based Access Control (RBAC) and system and recording configures Access
	Exit	

6. Configure Recording Profile (see Adding Recording Profiles on page 42).

Recording Profile Name	escription		
1. Configuration 2. Get Call Types Select what calls of recorded users as Image: Record All Call Types ()	sups Mapping 3. MSFT Policy		
User Peer to Peer Calls Internal: () 🖌 In 🖌 Out PSTN: () 🖉 In 🖉 Out	User Calls with Meetings	User Queue Calls ③ Calls Queue Instance ID Add	

superProfile	Profile for Customer Support			
1. Configuration 2. Group	s Mapping 3. MSFT Policy			
Call Types				
Select what calls of recorded users asso	ciated with the profile to record			
Record All Call Types 🔅				
User Peer to Peer Calls	User Calls with Meetings	User Queue Calls		
Internal: (i) 🗹 In 🗹 Out	External Meetings	Teams Queue Calls*:	Calls Queue Instance ID Add	
PSTN: 🔅 🗹 In 🕑 Out	✓ Internal Meetings ③	0		
External: 🗓 🗹 In 🗹 Out	All Meetings V			

User Peer to Peer Calls Internal: () 🖌 In 🖌 Out PSTN: () 🖌 In 🖌 Out	User Calls with Meetings External Meetings Internal Meetings	User Queue Calls (1)	Calls Queue Instance ID	Add	
External: 🛈 🗹 In 🕑 Out	All Meetings ~				
1 Year (365 Days) 🕠					
Storage (i)					
Europe LRS V					
Advanced Settings Y					
					Cancel Next
1 Year (365 Days) 🗸 🗸					
Storage (i)					
Europe LRS ~					
Advanced Settings ^					
Enable for all calls					
Filter Calls User Receives : List T	Type: Allow 💿 Block	Numbers	ular Expression		
Filter Calls User Makes : List 1	Type: Allow Block	Numbers	ular Expression		
Time Range (i)					
US/Eastern (-04:00)	~				
Custom recording bours (dafa)	lit hours 24/7)				
Week Days	Start Hour	End Hour			
Sunday	v 12:00:00 12	:00:00			

The Recording Notifications field is only displayed when enabled by the Service Provider when adding the service. In addition, the customer must sign a consent waiver.

- 7. Click Next to continue.
- 8. Assign Azure group to the profile; log in to the Azure portal for your tenant to confirm which group you wish to associate with the profile. Start typing the name of the group, and then click **Add Group**.

eccording Profile Name	Description ling Profile for Customer S	e coninguiarion. Sees anique groups are assigned to recording promes.	
. Configuration	2. Groups Mapping	3. MSFT Policy	
Assign Groups 🕕			
Communications (9)	l ×	Add Group Sync Groups From AAD	
Recording profile must ha	ive at least one AAD group		

		Ø Search resources, services, and docs (G+/)			도 🖉 🛞 Ø 🖗 admin@M365x21685	965 🙆 3.0N
Home > SIPTestOC Groups >						
SIPTERSOC GROUPS						×
° «	🚧 New group 🛓 Download groups 🚫 Refresh 🏼	Manage view \checkmark I Delete R Got feedback	1			
All groups	Azure Active Directory is now Microsoft Entra ID. Learn	1 more 🖸				×
Deleted groups	P Search	Y Add filter				
 Diagnose and solve problems Settings 	Search mode Contains					
> Activity	35 groups found					^
> Troubleshooting + Support	Name †	Object Id	Group type	Membership type	Email	
	AE All Employees	e751da10-7023-4de4-98ca-8b61ed4b6114	Distribution	Assigned	Employees@M365x21689653.OnMicrosoft.com	
	C Communications	4d93b1c7-f944-4e82-a372-1ebe23979c6e	Microsoft 365	Assigned	Communications@M365x21689653.onmicrosoft.com	
	Contoso	55ef9a2a-f336-4c42-89f1-832d789d698e	Microsoft 365	Assigned	Contoso@M365x21689653.onmicrosoft.com	
	Cm Contoso marketing	01dc0c2c-c11f-4150-a18a-14c4d8b80694	Microsoft 365	Assigned	Contosomarketing@M365x21689653.onmicrosoft.com	
	Contoso Team	12d2adca-71b7-481a-88fd-400705ec369a	Microsoft 365	Assigned	contosoteam@M365x21689653.onmicrosoft.com	
	Design	02e7826e-d3dd-42f0-a26a-df20179ee98e	Microsoft 365	Assigned	Design@M365x21689653.onmicrosoft.com	
	Digital Initiative Public Relations	e2d26497-c252-44c2-9783-156222ada575	Microsoft 365	Assigned	DigitalInitiativePublicRelations@M365x21689653.onmicroso	ft.com
	E Executives	299e90a2-9649-4fed-9cb6-1951e91ba179	Distribution	Assigned	Executives@M365x21689653.OnMicrosoft.com	
	FT Finance Team	a3bf47c3+6742+47eb+8785+4a17cd280097	Distribution	Assigned	FinanceTeam@M365x21689653.OnMicrosoft.com	
	Leadership	1788461a-be10-4017-92f5-dd8cd0fb91f9	Microsoft 365	Assigned	Leadership@M365x21689653.onmicrosoft.com	
	<					> ×

If you later add or remove group members, you must perform synchronization operation (see Synchronizing Recording Profiles on page 67).

Once assigned, the confirmation message below is displayed.

SuperProfile	ling Profile for Customer Su	pport				
1. Configuration	2. Groups Mapping	3. MSFT Policy				
Assign Groups (1)						
Communications (9)	×					
Communications gro Licenses.	up: 9 users were assigned with Reco	rding User 😵				
(i) Communications gro	up: When you make a change to the	group, you must trigger the Recordi	ng Profile's groups sync from AAD f	or the change to activate the change in	8	

9. Click Next to continue.

eccerding Profile	ling Profile for Customer S	pport	
1. Configuration	2. Groups Mapping	3. MSFT Policy	
Disconnect Calls w	hen Recorder Unavailable		
Disable Compliance	e Recording Audio Notifications		
Disable Compliance You must apply the M Click the button below	e Recording Audio Notifications SFT Compliance Policy configuration fo to downland MSFT Policy configuration	the recording to take effect. social to your machine, the social must be run by your organization M365 administrator.	
Disable Compliance You must apply the M Click the button below	e Recording Audio Notifications SFT Compliance Policy configuration fo to downlaod MSFT Policy configuratio	the recording to take effect. script to your machine, the script must be run by your organization M365 administrator.	
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Disable Compliance You must apply the M Click the button below Download Configur	e Recording Audio Notifications SFT Compliance Policy configuration fo to downlaad MSFT Policy configuratio	the recording to take effect. script to your machine, the script must be run by your organization M365 administrator.	
Disable Complianc You must apply the M Click the button below Download Configur	e Recording Audio Notifications SFT Compliance Policy configuration fo to downlaod MSFT Policy configuratio	the recording to take effect. script to your machine, the script must be run by your organization M365 administrator.	
Disable Complianc You must apply the M Click the button belov Download Configur	e Recording Audio Notifications SFT Compliance Policy configuration fo to downlaod MSFT Policy configuratio	the recording to take effect. script to your machine, the script must be run by your organization M365 administrator.	

- **10.** Configure the following MSFT Policies:
 - **Disconnect Calls when Recorder Unavailable:** Calls are disconnected when recording functionality is not available.
 - **Disable Compliance Recording Audio Notifications:** Disable Microsoft Teams Recording banner notifications.
- 11. Click the **Download Configuration Script** link to download the Recording Profile script.

.perProfile	ling Profile for Customer Support		
Configuration	2. Groups Mapping 3. MSFT Palicy		
 Disconnect Calls wh 	en Recorder Unavailable		
Disable Compliance	Recording Audio Notifications		
Disable Compliance	Recording Audio Notifications FT Compliance Policy configuration for the recording to take effect.		
Disable Compliance fou must apply the MSI Click the button below t	Recording Audio Notifications FT Compliance Policy configuration for the recording to take effect. to download MSFT Policy configuration script to your machine, the script must be run by your organization M365 administrator.		
Disable Compliance fou must apply the MSI Click the button below t Download Configurat	Recording Audio Notifications FT Compliance Policy configuration for the recording to take effect. to downlaod MSFT Policy configuration script to your machine, the script must be run by your organization M365 administrator.		
Disable Compliance fou must apply the MSI Click the button below t Download Configurat	Recording Audio Notifications FT Compliance Policy configuration for the recording to take effect. to download MSFT Policy configuration script to your machine, the script must be run by your organization M365 administrator. ion Script or successful MSFT Policy configuration script execution achnowledgement. Once the acknowledge received, the status of the	0	
Disable Compliance Disable Compliance fou must apply the MSI Click the button below t Download Configurat System is waitin recording profile	Recording Audio Notifications FT Compliance Policy configuration for the recording to take effect. to downlaod MSFT Policy configuration script to your machine, the script must be run by your organization M365 administrator. ion Script g for successful MSFT Policy configuration script execution acknowledgement Once the acknowledge received, the status of the will turned into ready/green color. You can click on "Finish" button now.	8	
Disable Compliance You must apply the MSI Dick the button below to Download Configurat System is waitin recording profile	Recording Audio Notifications FT Compliance Policy configuration for the recording to take effect. to downlaod MSFT Policy configuration script to your machine, the script must be run by your organization M365 administrator. tion Script g for successful MSFT Policy configuration script execution acknowledgement Once the acknowledge received, the status of the will turned into ready/green color. You can click on "Finish" button now.	8	
Disable Compliance You must apply the MSI Dick the button below to Download Configurat System is waitin recording profile Please note that recording and the	Recording Audio Notifications FT Compliance Policy configuration for the recording to take effect. to downlaod MSFT Policy configuration script to your machine, the script must be run by your organization M365 administrator. tion Script g for successful MSFT Policy configuration script execution acknowledgement Once the acknowledge received, the status of the will turned into ready/green color. You can click on "Finish" button now. It may take time for the configuration to take effect on the MSFT side, changes in existing MSFT compliance policy are not reflected in	0	

12. Open PowerShell console and run the following policy:



13. Run the script createProfileSuperProfile-dd-m-yyyy.ps1 as Administrator. Once running, you are prompted to enter the credentials of the Azure customer tenant account.


14. Enter Admin credentials of your customer tenant and authenticate the tenant using the Microsoft Authenticator when prompted.



The script supports Multifactor authentication.

Once the script has successfully completed, a confirmation message is displayed in the PowerShell console as shown below.



15. Return to the wizard. Notice that Step 1 and Step 2 have completed. Proceed to Step 3.

Ģ	Settings System Settings ^	Welco To get started with interas	tion Recording, please utilize the the quick start process below in 3 easy steps	to begin recording Microsoft							
E	Connect to your M365 Tools		teams calls.								
*	Storage	STEP 1	STEP 2	STEP 3							
-	lags Branding										
>	Licenses	Microsoft 365									
0	Descriften A										
>	Recording Profiles										
?	Access Profiles	Connect M365	Configure Recording Profile	Configure Access							
-		Grant admin consent links to ensure permissions are set to access the tenant	Determine what calls to record, for how long to keep, and the group of the users to record	Control permissions on call access commonly known as Roles Based Access Control (RBAC) and system and recording configuration							
	Monitoring ^	\odot	\bigcirc	Configure Access							
	View Users										
-1	System Activity Log		Exit								
ŀ.											

- 16. Click Configure Access.
- 17. Configure the Access Profile (see Adding an Access Profile on page 79).

411-	Settings	USSales USSales	
	System Settings		
E	Connect to your M365	1. Permissions 2. Groups Mapping	
242	Tools		
	Storage	Call Permissions	
	Tags	O No Call Access	✓ Play Media Related to a Call
	Branding	Access User's Own Calls	Download Media Related to a Call
	Licenses	Access User's Own and Group Calls	✓ Tag Calls
>		Select Groups Add	Add Notes
	Recording Settings		Delete Notes of Other Users
	Recording Profiles	Access All Calls	V Delete Calls
	Access Profiles		
•		Recording and Access Profiles permissions	
2		Create and Modify Recording Profiles	
•	Monitoring ^	Create and Modify Security Profiles	
	View Users	Create and Modify Tags	
0	System Activity Log	System Configuration Permissions	
MA		Configure System	
		Audit Trail Access/Export	
			Cancel Next
. I I.			

In the example above, an access profile has been assigned with maximum permissions to access all calls and perform all available configuration actions in the Web interface.

1. Click Next.

-	Settings		
.dh.	System Settings	Edit Access Profile Set Access Permissions	
E	Connect to your M365	Name Description	
	Tools	USUales USUales	
	Storage	1 Permissions 2 Groups Mapping	
	Tags		
	Branding	Assign Groups	
	Licenses	U.S. Sales Q. Add Group	
		U.S. Sales	
>			
	Recording Settings		
	Recording Profiles		
	Access Profiles		
٠	· ·		
?	Monitoring ^		
	View Users	Previous	Cancel Finish
50	Audit Trail		
Ŭ	System Activity Log		
MA			
l.			

2. Assign Groups: Start typing the name of the AAD group to assign, the group name is validated and then displayed; click **Add Group**.

3B12Prof	BB12Prof		
1. Configuration	2. Groups Mapping	3. MSFT Policy	
Assign Groups		Add Group Sync With AAD Groups	
Communications (9)	×)		
icensesAdded			G
Communications g application.	roup: When you make a change to th	e group, you must trigger the Recording Profile's groups sync from AAD for the change to activate the change in the	



The Access Profile group assignments are synchronized automatically with your M365 platform.

3. Click **Finish**; the following confirmation message is displayed indicating successful completion of the wizard.



Add and Pin Interaction Insights Teams App

Admins are recommended to add and pin the Interaction Insights Teams app to the whole organization or to Recording groups that will be using the app.

> To add and pin the Teams app:

1. Open Microsoft Teams admin center (TAC) and add to the organizational policy or create a new policy and assign it to the users or groups.

	Microsoft Teams admi	in center		𝒫 Search		
≡						
ඛ	Dashboard		App setup policies			
የቋየ	Teams	\sim	App setup policies control how apps are made available to a user with the Teams app. U and customize it or create custom policies and assign them to a set of users. Learn more	se the Global (Org-wide default)	policy	
RR	Users	\sim				
品	Teams devices	~	App setup policies summary			
₿	Teams apps	^	2 1			
	Manage apps •		Default policies Custom policy			
	Permission policies					
	Setup policies		Manage policies Group policy assignment			
	Customize store					
	Meetings	~	+ Add 🖉 Edit 🕼 Duplicate 📋 Delete 💭 Reset Global policy 😤 Manag	e users \vee		
Ţ	Messaging	~	✓ Name ↓	Description	Custom policy	
S	Voice	~	Global (Org-wide default)		No	
٢	Locations	~	SmallMediumBusiness_BusinessVoice	This is a SmallMediumB	Yes	
۲	Enhanced encrypt		FirstLineWorker	This is a default app set	No	

2. Add Interaction Insights app to the installed apps and to the pinned apps (recommended) so that it'll be displayed for users by default.

	🔀 Contoso Electronic	3 Microsoft Teams admin center	A Search	Ť œ	5 🛛 ? 📖
=					
ଇ	Dashboard	App setup policies			
50	Teams ^	App setup policies control how apps are made available to a user with the Teams app. Use the Glob and customize it or create custom policies and assign them to a set of users. Learn more	bal (Org-wide default) policy		
	Teams settings Teams policies Team templates Templates policies	App setup policies summary 2 1 Default policies Cattern policy			
	Teams update policies Teams upgrade settings	Manage policies Group policy assignment			
RR	Users ~	+ Add / Edit 🕼 Duplicate 🕅 Delete 🔾 Reset Global policy 👸 Manage users 🗸		Q. Search	
ß	Teams devices ~	Name 1 Description	tion Custom policy		
B	Teams apps	Global (Org-wide default)	No		
	Manage apps • Permission policies	Interaction Recording	Ves		
	Setup policies	FirstLineWorker This is a	a default app set No		
	Customize store				
	Meetings ~				
	Messaging V				
S	Voice ~				
G	Locations ~				0
Pin 1	Frontline deploy V				
۲	Enhanced encrypt				

- **3.** To apply to a group, create a separate policy, add the Interaction Insights Teams app to the installed and pinned apps, and then assign group(s) as shown below.
- 4. To assign to a group, click **Group policy assignment** under the setup policy option.

	Microsoft Teams admi	in center						
=								
ŵ	Dashboard	App s	etup policies					
* **	Teams	 App setup and custor 	policies control how apps ar mize it or create custom polic	e made available to a user with t ies and assign them to a set of u	he Teams app. Use the Global (Or isers, Learn more	rg-wide default) policy		
RR	Users	~	the real case real pair					
Ð	Teams devices	~ Apr	p setup policies summary					
B	Teams apps	^ 2	1					
	Manage apps •	Defa	ault policies Custom	policy				
	Permission policies							
	Setup policies	Manag	ge policies Group polic	y assignment				
	Customize store							
	Meetings	~ + Add	Remove 0 item					
Ţ	Messaging	~ ~ 0	Group name 🕐	Rank 1	Group email	Assigned policy		
S	Voice	~						
ø	Locations	~						
0	Enhanced encrypti							
땁	Policy packages						No data is available.	
	Contoso Electronics	Microsoft Teams admin cent	ter		₽ Search			
							Assign policy to group	
ଭ	Dashboard	App setup polici	ies				If users of this group have any direct assignments, they will override group assignments. Learn more about effective	
20	Teams ^	App setup policies control ho and customize it or create cus	ow apps are made available to a user w istom policies and assign them to a set	ith the Teams app. Use the Global (Org-wid of users, Learn more	e default) policy		policy and precedence rules.	
	Manage teams						Select a group	
	Teams settings	App setup policies su	immary				U.S. Sales Add	
	Teams policies	2	1				Select ~	
	Templates policies	Default policies	Custom policy				Select rank ()	
	Teams update policies						1	
	Teams upgrade settings	Manage policies Gr	roup policy assignment				Select rank 1 if you want the selected policy to be effective for everyone in the selected group.	
RR	Users 🗸	+ Add @ Bernary 0.0						
æ	Teams devices V							
EB	Teams apps	Grdup name ()	sanx T	Group email Assi				

5. Select the Recording group to which to assign the policy, and then click Add.

💠 🛞 Contoso Electronics	Microsoft Teams admin center	A search	
			Assign policy to group
â Dashboard	App setup policies		If users of this group have any direct assignments, they will override group assignments. Learn more about effective
t ^a Teams	App setup policies control how apps are made available to a	r with the Teams app. Use the Global (Org-wide default) policy	policy and precedence rules.
Manage teams	and customize it of create custom policies and assign memory	set of users, Learn more	Select a group
Teams settings			U.S. Sales
Teams policies	App setup policies summary		7 users 🖾
Team templates	2 1		Select a policy
Templates policies	Default policies Custom policy		Select
Teams update policies			Select rank ①
Teams upgrade settings	Manage policies Group policy assignment		1

6. Select a policy (Interaction Insights in the example shown below) and then click **Apply**.



The new policy is assigned.

	%Contoso Electronic	:s	Microsoft Teams admin center		₽ Search			Ŧ	•		MA
=		(Assigning the policy Interaction Recording to	J.S. Sales. Go to Activity log to check the stat	tus.						×
ŵ	Dashboard		App setup policies								
22	Teams ^		App setup policies control how apps are made and customize it or create custom policies and	etup policies control how apps are made available to a user with the Teams app. Use the Global (Org-wide default) policy							
	Manage teams		and customize it of create custom policies and	assign them to a set of uses. Cean more							
	Teams settings		Ann ratur policies summary								
	Teams policies		App setup policies summary								
	Team templates		2 1 Default policies Outloom policy								
	Templates policies										
	Teams update policies										
	Teams upgrade settings		Manage policies Group policy assign	nent							
R	Users ~		+ Add 🗍 Remove 1 item				Q Search	by display	name		
稻	Teams devices		Group pame () Rank	t Group email	Assigned policy						
8	Teams apps		115 Salar 1	1/55 alor: @4265 v2	5192094 or Interaction Recording						
	Manage apps •		Co. Januar 1	coursewood.	- Action of the second s						

3

Day Two Management using the Interaction Insights User Interface

This interface includes the following configuration and monitoring features:

- Recording Settings on page 41
- Interactions on page 90
- Managing Active Calls on page 128
- My Active Call on page 139
- System Settings on page 142
- Monitoring on page 163

Recording Settings

- Managing Recording Profiles below
- Managing Access Profiles on page 78

Managing Recording Profiles

Recording profiles configures the recording capabilities of AAD groups of targeted users. A profile may be assigned to one or more groups. In the Quick Start wizard, you created an initial Recording profile. You can modify this profile and create additional profiles. The Recording profile includes the following capabilities:

- Determines which call types may be recorded.
- Sets Data Retention policies.
- Configures Azure Blob Storage region location to store calls.
- Attaches AAD groups including Targeted users to recording profiles.
- Blocks recording of calls according to specific numbers.
- Determines the time of day you wish to record or to prevent recording of targeted users.
- Configures Microsoft Teams Calling Policies.

To comply with Microsoft Bot Grouping API for meeting recording, storage optimization and avoiding redundancy, Interaction Insights implements the following policy for recording large meetings:

Recording: Interaction Insights stores only one copy of a meeting recording for the organizer, regardless of the number of targeted participants. For example, in a 300-person call with 300 targeted users for recording, Interaction Insights stores one copy of the call for the organizer and another recording for the rest of the 299 users. This ensures efficient use of storage space.

When users belong to different recording policies, the result is one recording for all users of the same recording policy.

- Playback: Playback of a user recording of a meeting starts from the point the user joins the meeting and ends when user leaves the meeting.
- Retention Period: The retention period for recordings is based on the recording profile retention period of the targeted users. The longest retention period among the recording user groups (organizer vs. the rest of the targeted users) will apply.



Download of meeting is not supported.

See also:

- Adding Recording Profiles below
- Modifying Recording Profiles on page 62
- Synchronizing Recording Profiles on page 67
- Recording Profile-Call Type Configuration Examples on page 77
- Disabling Recording Profile on page 75
- Deleting Recording Profile on page 76
- > Do the following:
- In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Recording Profiles.

The Recording profile configured in the Wizard is displayed as "Successful".

	Settings	Recording Profiles (1) Auto	matic synchronization is OFF					
•	System Settings ^	+ New Profile						
E	Connect to your M365							
	Tools	Recording Profiles: 1						
101	Storage	PROFILE NAME	TOTAL USERS \$	RETENTION	DESCRIPTION	GROUP MAPPING	STATUS	
*	Tags							
	Branding	SuperProfile	4	1 Years (365 Days)	SuperProfile	Test	#Successful	
	Licenses							
>								

The table below describes the parameters in this table.

Field	Description
Profile Name	Enter a name for the new recording profile.
Total Users	The total number of users with Targeted user recording licenses.
Retention	Retention time period for calls associated with the profile. Default: One year.
Description	Description of the recording profile.
Group Mapping	Azure tenant Security group that is mapped to this profile.
Status	 Indicates the status of the synchronization with Azure tenant: Not in Sync with AAD Groups Successful

Adding Recording Profiles

The Quick Start wizard process created an initial Recording profile for your tenant. You can then add additional recording profiles for targeted users.

> Do the following:

In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Recording Profiles.

	Settings	Recording Profiles	Automatic synchronization is OFF				
* 0 *	System Settings	+ New Profile					
=	Connect to your M365						
242	Tools	Recording Profiles: 1					
	Storage	PROFILE NAME	TOTAL USERS	RETENTION	DESCRIPTION	GROUP MAPPING	STATUS
-	Tags	NA Traders	21 🔯	1 Years (365 Days)	NA traders	All Employees	#Not In Sync With AAD Groups
	Branding						
	Licenses						
>							
	Recording Settings						
	Recording Profiles						
	Access Profiles						
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	Monitoring						
5							
·hr							

2. Click New Profile.

	Settings	View Recording Profile Recording Profile Recording Violities index the recording, rentention, and storage configuration. Users and/or groups are assigned to recording profiles. Interview the Interview Inter	
E	Tools	B812Prof B812Prof	
쓷	Storage	Defension - American - Alterative - Alterative	
*	Tags	L Congulation 2. Groups Mapping 3. MoV Procy	
	Branding	Call Types ①	
	Licenses	Select what calls of recorded users associated with the profile to record Image: Record AI Call Types Expand Settings	
>	Recording Settings	User Peer to Peer Calls User Calls with Meetings User Queue Calls ①	
	Recording Profiles	Internal: 🛈 🥑 In 🧭 Out 🥪 External Meetings 🥪 Teams Queue Calls*: Calls Queue Instance ID Add	
	Access Profiles	PSTN: C C In COL C Internal Meetings	
•	Monitoring ^		
?	View Users Audit Trail	Retention Period (Deys)	
5	System Activity Log	1 Year (865 Days) v	
MA		Storage (j) Europe LRS v	
վր		Advanced Settings ✓	Exit Next

3. Click Expand Settings to configure Pause and Resume functionality and ROD and SOD.

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<complex-block></complex-block>	<complex-block></complex-block>	System Settings	1.Configuration 2. Oncops Mapping 3. MSFT Policy	
<complex-block></complex-block>	<complex-block></complex-block>	Connect to your M365 Tools	Cell Types ()	
<complex-block></complex-block>	<pre>visit visit v</pre>	Storage	Select what calls of recorded users associated with the profile to record	
<complex-block></complex-block>	<complex-block></complex-block>	Tags	🐷 Record All Call Types 🖌 Expand Settings	
<complex-block></complex-block>	<complex-block></complex-block>	Branding	These Reserves Reserves	
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<complex-block><pre>vint vint vint vint vint vint vint vint</pre></complex-block>		Audit Trail	Recording Type	
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Exit New	Exit Ne		Sunday V 12:00:00 12:00:00	
Exit New	Exit Ne			
Exit Nex	Exit Ne		-	
				Exit

4. Configure profile according to the tables below.

Field	Description		
Profile Name	Enter a name for the new recording profile.		
Profile Description	Enter a description of the new recording profile.		
All	Record all calls that the recording profile user participates in as calling party. This option is enabled by default or when a new recording profile is created.		

Field	Description				
Call Types (it's Mandato	ry to select at least one Call type)				
User Peer-to-Peer Calls					
When Call Type escalated to a C escalated Conf to-peer call reco	es 'PSTN', 'Internal' or 'External' are enabled, and then the call is Conference call (when additional parties are added to the call), the ference part of the call will be recorded as part of the original peer- ording leg.				
Internal	 Refers to Peer-to-Peer calls between the targeted recording profile user and other users within the same domain. One of the following values: In: Records Internal calls that the Targeted user receives. Out: Records Internal calls that the Targeted user makes 				
PSTN	 Refers to Peer-to-Peer calls between the Targeted recording profile user and parties outside of the organization's network on PSTN. One of the following values: In: Records PSTN calls that the user receives. 				
	Out: Records PSTN calls that the user makes.				
External	Refers to Peer-to-Peer calls between the Targeted recording pro- file user and parties with Federated domain or any public Microsoft Teams domain.				
	In: Records External calls received by the Targeted recording profile user from Federated Domain users.				
	Out: Records External calls made by the Targeted recording profile user to Federated Domain users.				
User Calls with Meeting	gs				
External Meetings	Refers to Targeted user calls with meetings that are scheduled by External users and belong to an External organization.				
	This option is supported by Microsoft Teams Integration and with "Full Time" Recording Type only.				
Internal Meetings	Refers to Targeted user calls with meetings that are scheduled by Internal users from the same domain as the Targeted user. This option records Teams calls with an Internal conference bridge in				

Field	Description
	the Enterprise domain.
	An Internal Conference is a scheduled, ad-hoc meeting that occurs on a bridge belonging to the targeted user organization. When enabled, all user calls with internal meetings are recorded according to the below options. When disabled, none of the user calls with internal conferences are recorded. One of the following options:
	All Meetings: Records meetings with both internal and external participants.
	External Participants: Records only meetings with External participants. External participants are those participants who either don't have an Azure object id or don't belong to the recording organization. For example, participants joined from PSTN, guests from Web or from Federated organization or from a Teams home client. The application starts recording the targeted user call leg to the meeting when an external participant joins the meeting and continues recording until the targeted user disconnects or the meeting bridge disconnects the call.
Expand Settings The be settings in the Tenant N	low settings must be enabled by the Service Provider in the Service lanagement interface.
Internal	From the Recording Type drop-down, choose one of the following values:
	✓ Full Time
	Record on Demand
	✓ Save on Demand
	Select the Pause/Resume check box to enable Pause and Resume functionality.
PSTN	From the Recording Type drop-down, choose one of the following values:
	✓ Full Time
	✓ Record on Demand
	✓ Save on Demand
	Select the Pause/Resume check box to enable Pause and Resume functionality.

Field	Description				
External	 From the Recording Type drop-down, choose one of the following values: ✓ Full Time ✓ Record on Demand ✓ Save on Demand Select the Pause/Resume check box to enable Pause and Resume functionality. 				
User Queue Calls					
Call Queues Instance ids Teams Queue Calls (transfer mode)	Comma separated list of the call queue instance ids which should be recorded (see Retrieving Recording Queue Instances on page 58). Relevant when Teams Queue Calls (Transfer mode) is configured and "All" is not selected. When "All" is selected, all user calls will be recording including calls from any call queue. The maximum length of the field is 2048 characters. Record Microsoft Teams calls that have been retrieved from a queue by a call agent. The recording is triggered as soon as the call is connected to an agent. Record method is set to 'Transfer'.				
Save on Demand	Elapsed time available to record call after the call has been				
After Call Timer	terminated.				
Storage Configuration					
Retention Period (Days)	Call retention is the number of days to keep recordings in storage. Use the default with caution since eventually the storage location will be completely consumed. To meet business requirements, it's highly recommended to set the retention value to a positive number. Interaction Insights deletes calls that exceed the retention period once a day. A network administrator with appropriate security profile credentials has the option to add / modify retention policies.				

Field	Description
	The default storage retention period is 12 months. The maximum storage period is 24 months (two years), unless the Unlimited Retention parameter is configured for the service , in which case, the retention period in days is unlimited .
	Configure one of the following Retention period time frames:
	Week (7 Days)
	Month (30 Days)
	3 Months (90 Days)
	6 Months (180 Days)
	1 year (365 Days) (Default)
	2 years (730 Days)
	Custom: When Unlimited Retention is enabled on the service Retention Period (Days) you can configure the number of days to retain data for an unlimited period. For example, if you wish to configure 10 years, configure 3600 days.
Storage	Azure Blob Storage account location according to geographical region where the instance is installed.

Advanced Settings

Field	Description
Recording Notification	Controls whether Microsoft Teams banner recording notifications are displayed:
	Enable for all calls: Recording notification are enabled for all calls (Default).
	Disable for all calls Recording notifications are disabled on all calls (visual and audio notifications).
	Disable for PSTN calls: Audio Recording notifications are disabled on PSTN calls.
	This parameter is only displayed when enabled by the Service Provider in the Interaction Insights service. In addition, you must sign a waiver to enable this feature.

