CALL RECORDING

Supervisor
User Guide

MOMENTUM

Powered by: miarec

25Q1e

Introduction

The guide provides a helpful introduction and some step-by-step instructions for getting started with the sections, tools, and features that may be displayed in the Call Recording portal for Supervisors and those users who are granted access to work within it. Note: Some features described here may not be available for all organizations.

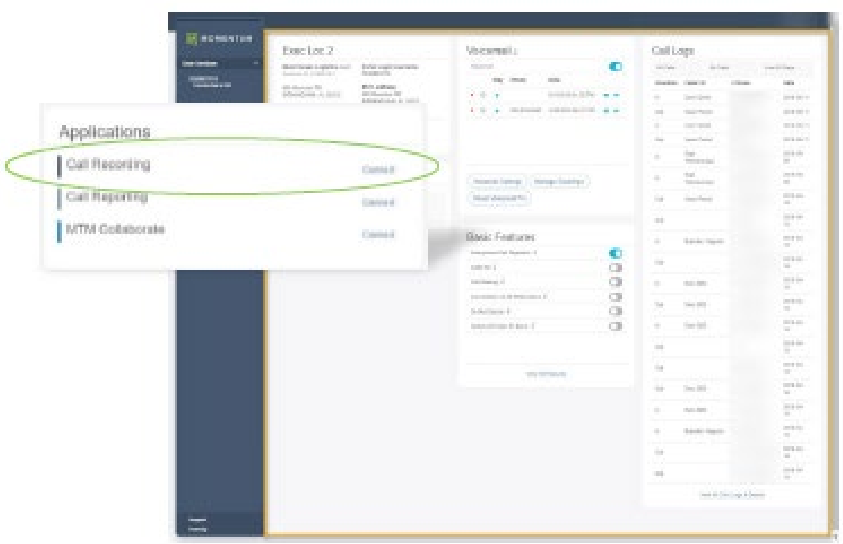
Getting Started

Accessing the Call Recording Portal

The Call Recording portal (powered by the MiaRec service) offers a user-friendly interface which can be accessed securely and easily 24/7/365.

SAML 2.0 / Single Sign-On Access

Recommended security protocol. The Cloud Services Portal offers a direct link to access the Call Recording Portal using your service provider system sign-in credentials. This link is found in the Applications card on your Dashboard within the Cloud Services Portal online. Once you log into the My Cloud Services Portal, you are ready to work in Call Recording when you need to do so. This helps reduce the number of sign-in credentials you have to remember and adds an extra layer of protection to keep important private data safe and secure.



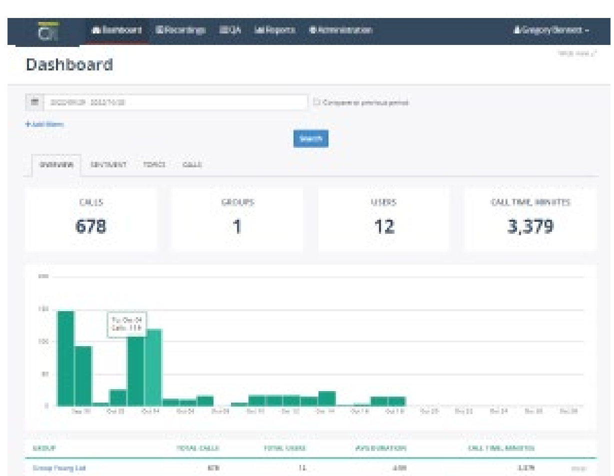
For Administrators in the Cloud Services Portal, the link to directly access the Call Recording portal using their Administrator credentials is found at the top of the Call Recording section page under Admin Tools.

Go to **Admin Tools > Call Recording** and click on the link at the top of the page. Once the Call Recording account is added and the user's permissions to work within the Call Recording Portal are defined by a Call Recording Admin, a simple click on the link displayed in the Cloud Services portal opens a new browser window and seamlessly launches the Supervisor directly into their Call Reporting Dashboard view. Once there, they may review information and/or select from available tools displayed within the Call Recording Portal to complete tasks they have been granted permission to perform.

Authorization for access is required to see tools or other's recordings in Call Recording.

This example shows a Dashboard view for a Supervisor who has access to view the Recordings and Reports and see information in Administration for her groups.

Non-Administrators will only see the sections they have been granted permission to view.

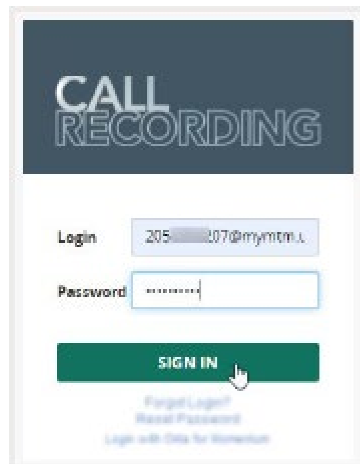


Direct or Password Access

Use at own risk. This access protocol requires specialized authorization and specific advanced permissions to be set by the Organization. Authorized users with these direct access credentials may open a web browser (e.g., Chrome or Edge) and enter the full address (URL) sent to you by the Service Provider *or granted by your organization's Call Recording Application Administrator*. The URL (site address) for your organization may have been formatted to use a customized protocol. Examples of site address formats that are supported for this type of access include:

- http://1.2.3.4
- http://recording.momentumtelecom.com
- https://cr.momentumutelecom.com

The exact address you should use and your user name (login) and password credentials for the Call Recording web portal are provided to you when enabled. Keep this information safe and secure at all times. Please Note: In the direct/password access scenario, the access credentials to sign in may differ from the credentials used for other sites, applications, or service portals and are dependent on the setup and security protocols defined by the organization rather than the service provider.



If the URL address you enter in the browser address field is correct, the login page displays:

Simply enter the User Name (Login) and Password credentials provided to you and click **Login**.

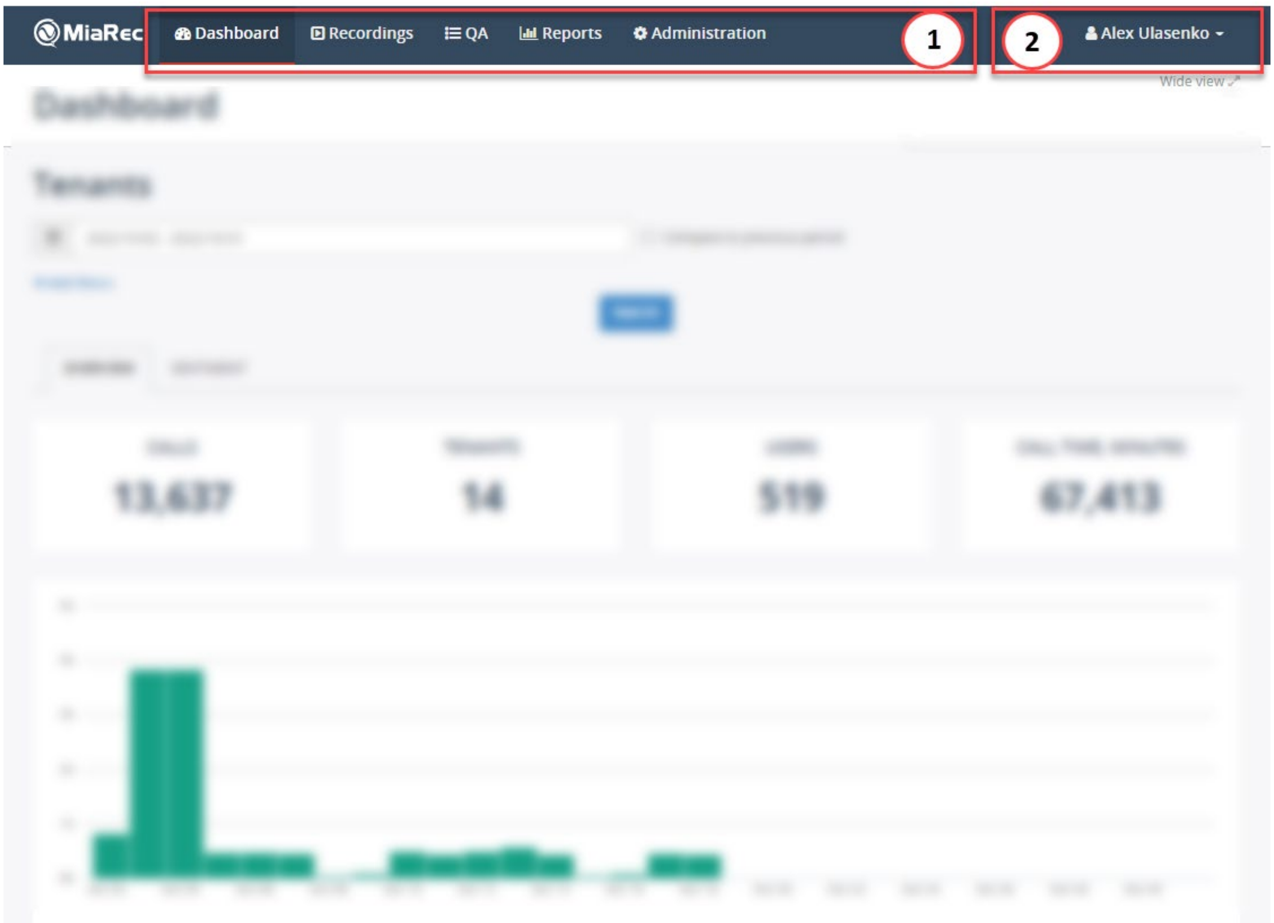
- If your organization requires authentication, you may be required to verify your account.
  in this case, follow the instructions that are provided to complete this process and continue.
- If your organization requires a password change during initial login, follow the instructions to
  create a new password that meets all security protocols in place within your organization.
- If the portal web page does not open (or an error message displays), check your credentials and try
  again, or contact your Call Recording Admin for assistance.

Once the login process is verified and successful, the Call Recording portal opens, and the Supervisor or User is presented with their Call Recording Dashboard and toolbar links to the areas they are authorized to access within the Call Recording Portal.

Toolbar

Navigation Options

At the top of the page, you will find the **Navigation** and **My Profile** menus.



Navigation Menu

(1 in the example) This toolbar displays navigation buttons you can use to access the following sections:

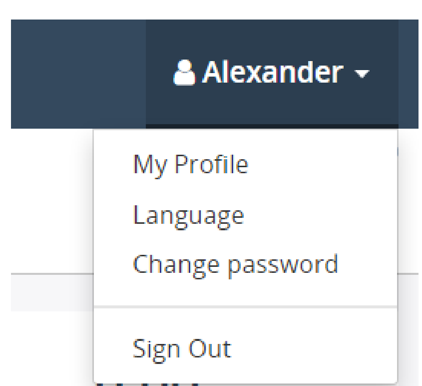
- **Dashboard**. Provides call metrics for your entire organization.
- **Recordings**. Provides to access call recordings.
- **QA**. Provides quality assurance (QA) metrics for your entire contact center.
- **Reports**. Provides access to build and run custom reports.
- **Administration**. Provides access to administration settings and configurations.

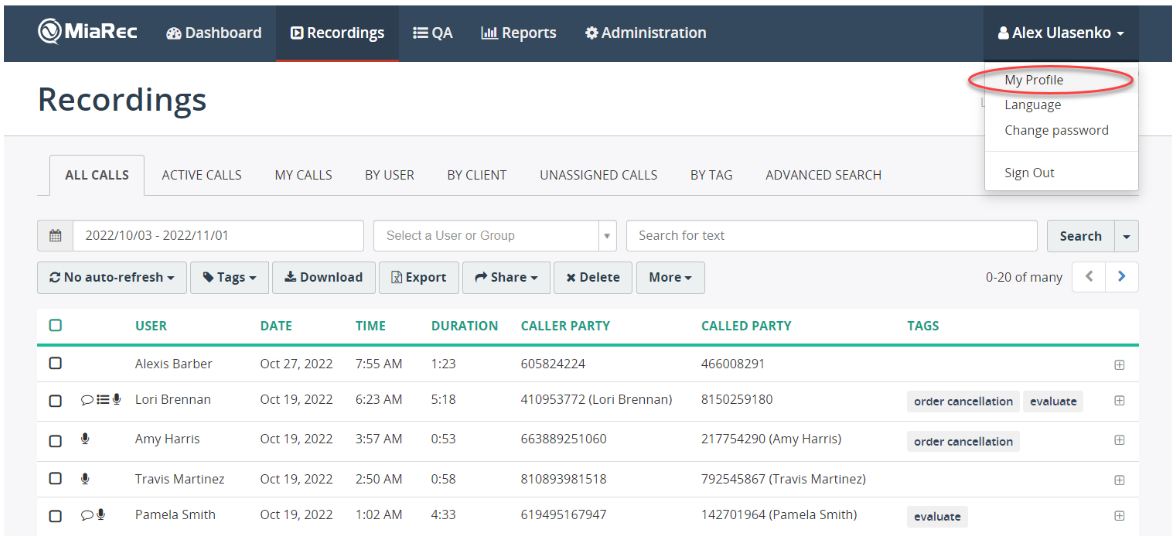
Note: Some sections may visible but the contents are read-only due to Role permissions and licensing set up by the administrator.

My Profile Menu

(2 in the example) The user profile menu provides quick access to your account settings, like language, time zone, email address and others.

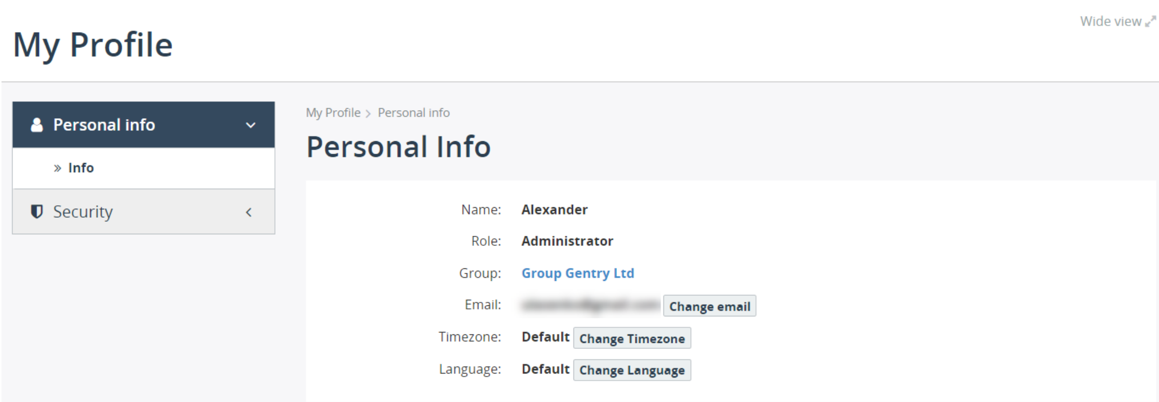
To access your user profile settings, click your name in the top right corner and select **My Profile**.





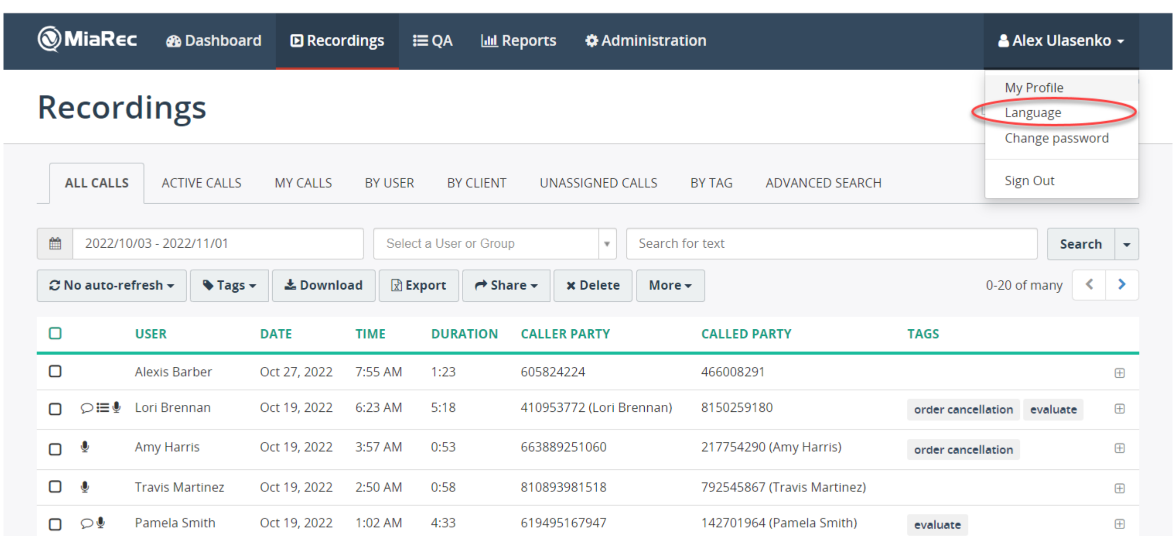
On the **Personal Info** page, you can edit your email and change the default timezone and language.

Note: To modify the name, role and group attribute, contact your administrator.

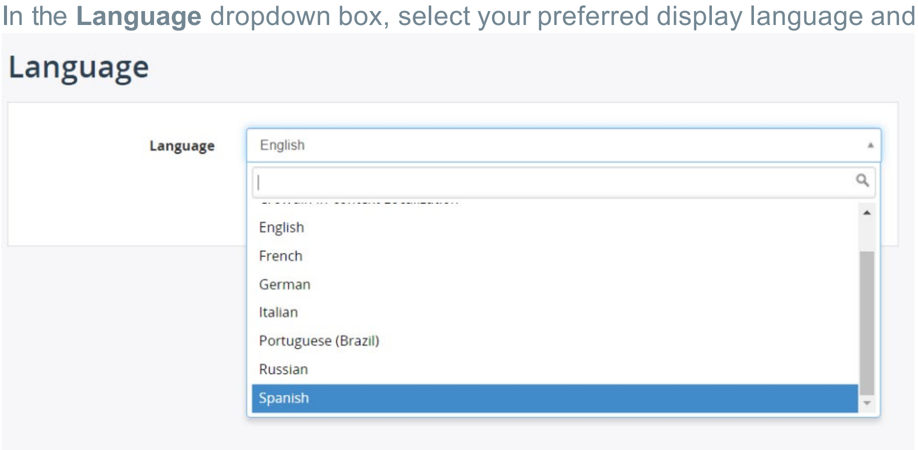


Change Portal Language Display

To change the web portal language, click your name in the top right corner and select **Language**.



In the **Language** dropdown box, select your preferred display language and click **Save**.

