

## Restricted and Sensitive call recordings

### Should some call recordings be flagged as "Restricted"?

If you want to record all calls, you should inform callers about it and give the caller the possibility to deny call recording. If a caller denies recording ('deny\_recording' is set), the call will not be recorded even if you have configured 'forced' recording on all calls on this queue or the agent answering, and the agent can not manually start a recording. More details in the [Call recording article](#).

If your company needs to record all calls (on all/some queues/agents) due to laws/regulations (and you do not allow the caller to deny recording), but you want or need to **get the caller's acceptance to listen to these call recordings for e.g. QA or training purposes**, then you can inform the caller about the recording and ask if it's ok that the recording is used for QA/training purposes. If the caller does not accept (or denies) that you use the recording for these purposes, then we can flag the call as "restricted" by setting variable 'SET\_RESTRICTED'=true' (done in Call Flow Tool) and store this variable to Raw data.

When a call ends and the call\_id's metadata and recording file(s) are imported into the Archive, the call\_id and its recording(s) will be given a restricted flag in Archive if variable 'SET\_RESTRICTED' exist in Raw data with value 'true'.

A call\_id that's restricted will have a **red stop sign** in Archive for the call and its recording(s) so that people will think twice before they play such a recording.

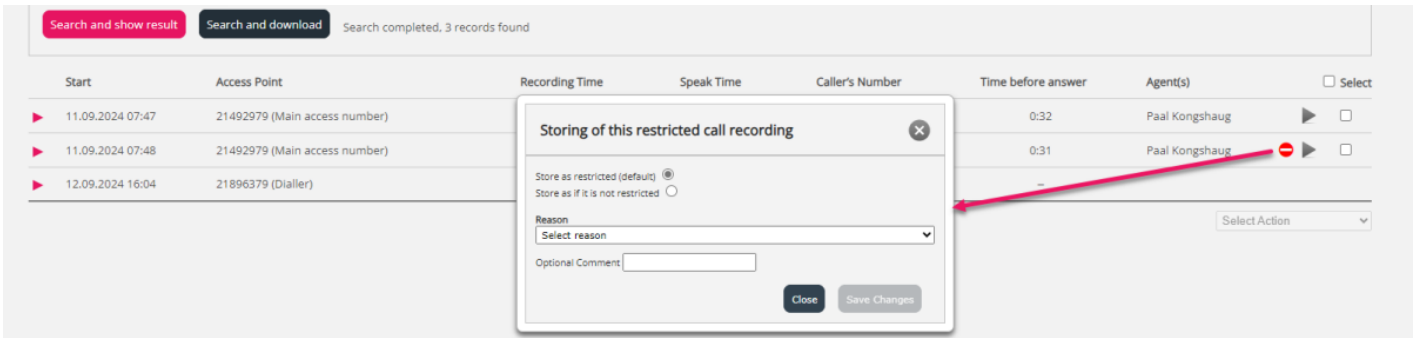
Start	Access Point	Recording Time	Speak Time	Caller's Number	Time before answer	Agent(s)	<input type="checkbox"/> Select
07.08.2024 09:05	21492979 (Main access number)	0:36	0:36	§§§§§§	0:28	F§§§§§§	  <input type="checkbox"/>
07.08.2024 09:06	21492979 (Main access number)	0:39	0:39	§§§§§§	0:19	F§§§§§§	 <input type="checkbox"/>
07.08.2024 09:08	21492979 (Main access number)	0:23	0:23	§§§§§§	0:21	F§§§§§§	 <input type="checkbox"/>

Select Action

The red stop sign is also shown in the Recording tab for this call when it's expanded, and in the **new Archive Player** (coming soon to all customers).

If you flag some calls as restricted, we have some options related to Restricted:

- By default, restricted call recordings are stored for the same number of days as recordings not flagged as restricted. However, you can decide that restricted recordings are **stored for a shorter time** period than call recordings that are not restricted, e.g. 90 days for recordings in general and 30 days for restricted.
  - The **Archive subscription** parameter 'Days to store restricted recordings' is by default empty, which means Puzzel uses the ordinary storage time. If 'Days to store restricted recordings' is set to a value less than ordinary storage time (must be done by Puzzel), the storage time will be accordingly.
- If you have a shorter storage time for restricted call recordings (e.g. 30) than for recordings not being restricted (e.g. 90), we show the parameter *Days to store restricted recordings* with the defined value in the **Storage time** modal that can be opened from the the Archive Search page. If you have a shorter storage time for restricted call recordings and you for some reason need to store one restricted call recording longer than the short storage time for restricted (in this case increase to storage time to 90 days), then you can **click on the red stop sign** for a restricted call to open a modal, where you can select "Store as if not restricted". When this is done, the call is still flagged as restricted, but it will be stored as long as recordings that do not have the restricted flag set.
  - If *Require reason for Play/delete/download* is ON, then we also require a reason for setting *Store as if not restricted*'.
  - If a user chooses *Store as if not restricted*' for a restricted call, an entry is created in the Archive Audit log ('Restricted call recording storage changed')



- On page **Users - Products** you can set the **Recording property** 'Access to restricted call recordings' to OFF for selected user groups/users if they should not have access to play restricted recordings in Admin Portal's Archive or in the agent application's *My call recordings* tab.

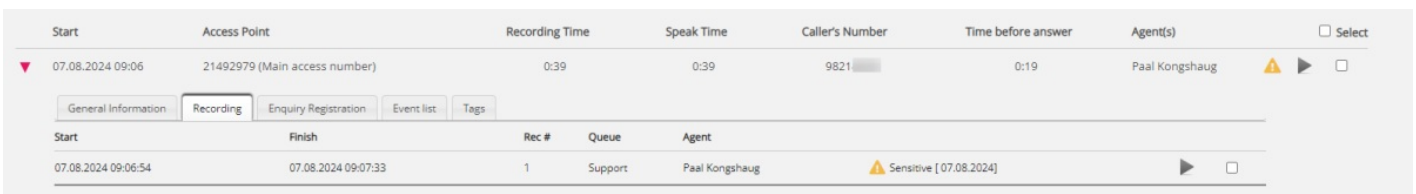
### Should some call recordings be flagged as "Sensitive"?

If sensitive information (e.g. a social security number) is revealed in a phone call that's being recorded, you can flag this call recording as sensitive, and possibly manually delete the recording (from Admin Portal's Archive) after the recording is done.

There are 3 ways to set the sensitive flag on a call recording.

- An agent, while connected to the caller or while in wrap-up, can select an **Enquiry registration Topic** that's configured as sensitive.
  - To configure that an Enquiry registration Topic is 'sensitive' is done on the new version of page **Users – Enquiry registration** (coming soon).
- An agent with access to **My call recordings tab** can tick 'sensitive' for an existing call recording if she did not select a 'sensitive' Enquiry registration topic. The agent can also untick sensitive if she by mistake selected a 'sensitive' topic in the Enquiry registration.
- A supervisor/administrator can listen to a call recording in **Admin Portal Archive's NEW Player** and tick (or untick) sensitive here if needed.

In the Archive result list, we show a Sensitive icon for calls that contain a recording (that has the sensitive flag set). In addition, in the **Recording tab** we show a **Sensitive icon** and the word 'Sensitive' if the recording has the sensitive flag set.



If an agent for a **Chat** selected an Enquiry registration topic that's sensitive, we show the sensitive icon in the Archive result list for this chat, and we show the sensitive icon in the upper right corner of this chat's Chat log.

In the **Enquiry registration tab** for a call in Archive's result set we show "[Sensitive]" next to a Topic's name if this Topic was configured as Sensitive when the registration was done.

**Please note** that the agent can finalize the Enquiry registration several minutes after the call ended, which means that the call's General information and the recording might be shown in Archive (as not sensitive) several minutes before the Enquiry registration is imported to Archive and the call recording is changed to sensitive.

In Archive's **NEW Player** you can see if the sensitive flag is set, and you can set/remove the sensitive flag if that's needed.

There is a **Advanced search field** named "Only include sensitive recordings" that you can tick if you want to find all sensitive recordings e.g. for 1 day.

## Limit how old call recordings a user has access to in Archive

If not all Archive users should have access to the call recordings in Archive for the full storage time defined for call recordings (as is the default), this can be solved by setting values for the (Users - Products) Recording property “**Limit Archive recording access to days**”.

- If users in an admin user group should only have access to call recordings in Admin Portal's Archive for e.g. 30 days when recording files are stored for e.g. 6 months, you can set this property to 30 for the relevant user group(s).
- If this property does not have a value for an agent user group, the agents will have access to their own recordings in the Agent application's My call recording tab for 90 days (given that they have access to this tab).