Field	Description		
Filter Calls User Receives Filter Calls User Makes	To filter calls that the user receives or makes, choose the type of the filter. To record the user calls with specific numbers, choose Allow in the List Type. To record calls of the user except with specific numbers, choose Block : in the List Type. The Filter is applied on the calls with the comma-separated phone numbers defined in the Numbers field. For example: "17326524689, 17326524690" regular expression can be entered when the phone number ranges need to be filtered. For example, to filter calls with phone numbers that starts with area code 732 or 609, enter the following in the regular expression field:^(1{1}\1{1})?(732 609)\d*\$. When both the numbers and regular expressions are provided, the system first checks against the regular expression and if a match is not found, continues with the numbers. The maximum length of the numbers and the regular expression field is 2048 characters. Filtering is applicable to Skype for Business integrations and to Microsoft Teams (PSTN calls only).		
	The + sign should not be added in Numbers and Regular Expression fields as its not recognized by Interaction Insights.		
Time Range	Specify a time range for call recording, which includes the option to choose specific days of the week and time ranges based on the location of the server for the (product name) region.		
Custom Recording Hours	Custom Recording Hours (default 24/7): Week Days Start Hour End Hour 		

1. Click Next to add groups.

Users can only be mapped to one Recording Profile; however, can be assigned to multiple groups that are mapped to the same profile. In this case, the following message is displayed:

	① Some of the users are already assigned to another Recording profile, you can assign user(s) to one recording profile only.							
	View list of conflicting users >							
_								
Settin System	ngs E 1 Settings ^ _R	dit Recording Profile ecording Profiles include the recordi	ng, rentention, and storage	e configuration.Users a	nd/or groups are ass	igned to recording profiles.		
E Conn	lect to your M365	Recording Profile Name	Internal Calls					
Stora	ge	1. Configuration 2.	Groups Mapping	3. MSFT Policy				
Brand	ling	Assign Groups ④		0				
,		Documentation		~				
Record Reco Acce	ing Settings ^ rding Profiles ss Profiles							
? Monito	ring ^ Users	Previous						Cancel Next
MA Syste	Trail em Activity Log							
վր								
1. Cor	nfiguration	2. Groups	Mapping		3. MSFT Po	licy		
Ass	sign Groups 🛈							
	Documentation (4) ×			×	Add Group	Sync Groups F	rom AAD
Rec	ording profile mu	st have at least one	AAD group					

100	Settings		
0	System Settings	Edit Recording Profile	
		Recording Promes include the Recording, remembron, and scorage configuration. Users and/or groups are assigned to recording promes.	
E	Connect to your M365	Internal Calls Internal Calls	
242	Tools		
_	Storage	1. Configuration 2. Groups Macoing 3. MSFT Policy	
*	Tags		
	Branding	Assign Groups ①	
	Licenses		
>			
	Recording Settings ^	Documentation (4)	
	Recording Profiles		
	recording ritemes		
	Assess Drofiles	C Documentation group: 4 users were assigned with Recording User	
•	Access Profiles	C Documentation group: 4 users were assigned with Recording User Licenses.	
•	Access Profiles	Concentration group: 4 users were assigned with Recording User	
0 ?	Access Profiles	Documentation group: 4 users were assigned with Recording User Output Documentation group: When you make a change to the group, you must trigger the Recording Profile's groups sync from AAD for the change to output defined the change in the anceleration	
¢ ?	Access Profiles	Occumentation group: 4 users were assigned with Recording User Incomentation group: 4 users were assigned with Recording User Image: Constraint on group: When you make a change to the group, you must trigger the Recording Profile's groups sync from AAD for the change to activate the change in the application.	
≎ ?	Access Profiles Monitoring ^ View Users	Documentation group: 4 users were assigned with Recording User Conses. Documentation group: When you make a change to the group, you must trigger the Recording Profile's groups sync from AAD for the change to activate the change in the application.	
♥ ?	Access Profiles Monitoring ^ View Users Audit Trail	Concentration group: 4 users were assigned with Recording User Documentation group: 4 users were assigned with Recording User Documentation group: When you make a change to the group; you must trigger the Recording Profile's groups sync from AAD for the change to Previous	lext
 	Access Profiles	Construction group: 4 users were assigned with Recording User Documentation group: 4 users were assigned with Recording User Documentation group: When your make a charge to the group, you must trigger the Recording Profile's groups sync from AAD for the change to activate the change in the application. Previous	ext
¢ ? ₪	Access Profiles Monitoring ^ View Users Audit Trail System Activity Log	Conservation group: 4 users were assigned with Recording User Decementation group: 4 users were assigned with Recording User Decementation group: When you make a change to the group, you must trigger the Recording Profile's groups sync from AAD for the change to activate the change in the application.	ext
 ○ ○ ○ 	Access Profiles Monitoring View Users Audit Trail System Activity Log	Concentration group: 4 users were assigned with Recording User Decementation group: When you make a change to the group, you must trigger the Recording Profile's groups sync from AAD for the change to Previous	lext
♥ ? MA	Access Profiles Monitoring View Users Audit Trail System Activity Log	Constrainting group: 4 users were assigned with Recording User Constrainting group: 4 users were assigned with Recording User Constrainting group: When you make a change to the group, you must trigger the Recording Profile's groups sync from AAD for the change to Previous	lext

2. Open the Azure portal of your tenant to verify which groups you wish to add.

=	Microsoft Azure		\mathcal{P} . Search resources, services, and docs (G+/)		🤷 Copilot		admin@M365x2168965 SIPTESTOC (M365X21689653.ON
Hor	ne > SIPTestOC Groups >						
2	Groups All groups						×
	0 «	🛠 New group 🞍 Download groups	🖔 Refresh Manage view 🗸 🗊 Delete 🔗 Got f	eedback?			
- 24	All groups	Azure Active Directory is now Micros	nft Entra ID. Learn more 12				×
24	Deleted groups	D Search					
×	Diagnose and solve problems	- Jean Ch	8 Add hiter				
>	Settings	Search mode Contains					
>	Activity	36 groups found					^
>	Troubleshooting + Support	Name ↑	Object Id	Group type	Membership type	Email	
		S sg-Finance	2edbf372-72bb-4455-9810-358432	137159 Security	Assigned		
		S sg-HR	dfbebe91-d59b-4542-add1-283b133	3b0e77 Security	Assigned		
		TI-ga 2	2bb4372f-f1d2-40fe-978b-eb6b1c12	236ac Security	Assigned		
		S sg-Legal	82c7014e-1a62-4cef-a2e3-838b577	b1982 Security	Assigned		
		S sg-Operations	fd02e174-3d38-4076-8139-6315f28	35cccb Security	Assigned		
		S sg-Retail	0dba24a2-20d6-4dd3-b791-1b8440	c9b658 Security	Assigned		
		SA sg-Sales and Marketing	519cdfe5-ee16-40d9-bd5f-031789d	660ca Security	Assigned		
		ST SOC Team	0406eff1-8012-4b30-b9dc-795fee95	1087 Microsoft 365	Assigned	SOCTeam@M365x21689653.or	microsoft.com
		SA: ssg-Contoso Ambassador	s cea1eb54+0a30+4ef0-a0c0+9530ff0b	bc8e Security	Assigned		
		SB ssg-Contoso Bug Bashers	ff400760-3767-4068-8859-415f57f0	05bda Security	Assigned		-
		<					>

The following message is displayed if you have not yet synced groups with your M365 platform.



3. Perform the Sync; a confirmation message is displayed.

System Sync Successful

8

4. Click Next to continue.

SuperProfile Name	Description ling Profile for Customer S	ipport	
. Configuration	2. Groups Mapping	3. MSFT Policy	
Disconnect Calls wh	en Recorder Unavailable		
 Disconnect Calls wh Disable Compliance 	en Recorder Unavailable Recording Audio Notifications		
Disconnect Calls wh Disable Compliance You must apply the MSF	an Recorder Unavailable Recording Audio Notifications T Compliance Policy configuration fo	the recording to take effect.	
Disconnect Calls wh Disable Compliance You must apply the MSF Click the button below t	an Recorder Unavailable Recording Audio Notifications T Compliance Policy configuration fo o downlaod MSFT Policy configuratio	the recording to take effect. script to your machine, the script must be run by your organization M365 administrator.	
Disconnect Calls wh Disable Compliance You must apply the MSF Click the button below t Download Configurat	an Recorder Unavailable Recording Audio Notifications T Compliance Policy configuration fo o downlaod MSFT Policy configuratio on Script	the recording to take effect. script to your machine, the script must be run by your organization M365 administrator.	
Disconnect Calls wh Disable Compliance You must apply the MSF Click the button below t Download Configurat	en Recorder Unavailable Recording Audio Notifications T Compliance Policy configuration fo downlaod MSFT Policy configuratio on Script	the recording to take effect. script to your machine, the script must be run by your organization M365 administrator.	
Disconnect Calls wh Disable Compliance You must apply the MSIf Click the button below t Download Configurat	en Recorder Unavailable Recording Audio Notifications T Compliance Policy configuration fo downlaad MSFT Policy configuratio on Script	the recording to take effect. script to your machine, the script must be run by your organization M365 administrator.	
Disconnect Calls wh Disable Compliance You must apply the MSI Click the button below t Download Configurat	en Recorder Unavailable Recording Audio Notifications T Compliance Policy configuration fo o downlaed MSFT Policy configuratio on Script	the recording to take effect. script to your machine, the script must be run by your organization M365 administrator.	
Disconnect Calls wh Disable Compliance You must apply the MSF Click the button below t Download Configurat	en Recorder Unavailable Recording Audio Notifications T Compliance Policy configuration fo o downlaed MSFT Policy configuratio on Script	the recording to take effect. script to your machine, the script must be run by your organization M365 administrator.	

- 5. Configure the following Microsoft Teams Calling Policies:
 - **Disconnect Calls when Recorder Unavailable:** Calls are disconnected when recording functionality is not available.
 - Disable Compliance Recording Audio Notifications: Disable Microsoft Teams Audio Recording notifications that are played to calls participants from PSTN or other UC platforms.
- 6. Click the Download Configuration Script link to download the PowerShell script to your PC.



You can also run the script at a later time using the right-click menu option **MSFT Scripts** (see Download and Run Microsoft Script on page 69).

7. Run the script createProfileSuperProfile-dd-m-yyyy.ps1 as Administrator.



8. Enter the credentials of the Azure customer tenant account and authenticate using the Microsoft Authenticator when prompted.



Sign in

to continue to Microsoft Azure

admin@M365x25192084.onmicrosoft.com

No account? Create one!

Can't access your account?





See example log file below (saved to Desktop on the PC where you run the script).

Windows PowerShell transcript start Start time: 20240616123342 Username: LAPTOP-M8LNK8BQ\USER RunAs User: LAPTOP-M8LNK8BQ\USER Configuration Name: Machine: LAPTOP-M8LNK8BQ (Microsoft Windows NT 10.0.19045.0) Host Application: C:\WINDOWS\System32\WindowsPowerShell\v1.0\powershell.exe -NoProfile -ExecutionPolicy Bypass -File C:\Users\USER\Desktop\Powershell\editProfileSuperProfile-16-6-2024.ps1 Process ID: 19148 PSVersion: 5.1.19041.4522 PSEdition: Desktop PSCompatibleVersions: 1.0, 2.0, 3.0, 4.0, 5.0, 5.1.19041.4522 BuildVersion: 10.0.19041.4522 CLRVersion: 4.0.30319.42000 WSManStackVersion: 3.0 PSRemotingProtocolVersion: 2.3 SerializationVersion: 1.1.0.1 ***** Transcript started, output file is C:\Users\USER\desktop\MSTC_ Policy06.16.12.33.txt PS>TerminatingError(Invoke-RestMethod): " {"type":"https://tools.ietf.org/html/rfc7231#section-

6.5.13", "title": "Unsupported Media Type", "status": 415, "traceId": "00-1fa6a9561e39115c5b5258f162c5540d-a5c8015bfcd9c025-00"}" 6/16/2024 12:33:43 PM - Searching 'MicrosoftTeams' module... 6/16/2024 12:33:47 PM - 'MicrosoftTeams' module installed successfully. 6/16/2024 12:33:47 PM - Importing 'MicrosoftTeams' module... INFO: Loaded Module 'Microsoft.Teams.ConfigAPI.Cmdlets' 6/16/2024 12:33:52 PM - 'MicrosoftTeams' module imported successfully. 6/16/2024 12:35:10 PM - Connected to Microsoft Teams successfully. 6/16/2024 12:35:10 PM - Getting recording policies... 6/16/2024 12:35:12 PM - Retrieved recording policies successfully. 6/16/2024 12:35:12 PM - fetching domains... 6/16/2024 12:35:15 PM - Domain M365x21689653.onmicrosoft.com fetched successfully. 6/16/2024 12:35:15 PM - SuperProfile06062024142032 already exists. Skipping policy creation. 6/16/2024 12:35:15 PM - Application Instance for SuperProfile06062024142032 already exist. 6/16/2024 12:35:16 PM - Starting Sync Process for SuperProfile06062024142032 . . . 6/16/2024 12:35:18 PM - Sync Process for SuperProfile06062024142032 Finished. 6/16/2024 12:35:18 PM - SuperProfile06062024142032 already exist , skipping.. 6/16/2024 12:35:18 PM - Configuring SuperProfile06062024142032 Recording Policy...

6/16/2024 12:35:24 PM - Configuring disconnectCalls True for SuperProfile06062024142032... 6/16/2024 12:35:26 PM - Configuring audioNotification False for SuperProfile06062024142032... 6/16/2024 12:35:27 PM - SuperProfile06062024142032 Recording Policy Has Been Configured. 6/16/2024 12:35:27 PM - Assigning groups to primary policy... Adding 4d93b1c7-f944-4e82-a372-1ebe23979c6e to SuperProfile06062024142032.. please wait.. WARNING: Group 4d93b1c7-f944-4e82-a372-1ebe23979c6e already assigned to SuperProfile05302024155452 policy. Force Assignment set to True, adding 4d93b1c7-f944-4e82-a372-1ebe23979c6e to SuperProfile06062024142032.. please wait.. Sending following status to API.... { "TenantId": "5f4e3129-dd39-4ccd-bc4f-98423bee2c1b", "Message": "Success", "PolicyId": "SuperProfile06062024142032", "StatusCode": 0 } Results sent successfully and should be reflected in the UI ***** Windows PowerShell transcript end

End time: 20240616123533		

9. Once you have successfully run the script, verify that the Recording Profile status is 'Successful'.

	Settings	Recording Profiles O Automatic synchronization is OFF							
•	System Settings ^	+ New Profile							
E	Connect to your M365								
	Tools	Recording Profiles: 1							
쑢	Storage	PROFILE NAME	TOTAL USERS 👙	RETENTION	DESCRIPTION	GROUP MAPPING	STATUS		
*	Tags								
	Branding	SuperProfile	4	1 Years (365 Days)	SuperProfile	Test	#Successful		
	Licenses								
>									

Retrieving Recording Queue Instances

Configuration of Teams call queues recordings (Transfer mode) in the recording profile requires the retrieval of the application instance of each call queue that is designated for recording. Each call queue is represented by a single Application Instance ID.

> To retrieve call queue application instances using PowerShell:

1. Enter the following PS command:

PS C:\Users\Admin> Get-CsCallQueue	
WARNING: All the agents added to callqueue agents to call.	have opted out. There are no
TenantId e07fd185c1c7	: ad41d6c3-67f0-47cc-9de3-
Name	: CallQueue1
Identity 62efe4db5c16	: 361635e9-1159-43be-bdc2-
RoutingMethod	: Attendant

DistributionLists	:
Users 2f4134736e42	: 9f7309ea-a318-4ac5-92a0-
DistributionListsLastExpanded	: 11/21/2021 08:12:49 +00:00
Agents 2f4134736e42, OptOut	: 9f7309ea-a318-4ac5-92a0-
AllowOptOut	: True
ConferenceMode	: False
PresenceBasedRouting	: True
AgentsCapped	: False
AgentsInSyncWithDistributionLists	: True
AgentAlertTime	: 60
LanguageId	: en-US
OverflowThreshold	: 200
OverflowAction	: DisconnectWithBusy
OverflowActionTarget	:
OverflowSharedVoicemailTextToSpeechPrompt	:
OverflowSharedVoicemailAudioFilePrompt	:
OverflowSharedVoicemailAudioFilePromptFileName	:
EnableOverflowSharedVoicemailTranscription	: False
TimeoutThreshold	: 1200

TimeoutAction	: Disconnect
TimooutActionTangat	
TimeoutActionTarget	
TimeoutSharedVoicemailTextToSpeechPrompt	:
TimeoutSharedVoicemailAudioFilePrompt	:
TimeoutSharedVoicemailAudioFilePromptFileName	:
EnableTimeoutSharedVoicemailTranscription	: False
WelcomeMusicFileName	: caal_queue_greeting.mp3
UseDefaultMusicOnHold	: True
MusicOnHoldFileName	:
Statistics	: Current queue size = 0
ApplicationInstances e9e31420edaf	: f17e8e19-1669-4a4c-bf13-
ChannelId	:
OboResourceAccounts	:

2. Copy the Application Instance to notepad.

> To retrieve call queue application instances using Teams Administration:

- **1.** Open the Teams Administration portal.
- 2. Select the Queue.
- **3.** Find Resource details.

	Microsoft Teams ad	min cen	ter	D Search - Preview	
Ę	Messaging policies		Call queues \ CallQueue1		
ବ	Voice	^			
	Phone numbers		CallQueue1		
	Operator Connect				
	Direct Routing		Resource accounts		^
	Calling policies		Add or remove resource accounts. You can	assign a phone number to a resource account you're adding.	0
	Call park policies		+ Add X Remove 1 item		
	Caller ID policies		Besource account	Phone number	
	Dial plans				
	Emergency policies		CallQueue resource	+972 1 809 461 699	
	Voice routing policies				
	Auto attendants	_			
ſ			Assign calling ID		^
	Holidays		Agents can make outbound calls using the	phone numbers on the following Resource Accounts. ①	
	Resource accounts				
٢	Locations	~	You haven't added any resource accounts	s yet.	
•	Policy packages		Add		
* =	Planning	~			
<i>4</i> 1	Analytics & reports	~			
¢	Notifications & alerts	~	Language		^
۲	Other settings	~	This lets you set the language used to trans	scribe voicemail messages and play system prompts to the cal	ller.
	Skype for Business		English (United States)		

Figure 4-1: Call Queues

4. In the Azure Active directory find the queue Resource.

Figure 4-2: Resources

Azure Active Directory admin center	
 Active Directory Summeteries Call Dashboard Call Services All services FAVORITES Azure Active Directory Users Users Call Lusers (Preview) Deleted users (Preview) Deleted users (Preview) Deleted users (Preview) Deleted users (Preview) Diagnose and solve problems Activity Sign-in logs Audit logs Bulk operation results Troubleshooting + Support New support request 	t) > iew) re Directory + New user + New guest user ♪ Bulk operations ∨ ◇ Refresh This page includes previews available for your evaluation. View previews → P queue y queue x + Add filters 1 user found Name ↑↓ User principal name ↑↓ User type CB CallQueue resource CallQueue@SmartTAP.on Member

5. Copy the Object ID (application instance) to notepad.

	-							
Azure Active Directory admin	center							
~	Dashboard > AudioCodes Ltd. (ai-logix.	net) > Users > CallQueue resource						
🚰 Dashboard	CallQueue resource	Profile						
All services	User User							
★ FAVORITES	«	🖉 Edit 🔑 Reset password 🚫 Revoke sessions	🗊 Delete 💍 Refresh 🕴 🖗 Got feedback?					
Azure Active Directory	X Diagnose and solve problems	C 110						
L Users	Manage	CallQueue resource						
Enterprise applications	💄 Profile	CallQueue@SmartTAP.onmicrosoft.com						
	 Custom security attributes (preview) 	CP	User Sign-ins	Group memberships 0				
	Assigned roles	CR						
	Administrative units							
	A Groups		Oct 24 Oct 31 Nov 7 Nov 14 Nov 2	21				
	Applications	Creation time		Last sign-in date				
	🔓 Licenses	8/25/2020, 2:59:14 PM						
	Devices							
	Azure role assignments	Identity						
	Authentication methods	Name	First name	Last name				
		CallQueue resource						
	Activity	User Principal Name	User type					
	Sign-in logs	Caliqueue@smartrAP.onmicrosoft.com	Member					
	Audit logs	Object ID f17e8e19-1669-4a4c-bf13-e9e31420edaf	Issuer SmartTAP.onmicrosoft.com	Manage B2B collaboration				
	Troubleshooting + Support	✓ View more						
	New support request	Job info						
		Job title	Department					
			Microsoft Communication Application Insta	ince				

Figure 4-3: Call Queue Resource

Modifying Recording Profiles

This option lets you modify existing recording profiles. For example, you may add a new site location and wish to associate the new user groups for this location to a recording profile and to configure the Blob storage location.

Whenever you update Group Mapping and MSFT Policy, you must download and run the Microsoft Configuration script to synchronize with your M365 tenant platform (see Download and Run Microsoft Script on page 69).

> Do the following:

In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Recording Profiles.

E	Settings	Recording Profiles	Automatic synchronization is OFF					
0	System Settings	+ New Profile						
E	Connect to your M365	Recording Profiles: 2						
-121	Storage	PROFILE NAME	TOTAL USERS 👙	RETENTION	DESCRIPTION	GROUP MAPPING	STATUS	
*	Tags	SuperProfile	11	1 Years (365 Davs)	SuperProfile	Communications, SOC Team	#Successful	
>	Branding Licenses	Internal Calls	-	1 Years (365 Days)	Internal Calls		#Disabled	:
•	Recording Settings							
: 	Recording Profiles							
5	Access Profiles							
MA								
	Monitoring ^							
	View Users Audit Trail							
վե	System Activity Log							

2. The following table describes the parameters in this screen.

Parameter	Description					
Profile Name	The name of the profile.					
Total Users	The total number of licensed users according to the number of users attached to Recording profiles.					
Retention	The Retention period according to the configuration in the Recording Profile.					
Description	Brief description of the Recording profile.					
Group Mapping	Indicates the names of the AAD groups that are mapped to the Recordin profile.					
Statuses						
#Not In Sync With AAD Groups	AAD Groups are not synchronized with your M365 platform due to one of the following:					
	Members have been added or removed from AAD groups on customer M365 platform.					
	AAD Groups have been added or removed from Recording Profile.					
	See Synchronizing AAD Groups with M365 Tenant Platform					
#Pending MSFT Policy Execution	Indicates that changes have been made to a Recording profile and as a result, the Microsoft script must be downloaded and run into to apply the changes to synchronize with your M365 platform.					
#Disabled	Indicates that the profile has been disabled. See					
#Successful	Indicates that the Recording Profile has been successfully synchronized with your M365 platform.					
Error	Indicates that the Recording Profile has an error.					

3. Click the dots adjacent to the profile that you wish to edit (see above), and then from the drop-down list, choose **Edit** (see below).

	Settings	Recording Profiles (i)	Automatic synchronization is OFF					
E	Connect to your M365							
242	Tools	Recording Profiles: 2						
*	Tags	PROFILE NAME	TOTAL USERS	RETENTION	DESCRIPTION	GROUP MAPPING	STATUS	
	Branding	SuperProfile	11	1 Years (365 Days)	SuperProfile	Communications, SOC Team	#Successful	View
,	Licenses	Internal Calls	-	1 Years (365 Days)	Internal Calls		#Disabled	Edit
٠								MSFT Scripts Disable
?	Recording Settings							Sync Groups From AAD Groups
	Access Profiles							
5								
MA	Monitoring ^							
	View Users							
.hu	Audit Trail System Activity Log							
	Settings	Edit Recording Profile						^
	System Settings	Recording Profiles include	the recording, rentention, and st	torage configuration.Users and/o	or groups are assigned to recordi	ing profiles.		
E	Tools	SuperProfile	SuperProfile					
-	Storage	1. Configuration	2. Groups Mapping	3. MSFT Policy				
1	Tags Branding	Call Types						
>	Licenses	Select what calls of re	corded users associated with the	e profile to record				
•		Record All Call Typ	es 🛈					
?	Recording Settings	User Peer to Peer 0	Calls User Calls	with Meetings	User Queue Calls (i)			
	Recording Profiles	Internal: 🛈 🗹 I	n 🕑 Out 🔍 Extern	al Meetings (1)	Teams Queue Calls*:	Calls Queue Instance ID Add		
5	Access Profiles	PSTN: 🛈 🗹 I	n 🕑 Out 🔽 Interna	al Meetings				
MA	Monitoring ^	External: 🛈 🗹 I	All Meeti	ings ~				
	View Users	Retention Period (Da	ys) (j					
	Audit Trail	1 Year (365 Days)	~					
·II·	System Activity Log	Storage (1)						



If you only update 1. Configuration and not Group Mapping and MSFT Policy, then you do not need to download and run the Microsoft Configuration screen as shown in the Figure below.

	Settings	Edit Recording Profile
.0.	System Settings ^	Recording Profiles include the recording, rentention, and storage configuration.Users and/or groups are assigned to recording profiles.
=	Connect to your M365	Recording Ptotle Name Description
-	Tools	SuperProfile
242	Storage	
	Taos	1. Configuration 2. Groups Mapping 3. MSFT Policy
	Branding	
>	Licensee	Disconnect Calls when Recorder Unavailable
	Licenses	Disable Compliance Recording Audio Notifications
~		You must apply the MSET Compliance Policy configuration for the recording to take effect. Click the button below to download MSET Policy configuration script to your
	Decording Settinge	machine, the script must be run by your organization M365 administrator from a PC that has PowerShell installed and unrestricted execution policy.
?	Nocording Joranga	Download Configuration Script
	Recording Profiles	
50	Access Profiles	Your changes to recording profile do not effect MSFT Policy so you don't need to download script, you can click finish now.
MA		
	Monitoring ^	Previous Cancel Finish
	View Users	
	Audit Trail	
վր	System Activity Log	

- 4. Configure fields according to the table in Adding Recording Profiles on page 42.
- 5. Click Next to configure additional groups.
 - Users can only be mapped to one Recording Profile and belong to one mapped group.
 - At least one group must exist in the Recording Profile.
- 6. Add additional groups as required (login to your Azure portal to verify the groups and their respective members).
- 7. Open the Azure portal of your customer tenant to verify which groups you wish to add.

		,O Search resources, services, and docs (G+/)		📀 Copilot	🖾 🗘 🛞 🕜 🖓 adm	in@M365x2168965 🔕
Home > SIPTestOC Groups > Groups All groups SIPTestOC						×
0 «	🛠 New group 🞍 Download groups	🕐 Refresh @ Manage view 🗸 🛛 🗻 Delete 🛛 🞘 Got feedback	?			
 All groups Deleted groups 	Azure Active Directory is now Microso Search	ft Entra ID. Learn more IS				×
 Diagnose and solve problems Settings Activity 	Search mode Contains 36 groups found					^
> Troubleshooting + Support	Name ↑	Object ld	Group type	Membership type	Email	
	S sg-Finance	2edbf372-72bb-4455-9810-358432137159	Security	Assigned		
	S sg-HR	dfbebe91-d59b-4542-add1-283b133b0e77	Security	Assigned		
	TI-ge 2	2bb4372f-f1d2-40fe-978b-eb6b1c1236ac	Security	Assigned		
	S sg-Legal	82c7014e-1a62-4cef-a2e3-838b577b1982	Security	Assigned		
	S sg-Operations	fd02e174-3d38-4076-8139-6315f285cccb	Security	Assigned		
	S sg-Retail	0dba24a2-20d6-4dd3-b791-1b8440d9b658	Security	Assigned		
	SA sg-Sales and Marketing	519cdfe5-ee16-40d9-bd5f-031789d660ca	Security	Assigned		
	ST SOC Team	0406eff1-8012-4b30-b9dc-795fee991087	Microsoft 365	Assigned	SOCTeam@M365x21689653.onmicrosc	uft.com
	SA ssg-Contoso Ambassadors	cea1eb54+0a30+4ef0-a0c0+9530ff0bbc8e	Security	Assigned		
	SB ssg-Contoso Bug Bashers	ff400760-3767-4068-8859-415f57f05bda	Security	Assigned		~
	٢					>

	Settings	Edit Recording Profile	
	System Settings ^	Recording Profiles include the recording, rentention, and storage configuration. Users and/or groups are assigned to recording profiles.	
=	Connect to your M365	Recording Profile Name Description	
e	Tools	Supervone Supervone	
242	Storage		
	-	1. Configuration 2. Groups Mapping 3. MSFT Policy	
-	lags		
	Branding	Assign Groups ①	
	Licenses		
>			
	Recording Settings	Test (4) Communications (9) Executives (1) SOC Team (5)	
	Accese Drofiles	SOC Team group: 1 users were assigned with Recording User	
۰.	Piccos Fiolines	Licenses.	
2			
•		① SOC Team group: When you make a change to the group, you must trigger the Recording Profile's groups sync from AAD for the change to activate the seture and the available activates the seture of the available activates the available activates the available activates the available activates th	
	Monitoring ^	change in the approach.	
5	View Users		
	Audit Trail	Previous	Cancel Next
MA	System Activity Log		
.ht.			
Ч,			
		Comment on one Paint	

The following message is displayed if you have not yet synced groups with your M365 platform.



8. Perform the Sync; a confirmation message is displayed.

9. Click Next to continue.

E	Settings	Edit Decertino Prefia	
0	System Settings ^	Recording Profiles include the recording, rentention, and storage configuration. Users and/or groups are assigned to recording profiles.	
E	Connect to your M365	Recording Profile Name Description	
tet.	Tools		
	Storage	1. Configuration 2. Groups Mapping 3. MSFT Policy	
	Branding	Disconnect Calls when Recorder Unavailable	
	Licenses	Disable Compliance Recording Audio Notifications	
>		You must apply the MSFT Compliance Policy configuration for the recording to take effect. Click the button below to download MSFT Policy configuration script to your machine, the script must be run by your organization M365 administrator from a PC that has PowerShell installed and unrestricted execution policy.	
	Recording Settings	Download Configuration Script	
	Recording Profiles		
~	Access Profiles	▲ Tour changes to recording profile effect MSF1 Poiccy	
Ť			
?	Marina		
	Monitoring	Previous Cancel Fin	ish
5	View Users		
MA	System Activity Log		
	cycon nonny 20g		
·h			
		"Untitled - Notepad	

- **10.** Configure the following Microsoft Teams Calling Policies:
 - Disconnect Calls when Recorder Unavailable: Calls are disconnected when recording functionality is not available.
 - Disable Compliance Recording Audio Notifications: Disable Microsoft Teams Recording notifications.
- 11. Click Download Configuration Script to download the script (see Downloading Microsoft PowerShell Script)

Viewing Recording Profiles

You can view the settings for an existing Recording profile.

> To view a recording profile:

 In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Recording Profiles.

	Settings				
•	Custom Cottings	View Recording Profile			
	System Settings A	Recording Profiles include the recording, rentention, and storage configuration. Users and/o	r groups are assigned to recording profiles.		
	Connect to your M365	SuperProfile SuperProfile			
	Tools				
	Storage	1 Configuration 2 Groups Manning 3 MSET Policy			
	Tags	Companier company of more reality			
	Branding	Call Types			
>	Licenses	Select what calls of recorded users associated with the profile to record	Select what calls of recorded users associated with the profile to record		
		Record All Call Types (
	Recording Settings	User Peer to Peer Calls User Calls with Meetings	User Queue Calls (i)		
	Recording Profiles				
	Access Profiles	Internal: () V In V Out	Teams Queue Calls*: Calls Queue Instance ID Add		
		PSTN: (1) V In V Out V Internal Meetings (1)			
		External: 🛈 🗹 In 🗹 Out 🛛 All Meetings 🗸 🗸			
7	Monitoring ^				
- 1	View Users	Betenties Beried (Dave)			
	Audit Trail	Retention Period (Days)			
	System Activity I on	1 Year (365 Days) V			
<u>،</u>	oysten Activity Log				
		Storage (i)			

Synchronizing Recording Profiles

This option lets you synchronize your recording profiles with your M365 platform. You must perform this action each time you update AAD groups on your M365 tenant.