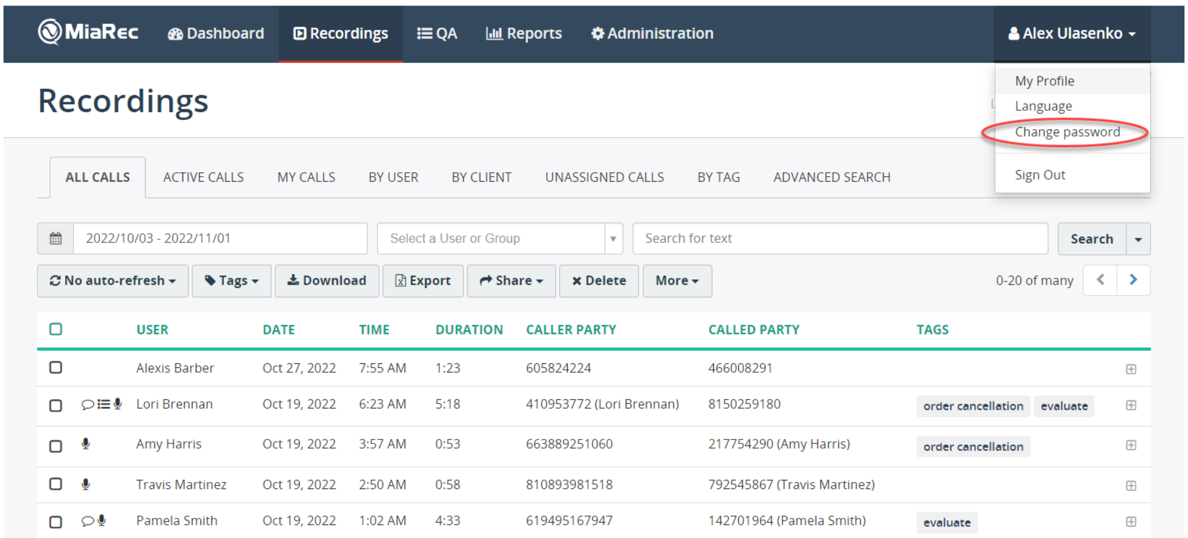


Change Password

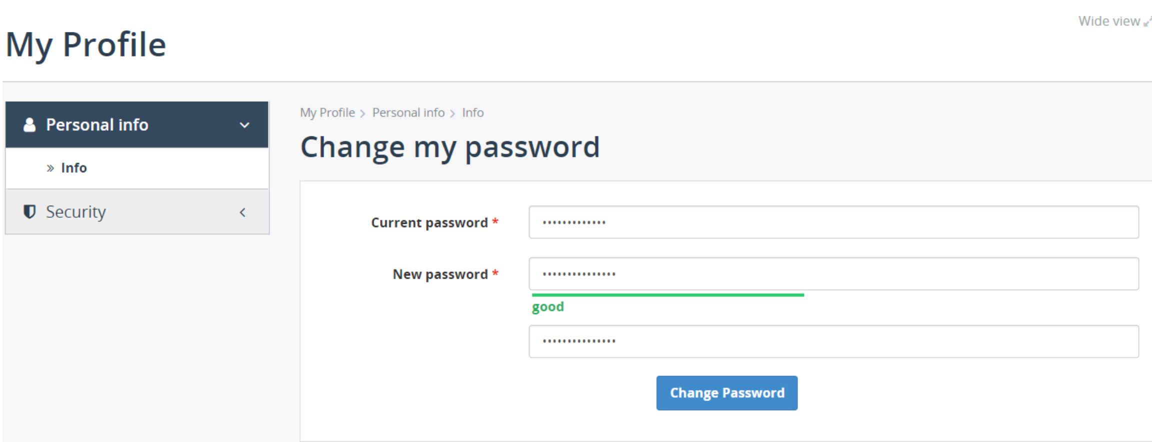
Do not change the information here if using SAML 2.0.

To change your password (if access to do so is permitted):

1. Click your name in the top right corner and select the **Change Password** option.



2. Enter your current and new passwords
3. Click the **Change Password** button.

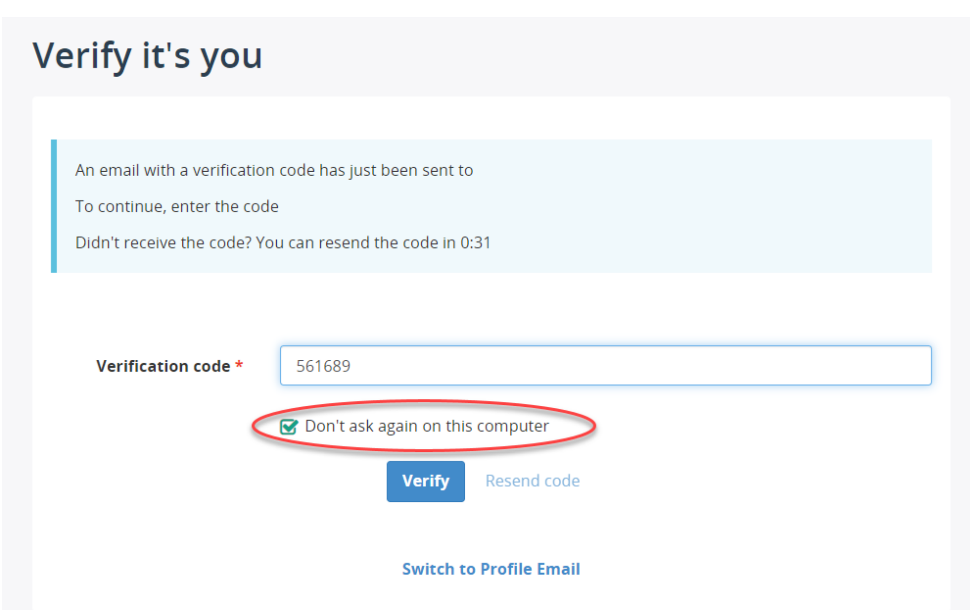


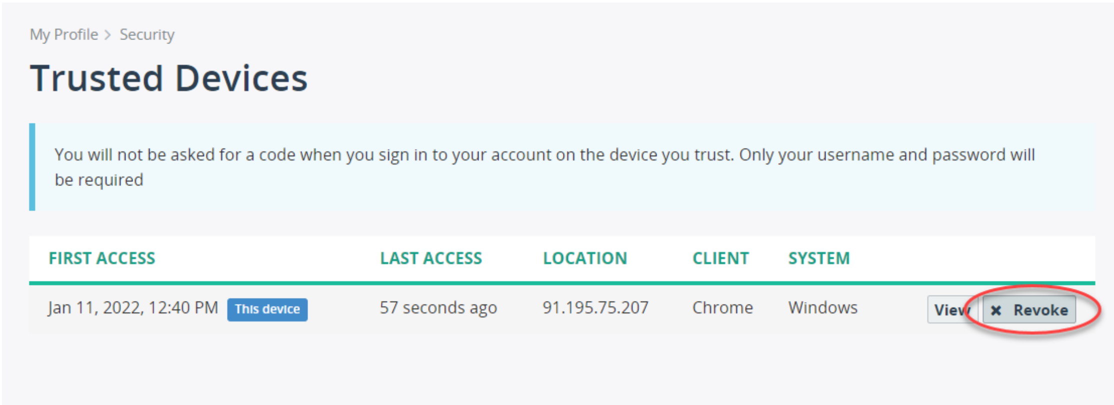
Security

Trusted Devices

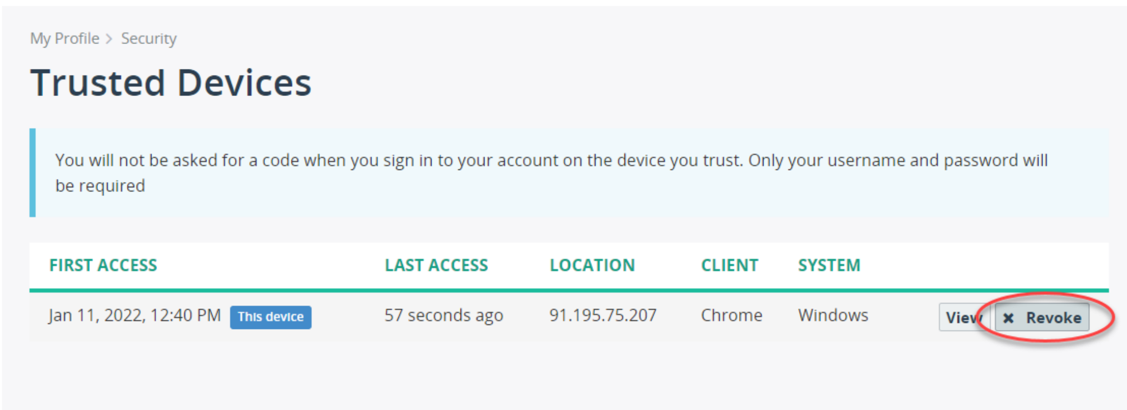
On the **Trusted Devices** page, you can view the devices that were marked as trusted when you signed in to your account.

When you sign into your account, you can enable the **Don't ask again on this computer** option. Such a device will be saved as trusted. You will not be asked for a code the next time you log in from the same device. Only your username and password will be required.



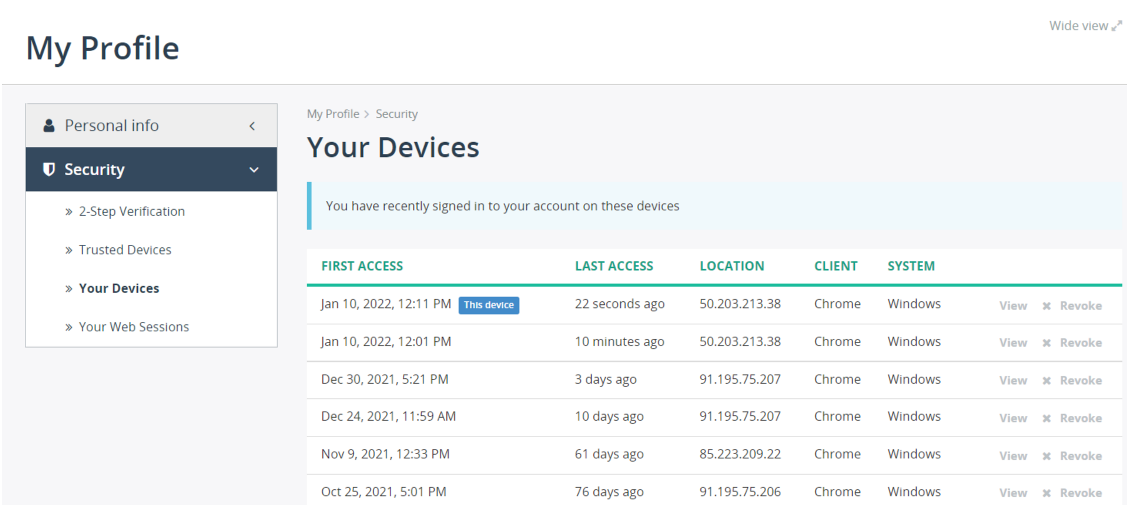


For a device listed that you do not recognize, you revoke a trust by clicking the **Revoke** button.

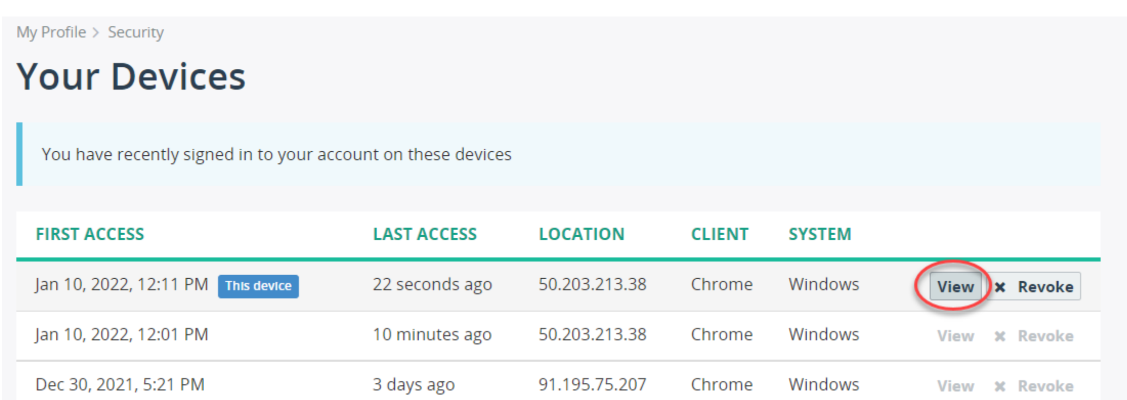


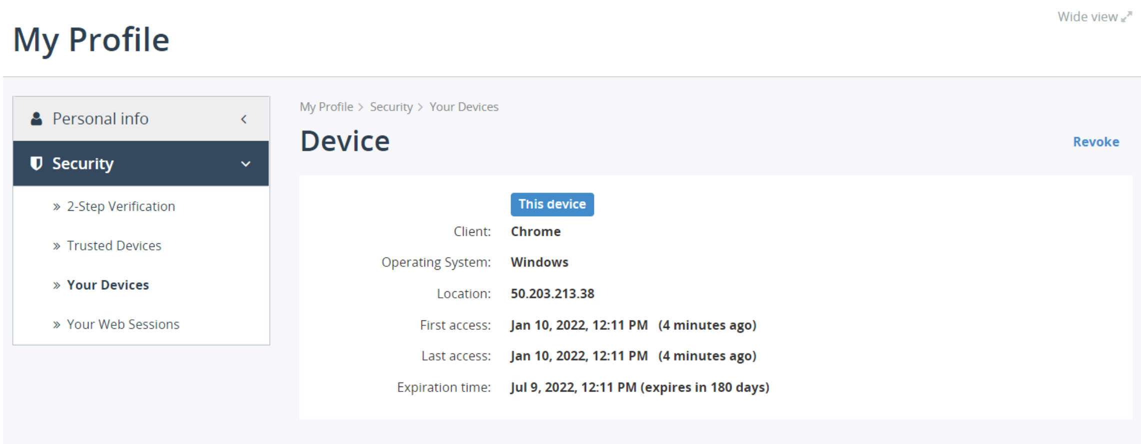
Your Devices

The **Your Devices** page shows all the devices and their IP addresses from where you accessed your account. When you access the web portal from a new device, you will receive an email notification.



To view detailed information about the device, click the **View** button in a list.

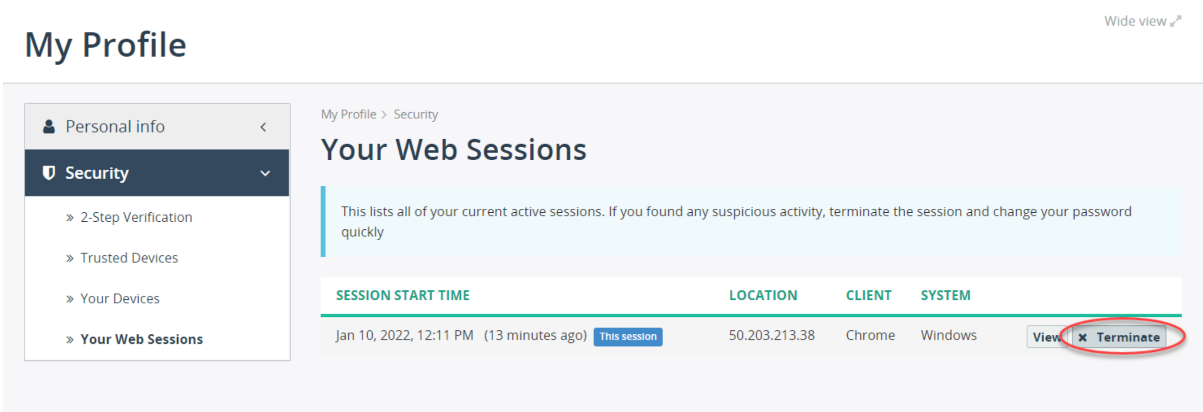




Your Web Sessions

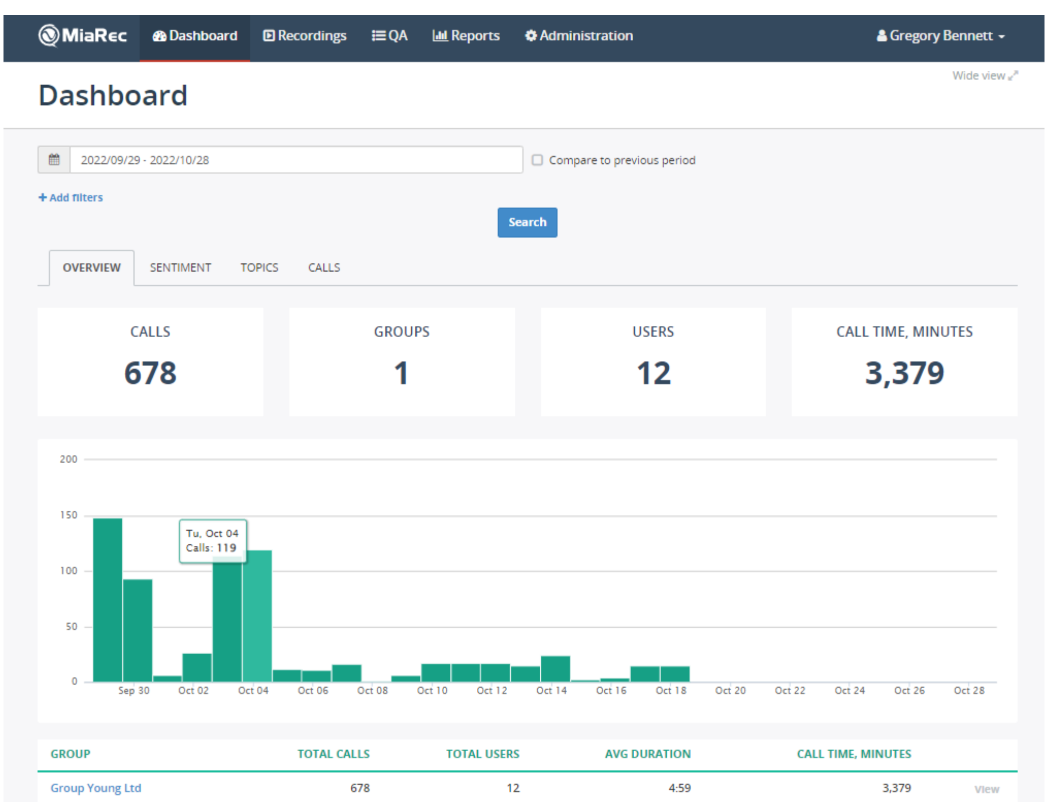
The **Your Web Sessions** page shows all your currently active web sessions.

If you see any suspicious activity, click **Terminate** to terminate the session and change your password.



Dashboard

The Dashboard page allows supervisors and users to gain an accurate and evolving picture of their entire call center's performance. With all key metrics available on a single screen, you can derive actionable insights, streamline efficiency, and enhance the experience between the company, agents, and customers.



Key features of the Dashboard:

- A bird's eye view of various call metrics, like the total number of recorded calls, calls' duration, calls per day and others.
- A drill-down view that allows you to dive deep into your data and lets you explore your data at a more granular level.
- Trend analysis view with the ability to compare key metrics over time to instantly see trends
- Powerful filtering capabilities, which allow you to focus only on the data that is important to you.