> Do the following:

In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Recording Profiles.
	Settings	Recording Profiles	Automatic synchronization is OFF				
101	System Settings	+ New Profile					
E	Connect to your M365						
**	Tools	Recording Profiles: 1					
	Storage	PROFILE NAME	TOTAL USERS 单	RETENTION	DESCRIPTION	GROUP MAPPING	STATUS
	Tags	NA Traders	21 🕅	1 Years (365 Days)	NA traders	All Employees	#Not In Sync With AAD Groups
	Branding						
	Licenses						
>							
	Recording Settings						
	Recording Profiles						
	Access Profiles						
?	Monitoring A						
	wontoning						
5							
J							

2. The following status is displayed when the Recording profile status is not synchronized.

#Not In Sync With AAD Groups

3. Select the profile you wish to sync, click the right-click menu link, and then choose **Sync Groups From AAD Groups**.

	Settings	Recording Profiles 3 A	utomatic synchronization is OFF					
0	System Settings	+ New Profile						
E	Connect to your M365							
	Tools	Recording Profiles: 1						
뵿	Storage	PROFILE NAME	TOTAL USERS	RETENTION	DESCRIPTION	GROUP MAPPING	STATUS	
<u> </u>	Tags							_
	Branding	NA Traders	21 N	1 Years (365 Days)	NA traders	All Employees	#Not In Sync With AAD Groups	:
	Licenses							
>								

View
Edit
MSFT Scripts
Disable
Sync Groups From AAD Groups

A confirmation message is displayed when the Sync operations has completed successfully.

Recording Profiles (i) Autom	atic synchronization is OFF						
+ New Profile						System Sync Successf	ul 🛛
Recording Profiles: 1							
PROFILE NAME	TOTAL USERS 👙	RETENTION	DESCRIPTION	GROUP MAPPING	STATUS		
SuperProfile	14	1 Years (365 Days)	SuperProfile	Test, Communications, Executi	#Successful		:

Download and Run Microsoft Script

The Microsoft Script must be run in Day Two whenever you update Group Mapping to Recording Profiles (adding or removing members on Azure Portal in AAD group or adding or removing groups in Interaction Insights profile) and whenever you change MSFT Policy. This script synchronizes with your M365 platform.



If you have already downloaded the script in Modifying Recording Profiles on page 62 proceed to Step 5 below.

> Do the following:

In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Recording Profiles.

	Settings	Recording Profiles ③	Automatic synchronization is OFF					
•	System Settings ^	+ New Profile						
E	Connect to your M365							
	Tools	Recording Profiles: 1						
•	Storage	PROFILE NAME	TOTAL USERS 🖕	RETENTION	DESCRIPTION	GROUP MAPPING	STATUS	
-	Tags Branding	SuperProfile	14 🔯	1 Years (365 Days)	SuperProfile	Test, Communications, Executi	#Not In Sync With AAD Groups	View
	Licenses							Edit
								MSFT Scripts
,								Disable
	Recording Settings							Sync Groups From AAD Groups
	Recording Profiles							
٠	AUUGas PTUIIlea							
?								
	Monitoring ^							
5	View Users							
	Audit Trail							
	System Activity Log							
·hı								

2. Select the Recording Profile whose script you wish to download, click the right-click menu link, and then choose **MSFT Scripts**.



- **3.** Click the Download button to download the script or the copy button to copy the script to clipboard.
- 4. Click the Download Configuration Script link to download the PowerShell script to your PC.
- 5. Run the script createProfileSuperProfile-dd-m-yyyy.ps1 as Administrator.

27 Administrator: Windows PowerShell —		×
Transcript started, output file is C:\Users\USER\desktop\MSTC_Policy06.16.12.33.txt 6/16/2024 12:33:43 PM - Searching 'MicrosoftTeams' module 0/16/2024 12:33:47 PM - 'WicrosoftTeams' module installed successfully		î
6/16/2024 12:33:47 PM - Importing TwicrosoftTeams' module 6/16/2024 12:33:52 PM - 'MicrosoftTeams' module imported successfully. 6/16/2024 12:23:52 PM - 'MicrosoftTeams' current fully.		
6/16/2024 12:35:10 PM - Genting recording policies 6/16/2024 12:35:10 PM - Getting recording policies successfully.		
6/16/2024 12:35:12 PM - fetching domains 6/16/2024 12:35:15 PM - Domain M365x21689653.commicrosoft.com fetched successfully.		
6/16/2024 12:33:15 PM - SuperProfile06062024142032 already exists. Skipping policy creation. 6/16/2024 12:33:15 PM - Application Instance for SuperProfile06062024142032 already exist. 6/16/2024 12:35:16 PM - Starting Sync Process for SuperProfile06062024142032		
6/16/2024 12:35:18 PM - SuperProfile06062024142032 already exist, skipping. 6/16/2024 12:35:18 PM - Configuring SuperProfile06062024142032 Recording Policy 6/16/2024 12:35:24 PM - Configuring disconnectCalls True for SuperProfile06062024142032 6/16/2024 12:35:26 PM - Configuring audioNotification False for SuperProfile06062024142032		
6/16/2024 12:35:27 PM - Assigning groups to primary policy Adding 4d93blc/-f944-4e82-a372-lebe23999c6e to SuperProfile0662024142032 please wait WARNING: Group 4d93blc/-f944-4e82-a372-lebe23999c6e already assigned to SuperProfile05302024155452 policy.		
Force Assignment set to True, adding 4d93blc/-†944-4e82-a3/2-lebe239/9c6e to SuperProfile06062024142032 please v -	vait.	•
		~

6. Enter the credentials of the Azure customer tenant account and authenticate using the Microsoft Authenticator when prompted.

		-
Back	Next	
		7
reque	oct	
reque	est	
reque tor app, a in.	e st and enter the	i.
reque tor app, a in. 7	est and enter the	1
	Back	Back Next

Notice that the Recording Profile has already been created, therefore the script updates the existing policy.

Administrator: Windows PowerShell –	×	
Transcript started, output file is C:\Users\USER\desktop\MSTC_Policy06.16.12.33.txt 6/16/2024 12:33:43 PM - Searching 'MicrosoftTeams' module		^
0/16/2024 12:33:47 PM - TMporting "Microsoftleams" module installed successfully. 6/16/2024 12:33:52 PM - 'Microsoftleams' module imported successfully.		
6/16/2024 12:35:10 PM - Connected to Microsoft Teams successfully. 6/16/2024 12:35:10 PM - Getting recording policies		
6/16/2024 12:35:12 PM - Retrieved recording policies successfully. 6/16/2024 12:35:12 PM - fetching domains		
6/16/2024 12:35:15 PM - SuperProfile06062024142032 already exists. Skipping policy creation. 6/16/2024 12:35:15 PM - Application Instance for SuperProfile06062024142032 already exist. 6/16/2024 12:35:16 PM - Starting Sync Process for SuperProfile06062024142032		
6/16/2024 12:35:18 PM - SuperProfile06062024142032 already exist, skipping. 6/16/2024 12:35:18 PM - Configuring SuperProfile06062024142032 Recording Policy 6/16/2024 12:35:24 PM - Configuring disconnectcalls True for SuperProfile06062024142032 6/16/2024 12:35:26 PM - Configuring audioNotification False for SuperProfile06062024142032		
<pre>Ordor2024 12:35:27 PM - SuperProfile00002/14/2032 Recording Poincy Has Been Configured. 6/16/2024 12:35:27 PM - Assigning groups to primary policy Adding 4d93b1c7-f944-4e82-a372-lebe23979c6e to SuperProfile00602024142032 please wait. WARNING: Group 4d93b1c7-f944-4e82-a372-lebe23979C6e and lready assigned to SuperProfile05302024155452 policy. Force Assignment set to True, adding 4d93b1c7-f944-4e82-a372-lebe23979c6e to SuperProfile06062024142032 please wait Sending following status to API { TrenantId": "5f4e3129-dd39-4ccd-bc4f-98423bee2c1b", "Message": "Success", "policyId": "SuperProfile06062024142032", "StatusCode": 0 } </pre>		
Provides one successfully and should be reflected in the UT Transcript stopped, output file is C:\Users\USER\desktop\MSTC_Policy06.16.12.33.txt Press Enter to continue: _		

See example log file below (saved to Desktop on PC where the script is run).

Windows PowerShell transcript start
Start time: 20240616123342
Username: LAPTOP-M8LNK8BQ\USER
RunAs User: LAPTOP-M8LNK8BQ\USER
Configuration Name:
Machine: LAPTOP-M8LNK8BQ (Microsoft Windows NT 10.0.19045.0)
Host Application: C:\WINDOWS\System32\WindowsPowerShell\v1.0\powershell.exe -NoProfile -ExecutionPolicy Bypass -File C:\Users\USER\Desktop\Powershell\editProfileSuperProfile-16-6-2024.ps1
Process ID: 19148
PSVersion: 5.1.19041.4522

PSEdition: Desktop PSCompatibleVersions: 1.0, 2.0, 3.0, 4.0, 5.0, 5.1.19041.4522 BuildVersion: 10.0.19041.4522 CLRVersion: 4.0.30319.42000 WSManStackVersion: 3.0 PSRemotingProtocolVersion: 2.3 SerializationVersion: 1.1.0.1 ***** Transcript started, output file is C:\Users\USER\desktop\MSTC_ Policy06.16.12.33.txt PS>TerminatingError(Invoke-RestMethod): " {"type":"https://tools.ietf.org/html/rfc7231#section-6.5.13","title":"Unsupported Media Type","status":415,"traceId":"00-1fa6a9561e39115c5b5258f162c5540d-a5c8015bfcd9c025-00"}" 6/16/2024 12:33:43 PM - Searching 'MicrosoftTeams' module... 6/16/2024 12:33:47 PM - 'MicrosoftTeams' module installed successfully. 6/16/2024 12:33:47 PM - Importing 'MicrosoftTeams' module... INFO: Loaded Module 'Microsoft.Teams.ConfigAPI.Cmdlets' 6/16/2024 12:33:52 PM - 'MicrosoftTeams' module imported successfully. 6/16/2024 12:35:10 PM - Connected to Microsoft Teams successfully. 6/16/2024 12:35:10 PM - Getting recording policies... 6/16/2024 12:35:12 PM - Retrieved recording policies successfully.

6/16/2024 12:35:12 PM - fetching domains...

6/16/2024 12:35:15 PM - Domain M365x21689653.onmicrosoft.com fetched successfully.

6/16/2024 12:35:15 PM - SuperProfile06062024142032 already exists. Skipping policy creation.

6/16/2024 12:35:15 \mbox{PM} - Application Instance for SuperProfile06062024142032 already exist.

6/16/2024 12:35:16 PM - Starting Sync Process for SuperProfile06062024142032 ...

6/16/2024 12:35:18 PM - Sync Process for SuperProfile06062024142032 Finished.

6/16/2024 12:35:18 <code>PM</code> - <code>SuperProfile06062024142032</code> already exist , skipping..

6/16/2024 12:35:18 PM - Configuring SuperProfile06062024142032 Recording Policy...

6/16/2024 12:35:24 PM - Configuring disconnectCalls True for SuperProfile06062024142032...

6/16/2024 12:35:26 PM - Configuring audioNotification False for SuperProfile06062024142032...

6/16/2024 12:35:27 PM - SuperProfile06062024142032 Recording Policy Has Been Configured.

6/16/2024 12:35:27 PM - Assigning groups to primary policy...

Adding 4d93b1c7-f944-4e82-a372-1ebe23979c6e to SuperProfile06062024142032.. please wait..

WARNING: Group 4d93b1c7-f944-4e82-a372-1ebe23979c6e already assigned to SuperProfile05302024155452 policy.

Force Assignment set to True, adding 4d93b1c7-f944-4e82-a372-1ebe23979c6e to SuperProfile06062024142032.. please wait..

Sending following status to API....

{	
"	TenantId": "5f4e3129-dd39-4ccd-bc4f-98423bee2c1b",
"	Message": "Success",
"	PolicyId": "SuperProfile06062024142032",
"	StatusCode": 0
}	
Resul	ts sent successfully and should be reflected in the UI
****	*******
Windo	ws PowerShell transcript end
End t	ime: 20240616123533
****	********

7. Once you have successfully run the script, verify that the Recording Profile status is 'Successful'.

	Settings	Recording Profiles	Recording Profiles (1) Automatic synchronization is OFF								
	System Settings	+ New Profile									
E	Connect to your M365										
241	Tools	Recording Profiles: 1									
	Storage	PROFILE NAME	TOTAL USERS 👙	RETENTION	DESCRIPTION	GROUP MAPPING	STATUS				
-	Tags										
	Branding	SuperProfile	4	1 Years (365 Days)	SuperProfile	Test	#Successful				
	Licenses										
>											

Disabling Recording Profile

You can disable a recording profile. Once disabled, the profile cannot be reenabled.

A profile cannot be deleted if it has associated calls.
 The Call Retention period can be edited upon deletion.

Do the following:

- In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Recording Profiles.
- 2. Select the Recording Profile that you wish to delete, and then from the right-click menu, choose **Disable Profile**. A confirmation dialog is displayed.



3. Click Disable. The profile is disabled.

R	Settings	Recording Profiles (1) Automatic synchronization is OFF								
0	System Settings	+ New Profile								
=	Connect to your M365									
4	Tools	Recording Profiles: 2								
	Storage	PROFILE NAME	TOTAL USERS ≑	RETENTION	DESCRIPTION	GROUP MAPPING	STATUS			
-	Tags									
	Branding	SuperProfile	-	1 Years (365 Days)	Recording Profile for Customer .		#Disabled	:		
	Licenses	SuperProfile1	-	1 Years (365 Days)	SuperProfile1		#Disabled	:		
>										

Deleting Recording Profile

You delete a recording profile that is no longer required.

- ➤ Do the following:
- In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Recording Profiles.
- 2. Select the Recording Profile that you wish to delete, and then from the right-click menu, choose **Delete Profile**. A confirmation dialog is displayed.

	Settings	Recording Profiles () A	utomatic synchronization is OFF					
0	System Settings ^	+ New Profile						
E	Connect to your M365							
	Tools	Recording Profiles: 2						
*	Storage	PROFILE NAME	TOTAL USERS \$	RETENTION	DESCRIPTION	GROUP MAPPING	STATUS	
-	Tags							
	Branding	SuperProfile	-	1 Years (365 Days)	Recording Profile for Custome	er	#Disabled	View
	Licenses	SuperProfile1	-	1 Years (365 Days)	SuperProfile1		#Disabled	Delete

A Delete Profile

You are going to delete recording profile and associated MSFT policy. Are you sure you want to permanently delete recording profile? This action cannot be reversed.



3. Click **Delete**. The profile is deleted.

Recording Profile-Call Type Configuration Examples

The following shows configuration examples for different call type settings.

Record inbound PSTN calls:

1. Configuration	2. Groups Mapping 3. MSFT Policy	
Call Types Select what calls of recorded use Record All Call Types ①	ers associated with the profile to record	
User Peer to Peer Calls Internal: ① In Ou PSTN: ② In Ou External: ② In Ou	User Calls with Meetings t External Meetings ① t Internal Meetings ③ t All Meetings	User Queue Calls () Teams Queue Calls*: Calls Queue Instance ID Add

Record all PSTN Calls:

1. Configuration	2. Groups Mapping	3. MSFT Policy			
Call Types Select what calls of recorded us Record All Call Types	sers associated with the profile to) record			
User Peer to Peer Calls Internal: In O PSTN: In O C External: In O C	User Calls with M Dut External Mee Dut Internal Meet All Meetings	feetings tings (1) ings (1) ~	User Queue Calls ①	Calls Queue Instance ID	Add

Record External calls (PSTN and Federation):

1. Configuration 2. Group	as Mapping 3. MSFT Policy			
Call Types Select what calls of recorded users ass Record All Call Types	ociated with the profile to record			
User Peer to Peer Calls Internal: () In Out PSTN: () VIN Out External: () VIN Out	User Calls with Meetings External Meetings ① Internal Meetings ① All Meetings ✓	User Queue Calls () Teams Queue Calls*:	Calls Queue Instance ID Add	

Calls with External Meetings:

sing Profile Name De erProfile Su	scription	guops are assigned to recording promes.	
II Types lect what calls of recorded users ass Record All Call Types	Mapping 3. MSFT Policy		
User Peer to Peer Calls Internal: ① In Out PSTN: ② In Out External: ① In Out	User Calls with Meetings External Meetings Internal Meetings With External Participants	User Queue Calls ① Teams Queue Calls*: Calls Queue Instance ID Add	

Managing Access Profiles

Access profiles lets you configure Call Permissions, Recording and Access Profiles and System Configuration Permissions. You can determine which calls the targeted users can access, which actions can be performed on the calls. You can determine whether operators can perform Global configuration in the Service Portal. AAD groups of the customer tenant including targeted users are mapped to the Access Profile.

See also:

- Adding an Access Profile on the next page
- Modifying Access Profiles on page 84

- Viewing Access Profiles on page 86
- Deleting Access Profiles on page 88
- Viewing Global Admin Details on page 89
- ➤ Do the following:
- In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Access Profiles.

	Settings System Settings ^ Connect to your M365 Tools	Add Access Profile Set Access Permissions Name Description
•	Storage Tags Branding Licenses	1. Permissions 2. Groups Mapping Call Permissions
> • ?	Recording Settings ^ Recording Profiles Access Profiles	 No Call Access Play Media Related to a Call Access User's Own Calls Download Media Related to a Call Access User's Own and Group Calls Email Media Related to a Call Tag Calls Add Notes Access All Calls Delete Notes of Other Users Delete Calls
ی ال	Monitoring ^ View Users Audit Trail System Activity Log	Recording and Access Profiles permissions Create and Modify Recording Profiles Create and Modify Security Profiles Create and Modify Tags System Configuration Permissions Configure System Audit Trail Access/Export

Adding an Access Profile

The Quick Start wizard process created an initial Access profile for your tenant. You can add additional profiles as required. For example, for new user groups or locations.

> To add an Access Profile:

In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Access Profiles.

	Settings System Settings	Add Access Profile Set Access Permissions	
E	Connect to your M365 Tools	Name Description	
•	Storage Tags	1. Permissions 2. Groups Mapping	
	Branding Licenses	Call Permissions	
>		No Call Access Access User's Own Calls	Play Media Related to a Call Download Media Related to a Call
	Recording Settings ^ Recording Profiles	Access User's Own and Group Calls Select Groups Add	Email Media Related to a Call Tag Calls
•	Access Profiles	Access All Calls	Add Notes Delete Notes of Other Users Reference Control of Cont
	Monitoring ^	Departing and Acases Defiles permissions	Delete Cans
	View Users Audit Trail System Activity Log	Create and Modify Recording Profiles Create and Modify Security Profiles Create and Modify Tags	
վր		System Configuration Permissions Configure System Audit Trail Access/Export	

2. Configure parameters according to the table below.

Field	Description
Name	Name of the Access Profile.
Description	Description of the Access Profile.
Call Permissions	
No Call Access	Prevent access to all calls.
Access User's Own Calls	Allow access of the Targeted user to their own calls.
Access User's Own and Group Calls	Click Add and then from the Drop-down list, select the M365 Azure group to add. Verify your group details in the Azure portal of your tenant.
Access All Calls	Allow access to all calls.
Play Media Related to Call	Allows the plays back of media for the call
Download Media Related to a Call	Allows the download of call media.

Field	Description
Tag Calls	Allows the creation of call tags.
Add Notes	Allows the adding of notes.
Delete Notes of Other Users	Allows the Global admin to delete notes created by tenant users.
Delete Calls	Allows the deletion of calls.
Recording and Access Profi	les permissions
Create and Modify Recording Profiles	Allows users to create and modify Recording profiles.
Create and Modify Access Profiles	Allows users to create and modify Access profiles (change the screen, it says Security Profiles).
Create and Modify Tags	Allows users to create and modify tags.
System Configuration Perm	issions
Configure System	Allows users to configure System settings.
	If you wish to create and modify tags, you must select 'Create and Modify Tags' option above.
Audit Trail Access/Export	Allows users to access and export Audit trails.

3. Click Next to configure groups.

	Settings	Administrators Description	
101	System Settings ^		
E	Connect to your M365	1. Permissions 2. Groups Mapping	
	Tools		
100	Storage	Call Permissions	
-	Tags	Nia Call Assess	Play Media Pelated to a Coll
	Branding	No Call Access	
	Licenses	Access User's Own Calls	
		Access User's Own and Group Calls	
>		Select Groups Add	
	Recording Settings ^	Access All Calls	Add Notes
	Recording Profiles		Delete Notes of Other Users
	Access Profiles		U Delete Calls
\$			
?		Recording and Access Profiles permissions	
	Monitoring ^	Create and Modify Recording Profiles	
		Create and Modify Security Profiles	
\otimes		Create and Modify Tags	
J		System Configuration Permissions	
		Configure Custom	
		Comgure System	
		Audit Irail Access/Export	
վե			Forth March
			EXIT

4. In the Assign Groups field, start typing the name of the group that you wish to assign; the field is auto-populated.

	Settings	
	Sustan Sattings A	Edit Access Profile
	Opprest to up of M265	Set Access Permissions Name Description
E	Connect to your M305	SuperAccessProfile SuperAccessProfile
**	Storage	
	Tags	1. Permissions 2. Groups Mapping
	Branding	Assign Groups
	Licenses	Communicational Q Add Group
>		Communications
	Recording Settings ^	lest (4)
	Recording Profiles	
a	Access Profiles	
2		
f	Monitoring	
	View Users	Previous Cancel Finish
5	Audit Trail	
MA	System Activity Log	
·h		

5. Click Add Group.

Name SuperAccessProfile	Description			
1. Permissions	2. Groups Mapping			
Assign Groups				
Communications (9)	×	× Add Group	2	
Test (4)	×			

A confirmation message is displayed.

.

SuperAccessProfile	SuperAccessProfile		
1. Permissions	2. Groups Mapping		
Assign Groups			
		Add Gro	
Test (4)	× × Communications (9)		
Communications: Access Profile. Cli	9 users were assigned with "SuperAccessProfile" ck Finish to finalize the action.	8	

6. Click Finish to complete the configuration.

Access profiles are synchronized automatically with the your M365 platform. This process may take a few minutes.

• The Sync Groups to AAD action is not applicable.

Modifying Access Profiles

This option lets you modify existing Access profiles. For example, you may decide that users can access not only their own calls, but also calls made by other users in their group.

- Access profiles are synchronized automatically with the your M365 platform. This process may take a few minutes.
 - The Sync Groups to AAD action is not applicable.

> Do the following:

In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Access Profiles.

B	Settings	Access Profiles			
•	System Settings ^	+ New Access Profile			
E	Connect to your M365	PROFILE NAME	TOTAL LISEPS	DESCRIPTION	
*	Tools Storage		26		
*	Tags	Administrators	20		:
	Branding	NA Trader - Supervisors	2		:
	Licenses				
>					
	Recording Settings ^				
	Recording Profiles				
•	Access Profiles				
?					
	Monitoring ^				
5					
.de.					

2. Select the profile you wish to edit, click ... to open the right-click menu, and then choose Edit.

	Settings	Access Profiles			
0	System Settings ^	+ New Access Profile			
E	Connect to your M365				
242	Tools	PROFILE NAME	TOTAL USERS	DESCRIPTION	
	Storage	Administrators	26		
-	Tags				
	Branding	NA Trader - Supervisors	2		:
	Licenses				



	Settings		
		Edit Access Profile	
	System Settings ^	Set Access Permissions	
E	Connect to your M365	Administrators Description	
	Tools		
	Storage	1 Derminations 2 Crauma Manazing	
•	Tags	2. Groups mapping	
	Branding		
	Licenses	Call Permissions	
		O No Call Access	Play Media Related to a Call
>		Access User's Own Calls	Download Media Related to a Call
	Recording Settings ^	Access User's Own and Group Calls	Email Media Related to a Call
	Recording Profiles	Select Groups Add	✓ Tag Calls
-	Access Profiles		Add Notes
· •		Access All Calls	Delete Notes of Other Users
?			Delete Calls
	Monitoring ^		
5	View Users	Recording and Access Profiles permissions	
	Audit Trail	Create and Modify Recording Profiles	
JL	System Activity Log	Create and Modify Security Profiles	
		Create and Modify Tags	
		Queters Quefferenties Description	
		System Configuration Permissions	
		Configure System	
		Audit Trail Access/Export	

3. Edit parameters according to the table below.

Field	Description
Name	Name of the Access Profile.
Description	Description of the Access Profile.
Call Permissions	
No Call Access	Prevent access to all calls.

Field	Description	
Access User's Own Calls	Play Media Related to Call	
	Download Media Related to a Call	
	Tag Calls	
	Add Notes	
	Delete Notes of Other Users	
	Delete Calls	
Access User's Own and Group Calls	Click Add and then from the Drop-down list, select Security group to add.	
Access All Calls	Allow access to all calls.	
Recording and Access Profiles permissions		
Create and Modify Recording Profiles	Allows users to create and modify Recording profiles.	
Create and Modify Security Profiles	Allows users to create and modify Security profiles	
Create and Modify Tags	Allows users to create and modify tags.	
System Configuration Perm	issions	
Configure System	Allows users to configure System settings.	
Audit Trail Access/Export	Allows users to access and export Audit trails.	

Viewing Access Profiles

You can view the details of an existing Access Profile in Read-only view.

> To view Access Profiles:

In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Access Profiles.

Ŗ	Settings	Access Profiles			
	System Settings	+ New Access Profile			
=	Connect to your M365				
	Tools	PROFILE NAME	TOTAL USERS	DESCRIPTION	
ž	Storage	SuperAccessProfile	4	SuperAccessProfile	
	Tags				
	Branding				

2. Click the relevant Access Profile or click its right-click menu, and then choose View.

	Settings	Access Profiles			
•	System Settings ^	+ New Access Profile			
E	Connect to your M365				
	Tools	PROFILE NAME	TOTAL USERS	DESCRIPTION	
*	Storage	SuperAccessProfile	4	SuperAccessProfile	Ø View
	Tags				
	Branding				/ Edit
	Licenses				Sync Groups to AAD
>					Delete

The Access Profile is displayed.

	Settings	View Access Profile	
0	System Settings ^	Set Access Permissions	
i=	Connect to your M365	SuperAccessProfile SuperAccessProfile	
•	Tools	1 Permissions 2 Groups Mapping	
	Storage	2. Oldupa Mapping	
	Tags	Call Permissions	
	Branoing Licenses		Plau Mada Delated to a Call
>		No Call Access	Play Media Related to a Call Download Media Related to a Call
		Access User's Own and Group Calls	✓ Tag Calls
	Recording Settings	Select Occurs Add	Add Notes
	Recording Profiles	Select Groups Ada	Delete Notes of Other Users
¢	Access Profiles	Access All Calls	Jelete Calls
2	· ·		
•	Monitoring ^	Recording and Access Profiles permissions	
55	View Users	Create and Modify Recording Profiles	
0	Audit Trail	Create and Modify Security Profiles	
AV	System Activity Log	Create and modify rags	
		System Configuration Permissions	
		Configure System	
In		Audit Trail Access/Export	
•			Exit Next

- 3. Refer to the parameter descriptions below.
- 4. Click Next to view attached Azure Groups.

Field	Description
Name	Name of the Access Profile.
Description	Description of the Access Profile.
Call Permissions	
No Call Access	Prevent access to all calls.
Access User's Own Calls	 Play Media Related to Call Download Media Related to a Call Email Media Related to a Call

Field	Description	
	Tag Calls	
	Add Notes	
	Delete Notes of Other Users	
	Delete Calls	
Access User's Own and Group Calls	Click Add and then from the Drop-down list, select Security group to add.	
Access All Calls	Allow access to all calls.	
Recording and Access Profiles permissions		
Create and Modify Recording Profiles	Allows users to create and modify Recording profiles.	
Create and Modify Security Profiles	Allows users to create and modify Security profiles	
Create and Modify Tags	Allows users to create and modify tags.	
System Configuration Perm	issions	
Configure System	Allows users to configure System settings.	
Audit Trail Access/Export	Allows users to access and export Audit trails.	

Deleting Access Profiles

You can delete an Access Profile that is no longer required.

> To delete profile:

In the Icon pane, click , and then in the Navigation pane, select Recording Settings > Access Profiles.

	Access Profiles			
	+ New Access Profile			
L	PROFILE NAME	TOTAL USERS	DESCRIPTION	
L	Sales Agents	9	Sales Agents	:
L	SuperAccessProfile	4	SuperAccessProfile	:

Access Profiles + New Access Profile			Â
PROFILE NAME	TOTAL USERS	DESCRIPTION	
Sales Agents	9	Sales Agents	O View
SuperAccessProfile	4	SuperAccessProfile	dit Edit
			Sync Groups to AAD

2. Click the relevant Access Profile or click its right-click menu, and then choose Delete.



3. Click **Delete** to confirm.

Viewing Global Admin Details

The details of the Global Admin of the customer tenant are displayed at the bottom of the Access Profiles page.

The permissions of this default administrator cannot be modified, and the user cannot belong to a mapped AAD group.



Interactions

The Interactions page lets you manage voice interactions of Targeted users. Active recordings are shown in red. Once a recording has ended, and is successfully synchronized with the database, you can playback the recording using the Media player. The Interactions page of the Global Admin user displays interactions for all Targeted users of the M365 tenant. The Interactions page for a specific user displays interactions according to the configuration of the attached Access Profile of this user's AAD group. For example, if Adele Vance is attached to the Sales-US AAD group whose profile is configured with full access, then this user can also access interactions of all users of the M365 tenant. For each interaction, you can open the Media Player to view the Time line of the call and details. The details displayed under the Time line is determined by whether the columns are displayed on the page itself. When you hide columns in the page (see Customizing Columns on page 120), then the column data that is removed from page view is displayed under the Time line of the call. You can filter interactions according to specified search criteria and export data to an Excel file.

See also:

- Filtering Interactions and Active Calls Information on page 96
- Listening to Voice Interaction on page 108
- Downloading an Audio Call on page 113
- Exporting Interaction to Excel on page 114
- Deleting Calls on page 118
- Assigning Tags to Interactions on page 122
- Adding Notes to Interactions on page 125
- Customizing Columns on page 120
- To manage interactions:
- 1. In the Icon pane, click I . The figure below displays the Interactions page for a Global admin user who manages all Targeted users in the tenant.

	Intera	actions	5										
	Total	Recordin	ngs: 14					5	Reset Search Save	ed Searches	* Save Searc	h ∉ Select Colu	mns : Action
				USER NAME \$	DATE	START TIME 💠	DURATION	DIRECTION	CALLED PARTY 💠	CALLING PARTY \$	ANSWERING PARTY $\ \ \updownarrow$	RELEASE CAUSE	CALL TYPE
			₹	Search *	07/01/2024 - 07/25/2024 ×			Select +	Search	Search	Search	Select +	Select +
		~	٥	Megan Bowen	Jul 15, 2024 15:14 PM	15:14:56 PM	02:42:29	Outgoing	MOD Administrator	Megan Bowen	MOD Administrator	Normal	Internal p2p
		~	0	MOD Administrator	Jul 15, 2024 15:14 PM	15:14:56 PM	02:42:29	Incoming	MOD Administrator	Megan Bowen	MOD Administrator	Normal	Internal p2p
		~	D	Lynne Robbins	Jul 15, 2024 15:14 PM	15:14:30 PM	00:00:52	Incoming	Lynne Robbins	MOD Administrator	Lynne Robbins	Normal	Internal p2p
>		~	0	MOD Administrator	Jul 15, 2024 15:14 PM	15:14:30 PM	00:00:52	Outgoing	Lynne Robbins	MOD Administrator	Lynne Robbins	Normal	Internal p2p
		~	C	Lynne Robbins	Jul 15, 2024 15:10 PM	15:10:15 PM		Outgoing	MOD Administrator	Lynne Robbins		Abandoned	Internal p2p
		~	¢	MOD Administrator	Jul 15, 2024 15:10 PM	15:10:14 PM		Incoming	MOD Administrator	Lynne Robbins		Missed	Internal p2p
		~	D	Megan Bowen	Jul 15, 2024 15:09 PM	15:09:28 PM	00:03:32	Incoming	Megan Bowen	MOD Administrator	Megan Bowen	Normal	Internal p2p
		~	0	MOD Administrator	Jul 15, 2024 15:09 PM	15:09:28 PM	00:03:32	Outgoing	Megan Bowen	MOD Administrator	Megan Bowen	Normal	Internal p2p
		~	D	Megan Bowen	Jul 15, 2024 14:27 PM	14:27:15 PM	00:01:13	Outgoing	MOD Administrator	Megan Bowen	MOD Administrator	Normal	Internal p2p
		~	0	MOD Administrator	Jul 15, 2024 14:27 PM	14:27:13 PM	00:01:13	Incoming	MOD Administrator	Megan Bowen	MOD Administrator	Normal	Internal p2p
		~	D	MOD Administrator	Jul 15, 2024 14:15 PM	14:15:10 PM	00:10:24				MOD Administrator	Normal	Internal Meeting
		~	C	MOD Administrator	Jul 15, 2024 14:11 PM	14:11:13 PM						Abandoned	Internal Meeting
		~	D	Megan Bowen	Jul 15, 2024 14:10 PM	14:10:47 PM	00:15:11			Megan Bowen	Conference	Normal	Internal Meeting

The figure below displays the Interactions page for a logged in user Alex Wilber.

Interactions										
Total Recordings: 2							Saved Searches *	Save Search	# Select Colum	ns : Action
0	USER NAME	DATE	START TIME 👙	DURATION	DIRECTION	CALLED PARTY	CALLING PARTY ⊕	RELEASE CAUSE	CALL TYPE	NOTES
Ŧ	Search 🔹 🗘	06/11/2024 - 06/18/2024 ×			Select +	Search	Search	Select +	Select +	Search
• • •	Alex Wilber	Jun 16, 2024 16:48 PM	16:48:30 PM	00:38:11	None			Normal	Internal Meeting	Note (1)
• • •	Alex Wilber	Jun 16, 2024 14:54 PM	14:54:42 PM		None				Internal Meeting	Note (1)

The figure below displays the Interactions page for a logged in user Adele Vance.

•	Interactions		
•	Total Recordings: 3		Saved Searches ▼ Save Search ≅ Select Columns : Action
E	USER NAME 💠 DATE	START TIME + DURATION DIRECTION	$ \mbox{Called party} \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$
*	Ξ Search ▼ 06/11/2024 - 06/18/2024 ×	Select	Search Search Select Select Select Select
	□ ~ ► Adele Vance Jun 16, 2024 16:47 PM	16:47:33 PM 00:39:03 None	Adele Vance Normal Internal Meeting Dote
	Adele Vance Jun 16, 2024 14:53 PM	14:53:54 PM 00:50:39 None	Adele Vance Normal Internal Meeting Pote
>	✓ ✓ Adele Vance Jun 16, 2024 14:53 PM	14:53:36 PM 00:00:03 None	Adele Vance Normal Internal Meeting Note

ParameterDescriptionOpens Media player.User nameM365 Tenant user name. For example, Alex Wilber. Hover over the
name to display the UPN e.g.
AlexW@M365x21689653.OnMicrosoft.comDate fieldIndicates the date and time when the call is started by the Calling
party. In the format Mon Day, YYYY HH:MM:SS AM/PM. For example,
Jun 20, 2024 19:24 PM.

The table below describes the parameters in this screen.

Parameter	Description
Start time	Indicates the date and time when the call is started i.e., when targeted user either receives or makes the call. In the format HH:MM:SS AM/PM. See example in figure below.
Answer Time	Indicates the time when the call is answered by the Called party; when the Targeted user answers the incoming call and the Called party answers the call made by the Targeted user. In the format HH:MM:SS AM/PM. See example in figure below.
Release Time	Indicates the date and time when the call is released; when the Targeted user terminates the call or the other party in the call terminates. In the format HH:MM:SS AM/PM. See example in figure below.
Hold/Retrieve Time	Indicates the time when the call was placed on hold and when it was retrieved. The field includes a list of time offsets from the start of the call and the name of the action.
	This value is not supported in this release.
On Behalf Of	Indicates the name of the party to whom the call is made on their behalf. For example, a sales representative places a call on behalf of the Brand Manager; Bill is Sales representative and Bob is the Brand Manager, when Bill makes a call on behalf of Bob, the recording associated with Bill should display 'On behalf of Bob'. When available, the party should include the user name (first and last name) and user UPN upon hover over.
Transferred By	Indicates the number or name of the party that transferred the call to another user. In the example below, Lynne Robbins transferred the call to Megan Bowen. The Transferred By party is Lynne Robbins.
Transferred To	Indicates the number or name of the party to whom the call is transferred. For example, when Bob is on call with Brian, and Bob transfers the call to Bill, the 'Transferred To' party is Bill. When available, the party should include user name (first and last name) and user UPN upon hover over.

Parameter	Description
Call Wait Time	Indicates the Wait time until the call is answered by the Called party.
Duration	Duration of the recording (this value increments on-the-fly when a recording is active, see Managing Active Calls on page 128). It measures from the time the call is answered until the time it is released. In format HH:MM:SS. Value of zero indicates Unanswered calls.
Direction	 Indicates if the call is 'Incoming' or 'Outgoing'. Incoming: The associated targeted user receives the call. Outgoing: The associated targeted user makes the call. None: Conference call.
Called Party	Indicates the number or name of the party who receives the call. It may be the Targeted user for whom the call is recorded where the Targeted user receives the call. When available Called party should include user name (first and last name) and user UPN when hovered over.
	The called party and answered party might not be the same if the call is answered on behalf of another user. For example, a secretary answers a call on behalf of their manager; Bob calls Brad; however, Bill answers the call. In this case, the answered part is Bill.
Participants	The name of the participants in the call (the Caller party is displayed with link to the names of the other participants).
Calling Party	Indicates the number or name of the party placing the call. It may be the Targeted user for whom the call is recorded where the Targeted user makes the call. When available Calling party should include user name (first and last name) and user UPN when hovered over.
Answering Party	The name of the party who answers the call. For transferred calls, party is displayed as 'Conference'.
Release Cause	Indicates the reason why a call is disconnected. One of the following values:
	Normal – the call was answered and then released.
	Failure – the call or recording was stopped due to an error.
	Missed – the Targeted user didn't answer an incoming call.
	Abandoned – the Targeted user made an outgoing call and hanged up before the call was answered

Parameter	Description
	Transferred – the call was transferred to another call.
Call Type	 Indicates the type of the call. One of the following values: Internal Meeting External Meeting with External Participants Externalp2p PSTN p2p
Tags	Indicates the tags assigned to the interaction and a number representing the number of tags assigned (seeAssigning Tags to Interactions on page 122).
Notes	Indicates the notes assigned the Interaction and a number representing the number of notes assigned (see Adding Notes to Interactions on page 125).
Recording Type	Default: Full Time
Call Expiration	Indicates the date that the call recording is purged as defined in the Recording profile.
Original Call ID	Indicates the ID used to identify the call (also known as the 'SysCallId'). This value may be either the original call id or scenario id (Microsoft Teams). For example, when recording a Teams call between user A and B the id of the call between A and B is displayed. This ID is also displayed in the Teams CDR.

See example for Date and Time information below.

Interactions	3							
Total Recordin	ngs: 25		3 Reset Search	Saved Searches	- I	Save Search		: Action
	USER NAME 🍦	DATE	START TIME $\stackrel{\oplus}{\mp}$	ANSWER TIME	RELEASE TIME 🍦	DURATION	DIRECTION	CALLED PAR
	= Search *	06/01/2024 - 07/08/2024 ×					Select	* Search
•	Alex Wilber	Jun 20, 2024 19:24 PM	19:24:49 PM	19:25:02 PM	19:44:03 PM	00:19:01	None	^

The table below describes the Recording statuses.



In the Status filter drop-down list, select the check box filter(s) that you wish to retrieve.

	Interactions								
0	Total Recordings: 16				3 Reset Search Saved	Searches ~	Save Search	# Select Columns	: Action
E	USER NAME \$	DATE	START TIME 👙	DURATION	DIRECTION CALLED PARTY \$	CALLING PARTY \$	RELEASE CAUSE	CALL TYPE	NOTES
쓭	= Search ▼	06/01/2024 - 06/30/2024 ×			Select • Search	Search	Select +	Select •	Search
*	🗆 🗸 🗹 🛇 Available	20, 2024 19:24 PM	19:24:49 PM	00:19:01	None		Normal	Internal Meeting	Note
	C v Recording	20, 2024 19:24 PM	19:24:33 PM	00:19:20	None	Adele Vance	Normal	Internal Meeting	Note
	C V SFailed	20, 2024 18:32 PM	18:32:41 PM	00:52:10	None		Normal	Internal Meeting	Note
	Deleted	20, 2024 18:32 PM	18:32:23 PM	00:43:56	None	Adele Vance	Normal	Internal Meeting	Note
	Pending	16, 2024 16:49 PM	16:49:59 PM	00:29:09	None		Normal	Internal Meeting	Note
۵	Unavailable	16, 2024 16:48 PM	16:48:30 PM	00:38:11	None		Normal	Internal Meeting	
?	🗌 👻 🜔 Adele Vance	Jun 16, 2024 16:47 PM	16:47:33 PM	00:39:03	None	Adele Vance	Normal	Internal Meeting	Note
	C V D Adele Vance	Jun 16, 2024 14:53 PM	14:53:36 PM	00:00:03	None	Adele Vance	Normal	Internal Meeting	Note
5	🗌 🗸 🜔 Alex Wilber	Jun 10, 2024 18:53 PM	18:53:51 PM	00:04:41	None		Normal	Internal Meeting	Note
MA	C V D Adele Vance	Jun 10, 2024 18:52 PM	18:52:09 PM	00:00:01	None	Adele Vance	Normal	Internal Meeting	Note
	🗌 👻 🜔 Alex Wilber	Jun 10, 2024 16:50 PM	16:50:00 PM	02:00:33	None		Normal	Internal Meeting	Note
	🗌 👻 🕟 Adele Vance	Jun 10, 2024 16:48 PM	16:48:35 PM	00:32:22	None	Adele Vance	Normal	Internal Meeting	Note (2)
·II·	< · · · · · · · · · · · · · · · · · · ·								• · · · · · ·
								Rows per page: 25 👻	1-16 of 16 < >

The following table describes the Media Audio Statuses.

lcon	Status	Description
D	Available	The interaction is available for playback.
\bigcirc	Pending	The interaction is pending database synchronization.
	Recording	The Interaction is currently being recorded.
\bigotimes	Failed	The recording failed.
(×	Unavailable	The recording is unavailable.
0	Deleted	The recording has been deleted.

Filtering Interactions and Active Calls Information

The tables below describes the filters that can be applied to filter information in the Interactions and Active Calls screens.

Search Criteria	Interactions	Active Calls
Filtering by Call Status on the next page	V	×
Filtering by Users and Groups on page 99	V	×
Filtering by Date on page 100	M	×
Filtering by Call Direction on page 102	M	
Filtering by Participants on page 104	×	
(Filtering by Called or Calling Party on page 103)		

Search Criteria	Interactions	Active Calls
(Filtering by Called or Calling Party on page 103)		
Filtering by Answering Party on page 103	V	×
Filtering by Call Tags on page 102	×	
Filtering by Release Cause on page 106		×
Filtering by Call Type on page 105		×
Filtering by Notes on page 106	V	V
Filtering in Time line on page 112	V	×

Filtering by Call Status

You can filter interactions according to the status of the recording.

> Do the following:

1. In the Icon pane, click

Interaction	S							
Total Recordi	ngs: 25				5 Reset Search Saved	Searches	earch 🗄 Select C	olumns E Action
	USER NAME 👙	DATE	START TIME $\stackrel{+}{\mp}$	DURATION	DIRECTION CA	LLED PARTY \ddagger CALLING PARTY \ddagger	RELEASE CAUSE	CALL TYPE NO
	- Search •	06/01/2024 - 06/30/2024 ×			Select +	Search	Select +	Select +
	Alex Wilber	Jun 20, 2024 19:24 PM	19:24:49 PM	00:19:01	None		Normal	Internal Meeting
•	Adele Vance	Jun 20, 2024 19:24 PM	19:24:33 PM	00:19:20	None	Adele Vance	Normal	Internal Meeting
•	Alex Wilber	Jun 20, 2024 18:32 PM	18:32:41 PM	00:52:10	None		Normal	Internal Meeting
•	Adele Vance	Jun 20, 2024 18:32 PM	18:32:23 PM	00:43:56	None	Adele Vance	Normal	Internal Meeting
	Christie Cline	Jun 16, 2024 16:49 PM	16:49:59 PM	00:29:09	None		Normal	Internal Meeting
	Alex Wilber	Jun 16, 2024 16:48 PM	16:48:30 PM	00:38:11	None		Normal	Internal Meeting
	Adele Vance	Jun 16, 2024 16:47 PM	16:47:33 PM	00:39:03	None	Adele Vance	Normal	Internal Meeting
•	Christie Cline	Jun 16, 2024 15:05 PM	15:05:49 PM		None			Internal Meeting
•	Alex Wilber	Jun 16, 2024 14:54 PM	14:54:42 PM		None			Internal Meeting
•	Adele Vance	Jun 16, 2024 14:53 PM	14:53:54 PM	00:50:39	None	Adele Vance	Normal	Internal Meeting
•	Adele Vance	Jun 16, 2024 14:53 PM	14:53:36 PM	00:00:03	None	Adele Vance	Normal	Internal Meeting
•	Alex Wilber	Jun 10, 2024 18:53 PM	18:53:51 PM	00:04:41	None		Normal	Internal Meeting
<	<u> </u>							··· ··· ·· ·· ·· ·· ·· ·· ·· ·· ·· ·· ·
							Rows per page:	25 💌 1–25 of 25 < >

2. Click the Status icon.



3. Select the check box adjacent to the status for which you wish to filter search. In the example below, interactions are filtered according to 'Recording' status.

Interactions	3									
Total Recordin	ngs: 2				3 Reset Search	Saved Searches	- Save	Search 🗄 Sele	act Columns	Action
	USER NAME ‡	DATE	START TIME 👙	DURATION	DIRECTION	CALLED PARTY	CALLING PARTY	RELEASE CAUSE	CALL TYPE	NOTES
	Ţ Search ▼	06/01/2024 - 07/02/2024 ×			Select -	Search	Search	Select	- Select	• Sea
•	Available	16, 2024 15:05 PM	15:05:49 PM		None				Internal Meeting	
•	Recording	16, 2024 14:54 PM	14:54:42 PM		None				Internal Meeting	
	Failed									
	O Deleted									
	Pending									
	🗌 🕲 Unavailable	_								

Interactions	
Total Recordings: 2	Saved Search Save Search
USER NAME 🗘 DATE START TIME 🗘 DURATION	Direction called party φ calling party ψ release cause call type notes
□ Search ▼ 06/01/2024 - 07/02/2024 ×	Select • Search Select • Select • Select •
Christie Cline Jun 16, 2024 15:05 PM 15:05:49 PM	None Internal Meeting
□ ∨ Alex Wilber Jun 16, 2024 14:54 PM 14:54:42 PM	None Internal Meeting

Filtering by Users and Groups

You can filter data according to specific group names that you have configured in one of your Recording profiles or by user names belonging to one these groups.

> Do the following:

1. In the Icon pane, click either or the .

•	Interactions			
0	Total Recordings: 11			5 Reset Search Saved Searches * Save Search # Select Columns : Action
E	USER NAME 🌩 DATE	START TIME 💠 DURATION	DIRECTION	CALLED PARTY 🗘 CALLING PARTY 🗘 RELEASE CAUSE CALL TYPE NOTES
221			Select	▼ Search Select ▼ Select ▼ Search
*	MOD Administrator May 24, 2024 07:26 AM	07:26:24 AM 00:03:03	None	MOD Administrator Normal Internal Meeting Pote

2. In the User Name search field, start typing the text string for the user that you wish to search.

Interactions		
Total Recordings: 12		Saved Searches 👻 Save Search 🗄 Select Columns 🗄 Action
USER NAME 💠 DATE	START TIME 🗍 URATION	DIRECTION CALLED PARTY $\frac{4}{7}$ Calling party $\frac{4}{7}$ Release cause call type
Search MM/DD/YYYY - MM/DD/YYYY		Select • Search Select • Select
C V D Alex Wilber PM	18:53:51 PM 00:04:41	None Normal Internal Meet
Adele Vance Jun 10, 2024 18:52 PM	18:52:25 PM 06:00:10	None Adele Vance Normal Internal Meet
C V Adele Vance Jun 10, 2024 18:52 PM	18:52:09 PM 00:00:01	None Adele Vance Normal Internal Meet
□ ∨ ▷ Alex Wilber Jun 10, 2024 16:50 PM	16:50:00 PM 02:00:33	None Normal Internal Meet
□ ~ ► Adele Vance Jun 10, 2024 16:48 PM	16:48:35 PM 00:32:22	None Adele Vance Normal Internal Meet

3. Select the check box adjacent to the username.

Interactions								
Total Recordings: 4				5 Reset S	earch Saved Searches *	Save Search	E Select Columns	: Action
	USER NAME	DATE	START TIME 👙	DURATION	DIRECTION CALLED PARTY	CALLING PARTY $\frac{1}{2}$	RELEASE CAUSE	CALL TYPE
Ŧ	Search^	MM/DD/YYYY - MM/DD/YYYY			Select • Search	Search	Select +	Select
• • •	🗹 💄 Alex Wilber	РМ	18:53:51 PM	00:04:41	None		Normal	Internal Meeting
• • •	Alex Wilber	Jun 10, 2024 16:50 PM	16:50:00 PM	02:00:33	None		Normal	Internal Meeting
• • •	Alex Wilber	Jun 9, 2024 11:52 AM	11:52:50 AM	00:04:20	None	Alex Wilber	Normal	Internal Meeting
0 × C	Alex Wilber	Jun 9, 2024 11:48 AM	11:48:02 AM		None		Abandoned	Internal Meeting

4. To search by group name, start typing the group name that you wish to search, and then select the check box adjacent to the group name.

Interactions							
Total Recordings: 12			5 Reset Sea	rch Saved Searches *	Save Search	Select Columns	: Action
	USER NAME 👙 DATE	START TIME 🙏	DURATION	DIRECTION CALLED PARTY \$	CALLING PARTY	RELEASE CAUSE	CALL TYPE
Ŧ	Search 06/09/2024-06/16/2024 ×			Select - Search	Search	Select +	Select
• • •	Communications PM	18:53:51 PM	00:04:41	None		Normal	Internal Meet
- v 😏	Adele Vance Jun 10, 2024 18:52 PM	18:52:25 PM	06:00:10	None	Adele Vance	Normal	Internal Meet

You can also search for multiple groups.



Filtering by Date

You can filter data according to specific date range.

Do the following:

1. In the Icon pane, click

•	Interactions				
0	Total Recordings: 11		3 Reset Search Saved Searches	- Save Search	E Select Columns I Action
E	USER NAME 🗘 DATE	START TIME 🔶 DURATION	DIRECTION CALLED PARTY + CALLING	PARTY ÷ RELEASE CAUSE	CALL TYPE NOTES
<u>14</u>			Select + Search Search	Select +	Select + Search
*	□ V D Administrator May 24, 2024 07:26 AM	07:26:24 AM 00:03:03	None MOD Ac	ninistrator Normal	Internal Meeting Note
	MOD Administrator May 24, 2024 07:20 AM	07:20:23 AM 00:02:22	None MOD Ad	ninistrator Normal	Internal Meeting Note

- 2. Double click inside the Date field to open the Calendar. On the left-hand side, select the desired month and day to commence the search range. In the 'From' Time range field, double-click the clock, and then drag the scrolling bars to the desired hour and minutes to commence the search range.
- 3. On the right-hand side, select the desired month and day to end the search range. In the 'To' Time range field, double-click the clock and then drag the scrolling bars to the desired hour and minutes to end the search range.

05/01/2024 – 06/	/01/2024	1 ×										Selec	t	•	Sear
Today	<		N	lay 202	24						Ju	ne 20	24		>
loday	s	м	т	w	т	F	S		s	м	т	w	т	F	s
This Week				1	2	3	4								1
Last Week	5	6	7	8	9	10	11		2	3	4	5	6	7	8
Current Month	12	13	14	15	16	17	18		9	10	11	12	13	14	15
Last Month	19	20	21	22	23	24	25		16	17	18	19	20	21	22
3 Months	26	27	28	29	30	31			23	24	25	26	27	28	29
Last Year									30						
Reset															
Time Range: 12:00 AM (S) - 11:59 PM (S)															
May 1, 2024 12:00 AM - Jun 1, 2024 11:59 PM Cancel App											Apply				

4. To set the time of day, click inside the Time Range fields and roll the slider to set the desired times.

05/01/2024 - 06	/01/2024	×]									Selec	t	Ŧ	Sea
T	<		м	ay 2024	4						Ju	ine 20	24		>
loday	s	м	т	w	т	F	s		s	м	т	w	т	F	s
This Week				1	2	3	4								1
Last Week	5	6	11	00		РМ	11		2	3	4	5	6	7	8
Current Month	12	13		05			18		9	10	11	12	13	14	15
Last Month	19	20		10			25		16	17	18	19	20	21	22
3 Months	26	27		15					23	24	25	26	27	28	29
Last Year				20					30						
Reset						ОК									
Time Range: 11:59 PM () - 11:59 PM ()															
	May 1, 2024 11:59 PM - Jun 1, 2024 11:59 PM										(Cancel		Apply	

5. Click Apply.

Filtering by Call Direction

You can filter data according to call direction.

Do the following:

1. In the Icon pane, click either

Settings	Interactions		
System Settings ^	Total Recordings: 108		Saved Searches Save Search Save Search Save Search
Connect to your M365	USER NAME 💠 DATE	START TIME 💠 DURATION	DIRECTION CALLED PARTY \ddagger CALLING PARTY \ddagger RELEASE CAUSE CALL TYPE
Tools	Search MM/DD/YYYY - MM/DD/YYYY		Select + Search Select + Select
Tags	□ ∨ (grouping6 Jun 4, 2024 11:50 AM	11:50:05 AM 00:04:31	None Normal Internal Mee

- 2. In the Direction field Drop-down list, select one of the following:
 - Incoming
 - Outgoing
 - None (indicates a Conference Call)

DIRECTION



Filtering by Call Tags

This section describes how to search by Call Tags.

> To search for calls by call tags:

1. In the Icon pane, click 🔽.

	Active Calls			
	Total Calls: 2			🕹 Export
1= 44	STATUS USER NAME $\mbox{$\updownarrow$}$ START TIME $\mbox{$\updownarrow$}$	DURATION	direction participants called party φ calling party φ	TAGS NOTES
*	Search V		Select • Contains • Contains Contains	Select
	Christie Cline 15:05:49 PM	03:31:46	None	SalesOrder ste
	Alex Wilber 14:54:42 PM	03:42:53	None	Marketing Positioning
>				Key Financials
				Inventory Control
~				
2				
·				

2. Select the check box adjacent to the tag that you wish to filter. The data is filtered.

	Active Calls								
	Total Calls: 1		🕹 Export						
=	STATUS USER NAME \div START TIME \div DURATION	DIRECTION PARTICIPANTS CALLED PARTY \div Calling party \div	TAGS NOTES						
•	Search -	Select • Contains • Contains Contains	Select X A						
	Christie Cline 15:05:49 PM 03:33:13	None	🕑 🖿 Help Desk						
			SalesOrder						
>			Marketing Positioning						
			Key Financials						
			Inventory Control						
٥		Executive Summary Call							
?									

Filtering by Called or Calling Party

You can filter data by Called or Calling party.

> Do the following:

1. In the Icon pane, click either or the .

Settings	Interactions						
System Settings ^	Total Recordings: 118		3 Reset Se	Saved Search	res • Save Search	E Select Columns E Acti	ion
Connect to your M365	USER NAME 🗘 DATE	START TIME 👙	DURATION	DIRECTION	CALLED PARTY \ddagger CALLING PARTY \ddagger	RELEASE CAUSE CALL TY	PE
Tools Storage	⊤ Search ▼			Select +	Search	Select + Select	t
Tags	grouping6 Jun 4, 2024 01:08 PM	13:08:16 PM	00:00:55	None		Normal Internal	Mee

2. In the Called Party or Calling Party search field, enter the name of the party to search.

Enhance the search by specifying the Calling (Caller ID), Called and/or Answering party. Use a wild card to broaden the search

Example

732 will return all calls with 732 anywhere in the number

732* will return all calls that start with 732

*Bill will return all calls with a user participant with a name that contains the word 'Bill'.

Filtering by Answering Party

You can filter data by Answering party.
> Do the following:

1. In the Icon pane, click 🔽.

Interactions	6								
Total Recordin	ngs: 14				3 Reset Search Saved S	Searches 👻	Save Search	≅ Select Column	Action
		USER NAME 🔺	DATE	LLED PARTY	PARTICIPANTS	CALLING PARTY $\frac{1}{2}$	ANSWERING PARTY $\frac{1}{2}$	RELEASE CAUSE	CALL TYPE
	Ŧ	Search +	07/01/2024-07/29/2024 ×	Search	Search	Search	Search	Select 👻	Select -
	D	Megan Bowen	Jul 15, 2024 15:14 PM	DD Administrator	Megan Bowen +1	Megan Bowen	MOD Administrator	Normal	Internal p2p
	0	MOD Administrator	Jul 15, 2024 15:14 PM	DD Administrator	Megan Bowen +1	Megan Bowen	MOD Administrator	Normal	Internal p2p
	D	Lynne Robbins	Jul 15, 2024 15:14 PM	nne Robbins	MOD Administrator +1	MOD Administrator	Lynne Robbins	Normal	Internal p2p
•	0	MOD Administrator	Jul 15, 2024 15:14 PM	nne Robbins	MOD Administrator +1	MOD Administrator	Lynne Robbins	Normal	Internal p2p
	G	Lynne Robbins	Jul 15, 2024 15:10 PM	DD Administrator		Lynne Robbins		Abandoned	Internal p2p
•	¢	MOD Administrator	Jul 15, 2024 15:10 PM	DD Administrator		Lynne Robbins		Missed	Internal p2p
•	0	Megan Bowen	Jul 15, 2024 15:09 PM	gan Bowen	Megan Bowen +1	MOD Administrator	Megan Bowen	Normal	Internal p2p
•	0	MOD Administrator	Jul 15, 2024 15:09 PM	igan Bowen	Megan Bowen +1	MOD Administrator	Megan Bowen	Normal	Internal p2p
	D	Megan Bowen	Jul 15, 2024 14:27 PM	DD Administrator	MOD Administrator +1	Megan Bowen	MOD Administrator	Normal	Internal p2p
•	0	MOD Administrator	Jul 15, 2024 14:27 PM	DD Administrator	MOD Administrator +1	Megan Bowen	MOD Administrator	Normal	Internal p2p
	0	MOD Administrator	Jul 15, 2024 14:15 PM		Megan Bowen +1		MOD Administrator	Normal	Internal Meeting
	G	MOD Administrator	Jul 15, 2024 14:11 PM		Megan Bowen			Abandoned	Internal Meeting
•	D	Megan Bowen	Jul 15, 2024 14:10 PM		Megan Bowen +1	Megan Bowen	Conference	Normal	Internal Meeting
								Bowe por pages 25	1.14.014

2. In the Answering party search field, start typing the name of the party to search. The filter results are shown.

	Settings	Interactions						
	System Settings ^	Total Recordings: 2	Saved Search Saved Search ≣ Select Columns					
E	Connect to your M365	USER NAME 💠 DATE LLED PARTY 🗘	PARTICIPANTS CALLING PARTY 🗘 ANSWERING PARTY 🗘 RELEASE CAUSE CALL TYPE					
<u>44</u>	Tools		Search Search Lymne Robbin X Select v Select v					
*	Tags	Lunae Dobbles Ind 15 2024 15:44 BM	NOD Administrator (1 NOD Administrator Lunno Palabine Normal Internal of a					
	Branding	Cyrine Roberns Juli 10, 2024 10.14 PM Ine Roberns						
	Licenses	MOD Administrator Jul 15, 2024 15:14 PM nne Robbins	MOD Administrator +1 MOD Administrator Lynne Robbins Normal Internal p2p					

Filtering by Participants

You can search by a Call participant.

> Do the following:

1. In the Icon pane, click 🔽.

Ø	Active Call	s								
	Total Calls: 2									🛃 Export
E	STATUS US	ER NAME ≑	START TIME 💠	DURATION	DIRECTION	PARTICIPANTS	CALLED PARTY	CALLING PARTY	TAGS	NOTES
*	5	Search 🔹 🗘			Select +	Alex	Contains	Contains	Select -	Select
-	Ch	ristie Cline	15:05:49 PM	03:53:34	None	🗌 💄 Alex Wilber			🔖 Tag (1)	Note
	(1) Ale	ax Wilber	14:54:42 PM	04:04:40	None				🔖 Tag (1)	Note

- 2. In the Participants search field, enter the name of the participant user to search.
- **3.** Select the entry.

Active Calls				
Total Calls: 0				🛃 Export
STATUS USER NAME $\stackrel{+}{\mp}$ START TIME $\stackrel{+}{\mp}$ DURATION	DIRECTION PARTICIPANTS	CALLED PARTY \ddagger Calling Party \ddagger	TAGS	NOTES
Search •	Select •	Contains Contains	Select	Select
	🗹 💄 Alex Wilber			

Filtering by Call Type

You can search by Call Type

> Do the following:

1. In the Navigation pane, select **Active Calls**.

	Interactions		
0	Total Recordings: 6		Saved Search Save Search ≅ Select Columns : Action
E	USER NAME 🗘 DATE	START TIME 💠 DURATION DIRECTION	CALLED PARTY 🗘 CALLING PARTY 🗘 RELEASE CAUSE CALL TYPE NOTES
22		Select	→ Search Select → Select → Search
*	Alex Wilber Jun 9, 2024 11:52 AM	11:52:50 AM 00:04:20 None	Alex Wilber Normal Internal Meeting Note
	Alex Wilber Jun 9, 2024 11:48 AM	11:48:02 AM None	Abandoned Internal Meeting Pote
>	✓ ✓ Adele Vance Jun 9, 2024 11:30 AM	11:30:17 AM 00:22:56 None	Adele Vance Normal Internal Meeting Device Note
	✓ ✓ Adele Vance Jun 6, 2024 18:37 PM	18:37:04 PM 00:33:37 None	Adele Vance Normal Internal Meeting Dote
	□ ~	18:36:35 PM 00:00:06 None	Adele Vance Normal Internal Meeting P Note
٥	Adele Vance Jun 6, 2024 18:09 PM	18:09:14 PM 00:25:47 None	Adele Vance Normal Internal Meeting P Note (2)
?			

- 2. From the Call Type drop-down list ,choose the call type to search. Select one of the following values:
 - Internal p2p: Call between two users who belong to the recorded organization domain.
 - External p2p: Call with a user that doesn't belong to the organization of the recorded/targeted user; a user from a Federated domain or any public Teams.
 - PSTN p2p: Call with a party on PSTN trunk.
 - Internal Meeting: Internal conference call
 - External Meeting: Calls with external conferences (Federated bridges)
 - Internal Meeting with External Participants: Call with internal conference that has external participants, where the external participant is a Federated user or a guest.
 - Queue Call: Name of the Queue name for calls routed from a queue.