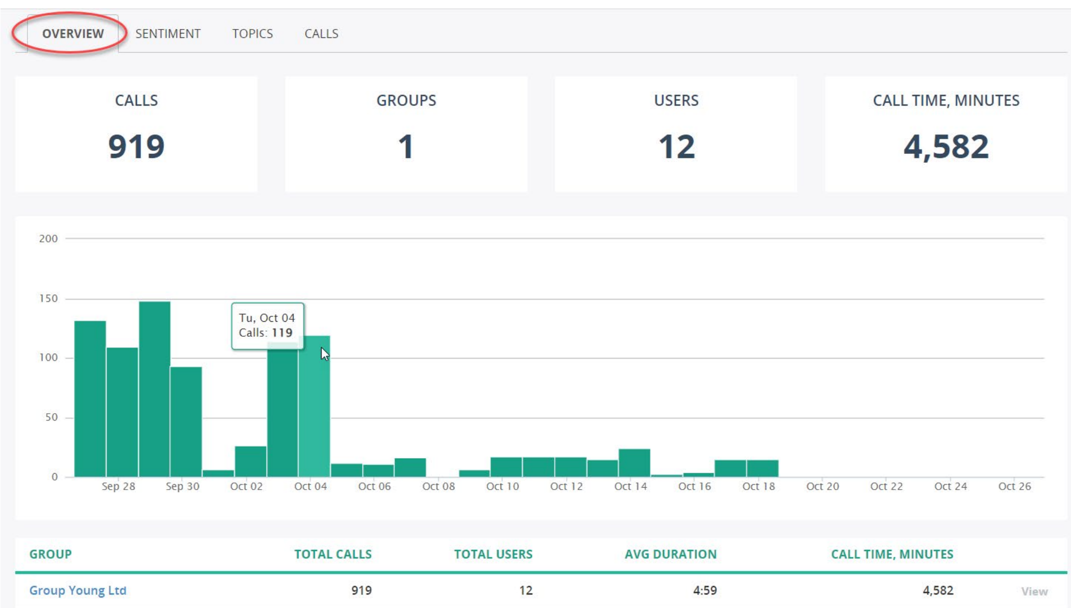
Dashboard Metrics

Call Metrics

Overview Tab

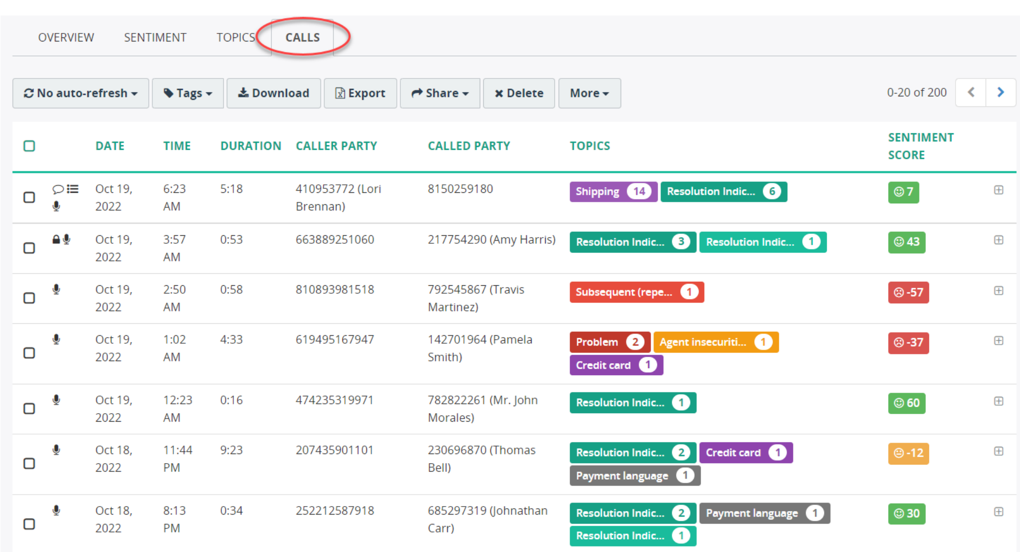
The **Overview** tab provides information about the key call metrics, like the total number of recorded calls per day, call time, and average duration time.

You can view the number of calls per day within the chart by hovering the cursor over a point on the graph.



Calls Tab

The **Calls** tab shows the call recordings, which relate to the selected period in the Dashboard and the applied filters. Use this tab to review the individual call recordings, from which the aggregated call metrics were calculated.



Info: A list of the displayed columns in the **Calls** tab is configured by the administrator under **Administration > Customization > Field Visibility**.

Sentiment Metrics

The **Sentiment** tab provides easy yet granular visibility into the sentiment analysis and scoring of all customer interactions.

Sentiment analysis uses Artificial Intelligence (AI) and machine learning to analyze call transcripts for polarity. Polarity refers to the overall sentiment conveyed by a particular text, phrase or word. This polarity can be expressed as a numerical rating known as a "sentiment score".

The call distribution by sentiment is grouped into 5 categories and marked with distinctive labels:

- Very negative
- Negative
- Neutral
- Positive
- Very positive

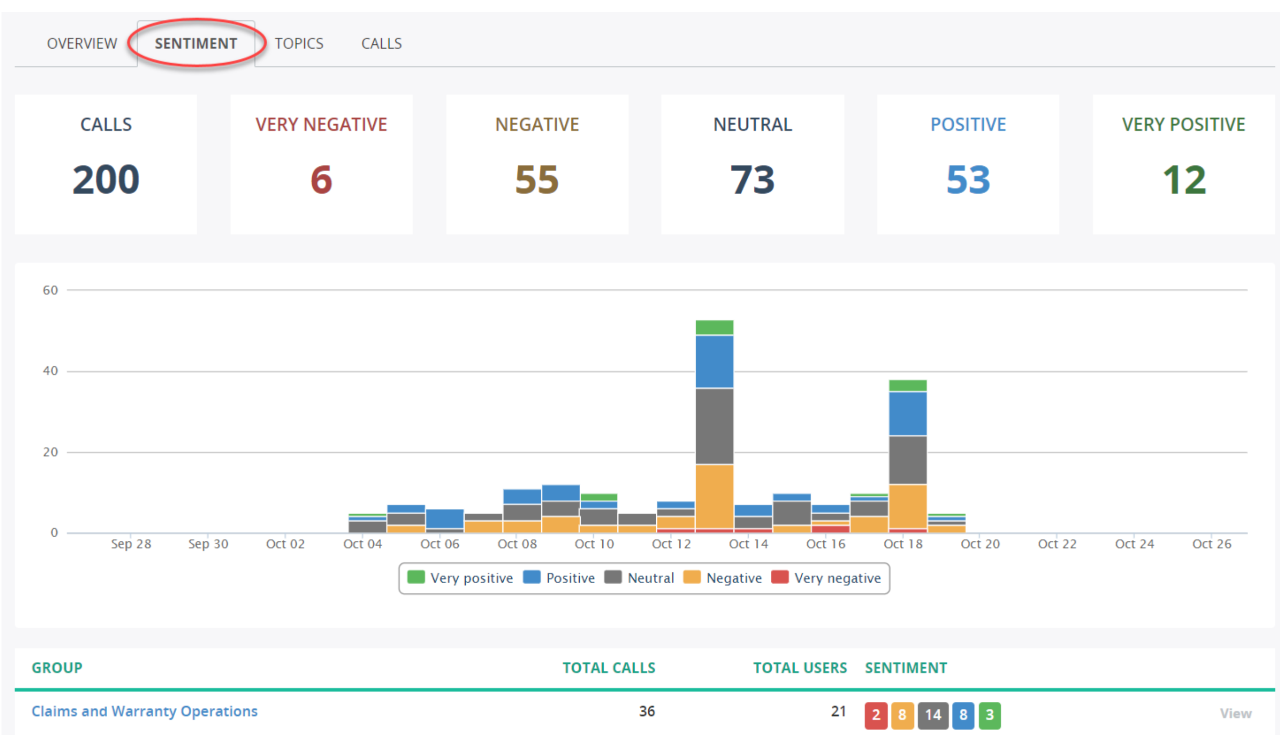
Sentiment Score vs Sentiment Label

The sentiment labels are set based on a numeric sentiment score that is calculated for each call, where each label covers 20% of the values on a scale. The Call Recording platform uses a numeric scale from -100 to +100 for a sentiment score.

A relationship between labels and scores is presented in the following list:

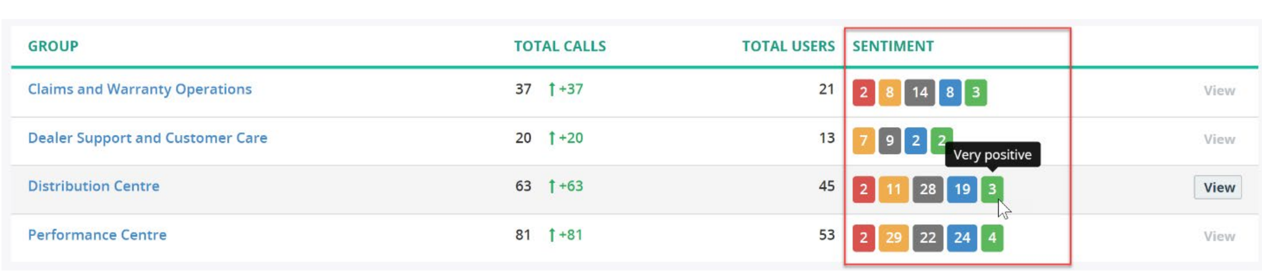
- **Very negative** (scores below -60)
- **Negative** (scores between -60 and -20)
- **Neutral** (scores between -20 and +20)
- **Positive** (scores between +20 to +60)
- **Very positive** (scores above +60)

The **Sentiment** page shows the overall distribution of calls by sentiment as well as the chart, which represents daily sentiment trends through the selected period.



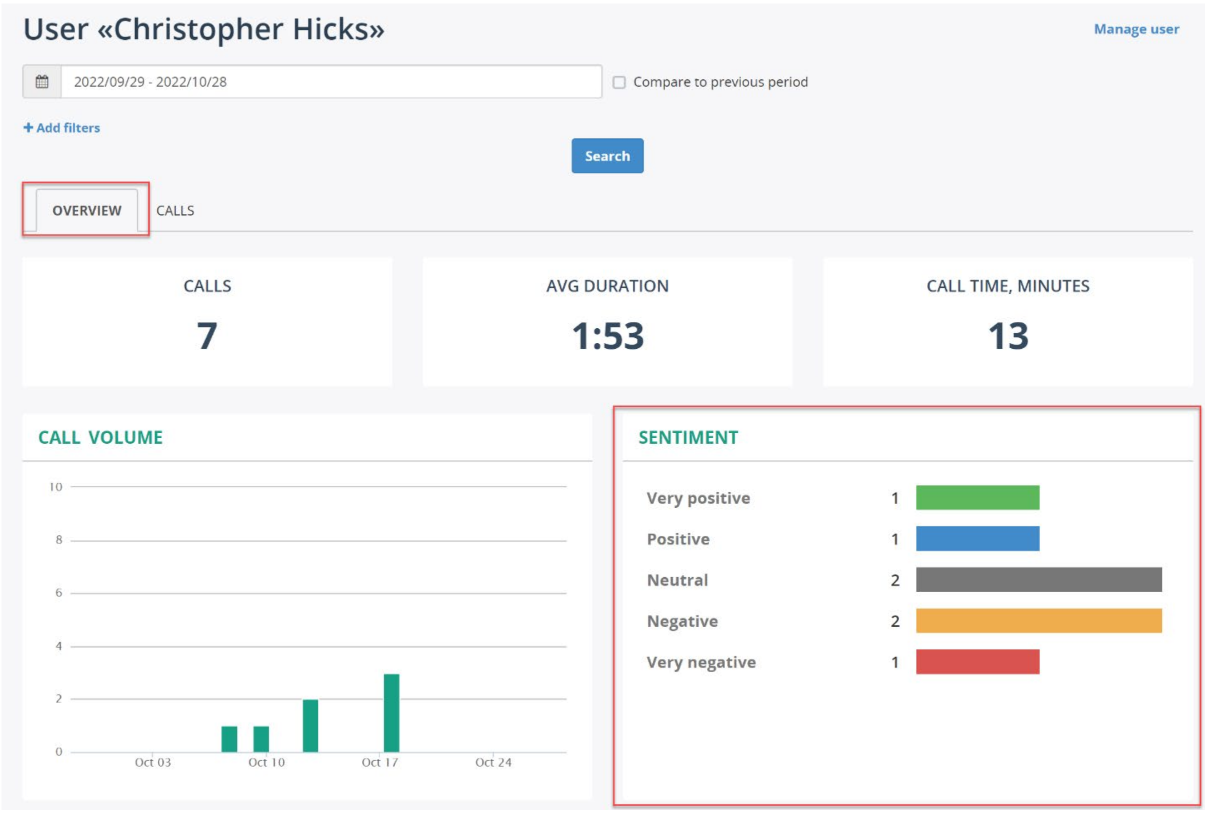
Depending on a drill-down level, the **Sentiment** page also shows a distribution of calls by sentiment for each group or user.

The inline labels show the total number of calls in each sentiment category. By hovering a mouse cursor over a label, you can see the sentiment category name.



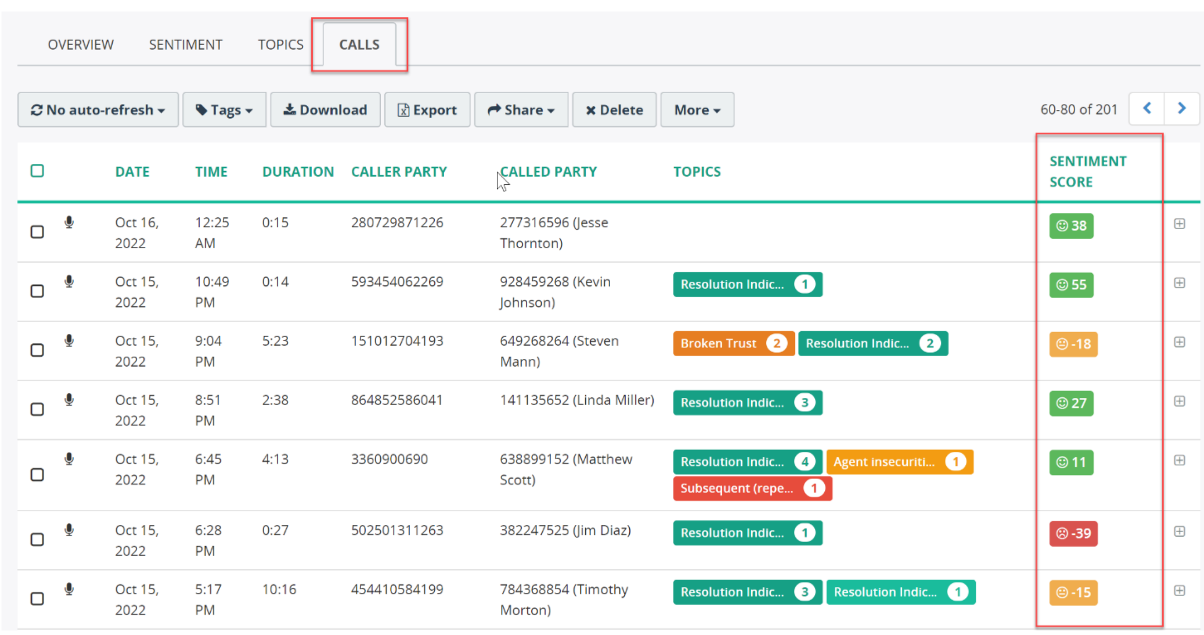
Sentiment Metrics - User Level

When drilling down to a user level, the sentiment metrics are presented on the **Overview** page:



Sentiment Score in Calls Tab

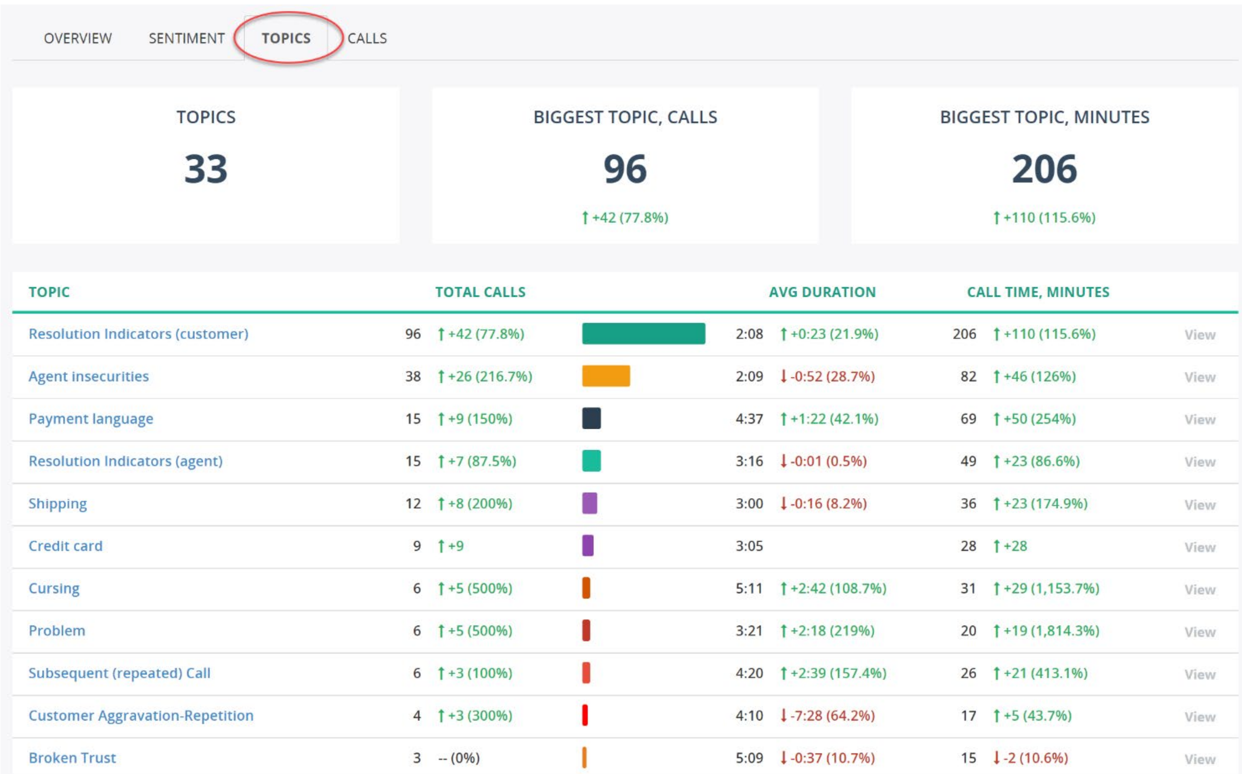
By navigating to the **Calls** tab, you can view the sentiment score in the corresponding column of the calls list.