	Interactions									
•	Total Recordings: 6					3 Reset Search Saved Sear	rches ~	Save Search	# Select Columns	1 Action
E	USER NAME	DATE	START TIME $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	DURATION	DIRECTION	CALLED PARTY 👙 CAL	LLING PARTY 👙 R	ELEASE CAUSE	CALL TYPE N	OTES
	= Search	* 06/02/2024 - 06/09/2024 ×			Select	* Search S	Search	Select v	Internal *	Search
*	Alex Wilber	Jun 9, 2024 11:52 AM	11:52:50 AM	00:04:20	None	Ale	ex Wilber N	lormal	Internal Meeting	Note
	🗌 👻 🔇 Alex Wilber	Jun 9, 2024 11:48 AM	11:48:02 AM		None		A	bandoned	Internal Meeting	, Note
>	Adele Vance	Jun 9, 2024 11:30 AM	11:30:17 AM	00:22:56	None	Adi	lele Vance N	lormal	Internal Meeting	, Note
	Adele Vance	Jun 6, 2024 18:37 PM	18:37:04 PM	00:33:37	None	Adi	iele Vance N	lormal	Internal Meeting	Note
	Adele Vance	Jun 6, 2024 18:36 PM	18:36:35 PM	00:00:06	None	Adi	lele Vance N	lormal	Internal Meeting	Note
٥	🗌 👻 🜔 Adele Vance	Jun 6, 2024 18:09 PM	18:09:14 PM	00:25:47	None	Ad	lele Vance N	lormal	Internal Meeting	Note (2)
?										

Filtering by Notes

You can search by notes that have been defined for a call.

<u>/</u>

You can only filter text strings using whole words.

> Do the following:

1. In the Icon pane, click either For the or the second se

	Interactions		
•	Total Recordings: 6		Save Search Save Search # Select Columns I Action
E	USER NAME 🗘 DATE	START TIME + DURATION DIRECTION	CALLED PARTY \Leftrightarrow Calling Party \Leftrightarrow Release Cause Call type notes
쓭	⊤ Search * ↓	Select	▼ Search Select ▼ Hermal ▼ X Search
<u>*</u>	□ ∨ ► Alex Wilber Jun 9, 2024 11:52 AM	11:52:50 AM 00:04:20 None	Alex Wilber Normal Internal Meeting 💭 Note
	V C Alex Wilber Jun 9, 2024 11:48 AM	11:48:02 AM None	Abandoned Internal Meeting
,	□ ✓ 🜔 Adele Vance Jun 9, 2024 11:30 AM	11:30:17 AM 00:22:56 None	Adele Vance Normal Internal Meeting Rote
	Adele Vance Jun 6, 2024 18:37 PM	18:37:04 PM 00:33:37 None	Adele Vance Normal Internal Meeting Rote
	□ ✓ ► Adele Vance Jun 6, 2024 18:36 PM	18:36:35 PM 00:00:06 None	Adele Vance Normal Internal Meeting Rote
٥	□ ✓ ► Adele Vance Jun 6, 2024 18:09 PM	18:09:14 PM 00:25:47 None	Adele Vance Normal Internal Meeting Note (2)

2. In the Notes field, enter text to search contained in the note. Notes containing text are indicated in blue as shown in the figure below. The number adjacent to the note icon indicates the number of notes that have been created for the interaction.

	Interactions				
-	Total Recordings: 1				Saved Searches ▼ Save Search Image: Search Sea
E	USER NAME 💠 🛛 DATE	START TIME \$	DURATION	DIRECTION	CALLED PARTY 💠 🛛 CALLING PARTY 💠 👘 RELEASE CAUSE 👘 CALL TYPE
*	Search ▼ 06/02/2024 - 06/09/2024 ×			Select	▼ Search Select ▼ Internal ▼ X
*	🗌 🛩 🜔 Adele Vance Jun 6, 2024 18:09 PM	18:09:14 PM	00:25:47	None	Adele Vance Normal Internal Meeting P Note (2)

Filtering by Release Cause

- ➤ Do the following:
- 1. In the Icon pane, click

ef:	Interactions			,
Ť	Total Recordings: 125		Reset Search Abandoned Calls	▼ Save Search Select Columns Action
E	USER NAME 💠 DATE	START TIME ≑ DURATION	DIRECTION CALLED PARTY $\frac{1}{2}$ Calling party $\frac{1}{2}$	RELEASE CAUSE CALL TYPE NOTES
*			Select • Search Search	Select • Select • Search
•	V Construction of the advantage of th	15:00:05 PM 00:00:15	None TeamsTestUser2	Normal Internal Meeting Note
	🗌 👻 🇭 teamstestuser2 Jun 4, 2024 02:58 PM	14:58:58 PM 00:00:54	None TeamsTestUser2	Normal Internal Meeting , Note

- 2. From the Release Cause drop-down list, select one of the following Release Causes to filter data:
 - Normal
 - Abandoned
 - Failure
 - Missed

In the example below, data has been filtered to retrieve "Missed Calls"

nf:	Interaction	Interactions								
	Total Recordings: 3				5 Reset Search	Abandoned Calls	Save Search	# Select Column	s I Action	
E	0	USER NAME 👙	DATE	START TIME 🗘 DURATION	N DIRECTION	CALLED PARTY	CALLING PARTY \$	RELEASE CAUSE	CALL TYPE	NOTES
갶		\Xi Search *	05/28/2024-06/04/2024 ×		Select	* Search	Search	Missed •	Select +	Search
÷.	•	Paircalitest1	May 30, 2024 10:09 PM	22:09:22 PM	Incoming	paircalItest1	TeamsTestUser2	Missed	Internal p2p	Note
	•	C paircalitest1	May 30, 2024 10:00 PM	22:00:02 PM	Incoming	paircalltest1	TeamsTestUser2	Missed	Internal p2p	Note
,	• •	Paircalltest1	May 30, 2024 09:51 PM	21:51:50 PM	Incoming	paircalItest1	TeamsTestUser2	Missed	Internal p2p	Note

Saving Queries

You can save search criteria as a query and then later retrieve it.

> Do the following:

1. In the Icon pane, click

nî:	Interactions			
	Total Recordings: 6		3 Reset Search Saved Searches	▼ Save Search
E	USER NAME 💠 DATE	START TIME 💠 DURATION	DIRECTION CALLED PARTY 👙 CALLING PARTY	Y 🗘 RELEASE CAUSE CALL TYPE NOTES
*			Select • Search Search	Abandon • X Select • Search
^	U V QA_Auto_User_1 May 29, 2024 04:39 PM	16:39:07 PM	None QA_Auto_Use	r_1 Abandoned Internal Meeting
	QA_Auto_User_1 May 29, 2024 10:35 AM	10:35:19 AM	None QA_Auto_Use	r_1 Abandoned Internal Meeting , Note
>	□ ~ 🔇 grouping2 May 29, 2024 10:16 AM	10:16:25 AM 00:01:10	None	Abandoned Internal Meeting , Note
	□ ~ 🔇 teamstestuser2 May 28, 2024 06:25 PM	18:25:21 PM	None TeamsTestUs	er2 Abandoned Internal Meeting Note
	C V QA_Auto_User_1 May 28, 2024 05:28 PM	17:28:08 PM	None QA_Auto_Use	r_1 Abandoned Internal Meeting Pote
•	QA_Auto_User_1 May 28, 2024 12:39 PM	12:39:17 PM	None QA_Auto_Use	r_1 Abandoned Internal Meeting P Note

2. Run a query using one of the filter criteria, and then select Save Search.

Save Search		
Abandoned Calls		
	Cancel	Save

- 3. Enter a name for the Search result and then click **Save**.
- 4. You can toggle in the adjacent search box to view your saved search.

nii	Interactions								
- T	Total Recordings: 6				3 Reset Search	andoned Calls ×	Save Search	≅ Select Colum	Action
E	USER NAME \$	DATE	START TIME 🐥 DURATI	DN DIRECTION	CALLED PARTY	CALLING PARTY $\stackrel{+}{\mp}$	RELEASE CAUSE	CALL TYPE	NOTES
**	Ţ Search ▼	05/28/2024 - 06/04/2024 ×		Select	* Search	Search	Abandon *	Select +	Search
Ť	QA_Auto_User_1	May 29, 2024 04:39 PM	16:39:07 PM	None		QA_Auto_User_1	Abandoned	Internal Meeting	Note
	QA_Auto_User_1	May 29, 2024 10:35 AM	10:35:19 AM	None		QA_Auto_User_1	Abandoned	Internal Meeting	Note
,	🗆 👻 🔇 grouping2	May 29, 2024 10:16 AM	10:16:25 AM 00:01:	10 None			Abandoned	Internal Meeting	Note
	🗌 🗸 🔇 teamstestuser2	May 28, 2024 06:25 PM	18:25:21 PM	None		TeamsTestUser2	Abandoned	Internal Meeting	Note
	QA_Auto_User_1	May 28, 2024 05:28 PM	17:28:08 PM	None		QA_Auto_User_1	Abandoned	Internal Meeting	Note
٥	QA_Auto_User_1	May 28, 2024 12:39 PM	12:39:17 PM	None		QA_Auto_User_1	Abandoned	Internal Meeting	Note
?									

Listening to Voice Interaction

Once a voice interaction is Available, you can open the Media player and listen to it.

See also Filtering in Time line on page 112.

- ➤ Do the following:
- **1.** In the Navigation pane, click **Interactions**
- **2.** Follow the instructions described in Filtering Interactions and Active Calls Information on page 96 to search filter for calls.
- **3.** In the retrieved calls list, select the desired call. The call recorder is displayed with the frequency spectrum of the call.

220 250 250 250 250 250 250 250		Adele Vance Ju	n 9, 2024 11:30 AM		Adele Vance	Adele Vance	Normal	Internal Meeting	, Note
0 so 200 Insert a new note Image: Comparison of the provided of	ļ								
ANSWER TIME: 11:30:19 AM RECORDING TYPE: Audio RELEASE TIME: 11:53:15 AM CALL EXPRATION: Jun 9, 2025 CALL WATT TIME: 00:00:02 ORIGINAL CALL ID: f2ccb262-8a72-428e-896c-d8f9ea7918c2 TAGS: Tag	0.00	Insert a new note	>	• 5	• •			Adele Vance	
CALL WAIT TIME: 00:00:02 ORIGINAL CALL ID: 12ccb262-8a72-428e-896c-d8f9ea7918c2 TA05: Tag	ANS	ISWER TIME: 11:30:19 AM	RECORDING TYPE: Audio CALL EXPIRATION: Jun 9, 2025						
	CAL	GS: Tag	ORIGINAL CALL ID: f2ccb262-8a72-4	128e-896c-d8f9ea79	118c2				

4. Click 😾 below the Media player to start listening to the call. Click again to pause while

the call is playing (the button changes to \checkmark) to allow the administrator to pause the player while playing the audio.



The Play button adjacent to the name of the Caller (shown in Red in the figure above) in not functional.

Insert a new note	>	»	5	0	Ċ	۲	16:08 Adele Vance
INSWER TIME: 11:30:19 AM	RECORDING TYPE: Audio						
LEASE TIME: 11:53:15 AM	CALL EXPIRATION: Jun 9, 2025						
ALL WAIT TIME: 00:00:02	ORIGINAL CALL ID: f2ccb262-8a	72-428e-896c-d8f9ea791	8c2				
AGS: 🔖 Tag							

Information at the top-left hand side of the screen includes the user name, date and time and status e.g. "PLAYING". On the top-right hand side of the screen includes the elapsed playback time and the total playing time.

The figure below displays a call with two participants.

✓ ^	0	Adele Vance Jur	n 10, 2024 16:48 PM			None				Adele Vance +1	Adele Vance	Normal	Internal Meeting	Note (1)
		2												
		0:00											32:21	
		Insert a new note		>		» 5	0	Ċ	۲			Adele Va	nce 🛛 🛑 Alex Wilber	
		ANSWER TIME: 16:48:36 PM	RECORDING TYPE: Audio											
		RELEASE TIME: 17:20:59 PM	CALL EXPIRATION: Jun 10, 2	025										
	CALL WATT TIME: 00:00:01 ORIGINAL CALL ID: d979fa44-aef1-46b0-b341-6id9ff4e6028													
		TAGS: 🍆 Tag												

The figures below displays a call with three participants.

Interactions									ŕ
Total Recordings: 11					3 Reset Search Saved	Searches v	Save Search		: Action
0	USER NAME 💠 DATE	START TIME 💠	DURATION	DIRECTION	CALLED PARTY	CALLING PARTY 👙	RELEASE CAUSE	CALL TYPE NOT	ES
Ŧ	Search * 06/09/2024-06/16/2024 ×			Select	* Search	Search	Select •	Select • Se	arch
• • •	Adele Vance Jun 16, 2024 16:47 PM	16:47:33 PM	00:39:03	None		Adele Vance	Normal	Internal Meeting	Note
	0.02	1 0 5					💼 Adala Vanca – 💼 Al	39:01	
							Vuele vance Vance	ex whiter +1	
	answer time: 16:47:36 PM Tags: 🐞 Tag								
	RELEASE TIME: 17:26:39 PM RECORDING TYPE: Audio CALL WAIT TIME: 00:00:03 CALL EXPIRATION: Jun 16, 202	5							
	PARTICIPANTS: Adele Vance +2 ORIGINAL CALL ID: 7dd11fac-ae	c51-40e8-8749-c74ea7	2b7078						
- v G	Adele Vance Ju	× 1:53:54 PM	00:50:39	None		Adele Vance	Normal	Internal Meeting	Note
• • •	Adele Vance Ju Alex Wilber	1:53:36 PM	00:00:03	None		Adele Vance	Normal	Internal Meeting	Note
- × Ø	Adele Vance Ju Christie Cline	3:52:25 PM	06:00:10	None		Adele Vance	Normal	Internal Meeting	Note
-	<	>							
Interactions									
Total Recordings: 3					3 Reset Search Sa	wed Searches	- Save Se	arch 🛛 🕸 Select Column	ns : Action
0	USER NAME 💠 DATE	START TIME ф	DURATION	DIRECTION	CALLED PARTY	CALLING PARTY	RELEASE CAUSE	CALL TYPE	NOTES
Ŧ	Search • 06/11/2024 - 06/18/2024 ×			Select	* Search	Search	Select	* Select *	Search
• • •	Adele Vance Jun 16, 2024 16:47 PM	16:47:33 PM	00:39:03	None		Adele Vance	Normal	Internal Meeting	Note
	0.00			-				39:03	
	Insert a new note		9 🔽 🤅 🤅	Ð			Adele Vanci	e Alex Wilber +1	
	ANSWER TIME: 16:47:36 PM TAOS: 🔖 Tag								
	RELEASE TIME: 17:26:39 PM RECORDING TYPE: Audio	125							
	PARTICIPANTS: Adele Vance +2 ORIGINAL CALL ID: 7dd11fac-	ac51-40e8-8749-c74e	a72b7078						
• • C	Adele Vance Jun 16, 2024 14:53 PM	14:53:54 PM	00:50:39	None		Adele Vance	Normal	Internal Meeting	Note
	Adele Vance Jun 16, 2024 14:53 PM	14:53:36 PM	00:00:03	None		Adele Vance	Normal	Internal Meeting	, Note

Field	Description
Time line	The Time line displays the call segments of the recording which are color- coded according to the speaker. In the example below, there are two participants in the call, Alex Wilber and Christie Cline.
	11.20 Tr.49 Insert a new note Alex Wilber Christie Cline 1
Time line scroll bar	Drag the Time line scroll bar to the desired segment of the recording; the elapsed time is displayed below the scroll bar.
Player Controls	
Insert a new note	> (1) (5) (6) (6) (7) (7) (7) (7) (7) (7) (7) (7) (7) (7

Field	Description							
	Adjusts playback volume. Hover over to display the scroll bar.							
5	Jumps to previous segment in the recording.							
C	Jumps to next segment in the recording.							
(\mathbf{b})	Playback speed levels: .5 (slowest) .75 1 (default normal speed) 1.25 1.5 1.75 2 (fastest)							
←→ ←→ 2nd Recording	Switches between Single and Double Recording BOT applications.							
Information Fields	 Information Fields (see Interactions on page 90): Answer Time Release Time Call Wait Time 							

Field	Description
	Tags (click to display tags defined for the call).
	Recording Type
	Call Expiration
	Original Call ID
Notes	Insert a new note in the text box. Click the note icon to view an existing note.
	11.20
	Insert a new note > 40 5 0 6 5 Alex Wilber 6 Christie Cline +1

Filtering in Time line

The Time line lets you filter display according to the recorded voice of each participant. A Unique color-code is assigned to each participant where the colored segment indicates the voice recorded for the participant.

> To filter in the Time line:

- **1.** Under the Time line, click the name of the participant whose recorded segments you wish to view.
- If the interaction includes three or more participants, click the +<number of additional participants> link and then select the check box is the speaker to view their recorded segments.

	500	> < 5 O & 5	Mogan Bowen Modan Bowen Modadministrator
• •	Lynne Robbins Jul 31, 2024 13:38 PM	13:38:58 PM 00:08:14	Lynne Robbins Conference Normal Internal Meeting
	5 oo Insert a new note ANSWER TIME: 13:39:02 PM TAGE: S Tag	> 🔹 🦻 🕲 🖘	Megan Bowen Lynne Robbins Solution MOD Administrator

Figure 5-1: Recorded Segments for Lynne Robbins

• • •	Megan Bowen	Jul 31, 2024 13:39 PM	13:39:21 PM	00:07:39		Megan Bowen Norr	nal Internal Meeting
							_
	0:00						0.00
	Insert a new note >		• • 5 (> ৫ ⊙ ≒	🔵 Megan E	3owen 🛛 🌔 Lynne Robbins	+1 Reset

Figure 5-2: Recorded Segments for Megan Bowen

• • •	Megan Bowen Jul 31, 3	2024 13:39 PM	13:39:21 PM	00:07:39		Megan Bowen	Normal	Internal Meeting
			_	_			_	
	0:47						0:52	
	Insert a new note	>	∎» (5) 🤇	6 🕑	← ●	Megan Bowen 💧 Lynne Rob	obins +1 Reset	
	ANSWER TIME: 13:39:37 PM	TAGS: 🔖 Tag						
	RELEASE TIME: 13:47:17 PM	RECORDING TYPE: Audio						

3. Click **Reset** to display recorded segments for all participants.

Figure 5-3: Recorded Segments for All Participants

• • •	Megan Bowen Jul 31, 2024 13:39 PM	13:39:21 PM 00:07:39	Megan Bowen Normal	Internal Meeting
	Insert a new note	> ◀ 5 0 ৫ ④ ≒	Megan Bowen OLynne Robbins +1	

Downloading an Audio Call

You can download an audio call. The file is downloaded in **.ogg** format.. Calls can be downloaded one at a time.

> To download an audio call:

1. In the Interactions page, select the check box adjacent to the call that you wish to download.

	Interactions											
•	Total Recor	dings: 12	Selected Recordings: 1				3 Reset Search Sa	red Searches	* Save Searc	h # Select Col	umns	i Action
E			USER NAME +	DATE	DIRECTION	CALLED PARTY	PARTICIPANTS	CALLING PARTY	RELEASE CAUSE	CALL TYPE	NOTI	Download Aud
*		₹	Search •	06/06/2024-06/13/2024 ×	Select •	Search	Search	Search	Select +	Select +	Se	Delete Calls
	• •	0	Adele Vance	Jun 10, 2024 18:52 PM	None		Adele Vance +1	Adele Vance	Normal	Internal Meeting		Note
	•	0	Adele Vance	Jun 10, 2024 18:52 PM	None		Adele Vance	Adele Vance	Normal	Internal Meeting		Note
>	☑ ^	O	Adele Vance	Jun 10, 2024 16:48 PM	None		Adele Vance +1	Adele Vance	Normal	Internal Meeting		Note (1)
o									32.21			
?			Insert a new note	>	4) 5 오	¢ ()			Adele Van	ce 🛑 Alex Wilber		
?			Insert a new note ANSWER TIME: 16:48:36 RELEASE TIME: 17:20:55 CALL WAIT TIME: 00:003 TAGS: Tag	SPM RECORDING TYPE: Audio PPM CALL EXPERITOR: Jun 10, 2025 01 ORIGINAL CALL ID: d979fe44-ae11-4680-b	141-61d9114e6028	¢ Ð			Adele Van	ce 🛛 Alex Wilber		
? © AV	•	8	Insert a new note ANSWER TIME: 16:48:36 RELEASE TIME: 17:20:56 CALL WAIT TIME: 00:00: TAOS: Tag Adele Vance	SPM RECORDING TYPE: Audio PM CALL EXPENTION: Jun 10, 2025 01 OBIONAL CALL ID: 9979644-sef1-4680-bp Jun 10, 2024 16-41 PM	49 5 0 441-6fd9ff4e6028 None	¢ Ð	Adele Vance	Adele Vance	Adele Van	ce Alex Wilber		Note
? ♥ ♥♥	· ·	8	Insert a new note Answer Twe: 16:48:34 RELEASE TWE: 17:20-56 CALL WATT TWE: 00:00: TAGS: TAGS: Adele Vance Adele Vance	3PM recommon trye: Audio PM CALL EXPRATOR: Jun 10, 2025 01 omonuut call in: d979fa44-wef1-4680-b Jun 10, 2024 10-41 PM Jun 10, 2024 10-34 PM	4) (5) (0) xd-6tds/t4e6028 None None	€ €	Adele Vance Adele Vance	Adele Vance Adele Vance	Adele Van	ce Alex Wilber		Note Note

2. From the Action menu, choose Download Audio.



An **.ogg** file is downloaded.

Exporting Interaction to Excel

You can export an interaction to an Excel file.

➤ To export a call:

- 1. In the Icon pane, click 🔽.
- 2. Select the check box adjacent to the call that you wish to export.

	Inte	ractions	6										Â
•	Tota	al Recordii	ngs: 11	Selected Recordings: 2					3 Reset Search Saved S	Searches +	Save Search 🗮 Se	elect Columns	E Action
E				USER NAME 💠	DATE	START TIME \$	DURATION	DIRECTION	CALLED PARTY \$	PARTICIPANTS	CALLING PARTY	RELEASE CAUSE	Download Audio
*			10 10	Search •	06/06/2024 - 06/13/2024 ×	TO-GOOD F M	00101100	Select	✓ Search	Search	Search	Select	Delete Calls
		~	9	Adele Vance	Jun 10, 2024 16:31 PM	16:31:23 PM	00:03:01	None		Adele Vance	Adele Vance	Normal	Internal F
,		~	⊗	Adele Vance	Jun 10, 2024 16:29 PM	16:29:14 PM	00:16:00	None		Adele Vance +1	Adele Vance	Normal	Internal F
,		^	0	Adele Vance	Jun 6, 2024 18:37 PM	18:37:04 PM	00:33:37	None		Adele Vance	Adele Vance	Normal	Internal P
¢ ? ⊗				0.50 Inserta new note RELEASE TIME: 19:10-42 CALL WAIT TIME: 00:00: TAGS: Tag	PM RECORDING TYPE: Audio PM CALL EXPRATION: Jun 6, 2025 01 ORIGINAL CALL ID: 344334467-669	4 ∂	5 C	۲			Adeie	23.36 Vance	

3. From the Actions drop-down list, choose **Export to Excel**. A .csv file is downloaded.



Report Header
Requested By Adele Vance
Created At 2024-06-13T10:08:05.058Z
Call Id Target Display Name Target Upn OnBehalfOf TransferredBy TransferredTo Called Party Calling Party Answered By Answered time Start Time Release Time SipCallId SysCallId Call Direction Call Type Release Cause Notes Participants Files Media Audio Status Expiration QueueName DoubleBecordingType PairedCall T

Call Link ags 6661d7a0dd2ca9b8cf1f0879 AdeleV@M365x21689653.OnMicrosoft.com AdeleV@ M365x21689653.OnMicrosoft.com Adele Vance Conference 2024-06-06T15:37:05.617Z 2024-06-06T15:37:04.000Z 2024-06-06T16:10:42.667Z e31f6000-c738-46c1-b1a0-3eaa4bc415cf 34d3d467-6697-4b12-9ec1-d9e13a2ea9c3 None Conference_ InternalNormalAdele Vancee31f6000-c738-46c1-b1a0-3eaa4bc415cf_05_6166.opusAvailable2025-06-06T15:37:04.000ZPrimaryhttps://stngqa.ailogix.net/ui/interactions/6661d7a0dd2ca9b8cf1f0879 66670433055f2769a12f2019 AdeleV@M365x21689653.OnMicrosoft.com AdeleV@ M365x21689653.OnMicrosoft.com Adele Vance Conference 2024-06-10T13:48:36.867Z 2024-06-10T13:48:35.000Z 2024-06-10T14:20:59.056Z 6a1f5c00-ff9c-41dd-aabd-0ec1d2232efd d979fa44-aef1-46b0-b34f-6fd9ff4e6028 None Conference_ Internal Normal Call with Alex Adele Vance; Alex Wilber 6a1f5c00ff9c-41dd-aabd-0ec1d2232efd_36_8665.opusAvailable2025-06-10T13:48:35.000ZPrimaryhttps://stngqa.ailogix.net/ui/interactions/66670433055f2769a12f2019

The following shows an exported interaction for a Conference call between two participants.

Call Id Target Display Name Target Upn OnBehalfOf TransferredBy TransferredTo Called Party Calling Party Answered By Answered time Start Time Release Time SipCallId SysCallId Call Direction Cal Type Release Cause Notes Participants Files Media Audio Call Status Expiration QueueName DoubleRecordingType PairedCall Т Call Link ags 666eed2e2a44e64a82cda43a AlexW@M365x21689653.OnMicrosoft.com AlexW@M3 65x21689653.OnMicrosoft.com Alex Wilber 2024-06-16T13:48:49.381Z2024-06-16T13:48:30.343Z16T14:27:01.034Z1-8692352b214e4a418aaea3520240616134830347dd11fac-ac51-40e8-8749-2024-06-1-8692352b214e4a418aaea352fd63fd35c74ea72b7078 None Conference_Internal Normal Sales Meeting; Sales feedback Adele Vance;Alex Wilber;Christie Cline de1f5c00-ce35-4e78-a89f-e02e6ee28165_30_3438.opus Available 16T13:48:30.343Z Primary Help Desk 2025-06https://stngqa.ailogix.net/ui/interactions/666eed2e2a44e64a82cda43a 66744b879f40fd53de91e70e AdeleV@M365x21689653.OnMicrosoft.com AdeleV@ M365x21689653.OnMicrosoft.com Adele Vance Conference 2024-06-20T15:32:25.266Z 2024-06-20T15:32:23.000Z 2024-06-20T16:16:22.014Z 761f5c00-da6f-4283-8c58c25f349f167f cd05e4fb-b37b-4843-a1c2-36413f6fcad0 None Conference_ Internal Normal Adele Vance; Alex Wilber 761f5c00-da6f-4283-8c58-c25f349f167f_25_2654.opus Available 2025-06-20T15:32:23.000Z Primary https://stngqa.ailogix.net/ui/interactions/66744b879f40fd53de91e70e

The table below describes the fields in the exported data record.

Field	Description				
Call Id	Unique call id				
Target Display Name	The M365 username of the targeted user.				
Target Upn	The M365 username of the targeted user.				
OnBehalfOf	The name of the party for whom the call was transferred.				
TransferredBy	The name of the party who transferred the call.				
TransferredTo	The name of the party to whom the call was transferred.				
Called Party	The M365 user receiving the call.				
Calling Party	The M365 user initiating the call.				
Answered By	The party who answered the call.				
Answered time	The time that the call was answered.				
Start Time	The time when voice recording commenced.				
Release Time	The time the call was released.				
SipCallId	The SIP CallId passed in the SIP Header.				
SysCallId	Indicates the ID used to identify the call (also known as 'Original Call ID'). This value may be either the original call id or scenario id (Teams). For example, when recording a Teams call between user A and B the id of the call between A and B is displayed. This ID is also displayed in the Teams CDR.				
Call Direction	Incoming or Outgoing				
Call Type	 Indicates the type of the call. One of the following values: Internal Meeting External Meeting Internal Meeting with External Participants 				

Field	Description				
	Externalp2pPSTN p2p				
Release Cause	Indicates the reason why a call is disconnected. One of the following values:				
	Normal: The call was answered and then released.				
	Failure: The call or recording was stopped due to an error.				
	Missed: The Targeted user didn't answer an incoming call.				
	Abandoned: The Targeted user made an outgoing call and hanged up before the call was answered				
	Transferred: The call was transferred to another call.				
Notes	Option to add notes to the Interaction record (see Adding Notes to Interactions on page 125).				
Participants	The names of the call participants.				
Files	This field is currently not supported.				
Media Audio Status	One of the following values:				
	Available: The interaction is available for playback.				
	Pending: The interaction is pending database synchronization.				
	Recording: The Interaction is currently being recorded.				
	Failed: The recording failed.				
	Unavailable: The recording is unavailable.				
	Deleted: The recording has been deleted.				
Expiration	Indicates the date that the call recording is purged as defined in the Recording profile.				
QueueName	Teams Queue Call Instance ID when configured in the Recording profile.				
DoubleRecordingType	Indicates whether Essentials (Single Recording Audio License) or Pro (Double Recording Audio & Redundancy license) is configured for the service.				
PairedCall	Indicates whether Geographical Redundancy Storage is				

Field	Description				
	enabled in a paired region for data disaster recovery (enabled by default when a Pro License is configured for the service).				
Tags	Names of any tags assigned to the calls.				
Call Link	Opens a summary of the call details with the Call Id in the URL . For example https://stngqa.ai- logix.net/ui/interactions/666ed2822a44e64a82cda302				
	Dar Take KBA42MM (Interview) In Balances Could Harm (Interview) Interview) Interview (Interview) Interview) Interview (Interview) Interview) Interview (Interview) Interview) Interview (Interview) Interview) In				

Deleting Calls

Interaction Insights is deployed in several recording scenarios such as compliance, quality monitoring and for malicious call recordings. While regulatory compliance requires that recordings are deleted automatically after a regulated time frame, quality monitoring scenarios requires the ability to manually delete recordings. Consequently, calls can be deleted on demand by users with the appropriate permissions in security profiles (see Managing Security Profiles).

If a user in on Legal Hold, their Calls cannot be deleted (see Managing Users).When calls are deleted, any associated evaluations are also deleted.

➤ To delete calls:

1. Search for calls according to desired search criteria (see Filtering Interactions and Active Calls Information on page 96).

Interactions									
Total Recordings:	23 Selected Recordings:	1				3 Reset Search Saved Searches	 Save Search 	h 🗮 Select Columns	E Action
	USER NAME 👙	DATE	START TIME 👙	DURATION	DIRECTION	CALLED PARTY 👙 CALLING	PARTY 🗘 RELEASE CAUSE	CALL TYPE N	Download Audio
3	- Search -	05/28/2024 - 06/04/2024 ×			Select	- Search Search	Select -	Select +	Export to Excel
- × (grouping1	Jun 3, 2024 06:43 PM	18:43:40 PM	00:01:05	None	grouping	1@ai-logi Normal	Internal Meeting	, Note
□ × (grouping6	Jun 3, 2024 06:40 PM	18:40:15 PM	00:01:54	None		Normal	Internal Meeting	, Note
□ ~ (grouping4	Jun 3, 2024 06:40 PM	18:40:11 PM	00:01:59	None		Normal	Internal Meeting	Note
• • (grouping3	Jun 3, 2024 06:40 PM	18:40:09 PM	00:02:01	None		Normal	Internal Meeting	, Note
✓ ✓ (grouping2	Jun 3, 2024 06:40 PM	18:40:07 PM	00:02:02	None		Normal	Internal Meeting	, Note

2. Select the check box adjacent to each call that you wish to delete.



Only the filtered and selected recordings are deleted.