Topic Metrics

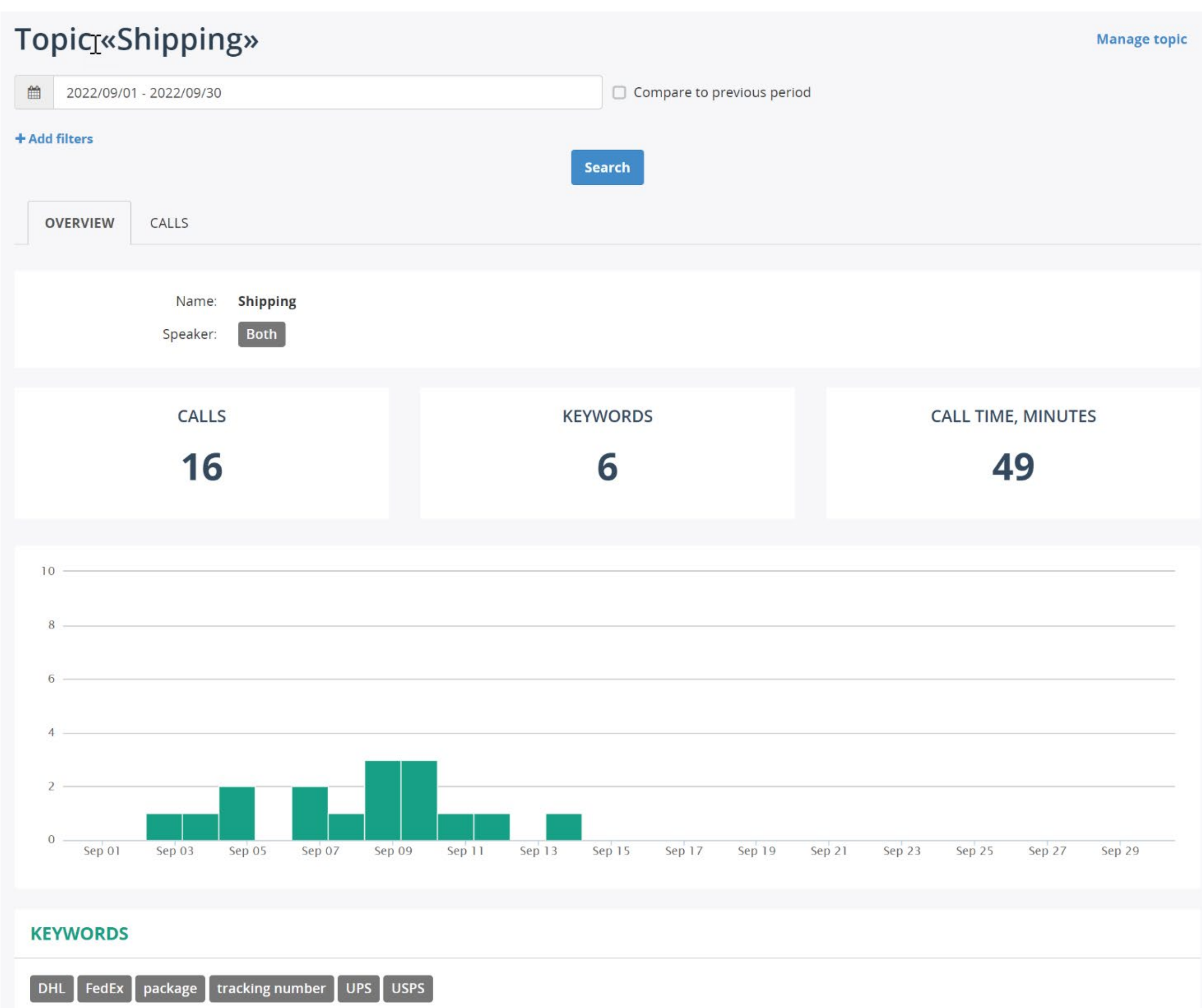
The **Topics** page shows the call distribution by topic. For example, as a supervisor, you can easily and quickly analyze call volume trends per topic over time, e.g., changes in the number of calls related to shipping issues from last month to this month.

The topics are shown in sorted order, starting with the topic with the highest number of calls shown at the top.



TOPIC	TOTAL CALLS		AVG DURATION		CALL TIME, MINUTES		
Resolution Indicators (customer)	96	↑+42 (77.8%)	2:08	↑+0:23 (21.9%)	206	↑+110 (115.6%)	View
Agent insecurities	38	↑+26 (216.7%)	2:09	↓-0:52 (28.7%)	82	↑+46 (126%)	View
Payment language	15	↑+9 (150%)	4:37	↑+1:22 (42.1%)	69	↑+50 (254%)	View
Resolution Indicators (agent)	15	↑+7 (87.5%)	3:16	↓-0:01 (0.5%)	49	↑+23 (86.6%)	View
Shipping	12	↑+8 (200%)	3:00	↓-0:16 (8.2%)	36	↑+23 (174.9%)	View
Credit card	9	↑+9	3:05		28	↑+28	View
Cursing	6	↑+5 (500%)	5:11	↑+2:42 (108.7%)	31	↑+29 (1,153.7%)	View
Problem	6	↑+5 (500%)	3:21	↑+2:18 (219%)	20	↑+19 (1,814.3%)	View
Subsequent (repeated) Call	6	↑+3 (100%)	4:20	↑+2:39 (157.4%)	26	↑+21 (413.1%)	View
Customer Aggravation-Repetition	4	↑+3 (300%)	4:10	↓-7:28 (64.2%)	17	↑+5 (43.7%)	View
Broken Trust	3	-- (0%)	5:09	↓-0:37 (10.7%)	15	↓-2 (10.6%)	View

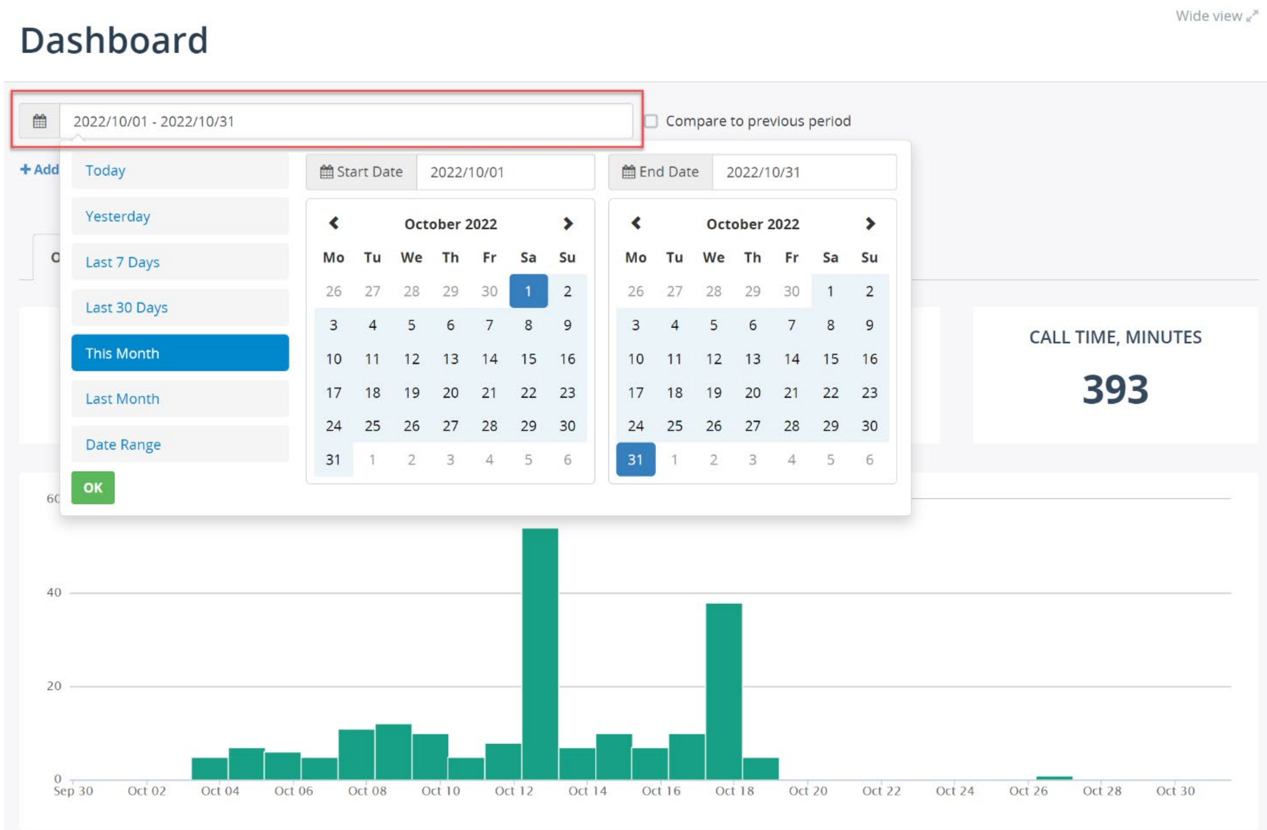
By drilling down to the individual topic, you can view trends of such a topic in a chart. This page also shows a list of keywords that are used to categorize calls with this topic.



Dashboard Filter

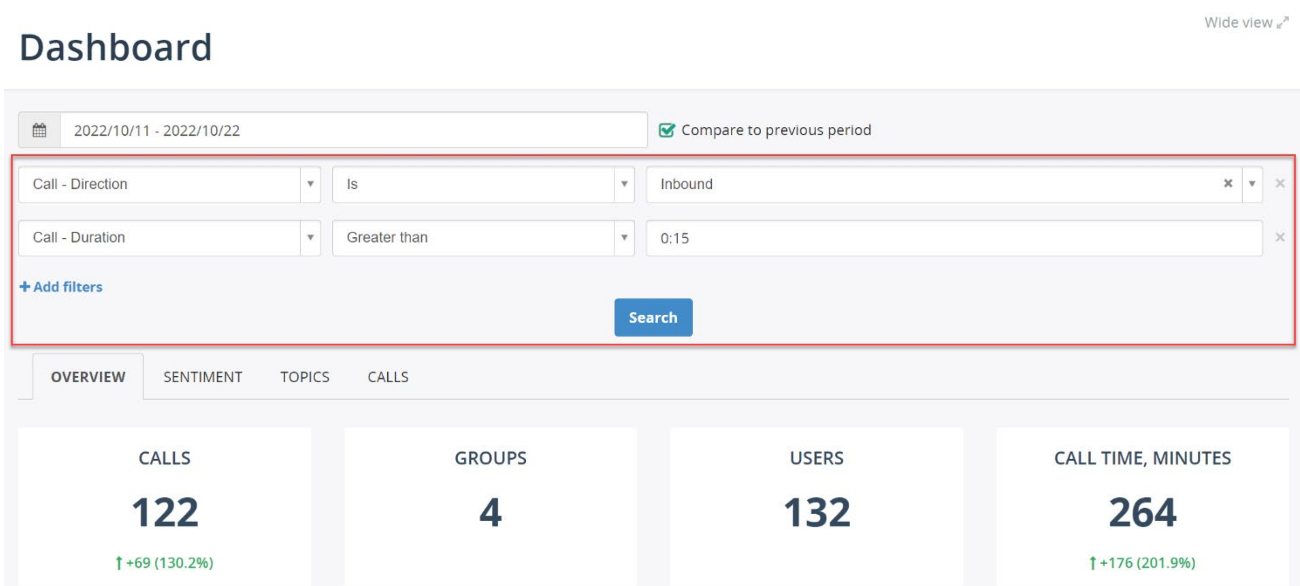
Select a Date Range

To review metrics for a specific period of time, select the date range in the Date Range input control. You can choose from one of the options like "Last 30 days", "This month", "Last month" as well as a custom date range:



Add Filters

Optionally, you can filter data that is presented in a dashboard. For example, you may filter calls by direction (inbound only) and duration (longer than 0:15).

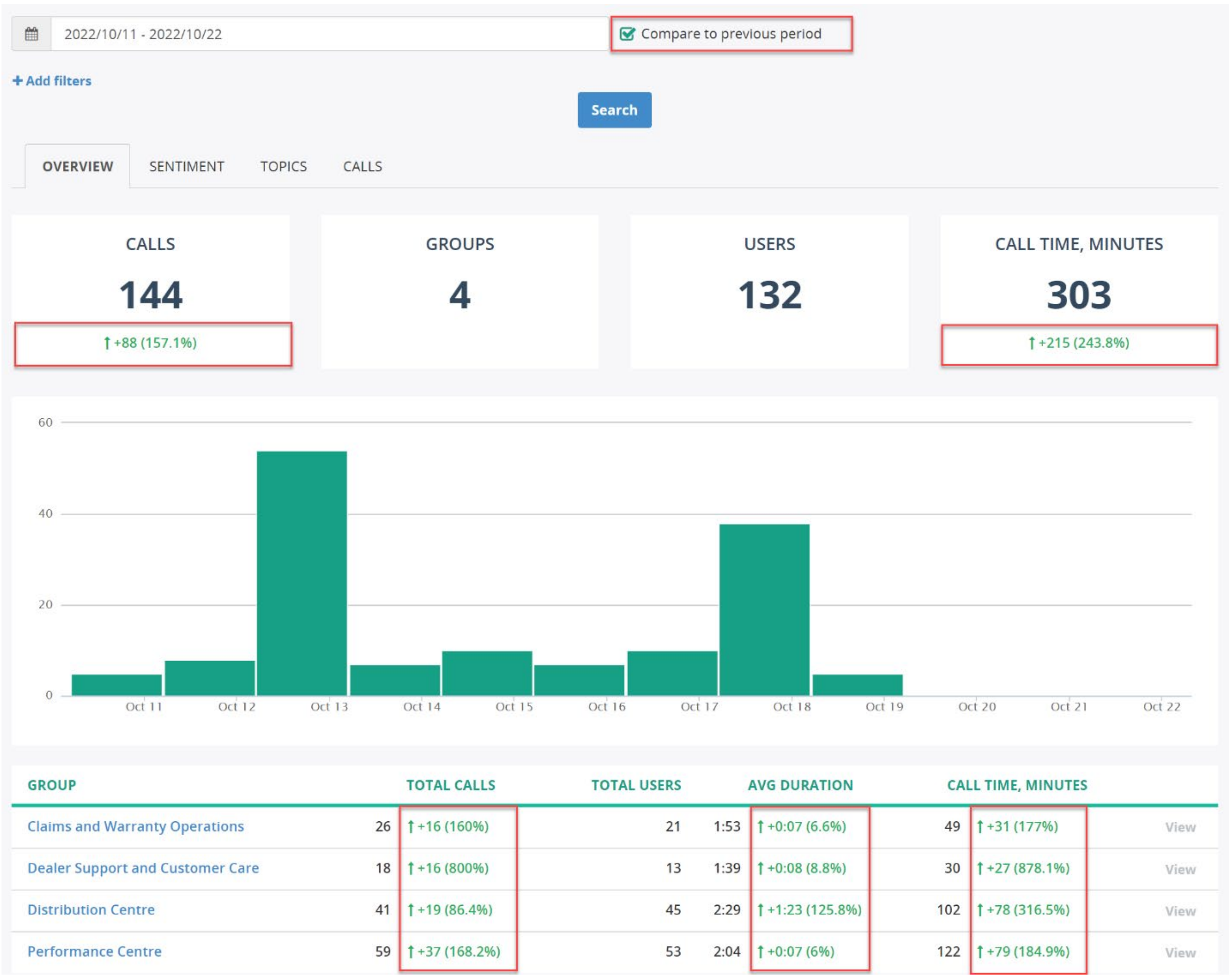


Compare to Previous Period

Comparing metrics over time is a great way to benchmark progress and identify issues as they come up.

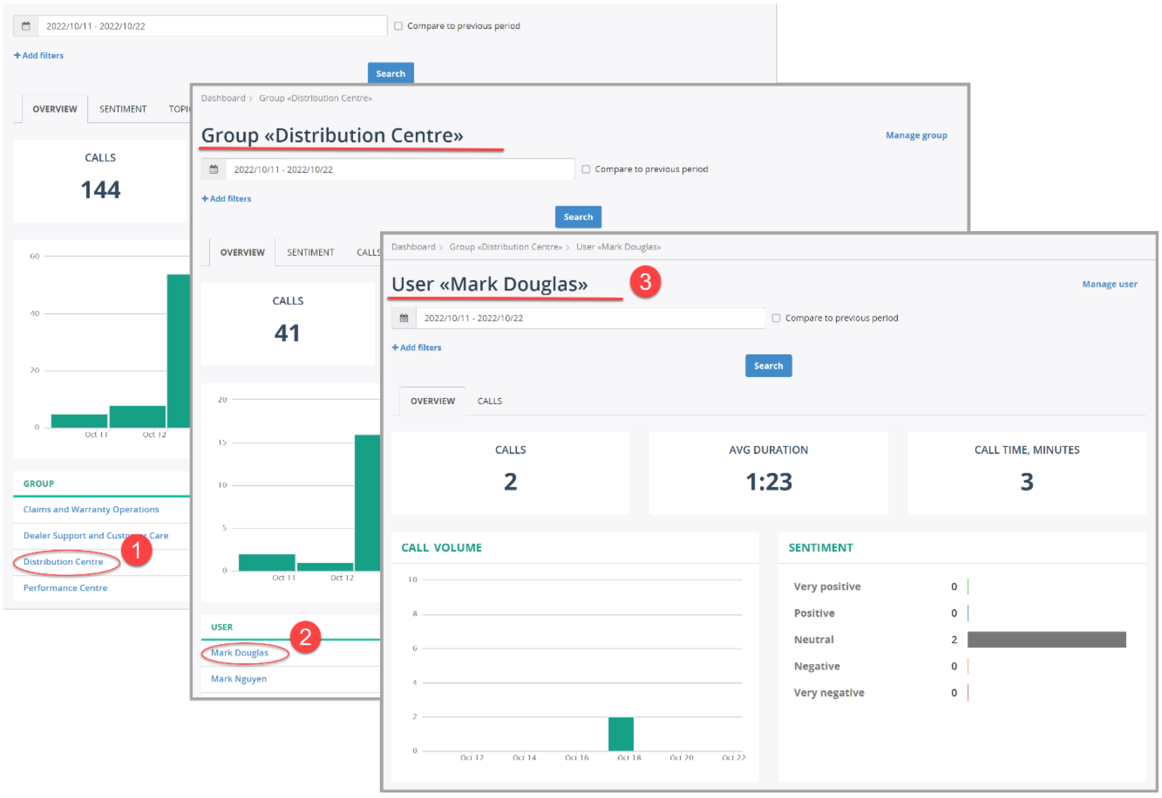
If the **Compare to previous period** checkbox is selected, then all applicable metrics are calculated for both the current period and the previous one (for example the current month and the previous month).

A magnitude of increase or decrease is shown in both absolute and relative (percentage) measures.



Drill-Down Capabilities

With a drill-down capability, you can dive deep from a bird's eye view of the data to a more granular view, like group or user-level metrics. To dive deep into the data, click the name of the corresponding group, user or topic, or click the **View** button next to such a name.

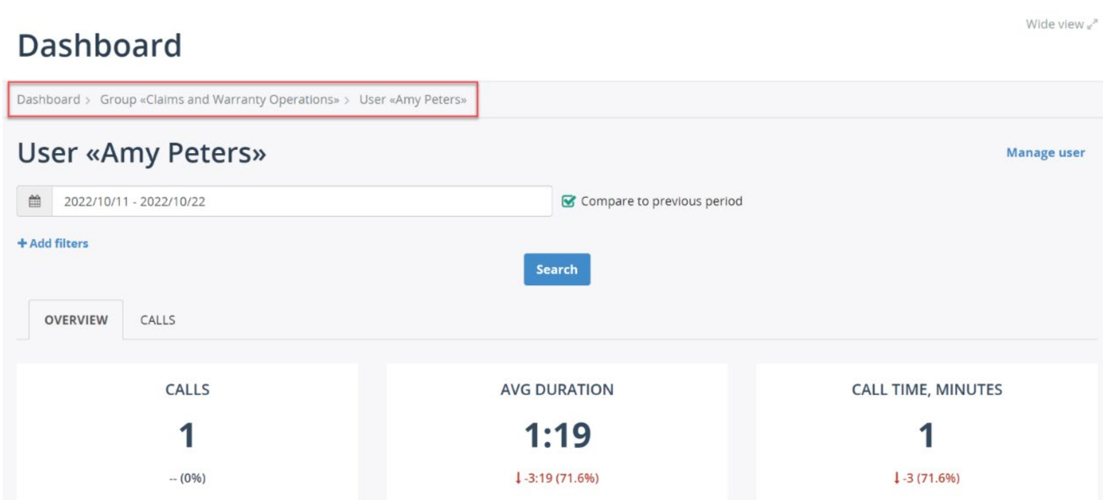


Breadcrumbs

The breadcrumbs at the top of the screen allow users to be aware of the current location within the hierarchical structure of a dashboard.

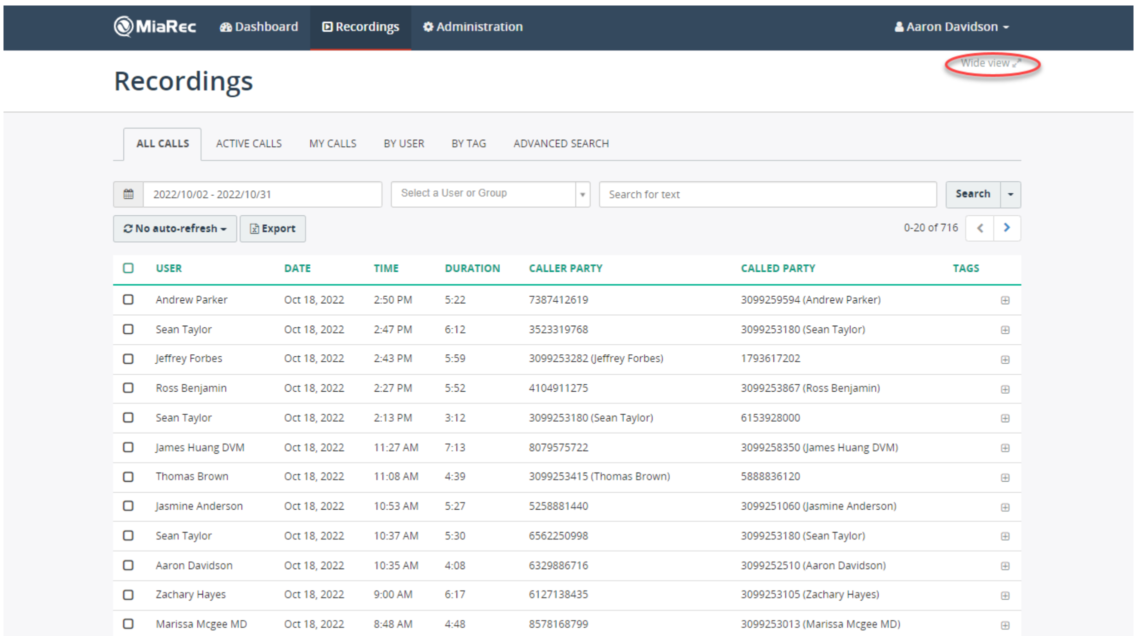
Breadcrumbs are a list of links representing the current page and its "ancestors" (parent page, grandparent page, and so on), going all the way back to the Dashboard homepage.

To navigate to the upper level in the Dashboard hierarchy, click the corresponding link within the Breadcrumbs.

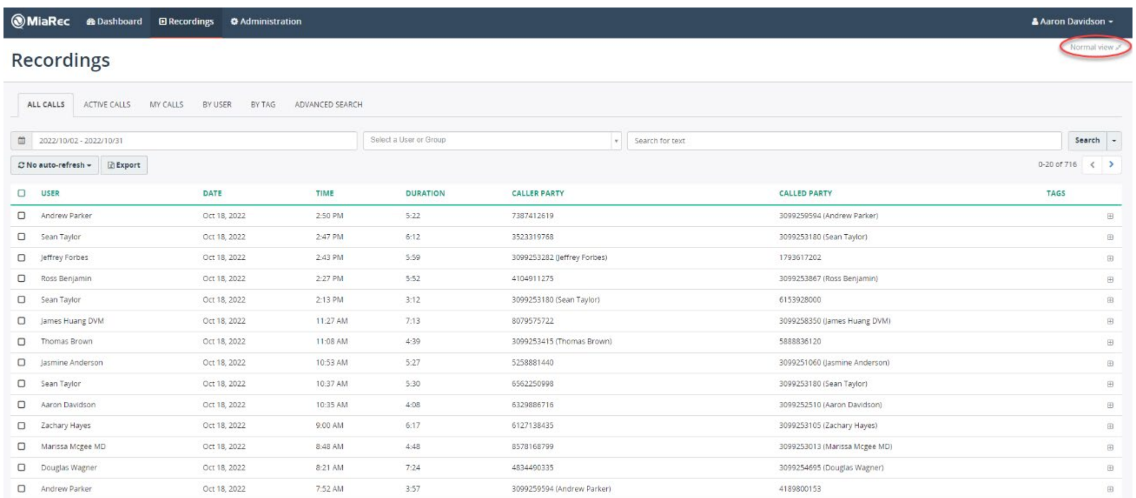


Using Wide View

The **Wide view** link in the top right corner allows you to change the width of the content on a page. This option is useful for tabular data like the **Recordings** page, where many columns could be displayed on a page.

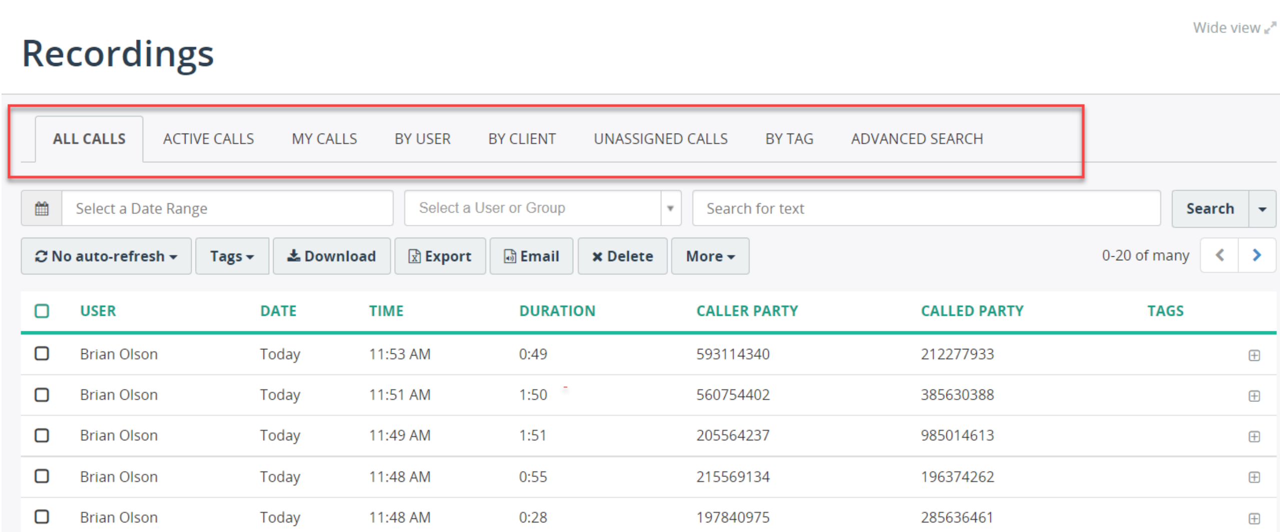


To switch back to a normal view, click the **Normal view** link in the top right corner.



Recordings

The **Recordings** page has the following tabs: **All Calls**, **Active Calls**, **My Calls** and others. Each provides quick access to the recordings that meet the respective criteria like "active calls only", "my calls only", and so on.



The service supports the following views:

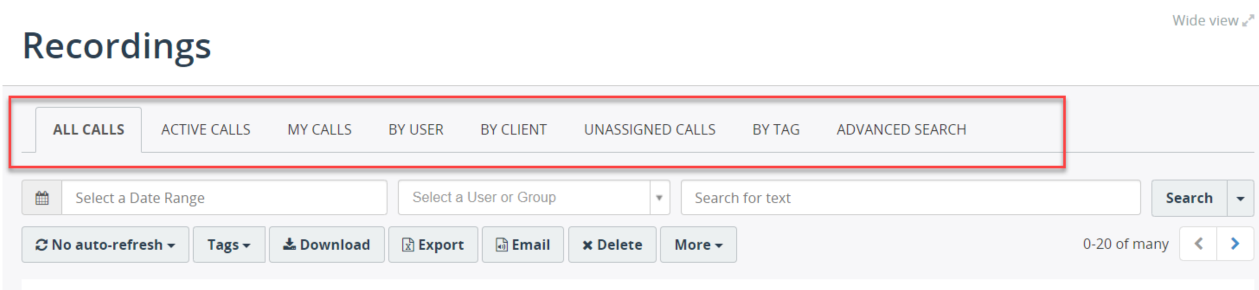
- **All calls** - Displays all the call recordings (including active ones). Note, depending on your role permissions and the access scope, not all call recordings might be accessible to you.
- **Active calls** - Displays any In-progress calls being recorded.
- **My calls** - Displays call recordings associated with the currently logged-in user.
- **By user** - Displays call recordings by a group or user.

- **By client** - Displays call recordings by a specified 'client' tag. Any calls assigned to the selected 'client' are listed for review and further filtering.
- **Unassigned calls** – Admins Only. Displays call recordings that are not assigned to any user. Lists calls that are recorded but did not get assigned to a user in your org – great way to ensure you've set up all users in correct groups.
- **By tag** - Displays call recordings by specified tag(s). For details, see Categorize call recordings.
- **Advanced search** - Provides access to an advanced search form. For details, see Advanced search.

Note: The Columns for data shown in each view are defined by your Call Recording Admin.

Recording Tabs

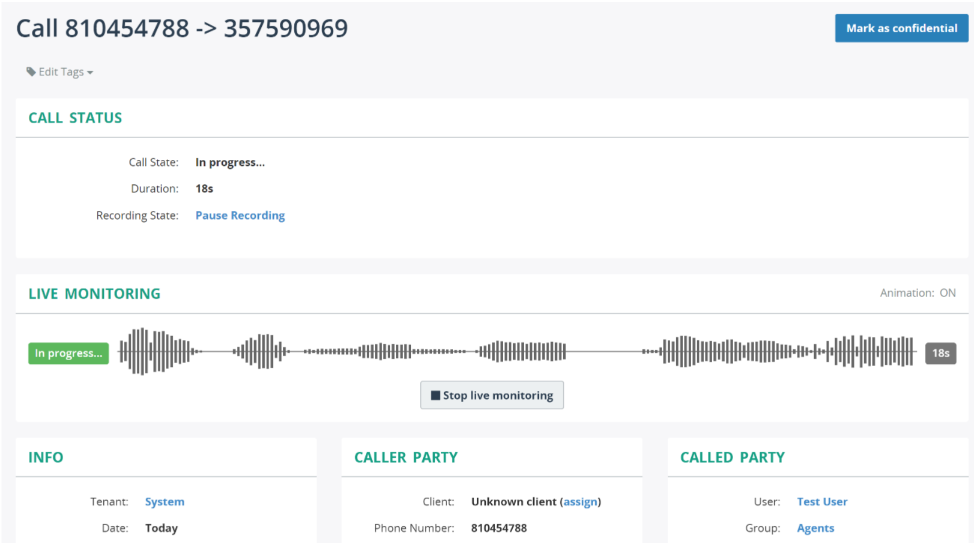
The tabs **All calls**, **Active calls**, **My calls** and others on the **Recordings** page provide quick access to the call recordings that meet the respective criteria, like "active calls only", "my calls only", and so on.



Monitor Calls in Real-Time

Note: Monitoring calls for others is an advanced feature add-on ($$) for some organizations. Ref Live Monitoring.

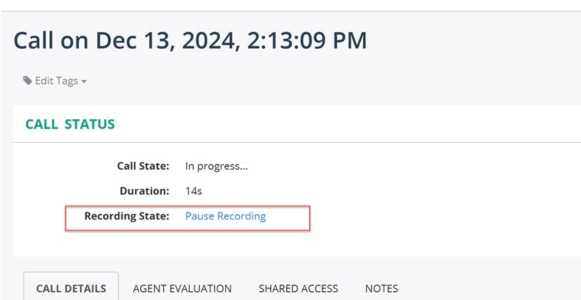
A Supervisor can monitor employees' calls in real-time to guide and support agents to deliver optimum customer service if that service has been enabled for the organization.

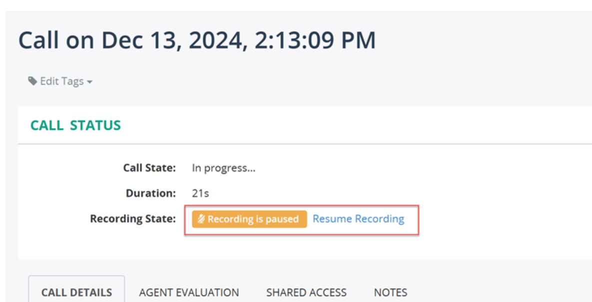


Pause and Resume Live Call Recording

While a call is currently active and in progress, the Call Details view offers a helpful tool to Pause Recording. This is useful for **PCI compliance**. Once clicked (enabled), the recording for the period of time this feature is enabled will not be saved, ensuring that details like credit card numbers or personal information that should not be included in the call recording data are kept secure.

- Click Pause Recording to halt recording for a period of time.
- Click Resume Recording to start recording the call again when ready.





Playback

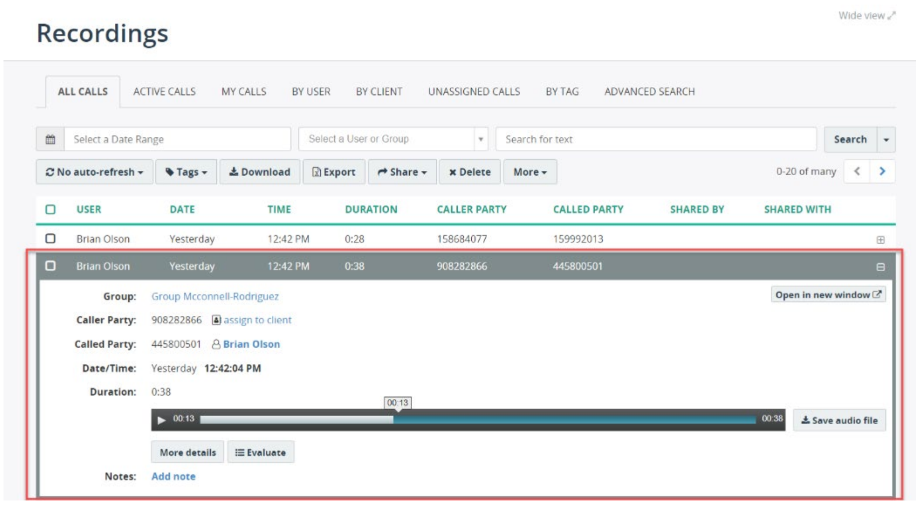
You can playback call recordings either on the **Recordings** page or in the **Call Details** page.

Note: To download audio files from Call Recording, your account must have **Download** permission enabled.

Recording Page: Inline Basic Media Player

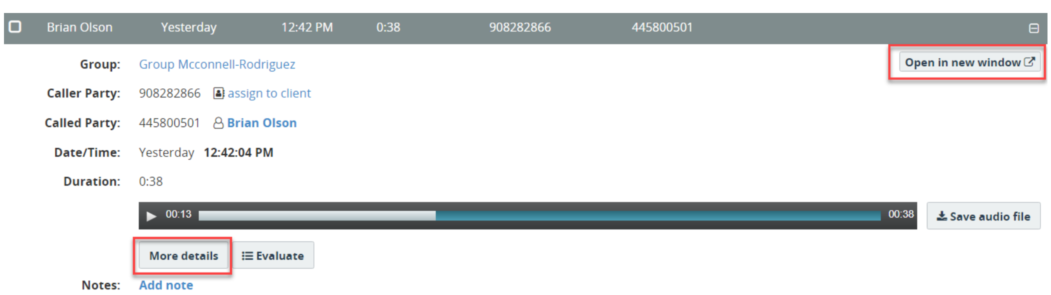
On the **Recordings** page, click in the list of recordings to display an inline basic audio player.

From this screen, you can also download an audio file by clicking **Save audio file** button.

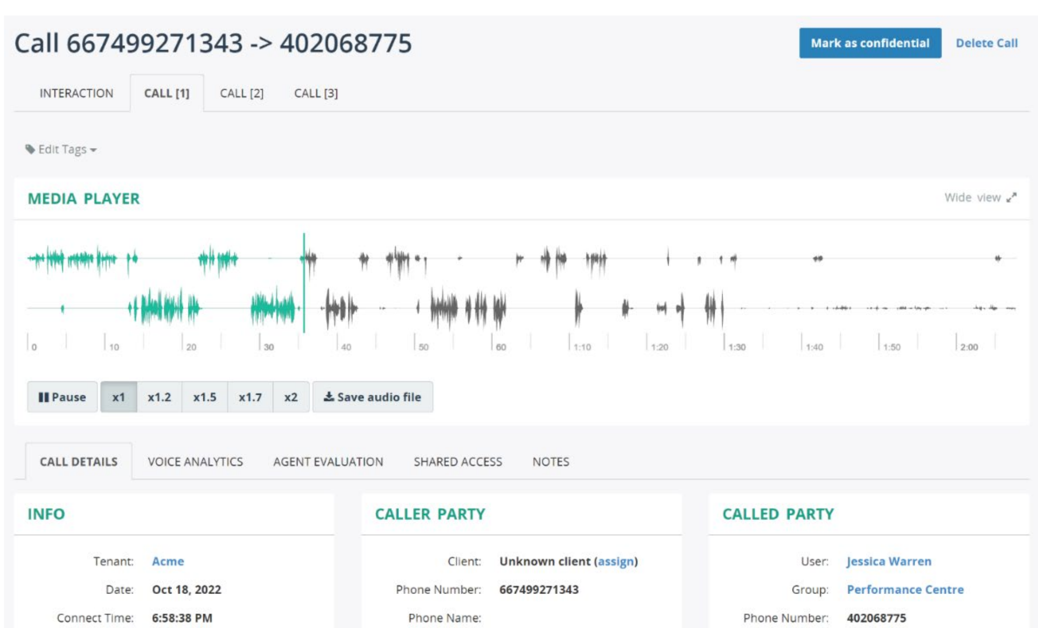


Call Details Page: Advanced Media Player

The Advanced Media Player is shown on the **Call Details** page. To open such a page, click **More details** or **Open in new window** buttons for the respective call on the **Recordings** page



An audio waveform in the Advanced Media Player, which allows you to visually see the moments of silence or overtalk in a conversation.



With the Advanced Media Player, you can control a playback speed from x1 to x2. Speeding up will allow you to listen to the recording faster, which saves time.