3. From the Action drop-down list, select **Delete Calls**.

A Delete Calls					
Are you sure you want to permanently delete this calls? This action cannot be reversed.					
Total of 1 calls records are selected for deletion. These calls will be processed in the next retention cycle.					
 Delete calls's metadata and media Delete calls's media 					
Authorized By					
Note					
Cancel Delete					
▲ Delete Calls					
Are you sure you want to permanently delete this calls? This action cannot be reversed.					
Total of 1 calls records are selected for deletion. These calls will be processed in the next retention cycle.					
 Delete calls's metadata and media Delete calls's media 					
GlobalAdmin					
Note					
Purging call data					
Cancel Delete					

 Select Delete call's metadata and media to delete both call metadata and media or select Delete call's media to delete only media.

- 5. In the Authorized By text box, enter the name of the operator approving the action.
- In the Note text box, enter free text describing the reason for the delete, and then click Delete.
- 7. Open the Audit Trails page to monitor the deletion process.

Settings	Audit trail		,
System Settings ^	Total Audits: 272		Export
Connect to your M365	DATE AND TIME 💠 NAME 💠	ACTION \Leftrightarrow ITEM \Leftrightarrow	DESCRIPTION \$
Tools	MM/DD/YYYY - MM/DD/YY Contains	Select + Select +	Contains
Storage			
Tags	Jun 04, 2024 03:05:10 PM	delete call	deleted calls media and metadata https://stngdev.ai-logix.net/ui/interactions/665de3d8057f26867cbf306f with record count 1
Branding	Jun 04, 2024 02:54:36 PM Brian Kling	access user	Brian Kling accessed Users
Licenses			
	Jun 04, 2024 02:54:33 PM	access interactions	brodym@ai-logix.net accessed Interactions Page

Customizing Columns

You can customize the columns that are displayed to remove clutter and optimize the page display according to analysis requirements. Displaying and hiding columns affects whether the same information is displayed below the Call Time line. In the example below, the 'Answer Time' is shown below the Time line; however, once the 'Answer Time' column is enabled, the 'Answer Time' data column is displayed, and this data is removed from the Time line display.

•	Lynne Robbins Jul 15, 2024 15:14 PM	15:14:30 PM 00:00:52	Incoming Lynne Robbin	ns MOD Administrator Normal	Internal p2p Note
	S 00 Insert a new note ANSWER TIME: 15:14:36 PM RELEASE TIME: 15:15:29 PM CALL WAT TIME: 05:00:06 CALL EXPRATOR: PARTICIPANTS: MOD Administrator 11 ORIGINAL CALL ID:	► 1 3 • 1 Audio Jul 15, 2025 Bød3cab0-93bf-48ød-ødf3-77337b8øe9b3	ġ ⊕ ≒		000 MOD Administrator
Interactions					
Total Recording	USER NAME 💠 DATE	START TIME 💠 ANSWER TIME	DURATION DIRECTION	CALLED PARTY CALLING PARTY CALLING PARTY	
			Select +	Search	Select + Select +
	CALL WAIT TIME: 00:00:32 CALL EXPIRATION: Jul 15, PARTICIPANTS: Megan Bowen +1 ORIGINAL CALL ID: ca168 TAGS: TAG	2025 251-6660-4978-bc60-0419772a40b0			Â
•	MOD Administrator Jul 15, 2024 15:14 PM	15:14:56 PM 15:15:28 PM	Incoming	MOD Administrator Megan Bowen	Internal p2p
•	Lynne Robbins Jul 15, 2024 15:14 PM	15:14:30 PM 15:14:36 PM	00:00:52 Incoming	Lynne Robbins MOD Administrator	Normal Internal p2p
	noet a new note	► ● 5 ○ ¢	()	• MC	0.00 DD Administrator
	RELEASE TME: 15/15/29 PM RECORDING TYPE: Å CALL WAT TME: 00:00:06 CALL EXPRATION: JA PARTICIPANTS: MOD Administrator +1 0808/MAL CALL ID: b TAOS: ● Tag	dio 115, 2025 Id3cab0-93bf-48ad-adf3-77337b8ae9b3			

The following list displays the maximum number of parameters that are displayed under the Time line (when all columns are disabled).

^	MOD Administrator	Jul 15, 2024 15:14	PM		
	0.00				0:17
	Insert a new note	>	م) 🕒 🔹	₫ ④ ⇔	MOD Administrator
	START TIME: 15:14:30 PM	DURATION: 00:00:52	CALLING PARTY: MOD Administrator	NOTES: Note	
	ANSWER TIME: 15:14:36 PM	DIRECTION: Outgoing	RELEASE CAUSE: Normal	RECORDING TYPE: Audio	
	RELEASE TIME: 15:15:29 PM	CALLED PARTY: Lynne Robbins	CALL TYPE: Internal p2p	CALL EXPIRATION: Jul 15, 2025	
	CALL WAIT TIME: 00:00:06	PARTICIPANTS: MOD Administrator +1	TAGS: 🔖 Tag	ORIGINAL CALL ID: b9d3cab0-93bf-48ad-adf3-77337b8ae	963

> To customize columns:

1. In the Toolbar, select Select Columns.

辈 Select Columns	: Action
Find column	
User Name	^
Date	
Start Time	
Answer Time	
Release Time	
Hold/Retrieve Time	
On Behalf Of	
Transferred By	
Transferred To	
Call Wait Time	
Ouration	
Direction	
Called Party	~
Hide All	Show All

2. Slide the roller to the right adjacent to the column that you wish to display.

3. Slide the roller to the left adjacent to the column that you wish to hide.

Assigning Tags to Interactions

You can assign tags to Interactions, where the tag serves as a reminder or keyword that can be later used to retrieve the call details and for segmentation in interaction analysis.

► To assign tags:

- 1. In the Icon pane, click 💒.
- 2. Select the check box adjacent to the interaction that you wish to tag.
- **3.** From the Action drop-down list, choose **Tag**.

-	Interacti	ons										
	Total Rec	ordings: 14	Selected Recordings:	1				3 Reset Search Sav	ved Searches	* Save Searc	h 🗄 Select Coli	umns : Action
E.	•		USER NAME 👙	DATE	START TIME \$	DURATION	DIRECTION	CALLED PARTY	CALLING PARTY $\stackrel{+}{\mp}$	ANSWERING PARTY	RELEASE CAUSE	CA Download Audio
- -		Ŧ	Search •	07/01/2024 - 07/29/2024 ×			Select	• Search	Search	Search	Select •	Tag
	• •	C	Megan Bowen	Jul 15, 2024 15:14 PM	15:14:56 PM	02:42:29	Outgoing	MOD Administrator	Megan Bowen	MOD Administrator	Normal	Int 🖀 Delete Calls
	•	C	MOD Administrator	Jul 15, 2024 15:14 PM	15:14:56 PM	02:42:29	Incoming	MOD Administrator	Megan Bowen	MOD Administrator	Normal	Internal p2p
	 	C	Lynne Robbins	Jul 15, 2024 15:14 PM	15:14:30 PM	00:00:52	Incoming	Lynne Robbins	MOD Administrator	Lynne Robbins	Normal	Internal p2p
,	•	C	MOD Administrator	Jul 15, 2024 15:14 PM	15:14:30 PM	00:00:52	Outgoing	Lynne Robbins	MOD Administrator	Lynne Robbins	Normal	Internal p2p
	• •	୯	Lynne Robbins	Jul 15, 2024 15:10 PM	15:10:15 PM		Outgoing	MOD Administrator	Lynne Robbins		Abandoned	Internal p2p
	•	C	MOD Administrator	Jul 15, 2024 15:10 PM	15:10:14 PM		Incoming	MOD Administrator	Lynne Robbins		Missed	Internal p2p
*	• •	C	Megan Bowen	Jul 15, 2024 15:09 PM	15:09:28 PM	00:03:32	Incoming	Megan Bowen	MOD Administrator	Megan Bowen	Normal	Internal p2p
	• •	C	MOD Administrator	Jul 15, 2024 15:09 PM	15:09:28 PM	00:03:32	Outgoing	Megan Bowen	MOD Administrator	Megan Bowen	Normal	Internal p2p
5	• •	C	Megan Bowen	Jul 15, 2024 14:27 PM	14:27:15 PM	00:01:13	Outgoing	MOD Administrator	Megan Bowen	MOD Administrator	Normal	Internal p2p
MA	• •	C	MOD Administrator	Jul 15, 2024 14:27 PM	14:27:13 PM	00:01:13	Incoming	MOD Administrator	Megan Bowen	MOD Administrator	Normal	Internal p2p
_	• •	C	MOD Administrator	Jul 15, 2024 14:15 PM	14:15:10 PM	00:10:24				MOD Administrator	Normal	Internal Meeting
	• •	C	MOD Administrator	Jul 15, 2024 14:11 PM	14:11:13 PM						Abandoned	Internal Meeting
·ψ	• •	C	Megan Bowen	Jul 15, 2024 14:10 PM	14:10:47 PM	00:15:11			Megan Bowen	Conference	Normal	Internal Meeting

4. From the Set Tags drop-down list, select the check box adjacent to the tag that you wish set.

÷.

Set Tags(s)

Setting tag(s) for multiple calls automatically overwrites any previously associated tags.

	- Set Tags(s) -		n –
		*	
_		SalesOrder	Ī
		Marketing Positioning	
		Key Financials	ľ
		Inventory Control	
		Help Desk	
		Executive Summary Call	



- 5. Click Save.
- 6. Open the Time line for the interaction. Notice the link to the tag that you just added.

· ·	C	MOD Administrator	Jul 15, 2024 15:14 PM	15:14:56 PM	15:15:28 PM	02:42:29	Incoming	MOD Administrator	Megan Bowen	MOD Administra
 	C	Lynne Robbins	Jul 15, 2024 15:14 PM	15:14:30 PM	15:14:36 PM	00:00:52	Incoming	Lynne Robbins	MOD Administrator	Lynne Robbins
		0:00							0:09	
		Insert a new note	>	🔹 🕼 🕪	ć (€) ≒			🛑 MOD Administra	tor Reset	
		RELEASE TIME: 15:15:29	PM RECORDING TYPE: Audio							
		CALL WAIT TIME: 00:00	CALL EXPIRATION: Jul 15	2025						
		PARTICIPANTS: MOD Ad	Iministrator +1 ORIGINAL CALL ID: b9d3	ab0-93bf-48ad-adf3-	77337b8ae9b3					
		TAGS: 🔖 Tag (1)]							

0.00 Insert a new note	Set Tags(s) Setting tag(s) for multiple calls automatically overwrites any previously associated tags. Set Tags(s) Mey Financials ×	C.50 MOD Administrator Reset	
RELEASE TIME: 15:15:29 PM	RECO Cancel Save		1
CALL WAIT TIME: 00:00:06	CALL EXPIRATION: JUL 10, 2020		
PARTICIPANTS: MOD Administrator +1	ORIGINAL CALL ID: b9d3cab0-93bf-48ad-adf3-77337b8ae9b3		
TAGS: 💊 Tag (1)			

Adding Notes to Interactions

You can attach notes to Interactions containing any text or keywords that may later assist to identify the interaction when specifying search criteria (see Filtering Interactions and Active Calls Information on page 96).

> To add notes:

1. In the Icon pane, click , and then click the note icon adjacent to the interaction for which you wish to attach a note.

teractions	3							
otal Recordir	ngs: 17			3 Reset Search	Saved Searches	* Save S	earch 🗄 Select Col	umns : Action
	USER NAME	DATE	DIRECTION	CALLED PARTY	CALLING PARTY	RELEASE CAUSE	CALL TYPE	NOTES
	≂ Search ▼	06/10/2024-06/17/2024 ×	Select	* Search	Search	Select	• Select •	Search
~	Christie Cline	Jun 16, 2024 16:49 PM	None			Normal	Internal Meeting	, Note
	Alex Wilber	Jun 16, 2024 16:48 PM	None			Normal	Internal Meeting	P Note
~	Adele Vance	Jun 16, 2024 16:47 PM	None		Adele Vance	Normal	Internal Meeting	Note
□ ^	Christie Cline	Jun 16, 2024 15:05 PM	None				Internal Meeting	Note

2. Click the arrow adjacent to the note text that you entered.

Add Note	
Sales Meeting	>

The new note is added.

Add Note	
06/17/2024 07:05 PM 💉 📋 Sales Meeting	
Insert a new note	>

3. You can also add an a new note from an existing note inside the Media player. Click the note icon above the player.

• •	Adele Vance Ju	n 10, 2024 16:48 PM	16:48:35 PM	00:32:22	None		Adele Vance	Normal	Internal Meeting	Note (1)
				Edit Note(s) 16/10/2024 07:27 PM	/ 1					
	Insert a new note	>	Ins	ert a new note		>		Adele Vance	Alex Wilber	

4. Enter the note text and then click the arrow.

		Edit Note(s) O(6/10/2024 07:27 PM Call with Alev	
3.27 Insert a new note	>	event a new roleRequest Sales figures	20.54 Adele Vance Alex Wilber

The new note is added.



You can alternatively add notes below the Media player.

•	Alex Wilber	Jun 16, 2024 16:48 PM	16:48:30 PM	00:38:11	None		Normal	Internal Meeting	Note (1)
	•								
	0:00 Insert a new note		1 0 5				🗖 Adala Vanca 🛛 🔵	0.00	
	Sales recuback			000					
 	Adele Vance	Jun 16, 2024 16:47 PM	16:47:33 PM	00:39:03	None	Adele Vance	Normal	Internal Meeting	Note
<									>

Managing Active Calls

The Active Calls screen lets you view Active Calls of the targeted users of the customer tenant (users configured in recording profiles activated during the Onboarding or in Day Two (see Managing Recording Profiles on page 41). Global admin can view the Active calls for all tenant users. For the Calling party user, you can drill down to view the details of the other participants (Called Parties).

See also:

- Assigning Tags to Active Calls below
- Adding Notes to Active Calls on page 133
- My Active Call on page 139
- Exporting Active Calls on page 134

> To manage Active Calls:

In the Icon pane, click ²/₄.

B	Active	Calls								
,	Total Cal	lls: 3								🛓 Export
E	STATUS	USER NAME 💠	START TIME 👙	DURATION	DIRECTION	PARTICIPANTS	CALLED PARTY \$	CALLING PARTY \$	TAGS	NOTES
Ĩ		Search 🔹 🗘			Select +	Contains 👻 🗘	Contains	Contains	Select 🔹	Select
	٢	Christie Cline	15:05:49 PM	00:03:21	None				💊 Tag (1)	Note
	٢	Alex Wilber	14:54:42 PM	00:14:27	None				🗣 Tag (1)	Note
>	٢	Adele Vance	14:53:54 PM	00:15:16	None	Adele Vance +2		Adele Vance	💊 Tag (1)	Note

The figure below shows the Active Calls page of the Global Admin user, who can view the Active calls of all users. In the example, Adele Vance is the Caller and Christie Cline and Alex Wilber are the two other participants in the call.

Active	Calls								
Total Ca	lls: 3								🛃 Export
STATUS	USER NAME 👙	START TIME 👙	DURATION	DIRECTION	PARTICIPANTS	CALLED PARTY	CALLING PARTY	TAGS	NOTES
	Search •			Select +	Contains -	Contains	Contains	Select •	Select
٢	Christie Cline	15:05:49 PM	00:06:20	None				🔖 Tag (1)	Note
٢	Alex Wilber	14:54:42 PM	00:17:27	None				🔖 Tag (1)	Note
٢	Adele Vance	14:53:54 PM	00:18:15	None	Adele Vance +2 Q. Search Adele Vance Alex Wilber Christie Cline <	×	Adele Vance	Trag (1)	Note

Assigning Tags to Active Calls

You can assign tags to Active Calls, where the tag serves as a reminder or keyword that can be later used to retrieve the call details and for segmentation in call analysis. In the example below, an Active Call is shown with three participants where a different tag is assigned to each participant in the call.

➤ To assign tags:

- 1. In the Icon pane, click 💒.
- 2. Click the Tag icon adjacent to the call that you wish to tag.

The figure below shows the Active Calls screen with Global admin permissions where each call participant is displayed a separate leg.

Active (Calls								
Total Call	s: 3								🛃 Export
STATUS	USER NAME 💠	START TIME 💠	DURATION	DIRECTION PART	TICIPANTS	CALLED PARTY	CALLING PARTY	TAGS	NOTES
	Search •			Select + Co	Contains 🔹	Contains	Contains	Select -	Select
٢	Christie Cline	15:05:49 PM	00:06:20	None				🔖 Tag (1)	Note
٢	Alex Wilber	14:54:42 PM	00:17:27	None				💊 Tag (1)	Note
2	Adele Vance	14:53:54 PM	00:18:15	None Adel	ele Vance +2 Q. Search Adele Vance Alex Wilber Christie Cline <	×	Adele Vance	Tog (1)	Note

3. From the Set Tags drop-down list, select the check box adjacent to the tag that you wish set.

÷.

Set Tags(s)

Setting tag(s) for multiple calls automatically overwrites any previously associated tags.

- Set Tags(s) -		
	*	
	SalesOrder	ī
	Marketing Positioning	
	Key Financials	
	Inventory Control	
	Help Desk	
	Executive Summary Call	



4. Click Save.

The figures below show the separate tags that are assigned to each user participant in the Active call.





The examples below show the My Active Calls tab for each respective call participant where in each case the logged in user is the user shown in the screen.

My Active Calls	
USER DETAILS	CALLED PARTY:
START TIME: 14:53:54 PM DURATION: 00:26:19 DIRECTION: None	PARTICIPANTS: Adele Vance +2 CALLING PARTY: Adele Vance
	Set Tags(s) Setting tag(s) for multiple calls automatically overwrites any previously associated tags. Set Tags(s) Key Financials X Cancel Save



Adding Notes to Active Calls

You can attach notes to Active calls containing any text or keywords that may later assist to identify the call when specifying search criteria (see Filtering Interactions and Active Calls Information on page 96).

> To attach notes:

1. In the Icon pane, click a or **, and then click the note icon adjacent to the active call for which you wish to attach a note.

	🛃 Export
Direction participants called party $\frac{A}{\Psi}$ calling party $\frac{A}{\Psi}$	TAOS NOTES
Select + Contains - Contains Contains	Select Select
None	🔖 Teg (1)
	DERCTION PARTICIPARTS CALLED PARTY © CALLING PARTY © Select • Contains • Contains Contains None

Weekly Status Call	>

2. Click the arrow adjacent to the note text that you entered.

Add Note	
💿 06/17/2024 05:15 PM 🧪 🧃 Weekly Status Call	
Insert a new note	>

Exporting Active Calls

You can export the list of Active Calls to an Excel file. A separate entry is created for each currently Active call.

> To export a list of active calls:

1. In the Icon pane, click 💒.

Active	Calls								
Total Ca	lls: 2								🛃 Export
STATUS	USER NAME 🍦	START TIME $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	DURATION	DIRECTION	PARTICIPANTS	CALLED PART	Y ≑ CALLING PARTY ≑	TAGS	NOTES
	Search 👻			Select +	Contains	• Contains	Contains	Select	Select
٢	Christie Cline	15:05:49 PM	20:57:54	None				🔖 Tag (1)	Note
٢	Alex Wilber	14:54:42 PM	21:09:01	None				🔖 Tag (1)	Note

2. Click the Export button to export data. The following shows an example exported file.

Report Header
Requested By MOD Administrator
Created At 2024-06-17T09:07:55.322Z
Search Criteria
Call Id Target Display Name Target Upn OnBehalfOf TransferredBy TransferredTo Called Party Calling Party Answered By Answered time Start Time Release Time SipCallId SysCallId Call Direction Call Type Release Cause Notes Participants Files Media Audio Status Expiration QueueName DoubleRecordingType PairedCall T ags Call Link
666ed2822a44e64a82cda302 AlexW@M365x21689653.OnMicrosoft.com AlexW@M3 65x21689653.OnMicrosoft.com Alex Wilber 2024-06- 16T11:55:01.621Z 2024-06-16T11:54:42.471Z 1- 8692352b214e4a418aaea352fd63fd35-2024061611544247 9d756424-e79c-4095- b2be-0cd364b74498 None Conference_ Internal Recording 2025-06- 16T11:54:42.471Z Primary SalesOrder https://stngqa.ai- logix.net/ui/interactions/666ed2822a44e64a82cda302
666ed51d2a44e64a82cda3cc ChristieC@M365x21689653.OnMicrosoft.com Chri stieC@M365x21689653.OnMicrosoft.com Christie Cline 2024-06-16T12:06:09.765Z 2024-06-16T12:05:49.196Z 1- a4a790f99c6c40edb5100de2ce57c2cb-2024061612054919 9d756424-e79c-4095- b2be-0cd364b74498 None Conference_ Internal Recording 2025-06- 16T12:05:49.196Z Primary Help Desk https://stngqa.ai- logix.net/ui/interactions/666ed51d2a44e64a82cda3cc

The table below describes the fields in the exported data record.

Field	Description
Call Id	Unique call id

Field	Description			
Target Display Name	The M365 username of the targeted user.			
Target Upn	The M365 username of the targeted user.			
OnBehalfOf	The name of the party for whom the call was transferred.			
TransferredBy	The name of the party who transferred the call.			
TransferredTo	The name of the party to whom the call was transferred.			
Called Party	The M365 user receiving the call.			
Calling Party	The M365 user initiating the call.			
Answered By	The party who answered the call.			
Answered time	The time that the call was answered.			
Start Time	The time when voice recording commenced.			
Release Time	The time the call was released.			
SipCallId	The SIP CallId passed in the SIP Header.			
SysCallId	Indicates the ID used to identify the call (also known as 'Original Call ID'). This value may be either the original call id or scenario id (Teams). For example, when recording a Teams call between user A and B the id of the call between A and B is displayed. This ID is also displayed in the Teams CDR.			
Call Direction	Incoming or Outgoing			
Call Type	 Indicates the type of the call. One of the following values: Internal Meeting External Meeting Internal Meeting with External Participants Externalp2p PSTN p2p 			
Release Cause	 Indicates the reason why a call is disconnected. One of the following values: Normal: The call was answered and then released. Failure: The call or recording was stopped due to an error. 			

Field	Description			
	Missed: The Targeted user didn't answer an incoming call.			
	Abandoned: The Targeted user made an outgoing call and hanged up before the call was answered			
	Transferred: The call was transferred to another call.			
Notes	Option to add notes to the Interaction record (see Adding Notes to Interactions on page 125).			
Participants	The names of the call participants			
Files	This field is currently not supported.			
Media Audio Status	One of the following values:			
	Available: The interaction is available for playback.			
	Pending: The interaction is pending database synchronization.			
	Recording: The Interaction is currently being recorded.			
	Failed: The recording failed.			
	Unavailable: The recording is unavailable.			
	Deleted: The recording has been deleted.			
Expiration	Indicates the date that the call recording is purged as defined in the Recording profile.			
QueueName	Teams Queue Call Instance ID when configured in the Recording profile.			
DoubleRecordingType	Indicates whether Essentials (Single Recording Audio License) or Pro (Double Recording Audio &Redundancy license) is configured for the service.			
PairedCall	Indicates whether Geographical Redundancy Storage is enabled in a paired region for data disaster recovery (enabled by default when a Pro License is configured for the service).			
Tags	Names of any tags assigned to the calls.			
Call Link	Opens a summary of the call details with the Call Id in the URL . For example https://stngqa.ai- logix.net/ui/interactions/666ed2822a44e64a82cda302			

Field	Description
	Interactions Interactins Interactions Interactions </th

My Active Call

The My Active Calls screen displays the details of any Active calls in the targeted user's Teams client. The call details are displayed so long as the call remains active. The Duration field increments while the call remains active. Multiple Active calls can be displayed.

See also:

- Assigning Tags to Active Calls on page 128
- Adding Notes to Active Calls on page 133
- > Do the following:
- 1. In the Icon pane, click 📥.

8	My Active Calls				
E	USER DETAILS	CALLED PARTY:			🔖 Tag 📑 Note
1	START TIME: 18:09:14 PM DURATION: 00:00:31 DIRECTION: None	PARTICIPANTS: Adele Vance CALLING PARTY: Adele Vance			
>					



The following figure shows an example of an Active call between two participants.

My Active Calls						
USER DETAILS	USER DETAILS LNAME: Addle Vance CALLED PARTY:					
START TIME: 16-48-35 PM DURATION: 00-02-47 DIRECTION: None	PARTICIPANTS: Adde Vance +1 CALLING PARTY: Adde Vance Adde Vance Adde Vance CALK Wilber C					
The number of participants is displayed for the Calling party only (the party initiating the call).



The following figure shows an example of an Active Call between three participants.

USER DETAILS CALLED PARTY: Tea START TIME: 16.47.33 PM PARTICIPANTS: Adeb/ Vance #2 Image: Calleng Party: Adeb Vance #2 Image: Calleng Party: Adeb Vance #2 DIRACTOR: 0.02.716 Calleng Party: Adeb Vance #2 Image: Calleng Party: Adeb Vance #2 Image: Calleng Party: Adeb Vance #2 DIRACTOR: Nome Calleng Party: Adeb Vance Image: Calleng Party: Adeb Vance #2 <	Active Calls		
START TIME: 18.47.33PM PARTICIPANTS: Adde Vance + DURATION: 002216 CALLING PARTY: Addee Vance Simuch X DIRECTION: None Addee Vance Addee Vance Addee Vance	USER DETAILS	CALLED PARTY:	🍫 Tag
DURATION: 0:02/18 CALLING PARTY: Addee Vang Salactin X DIRECTION: None Addee Vange Addee Vange Addee Vange	START TIME: 16:47:33 PM	PARTICIPANTS: Adde Vance +2	
Alex Wilber	DURATION: 00:27:16 DIRECTION: None	CALLING PARTY: Addet Vano 4. Search X. Addete Vance	
		Alex Wilber	



The following figure shows two Active calls for the user Alex Wilber.

My Active Calls			
USER DETAILS	CALLED PARTY:		🏷 Tag 🗾 Note
START TIME: 16:48:30 PM DURATION: 00:36:27 DIRECTION: None	PARTICIPANTS: CALLING PARTY:		
USER DETAILS FULL NAME: Alex Wilber	CALLED PARTY:		🔖 Tag (1) 📑 Note
START TIME: 14:54:42 PM DURATION: 02:30:15 DIRECTION: None	PARTICIPANTS: CALLING PARTY:		

System Settings

- Tools on page 144
- Bring-Your-Own-Storage on page 149
- Manage Tags on page 155
- Branding on page 158
- Licenses on page 160

Connect to M365

The M365 Settings screen lets you manage your connections to the M365 platform. You most likely provided consents during the Quick Start wizard (Quick Start on page 18). Upon consent an Enterprise application is created on your M365 tenant with the required permissions (see table below for details).



Global Admin privileges for the customer Azure tenant are required to provide consents.

The table below describes the required consents and the Enterprise applications that are created on your M365 tenant.

Consent	Description
M365 Login	Provide the application permissions to authenticate users with your M365 tenant credentials. The application reroutes users to M365 for authentication (Azure Active Directory authentication-Microsoft OpenID Connect-Oauth 2).
	The permissions are required for the SmarTAP application to authenticate users utilizing your tenant AAD authentication, and Microsoft Open ID Connect (Oauth 2) authentication. The permissions enable Interaction Insights to reroute users accessing the Interaction Insights application either from a browser or from the Interaction Insights Teams application (see row below) to be authenticated according to your organizational M365 policy. The Deployment generates the Enterprise application <liveplatformser vername="">- auth. Youconsent to the following permissions:</liveplatformser>
	email – View users; email address (Delegated)
	 offline_access – Maintain access to data you have given it access to (Delegated)
	openid – Sign users in (Delegated)
	profile – View users' basic profile (Delegated)

Consent	Description
	User.Read – Sign in and read user profile (Delegated)
Publish Teams Client App in your Teams Store	Add the application to users Teams Clients for access of the application within Microsoft Teams. Click the publish button to access the app within your Teams store using M365 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups are users. This consent is part of the M365 Login application (shown above). In addition to the permissions shown above, the following are added: AppCatalog.Submit – Submit application packages to the catalog and application submissions.
	AppCatalog ReadWrite All – Read and write to all app catalogs
	Appearatog. Nead write. All in Nead and write to all app caralogs
	Publishing the app makes it available for users in the tenant organization within Teams store. Each user needs to add the application from their Teams admin center in order to access it from Teams.
Read Azure Active Directory Users and Groups	Provide the application permissions to read AAD groups and users from your M365 tenant to enable the groups' targeted users for recording and access to the application. Deployment of Interaction Insights generates the Enterprise application <liveplatformservername>-aad. Youconsent to the following permissions:</liveplatformservername>
	User.Read.All – Read all users' full profiles (Application)
	GroupMember.Read.All – Read all group memberships (Application)
Recording Calls (Teams Bot consent to join calls)	Provide the application's Teams Bot with permissions to join your Tenant's Teams calls to record the calls' info and media. The calls-app permissions are required for the Interaction Insights Bot application to join your Teams' tenant calls and to receive the media to be recorded. Deployment of Interaction Insights generates the Enterprise application <liveplatformservername>-hue. Youconsent to the following permissions:</liveplatformservername>
	 Calls.JoinGroupCall.All - Join group calls and meetings as an app (Application)
	 Calls.AccessMedia.All - Access media streams in a call as an app (Application)
Redundant Recording Calls (Second	Provide the application's Redundant Teams Bot with permissions to join your tenant's Teams calls to record the calls' info and media. The calls-app permissions are required for the Interaction Insights Bot application to

Consent	Description
Teams Bot consent to join calls)	join your Teams' tenant calls and to receive the media to be recorded. Deployment of Interaction Insights generates the Enterprise application <liveplatformservername>-hue-paired. Youconsent to the following permissions:</liveplatformservername>
	 Calls.JoinGroupCall.All - Join group calls and meetings as an app (Application)
	 Calls.AccessMedia.All - Access media streams in a call as an app (Application)
	This consent is required in the event where a Pro User license has been configured for the service.

> Do the following:

In the Icon pane, click , and then in the Navigation pane, select System Settings
 Connect to your M365.

Settings System Settings	• •	M365 Tenant ID 05823149-527a-40ab-9cb1-da@f122c7fa9	SmartTap Tenant ID a264448d-da36-44b1-9f74	-79aa6ba17295		
Tools	ur M365	CONSENT NAME		ACTION	COMPLETED	DESCRIPTION
Storage Tags Branding		M365 Login		Grant Admin Consent >	٥	Provide the application permissions to authenticate users with your M365 credentials, application reroutes users to M365 for authentication (Azure Active Directory authentication - Microsoft OpenID Connect)
Licenses		Read Azure Active Directory Groups and L	sers	Grant Admin Consent >	0	Provide the application with permissions to read AAD groups and users to enable the groups' users for recording and access to the application
> Recording Settin	ngs ^	Recording Calls (Teams Bot consent to joi	n calls)	Grant Admin Consent >	0	Provide the application's Teams Bot with permissions to join your Tenant's Teams calls to record the calls' info and media
Recording Profi	files s	Redundant Recording Calls (Second Team	s Bot consent to join calls)	Grant Admin Consent >	۰	Provide the application's redundant Teams Bot with permissions to join your Tenant's Teams calls to record the calls' info and media
? Monitoring	^	Publish Teams Client App in your Teams S	tore	Publish	0	Add the application to users' Teams Clients for access of the application within Microsoft Teams. Click on the 'Publish' button to publish the app in your Teams store using MB36 Administrator permissions. In the store, you can set policies for installing and automatically pinning the application for specific groups or users
View Users Audit Trail System Activity	y Log					
վր						

2. Click the **Grant Admin Consent** button adjacent to each Consent for which you wish to activate. A green tick is displayed once the consent process has completed successfully.