To download the audio file simply click Save audio file button (if it is available to you)

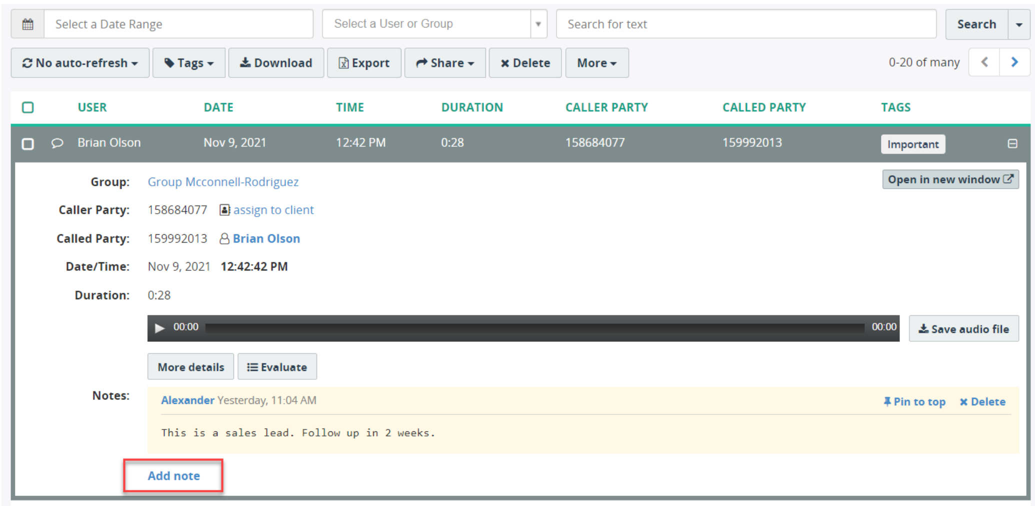
Add Notes

You can use notes to save important information related to call recordings. Such notes are searchable, so you can easily pull the recordings that have certain text in their notes.

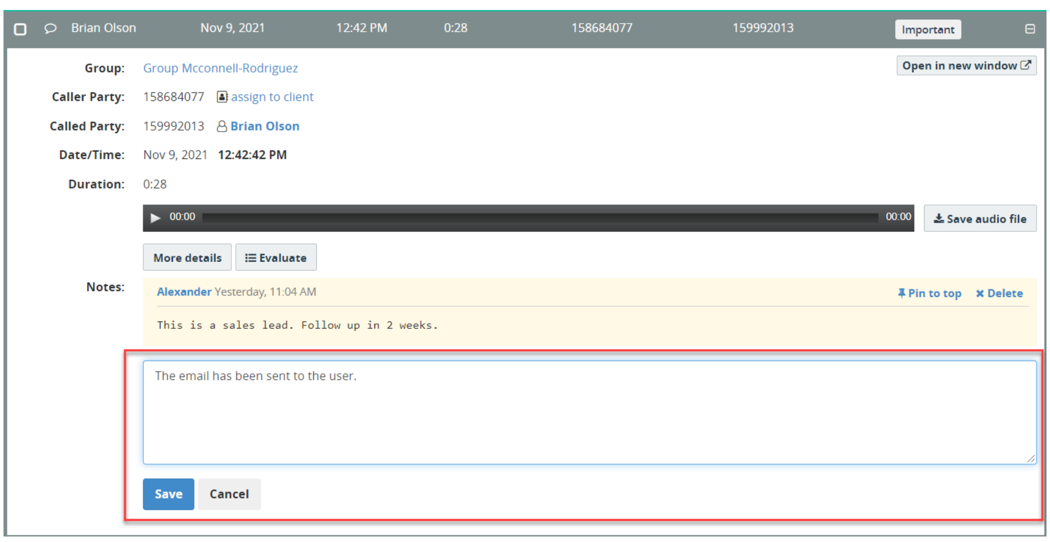
The notes can be added to either the **Recordings** page or the **Call Details** page.

Add Notes from Recordings Page

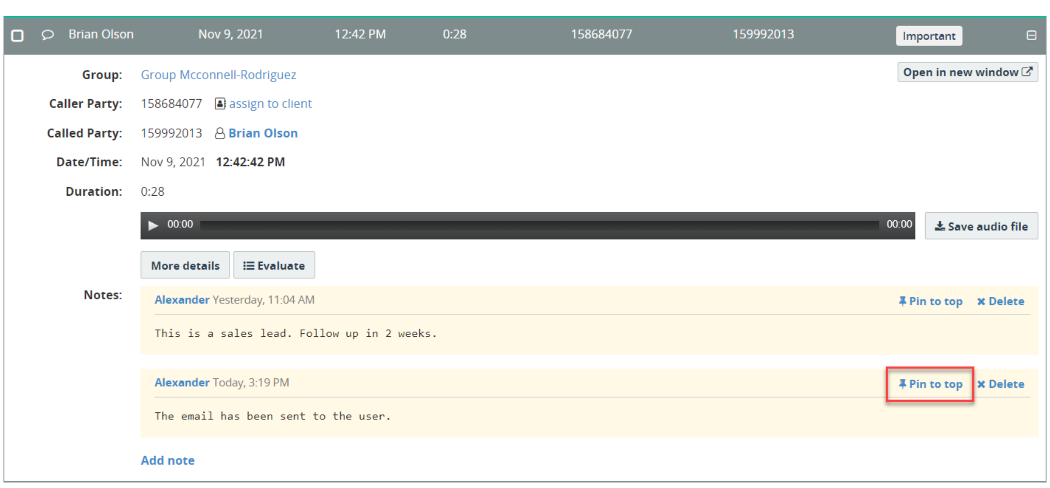
1. Navigate to the inline Call Details view and click **Add note**.



2. Enter your note in the dialog provided and click **Save**.

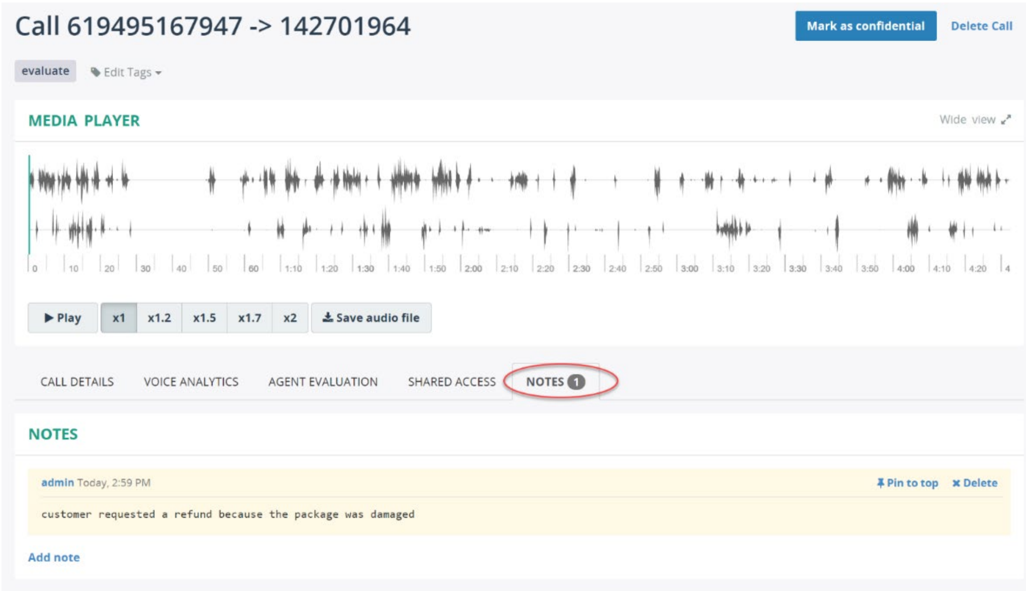


The notes are displayed in a sorting order from the oldest to the newest. However, it is possible to pin any note to the top (out of order) by clicking **Pin to top**.



Add Notes in Call Details View

You can also view/add notes from the **Call Details** page, using the **Notes** section at the bottom of the page.



Alternatives for Call Notes

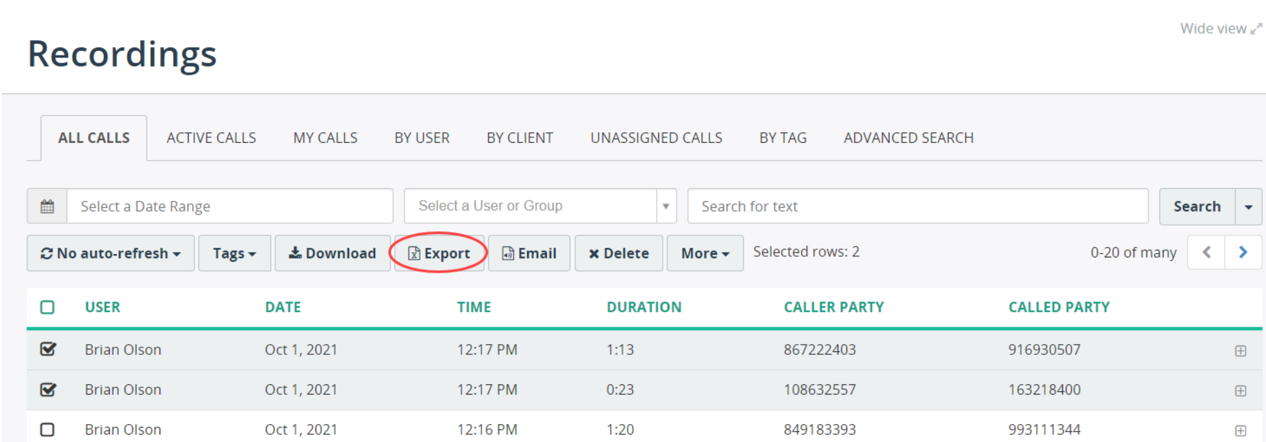
Adding notes is a powerful tool for users who need to add notes to call recordings in a free-text format.

If a free-text format capability is not required, then there are better alternatives for identifying calls, including:

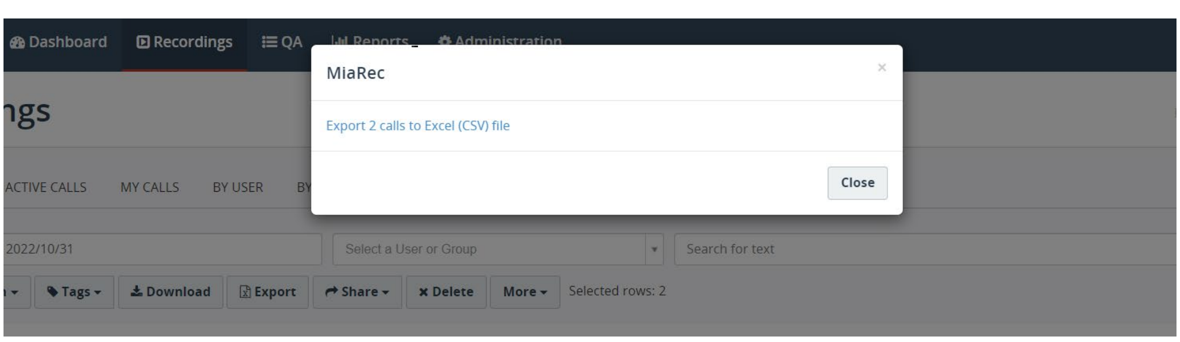
- Tags
- Custom fields

Export Call Details to CSV File

On the **Recordings** page, you can export call details for one or multiple recordings to Excel (*.csv) file for further data analysis. Please note that the CSV file contains metadata only – no audio. If you need to export audio files as well, then use the Download recordings option, if you are permitted. To export call details to a CSV file, select the Call Recordings you want to include using the checkboxes on the **Recordings** page, and click the **Export** button.



When ready a Pop-up displays the link to the CSV file. Click the link to download the CSV file and then click Close.

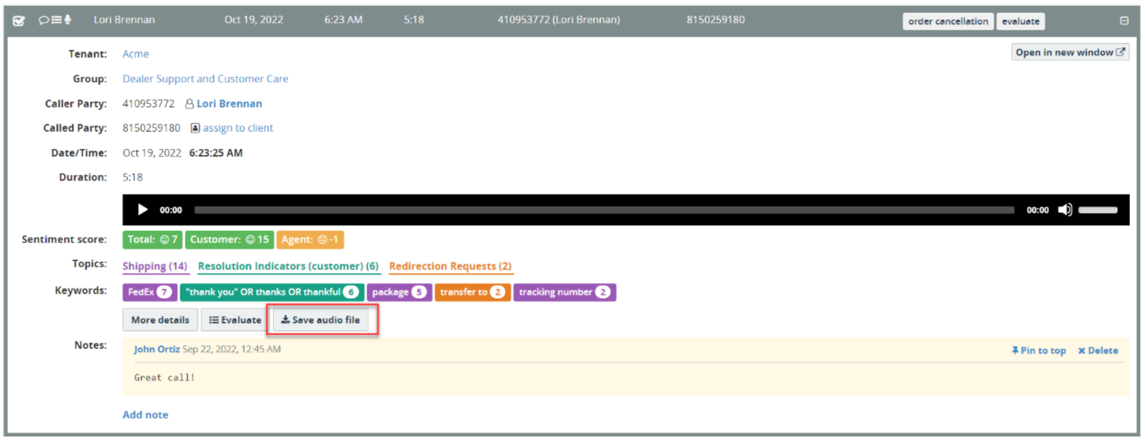


Download Audio Files

You can download an individual audio file or multiple audio files in bulk if the Download permission has been granted by your administrator to your user account.

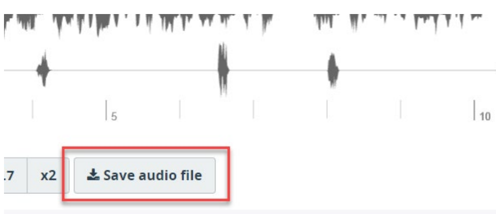
Download Audio File from the Recordings Page

On the **Recordings** page, select the call recording in the list and click the **Save audio file** button to download the audio file to your computer.



Download Audio File from the Call Details Page

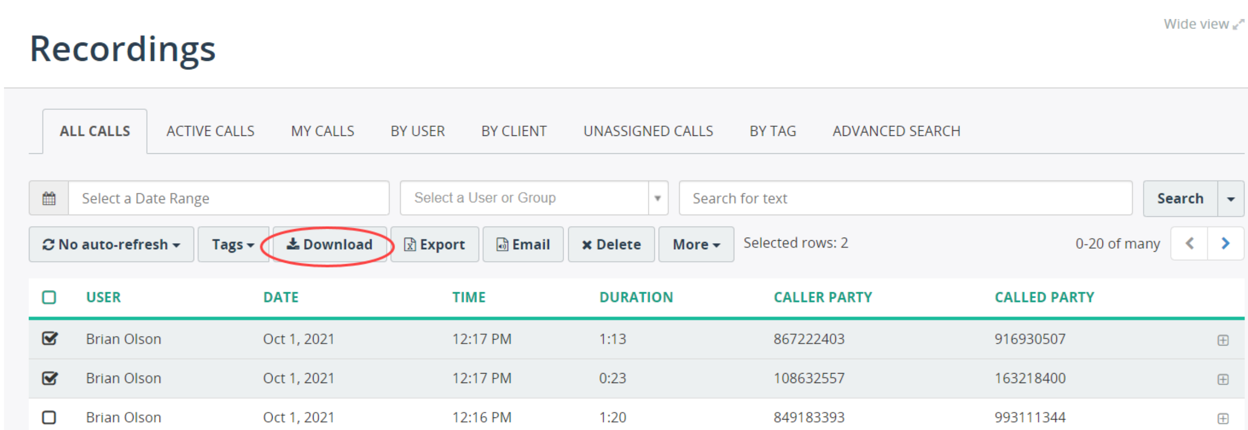
On the extended **Call Details** page, click the **Save audio file** button to download the audio file to your computer.



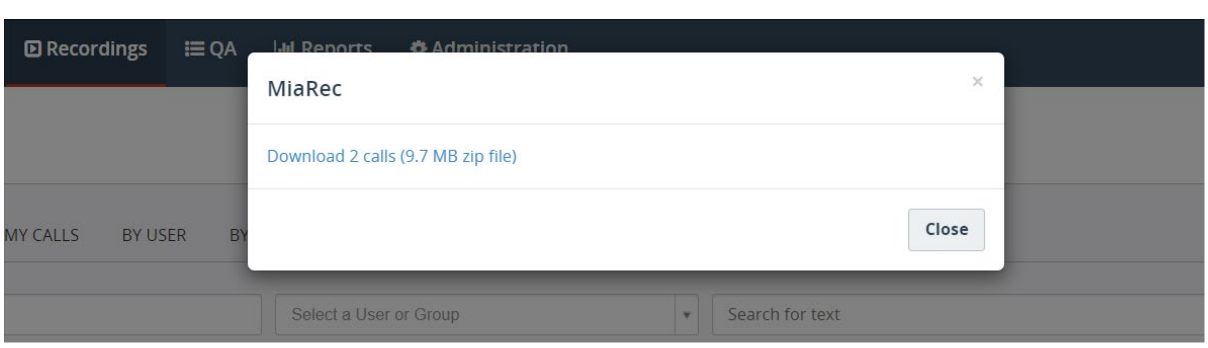
Bulk Download Multiple Audio Files

On the **Recordings** page, authorized users can download up to 20 recordings at once in a ZIP archive file.

To do that, select the respective recordings from the list and click the **Download** button.



The dialog box will pop up with the link to download a ZIP file.

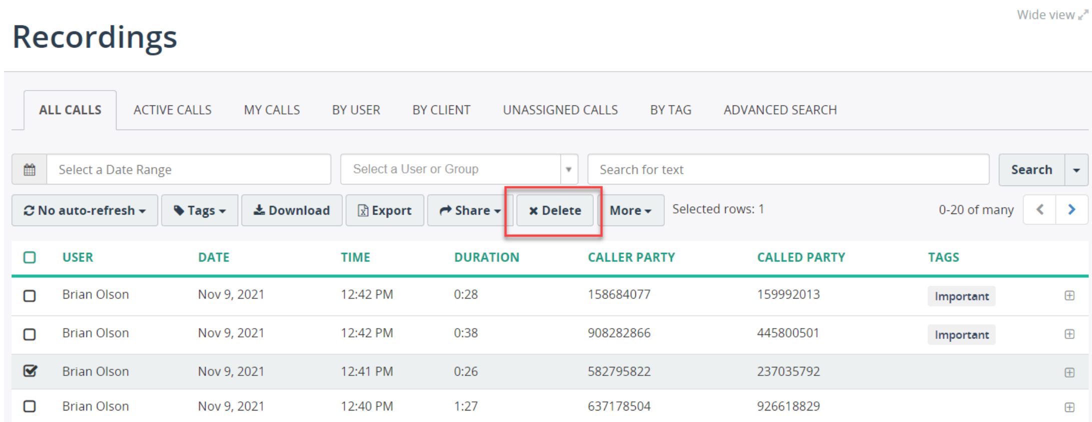


Delete

Administrators may have access to delete call recordings, where authorized to do so.

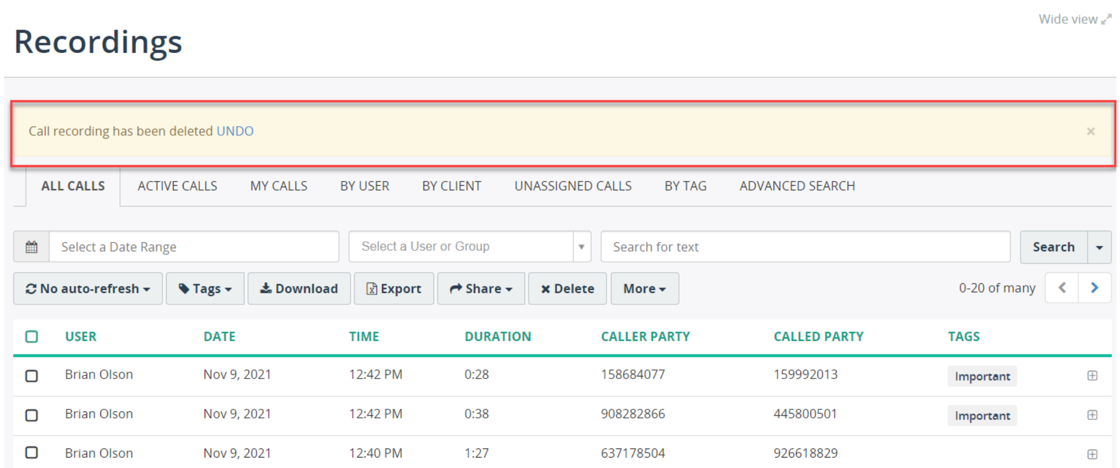
Bulk Delete

1. Click the Recordings tab.
2. Select the call(s) that you want to delete using the adjacent checkboxes (first column).
3. Click the Delete button.



The popup message will appear informing you that the selected recordings have been deleted.

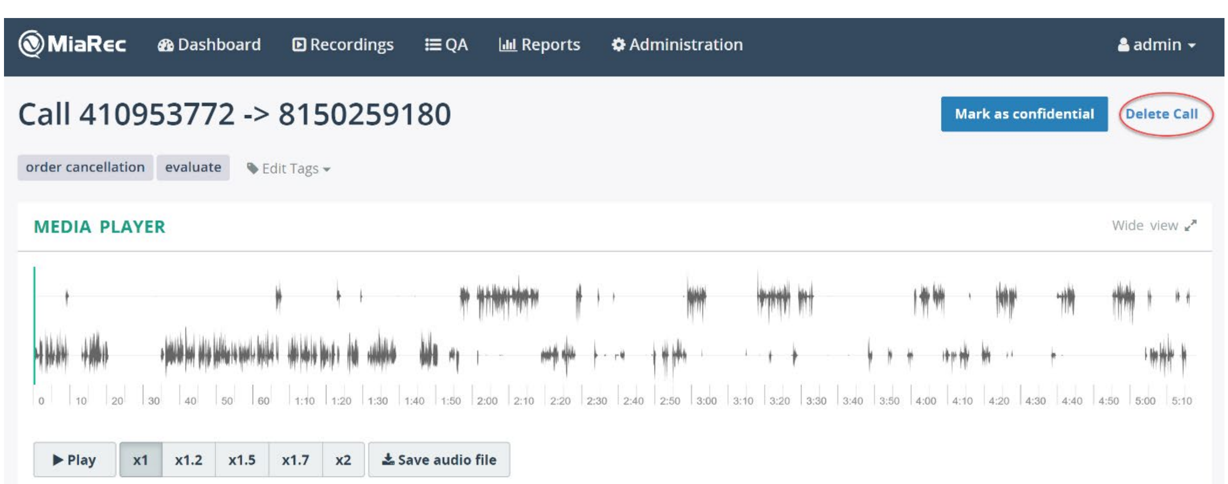
Clicking the **UNDO** link will restore the call recordings



Note: The Undo popup message disappears automatically in 45 seconds, so you have a limited time to undo the delete action.

Delete Individual Recordings

You can delete an individual call recording on the extended Call Details page by clicking the Delete Call button:



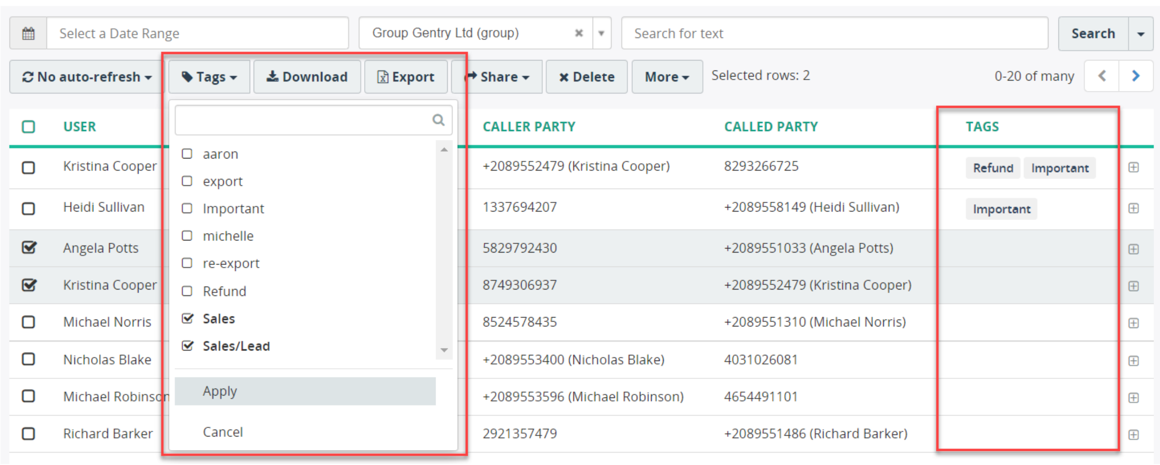
Tag

Tags allow you to easily identify and group associated call recordings. You can create your tags and then assign these tags to individual or multiple call recordings.

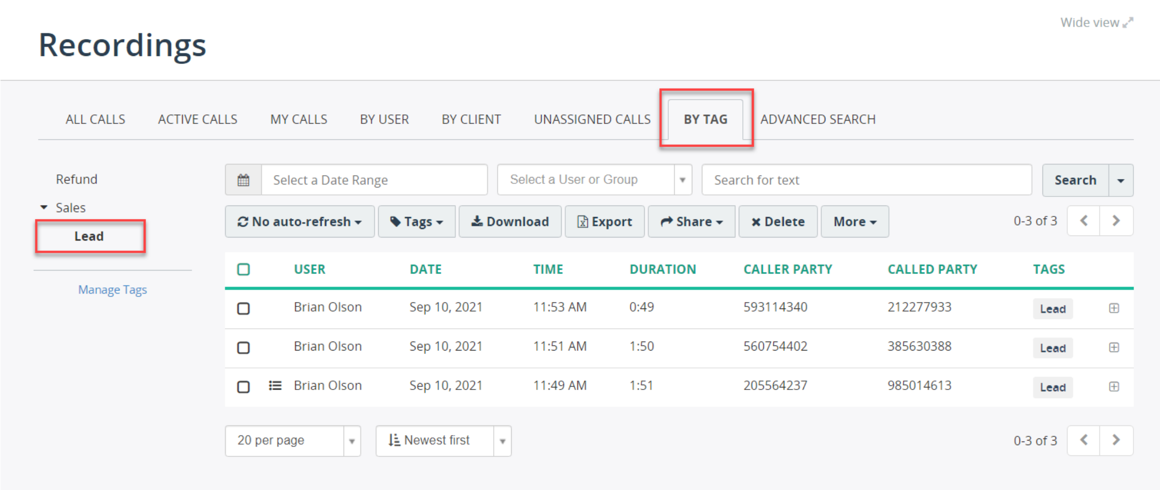
Note: The ability to Tag recordings and creating/managing tags requires appropriate permissions as set by an administrator.

Assign a Tag

1. Select one or more recordings
2. Click the **Tags** button
3. Select the target tag from the list and click **Apply**.
   You can assign multiple tags to the same call recording.

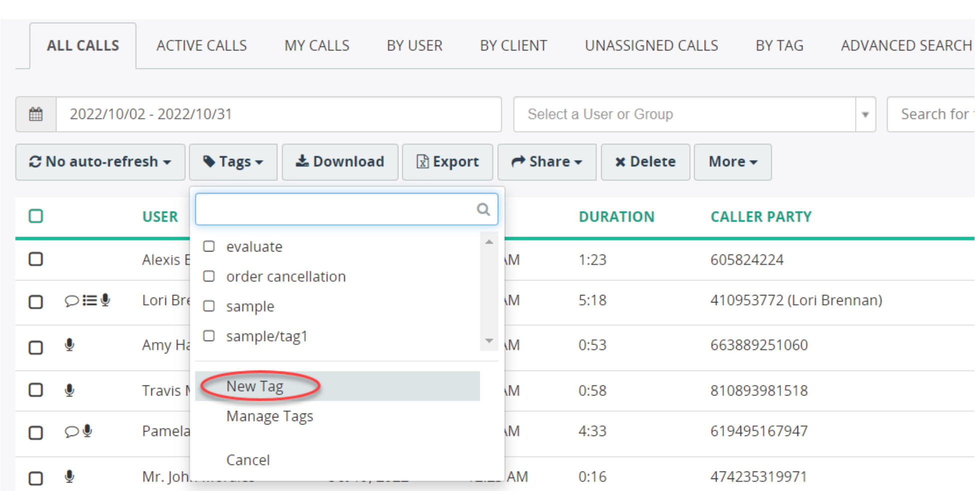


To quickly filter the recordings by tag, navigate to the **By Tag** tab and select the target tag from a list on the left.

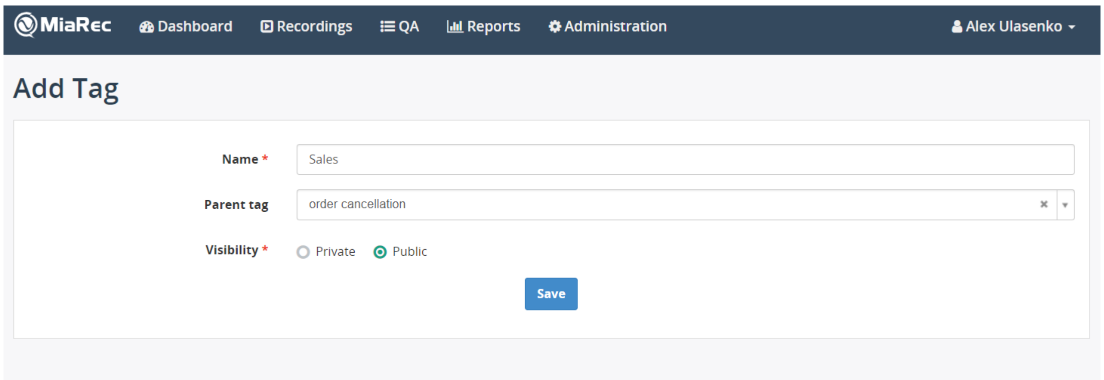


Create a New Tag

1. On the toolbar, click the **Tags** button.
2. Select **New Tag**.

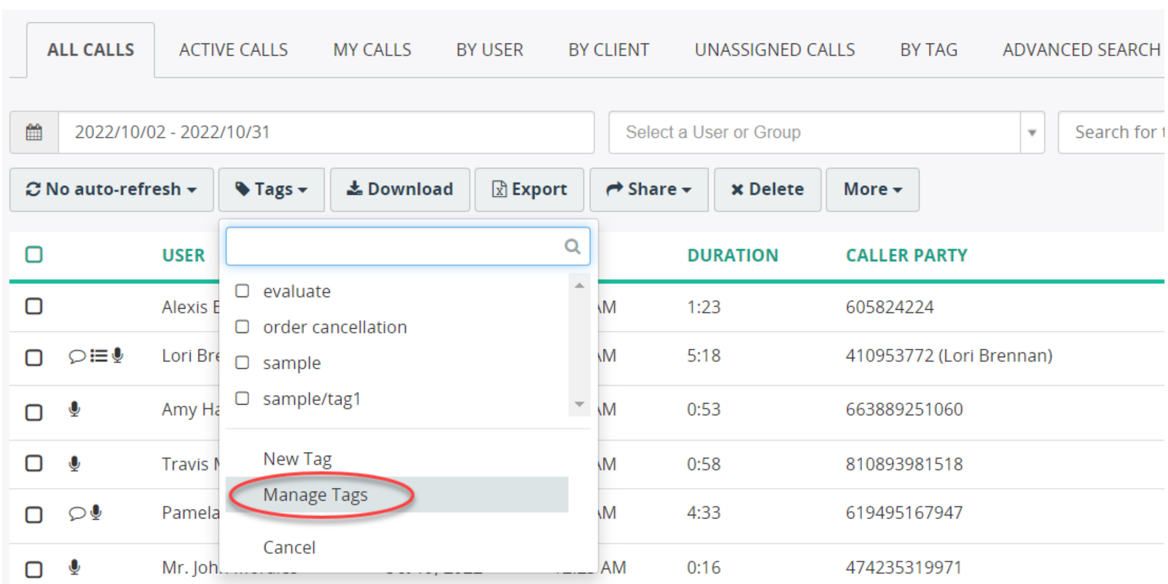


3. In the **Add Tag** screen, provide the following:
    - **Name** - give the unique name to a newly created tag. Required field.
    - **Parent tag** - optionally, you can specify if this tag will be a child element to an existing tag.
    - **Visibility** - choose a visibility setting. Private tags are visible to you only. Public tags are visible to all users.
4. Then click **Save**.

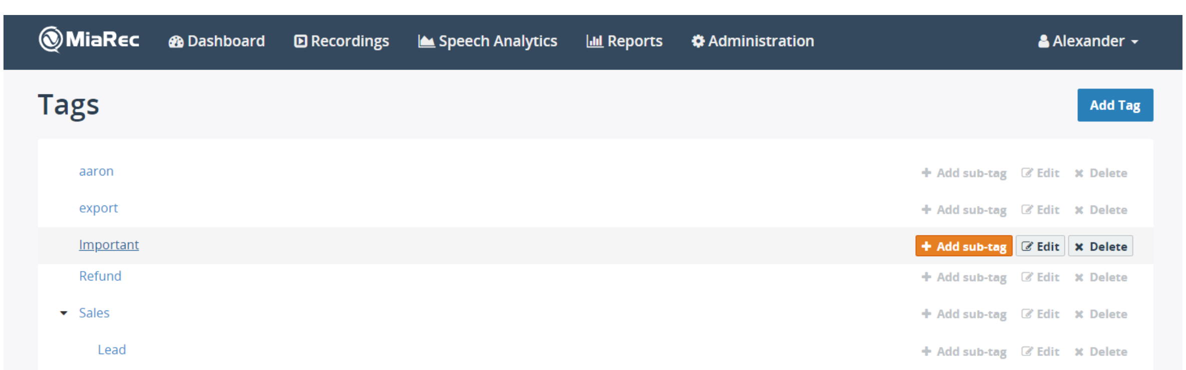


Manage Existing Tags

1. On the toolbar, click the **Tags** button.
2. Select Manage Tags.



In the **Tags** screen, you can create a new tag or modify/delete an existing tag.



Mark Confidential

Call recordings may be marked as Confidential to restrict access to them under certain conditions.

To understand how confidentiality works, consider the following scenario:

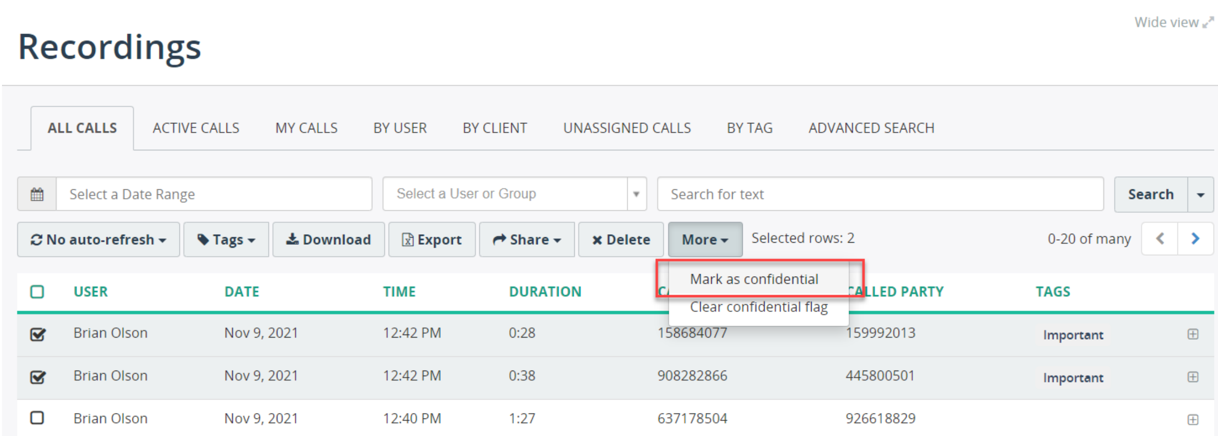
- The supervisor is a manager of a group of agents. He/she has access to all call recordings for specific agents.
- Now, suppose the company's executive makes a call to one of these agents. Typically, such a conversation between an agent and the executive would be visible to the supervisor because the supervisor can access all calls of this agent.
- However, when a call is marked as confidential, then such a call recording would be hidden from the supervisor unless he/she is granted permission to access the confidential calls.

A call recording may be marked as "confidential" either manually or automatically.

Manually Mark Calls Confidential

Note: The administrator must grant you the **Set confidential flag** permission to use this feature.

1. On the **Recordings** page, select the recording(s) you want to mark as confidential.
2. Click More > Mark as confidential.



Alternatively, you can click the **Mark as confidential** button from an extended call details view.

The **Confidential** label is shown in the call details for any calls that are marked as confidential.

Remove Confidential Flag

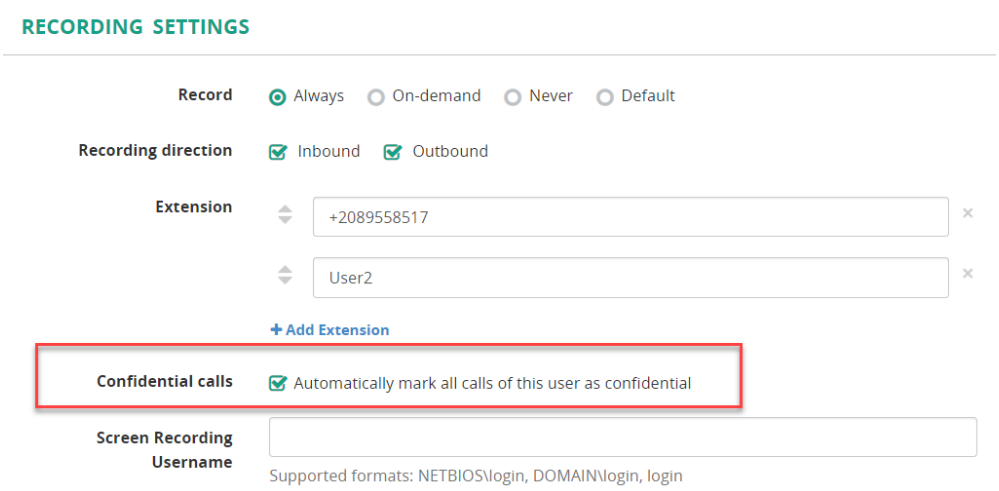
Click Clear confidential flag.

Automatically Mark Calls Confidential

Admin Only.