Tools

This option lets you publish the app to the admin user's Teams admin center. In the store you can also set policies for installing the app automatically for specific groups or users. This can also be performed in the Quick Start wizard (see Quick Start on page 18). Once you have published, open the Teams client for any of your tenant users and install the app in the Web client (see Add and Pin Interaction Insights Teams App on page 36).

> Do the following:

1. In the Icon pane, click **?**, and then in the Navigation pane, select **System Settings > Tools**.



2. Click Publish in Your Teams Store to publish the app to the logged in users' Teams client.

Publishing the app makes it available for users in the tenant organization within Teams store. Each user needs to add the application from their Teams admin center in order to access it from Teams.

3. Select the user account for which you wish to publish.



4. Click the Have an admin account? Sign in with that account link

~

- **CONTOSO** demo

adelev@m365x21689653.onmicrosoft.com

Need admin approval

unverified

needs permission to access resources in your organization that only an admin can grant. Please ask an admin to grant permission to this app before you can use it.

Have an admin account? Sign in with that account

Return to the application without granting consent

5. Click Accept.

admin@m365x21689653.o	onmicrosoft.com
Permissions requestion Review for your organization	uested
stngqa-auth <mark>unverified</mark>	
This app may be risky. Or app. Learn more	nly continue if you trust this
This app would like to:	
 Submit application package submissions 	ges to the catalog and cancel pending
\checkmark Read and write to all app	catalogs
View users' basic profile	
✓ Maintain access to data ye	ou have given it access to
If you accept, this app will get acc users in your organization. No on permissions.	cess to the specified resources for all ne else will be prompted to review these
Accepting these permissions mea data as specified in their terms of publisher has not provided link can change these permissions at	ans that you allow this app to use your f service and privacy statement. The ts to their terms for you to review. You https://myapps.microsoft.com. Show
details	

6. Open the Microsoft Teams, open the Apps page, and search for the Interaction Insights app.



7. Click Add.



SmartTAP for Teams

SmartTAP 360° Enterprise Interactions Recording for Microsoft Teams

AudioCodes SmartTAP 360° is an intelligent, fully-secured enterprise compliance-recording solution, allowing companies to capture and index any customer or organizational interactions across both external and internal communication channels.

Companies using Microsoft Teams can seamlessly apply SmartTAP 360° to record all voice, video and IMs interactions for later-stage AI analysis and for meeting regulatory compliance demands.

App features

Personal app Keep track of important content and info

Created by: <u>Audiocodes Inc</u> Version 2.6.0

Permissions

This app will have permission to:

- Receive messages and data that I provide to it.
- Access my profile information such as my name, email address, company name and preferred language.

By using SmartTAP stngqa, you agree to the privacy policy, terms of use, and permissions.

8. Click Add. The app opens inside the users' Teams client.

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		• •	×	Adele Vance	Jun 10, 2024 16:41 PM	16:41:35 PM	00:01:43	None		Adele Vance	Normal	Internal Meeting		Note
			0	Adele Vance	Jun 10, 2024 16:34 PM	16:34:54 PM	00:00:02	None		Adele Vance	Normal	Internal Meeting		Note
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9. Right-click the app icon, and then choose Pin.

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Bring-Your-Own-Storage

This option lets you manage your Blob Storage accounts. The Quick Start process added the Service Provider Azure Blob System Storage account for your region. You can add additional Azure Blob accounts for different locations when this feature is enabled by your Service Provider. For each location, you can monitor the status of the connection and Consumption in GB for the storage utilization. Once you add BYOS locations, they can be associated to Recording profiles.

• The ability to add Blob storage accounts requires the BYOS feature key. Contact AudioCodes support for details.

- Ensure that you have added your BYOC accounts on your M365 tenant.
- Performance latency may be affected if the storage location is geographically remote to the Interaction Insights deployment instance.
- Data consumption is only displayed for GRS (Geo Recording Storage) storage accounts.

> Do the following:

In the Icon pane, click , and then in the Navigation pane, select System Settings
 Storage.

In the figure below, the default System storage account is 'United Kingdom GRS'. The storage utilization is 0.35 GB. If your service was onboarded with an Essentials user license with Single Recording server instance, then the default system storage location name is <RegionName> LRS (Local Recording Storage). If your service was onboarded with a Pro user license with Redundancy Recording server instance, then the name is <Region Name> GRS (Geo Recording Storage).

P	Settings	Storage		
0	System Settings	+ Bring Your Own Blob Storage		
E	Connect to your M365	NAME	STATUS	CONSUMED
202	Tools	United Kingdom GRS	#Connected	0.35 GB
	Tags			
	Branding			
	Licenses			
>				
	Recording Settings			
	Recording Profiles			
•	Access Profiles			
?				
	Monitoring			
5	View Users			
	Audit Trail			
	System Activity Log			
·III·				

The figure below shows added BYOS storage accounts. Once added, accounts can be later removed.

E	Settings System Settings ^	Storage + Bring Your Own Blob Storage			
E	Connect to your M365	NAME	STATUS	CONSUMED	
444	Tools	Europe LRS	#Connected	-	
	Storage	Ai-Logix	#Connected		
	Branding				
>	Licenses				
•					
?	Recording Settings				
	Recording Profiles				
5	Access Profiles				
MA					
	Monitoring ^				
	View Users				
·hu·	System Activity Log				
	Settings	Storage			
0	System Settings ^	+ Bring Your Own Blob Storage			
E	Connect to your M365	NAME	STATUS	CONSUMED	
*	Tools	United Vienders CDC			
*	Storage	onited Kingdoni GKS	#Connected	11.62 GB	
	Storage Tags	United Kingdom GRS	#Connected	11.62 GB	
	Storage Tags Branding Licenses	Unlind Kingdom GRS Byost	#Connected #Connected #Connected		
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>	Storage Tags Branding Licenses Recording Settings	United Kingdom GRS Byos1 Dis Al-Logic2	#Connected #Connected #Disconnected #Disconnected #Disconnected	11.62 08	•
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2. If you have a Pro User license supporting Double Recording with Paired Bot users (Geographical Redundancy Storage), configure the details of the storage container for each region.

Bring Your Own Blob Redundant Storage		
Friendly Name		
Blob Storage 1		
Connection String		
text		
Blob Storage 2		
Connection String		
text		
	Cancel	Apply

3. Login to the Microsoft Azure customer tenant, and open the relevant Blob Storage account.

Microsoft Azure			Search resources, services, and docs (G+/)	ΣĻ	ා ල බ evgenyp@smarttap.on 🤵
Home > Storage accounts >					AUDIOCODES LTD. (AI-LOGIX.NE
Storage accounts AudioCodes Ltd. (ai-logix.net) (ai-logix.net)	«	byos1 ☆ ☆ … Storage account			×
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appdiag4zvktzfn54yyq		🔀 Diagnose and solve problems	Primary/Secondary Loc : Primary: North Europe. Secondary: West Europe Account	nt kind : StorageV2 (gene	eral purpose v2)
artifacts001sane		Recess Control (IAM)	Subscription (move) : SmartTAP_MI_EA Provision	ioning state : Succeeded	
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automationstoragevision		🗲 Events	Disk state : Primary: Available, Secondary: Available		
azurecline		Storage browser	Tags (edit) : Add tags		
byos1		🍋 Storage Mover	Properties Monitoring Capabilities (7) Recommendations (1) Tutorials Tool	ls + SDKs	
byos2immutable		✓ Data storage	_		
byosdor		Containers	🚍 Blob service 🔒 S	iecurity	
byostestdor		🛋 File shares	Hierarchical namespace Disabled R	lequire secure transfer for REST API	Enabled
daudedevminofuncstorage		🔟 Queues	Default access tier Hot S	torage account key access	Enabled
daudepentestmist		Tables	Blob anonymous access Disabled N	Ainimum TLS version	Version 1.2
audeperfnaminest		✓ Security + networking	Container reft delate Disabled	nfrastructure encryption	Disabled
a daudetestoaminost		2 Networking	Versioning Disabled		
doudshellarch		Front Door and CDN	Change feed Disabled	vetworking	All second as
	~	📍 Access keys	NFS v3 Disabled	wow access from	All networks
< Page 1 V of 6 >		 Shared access signature 	Allow cross-tenant replication Disabled	letwork routing	Microsoft petwork routing
			Storage tasks assignments None		······································

4. In Navigation pane, select **Data storage** > **Containers**, and then select the relevant container in which you wish to store media.

Microsoft Azure			∠ Search resources, services, and docs (G+/)		5 Q @	⑦ & evgenyp@sm AUDIOCODES LTD	harttap.on 🔕
Home > Storage accounts > byos1							
Storage accounts AudioCodes Ltd. (ai-logix.net) (ai-logix.net)	«	byos1 Containers	☆ ☆ …				×
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audcsistorage		🔐 Data migration	aaa	6/26/2024, 9:50:50 AM	Private	Available	
automationstoragevision		🗲 Events	ai-logix-1	5/29/2024, 12:08:12 PM	Private	Available	
azurecline		Storage browser	ai-logix2	6/13/2024, 1:28:41 PM	Private	Available	
🚍 byos1		Korage Mover	container	5/20/2024, 2:37:41 PM	Private	Available	
byos2immutable		✓ Data storage	container1	3/4/2024, 12:13:04 PM	Private	Available	
byosdor		Containers	container2	4/1/2024, 1:10:21 PM	Private	Available	
byostestdor		🛋 File shares	deb-media-container	6/10/2024, 5:13:41 PM	Private	Available	
audedevmingfuncstorage		1 Queues	ilana	5/30/2024, 12:01:43 AM	Private	Available	
audepentestmist		🚥 Tables	m365edu891557	5/29/2024, 11:58:40 AM	Private	Available	
audeperfqamingst		> Security + networking	m365edu8915572	6/3/2024, 10:25:56 AM	Private	Available	
audetestgamingst		> Data management	m365x36353013	6/20/2024, 12:42:48 PM	Private	Available	
a doudshellaccb		> Settings	m365x36353013second	6/20/2024, 12:43:42 PM	Private	Available	
	*	> Monitoring	m365x67257920	5/29/2024, 11:58:07 AM	Private	Available	
< Page 1 V of 6 >		> Monitoring (classic)	m365x67257920-1	5/30/2024, 10:02:29 PM	Private	Available	

5. Select the entry and then from theright-click menu, choose Generate SAS.

≡ Microsoft Azure			$\mathcal P$. Search resources, services, and docs (G+/)		∑ 4 ©	R evgenyp@smartta AUDROCODES LTD. (A440	p.on 🙆
Home > Storage accounts > byos1							
Storage accounts AudioCodes Ltd. (ai-logix.net) (ai-logix.net)	»	byos1 Containers	* * …				×
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Filter for any field		Cverview	Search containers by prefix		 • 	Show deleted containers	^
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artifacts001sane		Access Control (IAM)	67257920	6/6/2024, 3:04:55 PM	Private	Available	
audosistorage		💕 Data migration	333	6/26/2024, 9:50:50 AM	Private	Available	
automationstoragevision		🗲 Events	v ai-logix-1	5/29/2024, 12:08:12 PM	Private	A 😁 Container properties	
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冒 byosdor		Containers	container2	4/1/2024. 1:10:21 PM	Private	An Break leave	
byostestdor		🛋 File shares	deb-media-container	6/10/2024, 5:13:41 PM	Private	At O Characteria	
audedevmingfuncstorage		1 Queues	ilana	5/30/2024, 12:01:43 AM	Private	Av Change access level	
audepentestmist		Tables	m365edu891557	5/29/2024, 11:58:40 AM	Private	Av	
audeperfqamingst		> Security + networking	m365edu8915572	6/3/2024, 10:25:56 AM	Private	At Delete	
audetestgamingst		> Data management	m365x36353013	6/20/2024, 12:42:48 PM	Private	Available	
doudshellacdb		> Settings	m365x36353013second	6/20/2024. 12:43:42 PM	Private	Available	
		> Monitoring	m365x67257920	5/29/2024, 11:58:07 AM	Private	Available	
< Page 1 V of 6 >		> Monitoring (dassic)	m365x67257920-1	5/30/2024, 10:02:29 PM	Private	Available	
			×				~

Microsoft Azure			,O Search resources, services, and docs (G+/)		R 0 @ R	evgenyp@smarttap.on
Home > Storage accounts > byos1					Generate SAS	×
Storage accounts AudioCodes Ltd. (ai-logix.net) (ai-logix.net)	«	byos1 Containers	x \$		SAS	^
🕂 Create 🏷 Restore …			+ Container 🔒 Change access level 🏾 🏷	Restore containers 🗸 💍 Refresh 🕴 📋 De	Signing method	
Filter for you field		Cverview	Search containers by prefix		Account key User delegation key	
Name 1		Activity log			Signing key ①	
analyticssmartbscu6	^	🗳 Tags	Name	Last modified	Key 1 V	
appdiag4zvktzfn54yyg		🗙 Diagnose and solve problems	\$logs	3/4/2024, 12:09:0	Stored access policy	
artifacts001sane		Access Control (IAM)	67257920	6/6/2024, 3:04:55	None	
audesistorage		P Data migration	aaa	6/26/2024. 9:50:5	Permissions * () Read	
automationstoragevision		🗲 Events	ii-logix-1	5/29/2024, 12:08:	Start and series data films (0)	
azurecline		Storage browser	ai-logix2	6/13/2024, 1:28:4	Start	
byos1		🚔 Storage Mover	container	5/20/2024, 2:37:4	03/07/2024	
byos2immutable		✓ Data storage	container1	3/4/2024, 12:13:0	(UTC+03:00) Current Time Zone	~
wyosdor		Containers	container2	4/1/2024. 1:10:21	Expiry	
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audepentestmist		I Tables	m365edu891557	5/29/2024, 11:58:	Allowed IP addresses ①	
audeperfqamingst		> Security + networking	m365edu8915572	6/3/2024, 10:25:5	for example, 168.1.5.65 or 168.1.5.65-168.1	
audetestgamingst		> Data management	m365x36353013	6/20/2024, 12:42:	Allowed protocols ①	
a doudshellaccb		> Settings	m365x36353013second	6/20/2024, 12:43:	riles only riles and HIIP	
	~	> Monitoring	m365x67257920	5/29/2024, 11:58:	Generate SAS token and URL	
< Page 1 v of 6 > ttps://go.microsoft.com/fwlink/?Linkld=2221211		> Monitoring (classic)	m365x67257920-1	5/30/2024, 10:02:		

= Microsoft Azure			\mathcal{P} Search resources, services, and docs (G+/)		区 Д @ の 紀 evgenyp@smarttap.on 🤹
Home > Storage accounts > byos1					Generate SAS ×
Storage accounts AudioCodes Ltd. (ai-logix.net) (ai-logix.net)	«	byos1 Containers Storage account	x \$		SAS
+ Create 🏷 Restore …			+ Container 🛔 Change access level 🏷 Re	store containers 🗸 💍 Refresh 📋 De	Signing method
Filter for any field		Cverview	Search containers by prefix		Account key User delegation key
Name ↑↓		Activity log			Signing key ①
analyticssmartbscu6	^	🗳 Tags	Name	Last modified	Key 1 V
appdiag4zvktzfn54yyq		🗙 Diagnose and solve problems	\$logs	3/4/2024, 12:09:0	Stored access policy
artifacts001sane		Access Control (IAM)	67257920	6/6/2024, 3:04:55	None V
audcsistorage		🔐 Data migration	aaa	6/26/2024, 9:50:5	Permissions * () 7 selected
automationstoragevision		🗲 Events	i-logix-1	5/29/2024, 12:08:	✓ Read
azurecline		Storage browser	ai-logix2	6/13/2024, 1:28:4	Add
🚍 byos1		Korage Mover	Container	5/20/2024, 2:37:4	Create 1:02:18 PM
byos2immutable		✓ Data storage	container1	3/4/2024, 12:13:0	Write Time Zone V
byosdor		Containers	container2	4/1/2024, 1:10:21	V Delete
byostestdor		🛋 File shares	deb-media-container	6/10/2024, 5:13:4	9:02:18 PM
audedevmingfuncstorage		1 Queues	🗌 ilana	5/30/2024, 12:01:	Immutable storage
audepentestmist		Tables	m365edu891557	5/29/2024. 11:58:	Allowed IP addresses ①
audeperfqamingst		> Security + networking	m365edu8915572	6/3/2024, 10:25:5	for example, 168.1.5.65 or 168.1.5.65-168.1
audetestgamingst		> Data management	m365x36353013	6/20/2024, 12:42:	Allowed protocols ①
doudshellaccb		> Settings	m365x36353013second	6/20/2024, 12:43:	
	~	> Monitoring	m365x67257920	5/29/2024, 11:58:	Generate SAS token and URL

- 6. Configure as follows:
 - a. Select the Account key check box.
 - b. Signing key Key 1
 - c. Shared access policy
 - **d.** Select all permission check boxes.
 - e. Allowed protocols HTTPS only.
- 7. Click Generate SAS token and URL.
- 8. Copy the Blob SAS URL value to notepad.

		, P Search resources, services, and docs (G+/)		E Q © R	evgenyp@smarttap.on
Home > Storage accounts > byos1				Generate SAS	×
Storage accounts AudioCodes Ltd. (ai-logic.net) (ai-logic.net)	w byos1 Co Storage account	ntainers 🖉 🖈 …		Signing key U	^
+ Create 🏷 Restore …	₽ Search	◇ ≪ + Container 🔒 Change access level 🏷 R	estore containers 🗸 🕐 Refresh 🛛 📋 De	Stored access policy	
Filter for any field	Cverview 🔤	Search containers by prefix		None	
Name ↑↓	Activity log			Permissions * ③	
💼 oxaqanniyas	🔨 🏈 Tags	Name	Last modified	7 selected V	
aksstngdevst	*** X Diagnose and solve pr	oblems Slogs	3/4/2024, 12:09:0	Start and expiry date/time ①	
aksstngqast	*** 🎭 Access Control (IAM)	67257920	6/6/2024. 3:04:55	Start	
akstestgamingst	🔐 Data migration	aaa	6/26/2024, 9:50:5	03/07/2024 🗐 3:16:01 PM	
alexrdelme	••• Fvents	ai-logix-1	5/29/2024, 12:08:	(UTC+03:00) Current Time Zone	\sim
alpahmeetings	Storage browser	ai-logix2	6/13/2024, 1:28:4	Expiry	
analyticsbsocu6addtest	••• Storage Mover	container	5/20/2024, 2:37:4	03/07/2024 🗐 11:16:01 PM	
analyticssmartbscu6	···· V Data storage	container1	3/4/2024, 12:13:0	(UTC+03:00) Current Time Zone	~
appdiag4zvktzfn54yyq	Containers	container2	4/1/2024. 1:10:21	Allowed IP addresses ①	
artifacts001sane	••• 📑 File shares	deb-media-container	6/10/2024, 5:13:4	for example, 168.1.5.65 or 168.1.5.65-168.1	
audcsistorage	··· Queues	ilana	5/30/2024, 12:01:	Allowed protocols ①	
automationstoragevision	Tables	m365edu891557	5/29/2024, 11:58:	HIPS only O HIPS and HIP	
azuredine	··· > Security + networking	m365edu8915572	6/3/2024, 10:25:5	Generate SAS token and URL	
🚍 byos1	···· > Data management		6/20/2024, 12:42:	Blob SAS token ()	
byos2immutable	··· > Settings		6/20/2024, 12:43:	sp=racwdli8tst=2024-07-03T12:16:01Z8tse=2024-07-03T20:	16:01Z&spr=https&sv=
Dvosdor	···· V > Monitoring	m365x67257920	5/29/2024, 11:58:	Blob SAS URL	
< Page 1 V of 6 >	> Monitoring (dassic)	m365x67257920-1	5/30/2024, 10:02:	https://byos1.blob.core.windows.net/ai-logix-1?sp=racwdli8tst	=2024-07-03T12:16:01 🗈

9. Return to the Storage page in the Interaction Insights interface.

10. Click Bring Your Own Blob Storage.

- **11.** Enter the name of the Blob storage container.
- **12.** Paste the Blob SAS URL that you copied above to the Connection string field.

Bring Your own Blob storag	ge.
Ai-Logix	
Connection string g=WjyT3iyJ2r1N9iehXMYb8qIA9W	/CLS8NURbYrVlcM5Vs%3D
	Cancel Apply

13. Click Apply. The new BYOS account is added.

Settings Storage yourn Settings + Bing Your Committed Storage Correct your Mide - Make Tork Europe LRS Tags A-Logid Branding Logid Longes
Image: System Suttings Image: Lings Suttings Find Source to your Midde Storage Image: Sutting Suttings NALE Source to your Midde Storage Europe LIS Sutting Sutti
Employer M3ds NAME STATUE CONSUMED Tota Tota Europe LRS PConnected - Status Altogia PConnected - Image: Constatus Brandrug Lorense - - Image: Constatus
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Tags Al-Logiz WConnected -
Baradag Liberases
Licenses
Recording Settings 🔷
Recording Profiles
? Access Profiles
Aver Guess
Sviten/Activity Log

14. You can now associate the Storage account to a Recording Profile (see Modifying Recording Profiles on page 62).

	Settings	1. Configuration 2. Groups Mapping 3. MSFT Policy
Ŭ	System Settings ^	Call Types
E	Connect to your M365	Select what calls of recorded users associated with the profile to record
201	Tools	Record All Call Types ③
-	Storage	
*	Tags	Hare Develo Deve Calle
	Branding	User versi varis user varis user varis muti meetings user varies of the second se
	Licenses	Internal: () V In V Out V External Meetings () V Teams Queue Calls*: Calls Queue Instance ID Add
>		PSTN: ① Ø In Ø Out
		External: 🕃 🥑 In 🥑 Out 🛛 All Meetings 🗸
	Recording Settings ^	
٠	Recording Profiles	Retention Period (Davs)
?	Access Profiles	
		1 Year (365 Days) V
55		Standard ()
0	Monitoring ^	
MA	View Users	Europe LRS ^
	Audit Trail	Europe LRS
	System Activity Log	Ai-Logix
		SAVE & FYIT Cancel New
վե		

Manage Tags

Call Tags can be created by the network administrator defining tags' allowing users to enter data manually on their screen during the course of a call, or via a third-party application. A tag is a user definable label i.e. word or phrase that identifies a specific context associated to a call. The tags can then be applied to filters for quick and easy retrieval of the related context. For example, define a tag for Quarterly financial review for all calls related to the financial results reported for the quarter. Call Tagging provides the following benefits:

- Categorizes calls by type or outcome, making searches easy (i.e., Malicious, Account ID, etc.). By default, the Notes tag is already defined within the system.
- Saves money by dramatically reducing the time to find individual recorded calls.

Improves internal processes by using the call tags as searchable data fields for other applications.

> Do the following:

1. In the Icon pane, click ⁽²⁾, and then select **System Settings** > **Tags**.

	Settings	Tags				
0	System Settings ^	+ New Tag				
E	Connect to your M365	Tags 6				
*	Tools	TAG NAME	DESCRIPTION			
	Tags	Eventine Demonstration				
	Branding	Executive Summary Call	Call to discuss the main issues raised in last weeks meeting.			
,	Licenses	Help Desk	Call for discussing the critical support tickets opened in the last year.			
		Inventory Control	Call for discussing end-of-year stock-take.			
	Recording Settings	Key Financials	Call for discussing the quarterly results.			Î
	Recording Profiles	Marketing Positioning	Call discussing marketing positioning strategies for the forthcoming year.			Î.
٠	Access Piolities	SalesOrder	Sales Order desk notification call			Î
?						
	Monitoring ^					
5	Audit Trail					
AV	System Activity Log					
				Rows per page: 10 💌	1-6 of 6	$\langle \rangle$
փ						

2. Click New Tag to add a new tag.

Tag Name		
Tag Description		
	Concel	0

3. Enter the Tag Name and description and then click **Save**.

Table 8	8-1: Ca	all Tagg	ging	Fields
---------	---------	----------	------	--------

Field	Description
Tag Name	Enter the tag name to the filter list.
Tag Description	Enter description of the purpose of the tag that can later be used as keyword text in search filter queries.

4. Enter the Tag name and description, and then click **Save**.

Tags					
+ New Tag					
Tags 6					
TAG NAME 🌻	DESCRIPTION				
Executive Summary Call	Call to discuss the main issues raised in last weeks meeting.				Ĩ
Help Desk	Call for discussing the critical support tickets opened in the last year.				Ξ.
Inventory Control	Call for discussing end-of-year stock-take.				Ť.
Key Financials	Call for discussing the quarterly results.				Î
Marketing Positioning	Call discussing marketing positioning strategies for the forthcoming year.				Î
SalesOrder	Sales Order desk notification call				Î
		Rows per page:	10 👻	1-6 of 6	$\langle \rangle$

Branding

This option lets you load your Corporate logo to the application Web page. Once loaded, it is displayed in the top left corner of the interface.

> Do the following:

In the Icon pane, click , and then in the Navigation pane, select System Settings
 > Branding.



2. Click the New Logo button to add a new logo to the interface.



3. Drag or drop a logo or click Browse and then click Apply.

m	Interactions	3							
	Total Recordin	ngs: 14					3 Reset Search Saved Searches	✓ Save Search	mns : Action
E		USER NAME 👙	DATE	START TIME 💠	DURATION	DIRECTION	CALLED PARTY $\mbox{$\widehat{\uparrow}$}$ Calling party $\mbox{$\widehat{\uparrow}$}$	ANSWERING PARTY 💠 RELEASE CAUSE	CALL TYPE
상		Ţ Search ▼	07/01/2024 - 07/25/2024 ×			Select	• Search Search	Search Select +	Select +
ž	• •	Megan Bowen	Jul 15, 2024 15:14 PM	15:14:56 PM	02:42:29	Outgoing	MOD Administrator Megan Bowen	MOD Administrator Normal	Internal p2p

Licenses

This option lets you monitor the recordings licenses and Auto Sync with AAD. The page displays the number of licenses that were initially configured in the Quick Start wizard, the number of Targeted users belonging to Azure groups that are attached to Recording profiles, and the number of remaining licenses. In the figure below, 100 licenses were configured in the wizard, there are 21 licensed users belonging to attached Azure groups, and therefore the remaining number of users is 79 (100-21). When AAD groups are updated or associations with Recording Profiles are changed, the License utilization data displayed is synchronized.

- You can exceed the number of purchased licenses with pay-as-you-go option. For example, if you purchase 100 recording user licenses (minimum), you are allowed to exceed the number with a pay-as-you-go option for the average at the same price as the 100 recording user licenses.
- The customer is charged for 100 user licenses per month regardless if the licenses are in use.
- When an additional user recording license is added and at least one day has elapsed, you are charged for the entire month.

The customer may choose Automatic or Manual license and user management (sync with AAD).

If you add or remove users from AAD groups or add or remove AAD groups from Recording profiles, you must perform AAD Group Sync (see Synchronizing Recording Profiles on page 67) to update license data.

- Automatic: Automatic user license assignment and management is available for customers who are allowed to exceed the number of included user licenses. Default.
- Manual: Customers don't have an option to exceed the included user licenses or for customers that do have the option to exceed however they opt out from the automatic management. The assignment of the users with license is performed when you add users to a recording profile. If the customer adds users directly in AAD groups that are attached to Recording profiles, you must perform synchronization, see Synchronizing Recording Profiles on page 67.

> Do the following:

In the Icon pane, click , and then in the Navigation pane, select System Settings
 > Licenses.



The following license data is displayed.

License Parameter	Description
Licenses Included	Total number of user licenses allocated to the tenant.
Licenses in Use	Total number of active user licenses.
Licenses Left	Total number of remaining user licenses.

Monitoring

- Managing Users below
- Viewing and Searching an Audit Trail on page 169
- System Activity Log on page 172

Managing Users

This page displays users belonging to M365 groups assigned to Recording or Access profiles or who were previously assigned and have been unmapped for whatever reason. You can search and sort users according to their associated profiles and groups and place users on Legal Hold.



- Users cannot be deleted if they are mapped to a Recording profile, until their associated recordings are deleted, or the Retention period for the recordings expires or they are placed on Legal Hold.
- When a user is placed on Legal Hold, all of their associated calls are also placed on Legal Hold and cannot be deleted.

See also:

- Exporting Users on the next page
- Deleting Users on page 166
- Placing a User on Legal Hold on page 167
- ➤ Do the following:
- In the Icon pane, click , and then in the Navigation pane, select Monitoring > View Users.

Ø	Settings	View Users			
	System Settings ^	Total Users: 15			
E	Connect to your M365				
222	Tools	□ NAME \$ UPN \$	AAD OID 💠 AAD GROUPS	RECORDING PROFILE ACCESS PROFILES	LEGAL HOLD
	Storage	Starts With Starts With	Starts With Contains	Contains	Select +
	Branding	Patti Fernandez Patti F@M365x216890	353 4d49c244-ab4c-4a1f-a8 Communications +1	SuperProfile SuperAccessProfile	≯ Legal Hold
	Licenses	Nestor Wilke Nestor W@M365x216i	896 8bb72a4f-4e4c-4944-bf SOC Team	SuperProfile	≯ Legal Hold
>		MOD Administrator (8) admin@M365x21689	653 98f3fde1-b99a-4ef6-914		≯ Legal Hold
	Recording Settings	Miriam Graham Miriam G@M365x2168	896 8a5476c4-9d6d-4c78-b Communications	SuperProfile SuperAccessProfile	≯ Legal Hold
	Access Profiles	Megan Bowen MeganB@M365x2168	96 79318503-4d29-4eaa-9 Communications +1	SuperProfile SuperAccessProfile	Legal Hold
•		Lidia Holloway LidiaH@M365x21689	653 3968dc68-60d5-4694-b Communications +1	SuperProfile SuperAccessProfile	≯ Legal Hold
· ·	Monitoring ^	Joni Sherman Joni S@M365x216890	353 ddba004e-4a70-4f8e-80 Communications	SuperProfile SuperAccessProfile	Legal Hold
5	View Users	Isaiah Langer IsaiahL@M365x2168	65 7b3e8084-35db-4acd-b Communications + 1	SuperProfile SuperAccessProfile	≯ Legal Hold
MA	Audit Trail System Activity Log	Diego Siciliani DiegoS@M365x2168	965 ed1a7d02-910b-48df-80 Communications	SuperProfile SuperAccessProfile	≯ Legal Hold
		Debra Berger DebraB@M365x2168	965 9e7abbd5-f873-4b59-8e Communications	SuperProfile SuperAccessProfile	≯ Legal Hold
				Rows p	er page: 10 💌 1–10 of 15 < >
վր					

2. Click adjacent to the user that you wish to modify.

- **3.** Configure fields according to the table below.
- 4. Click to apply changes.

Field	Description	Filters
Name	The name of the M365 tenant user.	This field can be sorted in ascending or descending order by clicking header up or down arrows. If defined, the field entry displays only matching entries.
UPN	The email address of the M365 tenant user.	This field can be sorted in ascending or descending order by clicking header up or down arrows. If defined, the field entry displays only matching entries.
AAD OID	Object ID of the user in the Azure Active Directory of the M365 customer tenant	This field can be sorted in ascending or descending order by clicking header up or down arrows respectively. If defined, the field entry displays only matching entries.
AAD Groups	Indicates the M365 tenant groups that are assigned to the user.	Start typing the text of the desired Group name in the search field.
Recording Profile	Indicates the Recording profile that is assigned to the user.	Start typing the text of the desired Recording Profile in the search field.
Access Profile	Indicates the Access profile that is assigned to the user.	Start typing the text of the desired Access Profile in the search field.
Legal Hold	Indicates whether the Legal Hold is enabled for the user. Click the button adjacent to the user that you wish to place under Legal Hold.	From the Select drop-down list, select whether to display calls on Legal Hold or not.

Exporting Users

You can export a list of users to an Excel or PDF file.

> To export users:

In the Icon pane, click , and then in the Navigation pane, select Monitoring > View Users.

2. Select the check box adjacent to the users that you wish to export or select the Name check box.

otal U	Jsers: 15 Selected 10 Select A	I				Î	Delete 🛃 Export
•	NAME 👙	UPN ≑	AAD OID 👙	AAD GROUPS	RECORDING PROFILE	ACCESS PROFILES	LEGAL HOLD
	Starts With	Starts With	Starts With	Contains	Contains	Contains	Select •
•	Patti Fernandez	PattiF@M365x216896	4d49c244-ab4c-4a1f	Communications	SuperProfile	SuperAccessProfile	Legal Hold
•	Nestor Wilke	NestorW@M365x216	8bb72a4f-4e4c-4944	SOC Team	SuperProfile		Legal Hold
•	MOD Administr	admin@M365x21689	98f3fde1-b99a-4ef6				Legal Hold
	Miriam Graham	MiriamG@M365x2168	8a5476c4-9d6d-4c7	Communications	SuperProfile	SuperAccessProfile	Legal Hold
2	Megan Bowen	MeganB@M365x2168	79318503-4d29-4ea	Communications +1	SuperProfile	SuperAccessProfile	Legal Hold
	Lidia Holloway	LidiaH@M365x21689	3968dc68-60d5-469	Communications +1	SuperProfile	SuperAccessProfile	Legal Hold
•	Joni Sherman	JoniS@M365x216896	ddba004e-4a70-4f8e	Communications	SuperProfile	SuperAccessProfile	Legal Hold
•	Isaiah Langer	IsaiahL@M365x21689	7b3e8084-35db-4ac	Communications +1	SuperProfile	SuperAccessProfile	Legal Hold
0	Diego Siciliani	DiegoS@M365x21689	ed1a7d02-910b-48df	Communications	SuperProfile	SuperAccessProfile	Legal Hold

You are prompted whether you wish to **Export to PDF** or **Export to Excel**.

Export In what format would y	you like to download the	file?
	Export To PDF	Export To Excel

3. Choose one of the options.

The file is exported. See example of the exported data below.

Name AAD OID UPN Recording Profile Access Groups Admin Legal Hold	Profiles AAD
MOD Administrator 98f3fde1-b99a-4ef6-914d- 03464f7ccfad admin@M365x21689653.onmicrosoft.com FALSE	TRUE
Diego Siciliani ed1a7d02-910b-48df-809b- 941456b22702 DiegoS@M365x21689653.OnMicrosoft.com erAccessProfile Communications FALSE FALSE	SuperProfile Sup
Megan Bowen 79318503-4d29-4eaa-9a22- a516fce884bc MeganB@M365x21689653.OnMicrosoft.com erAccessProfile Communications,SOC Team FALSE	SuperProfile Sup TRUE

Patti Fernandez 4d49c244-ab4c-4a1f-a8d3- dbe6fb758a91 PattiF@M365x21689653.OnMicrosoft.com erAccessProfile Communications FALSE TRUE	SuperProfile	Sup
Joni Sherman ddba004e-4a70-4f8e-80c7- ac2f2f4a2968 JoniS@M365x21689653.0nMicrosoft.com rAccessProfile Communications FALSE FALSE	SuperProfile	Supe
Lidia Holloway 3968dc68-60d5-4694-b205- a9778571e7af LidiaH@M365x21689653.OnMicrosoft.com erAccessProfile Communications,SOC Team FALSE	SuperProfile TRUE	Sup
Isaiah Langer 7b3e8084-35db-4acd-bbec- f040563cf9d0 IsaiahL@M365x21689653.0nMicrosoft.com perAccessProfile Communications,SOC Team FALSE	SuperProfile FALSE	Su
Miriam Graham 8a5476c4-9d6d-4c78-baf1- 7bf5889a251e MiriamG@M365x21689653.OnMicrosoft.com perAccessProfile Communications FALSE FALSE	SuperProfile	Su
Debra Berger 9e7abbd5-f873-4b59-8ec8- 1bc21528654f DebraB@M365x21689653.OnMicrosoft.com erAccessProfile Communications FALSE FALSE	SuperProfile	Sup
Nestor Wilke 8bb72a4f-4e4c-4944-bfe2- cce2c48b685e NestorW@M365x21689653.OnMicrosoft.com SOC Team FALSE FALSE	SuperProfile	

Deleting Users

You can delete tenant users. When deleting users, any calls associated with the users remain in the database until their Retention expiration period expires.

> To delete users:

- 1. In the Icon pane, click , and then in the Navigation pane, select Monitoring > View Users.
- 2. Select the check box adjacent to the users that you wish to delete.

	Users						
otal U	Jsers: 15 Selected 1					📋 De	lete 🛃 Export
-	NAME 🚔	UPN 💂	AAD OID 🚔	AAD GROUPS	RECORDING PROFILE	ACCESS PROFILES	LEGAL HOLD
	Starts With	Starts With	Starts With	Contains	Contains	Contains	Select -
	Patti Fernandez	PattiF@M365x216896	4d49c244-ab4c-4a1f	Communications	SuperProfile	SuperAccessProfile	Legal Hold
~	Nestor Wilke	NestorW@M365x216	8bb72a4f-4e4c-4944	SOC Team	SuperProfile		Legal Hold
	MOD Administr	admin@M365x21689	98f3fde1-b99a-4ef6				Legal Hold
	Miriam Graham	MiriamG@M365x2168	8a5476c4-9d6d-4c7	Communications	SuperProfile	SuperAccessProfile	Legal Hold
	Megan Bowen	MeganB@M365x2168	79318503-4d29-4ea	Communications +1	SuperProfile	SuperAccessProfile	Legal Hold
	Lidia Holloway	LidiaH@M365x21689	3968dc68-60d5-469	Communications +1	SuperProfile	SuperAccessProfile	Legal Hold
	Joni Sherman	JoniS@M365x216896	ddba004e-4a70-4f8e	Communications	SuperProfile	SuperAccessProfile	Legal Hold
	Isaiah Langer	IsaiahL@M365x21689	7b3e8084-35db-4ac	Communications +1	SuperProfile	SuperAccessProfile	Legal Hold
	Diego Siciliani	DiegoS@M365x21689	ed1a7d02-910b-48df	Communications	SuperProfile	SuperAccessProfile	Legal Hold
	Dobro Porgor	DahraD@M265v2160	007abbdE f072 AbEO	Communications	SuporDrofilo	SuperAcceseDrofile	S Logal Hold

3. Click Delete.



4. Click **Delete** to confirm.

Placing a User on Legal Hold

You can place a user on Legal Hold to disable the user from making or receiving calls. During the Legal Hold period, the user cannot be deleted and their calls are not deleted even if their retention period expires. Once a user is released from legal hold, their calls are purged according to the Cleanup scheduling. For example, if the Retention period is 3 Months (90 Days), the users' calls are placed on Legal Hold on June 1 2024, and then released on August 1 2024, then their calls are retained until September 1 2024.

> To place a user on legal hold:

In the Icon pane, click , and then in the Navigation pane, select Monitoring > View Users.

2. Select the check box adjacent to the user that you wish to place on Legal Hold, and then click the Legal Hold button.

Settings	View Users								
System Settings ^	Total Users: 15 Selected 1								
Tools	NAME ≑	UPN ≑	AAD OID \$	AAD GROUPS	RECORDING PROFILE	ACCESS PROFILES	LEGAL HOLD		
Storage Tags	Starts With	Starts With	Starts With	Contains	Contains	Contains	Select *		
Branding	Patti Fernandez	PattiF@M365x216896	4d49c244-ab4c-4a1f	Communications	SuperProfile	SuperAccessProfile	Legal Hold		
> Licenses	 Nestor Wilke 	NestorW@M365x216	8bb72a4f-4e4c-4944				Legal Hold		
•	MOD Administr (8)	admin@M365x21689	98f3fde1-b99a-4ef6				Legal Hold		
? Recording Settings ~	Miriam Graham	MiriamG@M365x2168	8a5476c4-9d6d-4c7	Communications	SuperProfile	SuperAccessProfile	Legal Hold		
	Megan Bowen	MeganB@M365x2168	79318503-4d29-4ea	Communications	SuperProfile	SuperAccessProfile	Legal Hold		
Monitoring ^	Lidia Holloway	LidiaH@M365x21689	3968dc68-60d5-469	Communications	SuperProfile	SuperAccessProfile	Legal Hold		
Audit Trail	Joni Sherman	JoniS@M365x216896	ddba004e-4a70-4f8e	Communications	SuperProfile	SuperAccessProfile	Legal Hold		
System Activity Log	Isaiah Langer	IsaiahL@M365x21689	7b3e8084-35db-4ac	Communications	SuperProfile	SuperAccessProfile	Legal Hold		
	Diego Siciliani	DiegoS@M365x21689	ed1a7d02-910b-48df	Communications	SuperProfile	SuperAccessProfile	Legal Hold		
	C Dabra Barriar	DahraD@M28Ev9180	0x7x66dE (072 46E0	Communications	CunorDrofilo	CuperAccoreDrofile	Local Mold		

A confirmation message is displayed.

	Settings	View Users					The user has been succes	isfully placed in legal hold.
	System Settings ^ Connect to your M365	Total Users: 15 Selected 1						Delete 🛃 Export
1	Tools	NAME \$	UPN ≑	AAD OID 💠	AAD GROUPS	RECORDING PROFILE	ACCESS PROFILES	LEGAL HOLD
±	Storage Tags	Starts With	Starts With	Starts With	Contains	Contains	Contains	Select •
,	Branding	Patti Fernandez	PattiF@M365x216896	4d49c244-ab4c-4a1f	Communications	SuperProfile	SuperAccessProfile	Legal Hold
	Licenses	Nestor Wilke	NestorW@M365x216	8bb72a4f-4e4c-4944				Legal Hold
۰	Recording Settings	MOD Administr (8)	admin@M365x21689	98f3fde1-b99a-4ef6				Legal Hold
?		Miriam Graham	MiriamG@M365x2168	8a5476c4-9d6d-4c7	Communications	SuperProfile	SuperAccessProfile	Legal Hold
5	Monitoring ^	Megan Bowen	MeganB@M365x2168	79318503-4d29-4ea	Communications	SuperProfile	SuperAccessProfile	Legal Hold
MA	View Users	Lidia Holloway	LidiaH@M365x21689	3968dc68-60d5-469	Communications	SuperProfile	SuperAccessProfile	Legal Hold
_	Audit Trail System Activity Log	Joni Sherman	Joni5@M365X216896	7b2o9094-25db-4ac	Communications	SuperProfile	SuperAccessProfile	Legal Hold
		Diego Siciliani	DiegoS@M365x21689	ed1a7d02-910b-48df	Communications	SuperProfile	SuperAccessProfile	Legal Hold
·μ		Dohro Porror	DahraD@M285v2180	0x7abbd6 (072 /b60	Communications	SuperDrofile	SuperAccessDrefile	* Logal Hold
							Rows per page:	10 ▼ 1-10 of 15 < >

3. Click again to remove the user from Legal Hold. A confirmation message is displayed.

	Settings							
	Coungo	View Users					The user has been success	fully removed from legal hold.
	System Settings	Total Lisers: 15 Selected 1						Delete
ŧ	Connect to your M365							
241	Tools	■ NAME \$	UPN 🕆	AAD OID 🗘	AAD GROUPS	RECORDING PROFILE	ACCESS PROFILES	LEGAL HOLD
•	Storage	Starts With	Starts With	Starts With	Contains	Contains	Contains	Select +
_	lags Branding	Patti Fernandez	PattiF@M365x216896	4d49c244-ab4c-4a1f	Communications	SuperProfile	SuperAccessProfile	★ Legal Hold
>	Licenses	0						
		 Nestor Wilke 	NestorW@M365x216	8bb72a4f-4e4c-4944				Legal Hold
٥		MOD Administr (8)	admin@M365x21689	98f3fde1-b99a-4ef6				Legal Hold
?	Recording Settings V	Miriam Graham	MiriamG@M365x2168	8a5476c4-9d6d-4c7	Communications	SuperProfile	SuperAccessProfile	Legal Hold
		Megan Bowen	MeganB@M365x2168	79318503-4d29-4ea	Communications	SuperProfile	SuperAccessProfile	Legal Hold
5	Monitoring ^	Lidia Holloway	LidiaH@M365x21689	3968dc68-60d5-469	Communications	SuperProfile	SuperAccessProfile	Legal Hold
ма	Audit Trail	Joni Sherman	JoniS@M365x216896	ddba004e-4a70-4f8e	Communications	SuperProfile	SuperAccessProfile	Legal Hold
	System Activity Log	Saiah Langer	IsaiahL@M365x21689	7b3e8084-35db-4ac	Communications	SuperProfile	SuperAccessProfile	Legal Hold
.lu.		Diego Siciliani	DiegoS@M365x21689	ed1a7d02-910b-48df	Communications	SuperProfile	SuperAccessProfile	Legal Hold
ч.		C Dobra Parmar	DahraD@M28Ev2180	0a7abbdE (072 /bE0	Communications	CuparDrofila	SuperAccessDrofile	S Local Hold
							Rows per page	e 10 💌 1–10 of 15 < 🔿

Viewing and Searching an Audit Trail

The Audit Trail feature allows the administrator to search the history of all user activity on Interaction Insights. The Audit Trail is searchable but cannot be edited or deleted. You can view and search the user changes made to the Interaction Insights database.

> Do the following:

 In the Icon pane, click , and then in the Navigation pane, select Monitoring > Audit Trail.

	Settings	AuditTrailTitle				^
0	System Settings	Total Audits: 630				Export
E	Connect to your M365					
-141	Tools		NAME + ACTION +	TIEM +		
	Storage	MM/DD/YYYY-MM/DE	Contains Select •	Select 👻	Contains	
^	Tags Branding	Jul 04, 2024 04:16:10 PM	MOD Administr Access	Audit Trail	MOD Administrator accessed Audit Trail	
>	Licenses	Jul 04, 2024 03:37:05 PM	MOD Administr Export	User	MOD Administrator exported Users to file	
•		Jul 04, 2024 03:20:33 PM	MOD Administr Access	User	MOD Administrator accessed Users	
?	Recording Settings	Jul 04, 2024 03:20:25 PM	MOD Administr Access	Interactions	MOD Administrator accessed Interactions	
	Recording Profiles	Jul 04, 2024 03:20:24 PM	MOD Administr Login	User	MOD Administrator logged into system	
5		Jul 03, 2024 07:27:32 PM	st-user st-user View	Tenant	Tenant SuperInter was viewed	
MA	Monitoring ^	Jul 03, 2024 07:08:08 PM	st-user View	Tenant	Tenant SuperInter was viewed	
	View Users	Jul 03, 2024 07:02:20 PM	st-user st-user View	Tenant	Tenant SuperInter was viewed	
	Audit Trail	Jul 03, 2024 06:44:01 PM	MOD Administr Logout	User	MOD Administrator logged out of system	
۰ <mark>۱</mark> ۱۰	System Activity Log	Jul 03, 2024 06:42:31 PM	MOD Administr Access	Storage	MOD Administrator accessed Storage	

2. Set the search filter criteria according to the table below.

Parameter	Description
Date and Time	Select the Date and Time check box, and then from the calendar set the desired date range.

Parameter	Description					
	Audit trail					
	Total Audits: 14 Selected 10 Select All					
	✓ DATE AND TIME	ITEM 🔶				
	MM/DD/YYYY – MM/DD/YY Contains Select	▼ Select ▼				
	< May 2024 June 20)24 >				
	SMTWTFS SMTW	T F S				
	✓ 5 6 7 8 9 10 11 2 3 4 5	6 7 8				
	✓ 12 13 14 15 16 17 18 9 10 11 12	13 14 15				
	19 20 21 22 23 24 25 16 17 18 19	20 21 22				
	26 27 28 29 30 31 23 24 25 26	27 28 29				
	30					
		Cancel				
	May 14, 2024 02:38:15 AM MOD Administrator add	user				
	May 14, 2024 02:38:05 AM MOD Administrator add	user				
	May 14, 2024 02:35:11 AM MOD Administrator add	user				
Name	M365 Tenant user performing the action. For example	Alex Wilber. Hover				
	AlexW@M365x21689653.OnMicrosoft.com					
Action	From the drop-down list, choose one of the following a	ctions:				
	Login- – user logged in the system					
	Logout-user logged out of the system					
	Add-an item(s) was added					
	Modify-an item(s) was modified					
	View-an item was viewed					
	Delete-an item(s) was deleted					
	Export-an item was exported					
	Export-an item was exported					

Parameter	Description
	Play-an item was played
	Send Mail (currently not supported)
	Disabled-an item was disabled.
ltem	From the Drop-down list choose one of the following entities upon which one of the above actions was performed:
	Recording Profile
	Access Profile
	Group
	User
	Call
	Tag
	Note
	Tenant
	Legal Hold
	Auto Sync with AAD
Description	Enter free text to search in descriptions.

3. To export the Audit Trail for accountability purposes, select the entries that you wish to export or select the check box adjacent to the Date and Time search field.

Settings	AuditTrailTitle	î
System Settings	Total Audits: 630 Selected 10 Select All	Export
Connect to your M365 Tools	I date and time φ name φ action φ item φ description φ	
Storage	MM/DD/YYYY-MM/DE Contains Select • Contains	
Tags Branding	Jul 04, 2024 04:16:10 PM MOD Administr Access Audit Trail MOD Administrator accessed Audit Trail	
Licenses	Jul 04, 2024 03:37:05 PM MOD Administr Export User MOD Administrator exported Users to file	
	Jul 04, 2024 03:20:33 PM MOD Administr Access User MOD Administrator accessed Users	
Recording Settings	Jul 04, 2024 03:20:25 PM MOD Administr Access Interactions MOD Administrator accessed Interactions	
Recording Profiles	Jul 04, 2024 03:20:24 PM MOD Administr Login User MOD Administrator logged into system	
Access Frones	Jul 03, 2024 07:27:32 PM st-user st-user View Tenant Tenant SuperInter was viewed	
Monitorina ^	Jul 03, 2024 07:08:08 PM st-user st-user View Tenant Tenant Superinter was viewed	
View Users	Jul 03, 2024 07:02:20 PM st-user st-user View Tenant Tenant SuperInter was viewed	
Audit Trail	Jul 03, 2024 06:44:01 PM MOD Administr Logout. User MOD Administrator logged out of system	
System Activity Log	Jul 03, 2024 06:42:31 PM MOD Administr Access Storage MOD Administrator accessed Storage	

4. Click Export.

Settings	Audiť	TrailTitle					ŕ
System Settings	Total	Audits: 630 Selected 10 Select	at All			Export	1
Connect to your M365 Tools		DATE AND TIME 👙	NAME ≑	ACTION ≑	item \$	DESCRIPTION \$	
Storage		MM/DD/YYYY - MM/DE	Contains	Select +	Select +	Contains	
Tags Branding		Jul 04, 2024 04:16:10 PM	MOD Administr	Access	Audit Trail	MOD Administrator accessed Audit Trail	
Licenses	<	Jul 04, 2024 03:37:05 PM	MOD Administr	Export	User	MOD Administrator exported Users to file	
	~	Jul 04, 2024 03:20:33 PM	MOD Administr	Access	User	MOD Administrator accessed Users	
Recording Settings		Jul 04, 2024 03:20:25 PM	MOD Administr	Access	Interactions	MOD Administrator accessed Interactions	
Recording Profiles Access Profiles		Jul 04, 2024 03:20:24 PM	MOD Administr	Login	User	MOD Administrator logged into system	
	<	Jul 03, 2024 07:27:32 PM	st-user st-user	View	Tenant	Tenant SuperInter was viewed	
Monitoring ^	~	Jul 03, 2024 07:08:08 PM	st-user st-user	View	Tenant	Tenant SuperInter was viewed	
View Users		Jul 03, 2024 07:02:20 PM	st-user st-user	View	Tenant	Tenant SuperInter was viewed	
Audit Trail		Jul 03, 2024 06:44:01 PM	MOD Administr	Logout	User	MOD Administrator logged out of system	
System Activity Log		Jul 03, 2024 06:42:31 PM	MOD Administr	Access	Storage	MOD Administrator accessed Storage	

System Activity Log

The System Activity Log lets you monitor system tasks for activities of the system. The figures below display filtered views for the License and Script logs.

	Settings	System Activity Log			
0	System Settings ^	Total 15			Export
E	Connect to your M365 Tools	DATE & TIME	LOG TYPE 💠	ACTIVITY TYPE	LOG DESCRIPTION
•	Storage	MM/DD/YYYY – MM/DD/YYYY	Select •	License *	Contains
	Tags Branding	Jul 09, 2024 06:11:34 PM	Info	License	1 new users were assigned with the license.
>	Licenses	Jul 09, 2024 06:04:26 PM	Warning Clear	License	The mapped AAD group(s) has been successfully synchronized
•		Jul 09, 2024 06:01:55 PM	Warning	License	One of the mapped AAD Groups is not in sync with Interaction Recording,
?	Recording Settings	Jul 09, 2024 03:56:48 PM	Info	License	4 users were unassigned from the licenses.
	Recording Profiles	Jul 09, 2024 02:43:35 PM	Info	License	1 users were unassigned from the licenses.
5		Jul 01, 2024 01:34:39 PM	Info	License	4 new users were assigned with the license.
MA	Monitoring ^	Jul 01, 2024 01:30:15 PM	Warning Clear	License	The mapped AAD group(s) has been successfully synchronized
	View Users	Jul 01, 2024 01:29:17 PM	Warning	License	One of the mapped AAD Groups is not in sync with Interaction Recording, \ldots
	Audit Trail	Jul 01, 2024 01:28:24 PM	Info	License	4 new users were assigned with the license.
۰ <mark>۱</mark> ۱۰	System Activity Log	Jul 01, 2024 01:27:04 PM	Info	License	4 users were unassigned from the licenses.

Settings	System Activity Log			
System Settings	Total 17			Export
Connect to your M365	DATE & TIME	LOG TYPE 🐥	ACTIVITY TYPE 👙	LOG DESCRIPTION
Storage	MM/DD/YYYY - MM/DD/YYYY	Select -	Script *	Contains
Tags	Jun 19, 2024 10:56:08 AM	Info	Script	Script was downloaded and pending execution
Branding	Jun 16, 2024 12:35:32 PM	Info	Script	Successful MSFT configuration script execution acknowledgement received
	Jun 16, 2024 12:23:43 PM	Info	Script	Script was downloaded and pending execution
Recording Settings	Jun 06, 2024 05:28:58 PM	Info	Script	Successful MSFT configuration script execution acknowledgement received
Recording Profiles	Jul 09, 2024 06:58:55 PM	Info	Script	Successful MSFT configuration script execution acknowledgement received
Access Profiles	Jul 09, 2024 06:14:12 PM	Info	Script	Script was downloaded and pending execution
	Jul 09, 2024 03:37:00 PM	Info	Script	Successful MSFT configuration script execution acknowledgement received
Monitoring ^	Jul 09, 2024 03:06:19 PM	Info	Script	Script was downloaded and pending execution
View Users Audit Trail	Jul 07, 2024 11:16:35 AM	Info	Script	Successful MSFT configuration script execution acknowledgement received
System Activity Log	Jul 07, 2024 10:51:37 AM	Info	Script	Script was downloaded and pending execution
				Rows per page: 10 ▼ 1–10 of 17 < >

The following figure displays a Filtered view for Warning messages.

	Settings	System Activity Log			
	System Settings	Total 3			Export
E	Connect to your M365				
222	Tools		Select		
±	Tags	MM/DD/YYYY - MM/DD/YYYY	Warning	Select *	Contains
	Branding	Jul 09, 2024 06:01:55 PM	Warning	License	One of the mapped AAD Groups is not in sync with Interaction Recording,
>	Licenses	Jul 02, 2024 05:52:29 PM	Warning	Configuration	Failed to update teams application
•		Jul 01, 2024 01:29:17 PM	Warning	License	One of the mapped AAD Groups is not in sync with Interaction Recording,
?	Recording Settings				
	Recording Profiles				Rows per page: 10 ▼ 1–3 of 3 < >
5	Access Profiles				

> Do the following:

 In the Icon pane, click , and then in the Navigation pane, select Monitoring > System Activity Log.

	Settings	System Activity Log				
* 0 *	System Settings ^	Total 4189				Export
E	Connect to your M365 Tools	DATE & TIME \$	LOG TYPE 🐥	ACTIVITY TYPE 🔹	LOG DESCRIPTION	
201	Storage	MM/DD/YYYY - MM/DD/YYYY	Select +	Select +	Contains	
*	Tags Branding	Мау 02, 2024 02:13:44 РМ	Alarm Clear	Storage	Connection to storage unitedKingdom Grs was restored.	
	Licenses	May 02, 2024 02:14:44 PM	Alarm Clear	Storage	Connection to storage unitedKingdom Grs was restored.	
>		May 02, 2024 02:15:44 PM	Alarm Clear	Storage	Connection to storage unitedKingdom Grs was restored.	
	Recording Settings	May 02, 2024 02:16:44 PM	Alarm Clear	Storage	Connection to storage unitedKingdom Grs was restored.	
	Recording Profiles	May 02, 2024 02:18:26 PM	Alarm Clear	Storage	Connection to storage unitedKingdom Grs was restored.	
٠		May 02, 2024 02:18:44 PM	Alarm Clear	Storage	Connection to storage unitedKingdom Grs was restored.	
?	Monitoring ^	May 02, 2024 02:18:48 PM	Alarm	AAD Connection	Connection to Azure AAD was lost.	
	- View Users	May 02, 2024 02:19:45 PM	Alarm Clear	Storage	Connection to storage unitedKingdom Grs was restored.	
5	Audit Trail	May 02, 2024 02:20:44 PM	Alarm Clear	Storage	Connection to storage unitedKingdom Grs was restored.	
JL	System Activity Log	May 02, 2024 02:21:44 PM	Alarm Clear	Storage	Connection to storage unitedKingdom Grs was restored.	
					Rows per page: 10 💌 1-10 of	4189 < >
փ						

2. Set the Search criteria according to the table below.

Parameter	Description
Date and Time	Select the Date and Time check box, and then from the calendar set the desired date range.

Parameter	Description			
Audit trail				
	Total Audits: 14 Selected 10 Select All			
	✓ DATE AND TIME	A.V.		
	MM/DD/YYYY – MM/DD/YY Contains Select - Select	ect 👻		
	< May 2024 June 2024	>		
	SMTWTFS SMTWTFS	s		
		1		
	✓ 5 6 7 8 9 10 11 2 3 4 5 6 7 8	3		
	✓ 12 13 14 15 16 17 18 9 10 11 12 13 14 15	5		
	IP 20 21 22 23 24 25 16 17 18 19 20 21 23	2		
	26 27 (28) 29 30 31 23 24 25 26 27 28 29	9		
	30			
	Can	cel		
	May 14, 2024 02:38:15 AM MOD Administrator add user	_		
	May 14, 2024 02:38:05 AM MOD Administrator add user			
	May 14, 2024 02:35:11 AM MOD Administrator add user			
Log Type	From the drop-down list, choose one of the following values:			
	Info			
	 alarm alarm Clear warning warning Clear error 			
	errorClear			
Activity Type	From the drop-down list, choose one of the following values:			
	License: Monitors user license assignments.			

Parameter	Description		
	Storage: Monitors status of connection to storage accounts.		
	 Configuration: Monitors consent actions (see Connect to M365 on page 142) 		
	AAD Connection: Monitors connection with your M365 platform.		
	 AAD Sync: Monitors status of AAD synchronization (see Synchronizing Recording Profiles on page 67) 		
	Script: Monitors status of Microsoft script download and execution (see Download and Run Microsoft Script on page 69)		
Log Description	Description of the log event. Enter text in the search field to search for a word or phrase matching an event description.		

Alarms

This section describes the alarms that are raised on the Interaction Insights server and sent to the OVOC interface.

Recording Resource Unavailable

Alarm Field	Description					
Description	This alarm is sent when Bot fail	This alarm is sent when Bot fails to record a call due to Graph API error.				
SNMP Alarm	RecordingResourceUnavailable					
SNMP OID	.1.3.6.1.4.1.5003.9.40.3.2.0.100					
Alarm Source	<unique id="" service="">/Bot Where unique service Id is the Tenant Id for the service. View the service to match the Id.</unique>					
	Tenant Management Tenant Configuration Connection To M365 System Activity Log Storage Licenses	ew Interaction R Tenant Information # Created By User ① manojp@audiocodes.co Tenant URL ③ https://sandbox1st.smar	ecording Tenant #Active Creation Date And Time ① m m Jul 16, 2024 10:46:19 AM ① rttap.finebak.com ① Tenant ID ① ttap.finebak.com ① Tenant ID ① ttap.finebak.com ①			
Alarm Title	Recording Resource Unavailable					
Alarm Type	Other					
Probable Cause	Other					
Additional Info						
Alarm Severity	Condition	<text></text>	Corrective Action			
Critical	Bot receives Graph Api error when trying to join call and access media stream.	<graph api<br="">error that was returned></graph>	Grant consent for the Teams Bot to record calls (in the Interaction Insights Web interface go to either the Quick Start wizard or the Connect to your M365 Platform page). Try to record a call.			
Alarm Field	Description					
-------------	--	--	--			
Cleared	Bot is able to join call and record media for this tenant.					

Connection Failed

Alarm Field	Description					
Description	This alarm is generated when the application fails to connect to customer Entra ID (AAD) or to customer provided storage account (BYOS).					
SNMP Alarm	ConnectionFailed					
SNMP OID	.1.3.6.1.4.1.5003.9.40.3.2.0.101					
Alarm Source	 <unique id="" services="">/Sync</unique> <unique id="" services="">/<storagefriendlyname>-SystemConfiguration</storagefriendlyname></unique> 					
	Tenant Management View Interact Tenant Tenant Inform Configuration Created By Us Connection To M365 manojp@audioc System Activity Log Tenant URL ① Storage https://sandboor Licenses Image: Content of the second	tion Recording Tenant nation #Active er ③ codes.com	Creation Date And Time () Jul 16, 2024 10:46:19 AM () Tenant ID () 1886/451-3040-49:84 softs-1a309402b3dB			
Alarm Title	Connection Failed					
Alarm Type	Communications Alarm					
Probable Cause	Other					
Additional Info						
Alarm Severity	Condition	<text></text>	Corrective Action			
Critical	 Service has been successfully added on Interaction Insights; however the customer has not yet provided consent for connecting to their M365 platform. Sync service communication to customer AAD has failed. 	Connection to AAD failed, please provide ensure to consent for the application to read AAD groups and users.	 Complete the Quick Start wizard, providing all consents and run the Microsoft Quick Start script (see Quick Start on page 18). Perform Sync Groups to AAD action in Interaction Insights Web interface Access Profiles page. 			
Critical	SystemConfiguration failed to connect to customer provided storage account	Connection To Storage <storagefriendlyname> Lost</storagefriendlyname>	 Check that the Blob SAS URL has been configured correctly in the IR Web Storage screen. In addition, check its' Expiry period. Regenerate and update in Storage screen if necessary. Check that access to the storage account is not blocked by firewall. 			
Cleared	 Sync service communication to customer AAD succeeded. SystemConfiguration service successfully connected to customer provided storage. 	-	-			

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