To automatically mark all call recordings of a specific user as confidential:

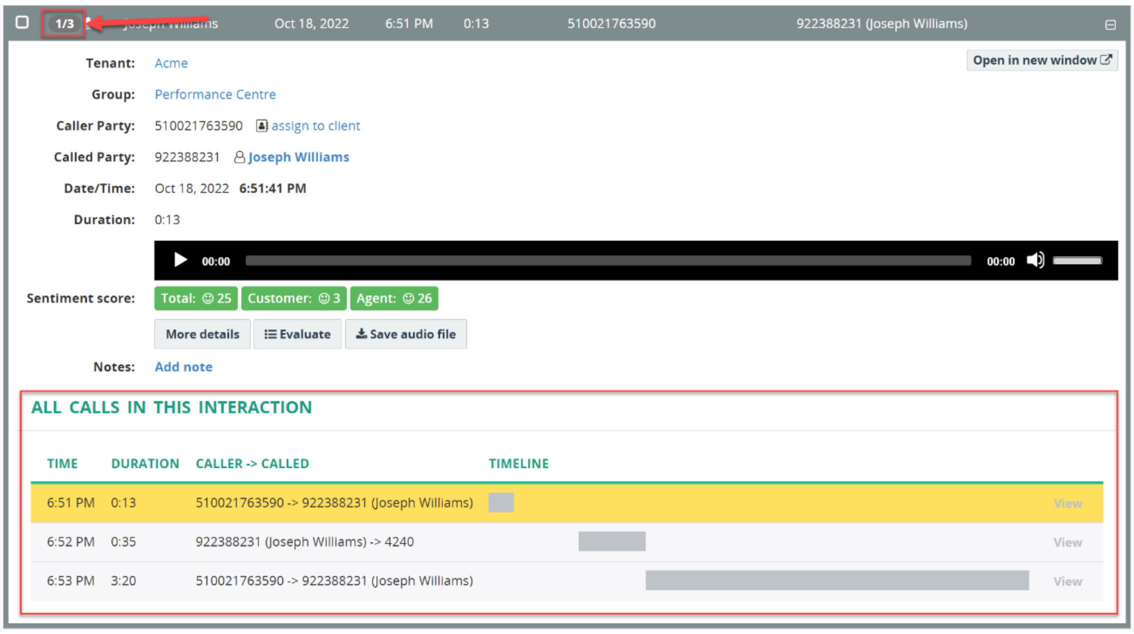
1. Edit the user profile in the Admin portal (menu **Administration > User Management > Users**),
2. In the Recording settings section, select the checkbox Automatically mark all calls of this user as confidential.
3. Click **Save** to update the user's profile.



Multi-Segment Calls

Call Recording groups all related call segments into a single interaction to create a complete picture of customer communication with your agents. If the call segment is a part of a longer interaction within your system, then a corresponding badge identifying the number of segments is shown to the right of the call details (for example, **1/3** means this call segment is the first in the interaction that consists of 3 segments).

When you open call details, you can see the other segments in a timeline.



Call Recording treats the following calls as “related”:

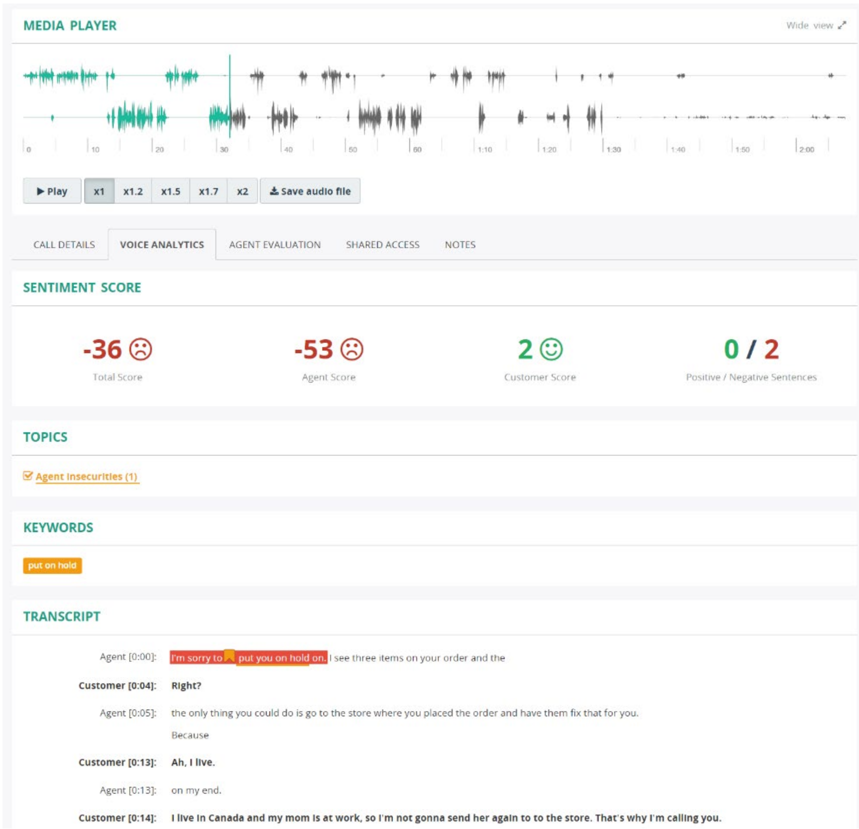
1. Call is transferred from one agent to another. With many phone systems, in such a scenario, two call recordings are created. These two call segments are treated as related, and the application automatically groups them into a single interaction.
2. Call is put on hold and then resumed. With many phone systems, a new call recording is created when the call is resumed. The application automatically groups such call recordings into a single interaction.
3. Agent places a call on hold and makes a consultative call to a supervisor, then the agent resumes the original call. In this case, three call recordings are created, and the consultative call is "sandwiched" between the other two. The application automatically groups all three call segments into a single interaction.

Note: In a scenario when an agent places a call on hold and answers another inbound call, the answered inbound call is not treated as related to the call on hold.

In the extended call details view, you can see more details about each call segment by clicking the corresponding tab at the top of the screen. Also, you can play all call segments at once by navigating to the **Interaction** tab.

Transcription and Speech Analytics

The application can automatically transcribe call recordings, analyze them for sentiment, extract keywords and categorize calls into topics using AI if the Speech Analytics license was added. ($$)



Live Monitoring

The live monitoring feature allows authorized users (supervisors) to listen to active calls in real time. This feature helps improve customer service, train new employees, and escalate problems as soon as possible. Live monitoring is built into the recording core and doesn't require the support of live monitoring from the phone system; thus, it works with all the phone platforms that the service supports.

The live monitoring supports two use cases:

- Monitoring of a single call: The monitoring session automatically ends when the current call ends.
- Monitoring of consecutive calls of a particular user: In this case, a monitoring session automatically resumes when the monitored user makes or receives a new call. A supervisor simply initiates a live monitoring session once and keeps listening to the consecutive calls of a certain user without having to return to the active call screen. These sessions end when the supervisor elects to stop monitoring.

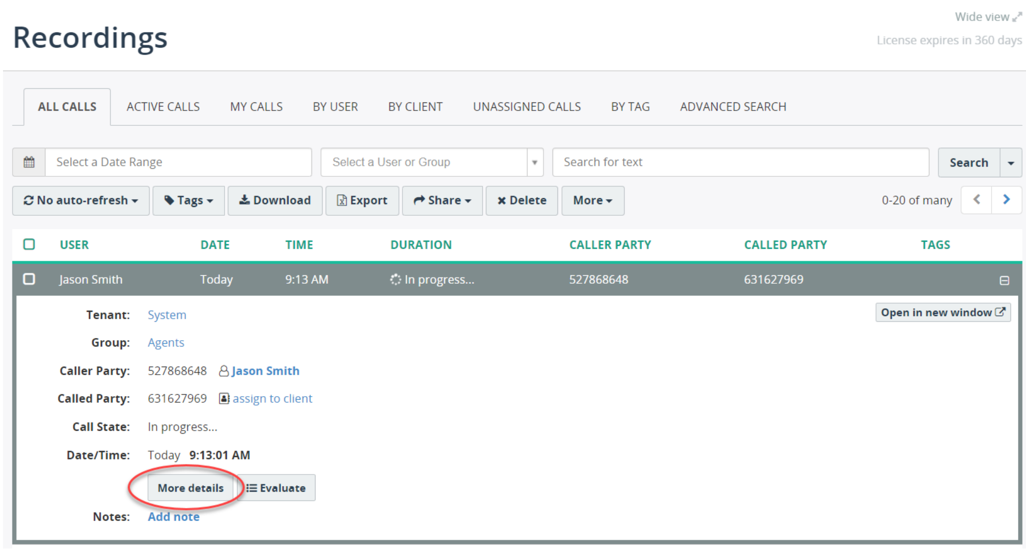
Prerequisites

- The monitored calls should be assigned to all users who will be monitored.
- The "Live monitoring" license should be allocated to the monitored user (menu **Administration > User Management > Users**). **Note:** *The live monitoring license must be allocated to the user who is being monitored, not the user who is monitoring!*
- A supervisor's role should have permission to live monitor other users' calls (menu **Administration > User Management > Roles**).
- The latest web browser (Chrome, Firefox, Edge, Safari) with support of the WebRTC protocol.

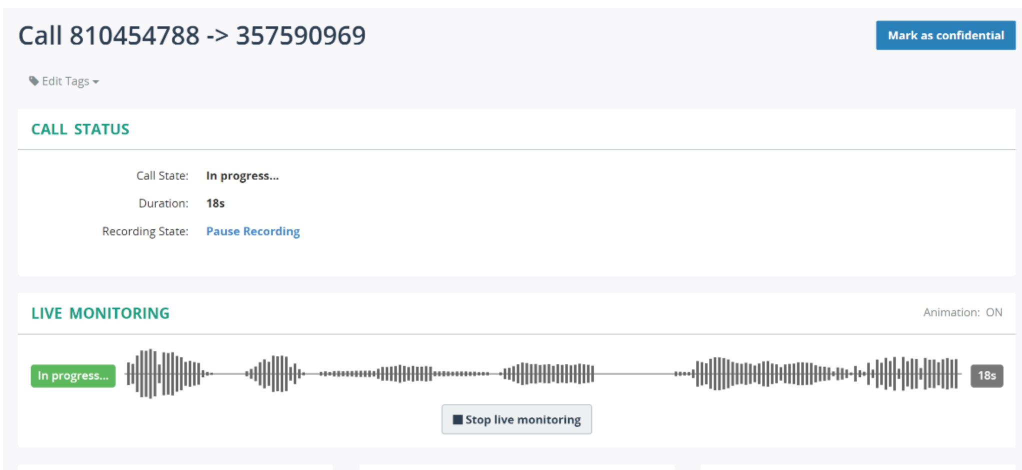
Monitor a Single Call

To monitor an active call:

1. On the **Recordings** page, locate a call that is currently in progress which you want to monitor.
2. Click the **More details** button to open the extended call details page.

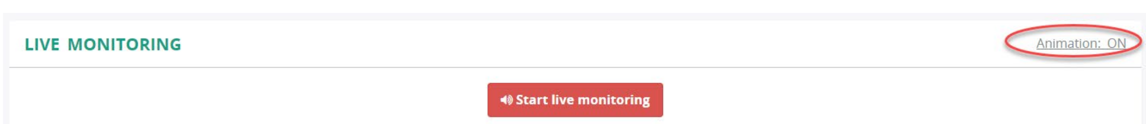


3. Click the **Start Live Monitoring** button. You should hear the audio of the monitored call and see the animation representing the audio signal.



4. To stop monitoring the call, click **Stop Live Monitoring**.

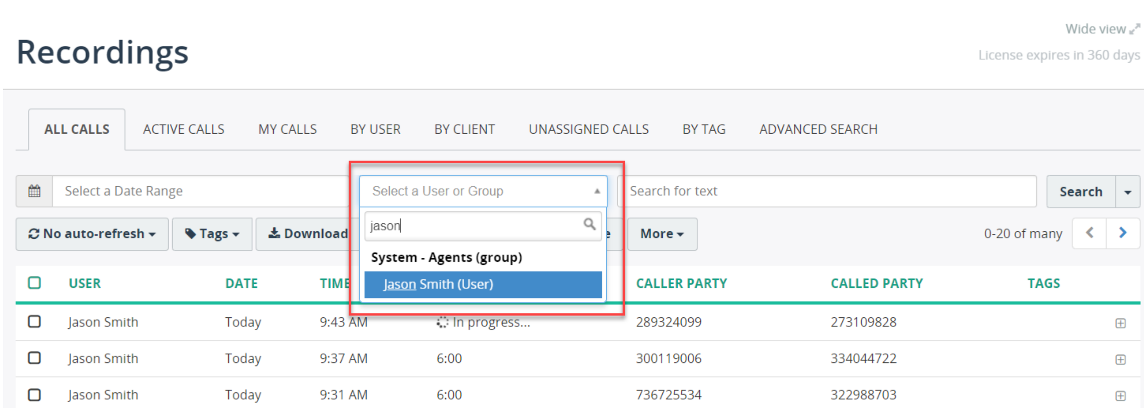
Optionally, you can disable the call animation by clicking **Animation ON/OFF** link.



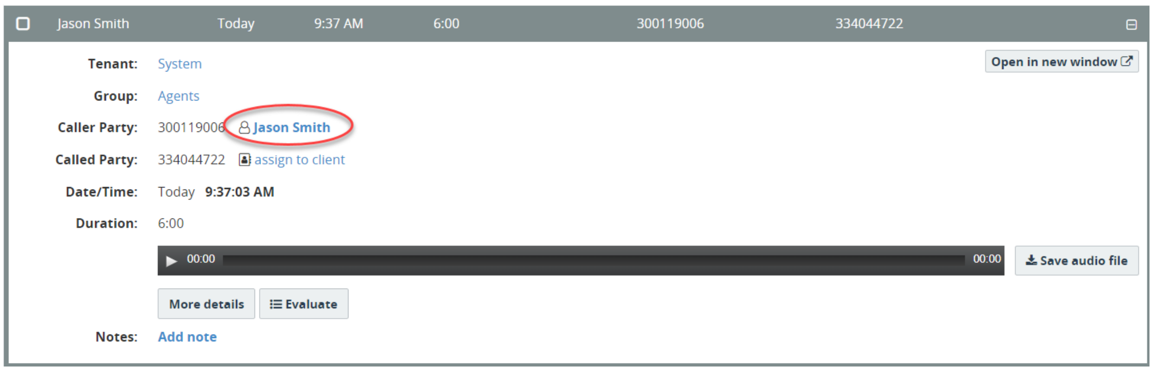
Monitor Consecutive Calls

This option allows you to monitor consecutive calls of a user.

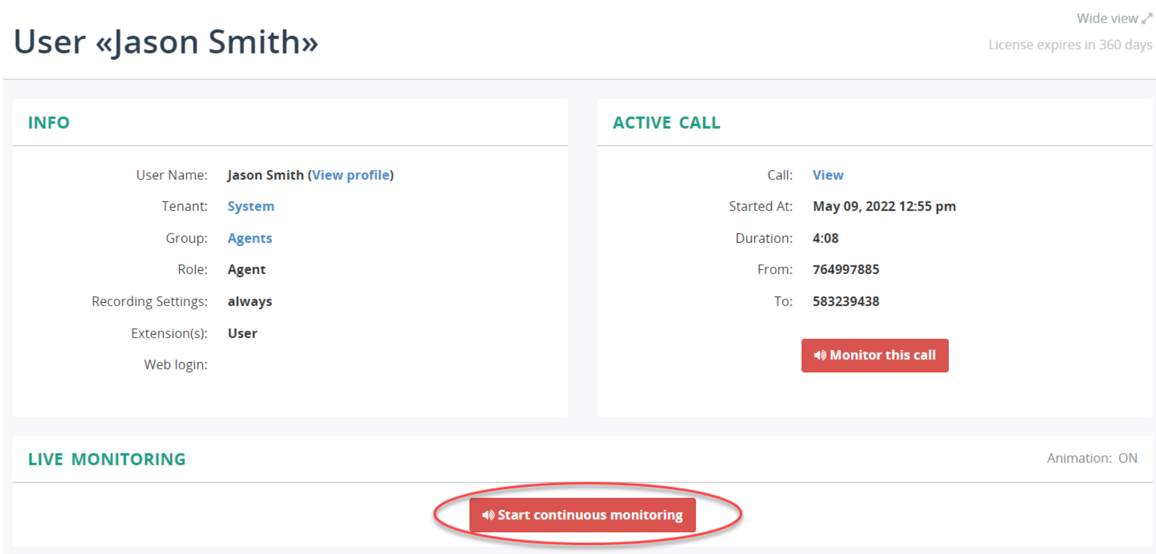
1. Locate one of the previous recordings of the user by using the Quick Search on the **Recordings** page.



2. Click the name of the user in the call details.



3. On the **User** page, click **Start continuous monitoring** to monitor all calls of this user until you elect to stop. Note: Clicking **Monitor this call** will allow you to monitor only the currently active call until it ends.



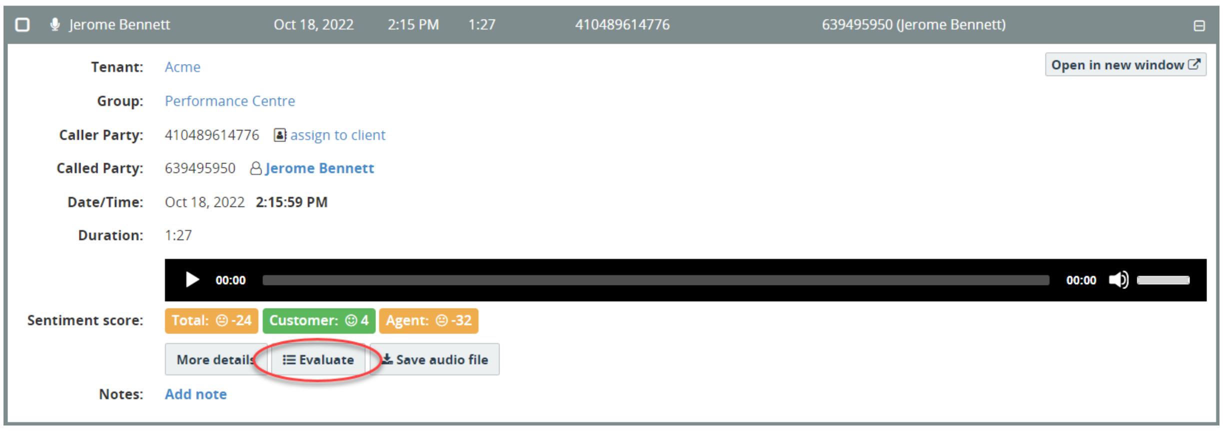
Note: If a user has multiple active calls concurrently, live monitoring will always use the most recent one.

Evaluate

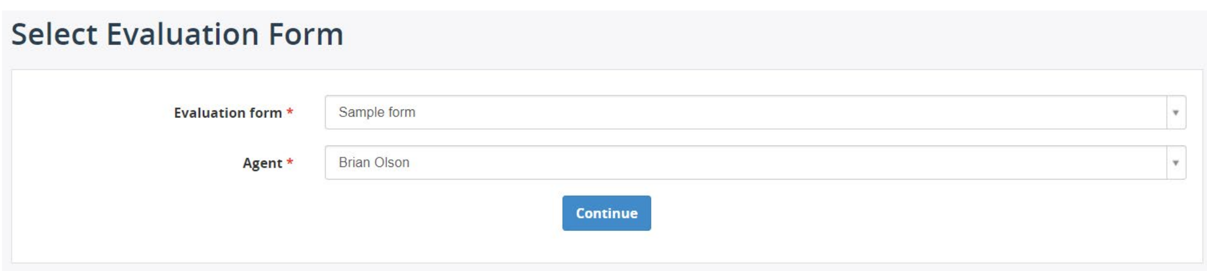
($) The Agent Evaluation module add-on provides the contact center managers with a tool to evaluate and monitor agent performance. The tool can help you identify and address potential customer interaction issues, improve the contact center's productivity and performance, and increase customer satisfaction. The existing evaluation forms can be quickly customized via the Evaluation Form Designer (Admins only).

Manually Evaluate an Agent

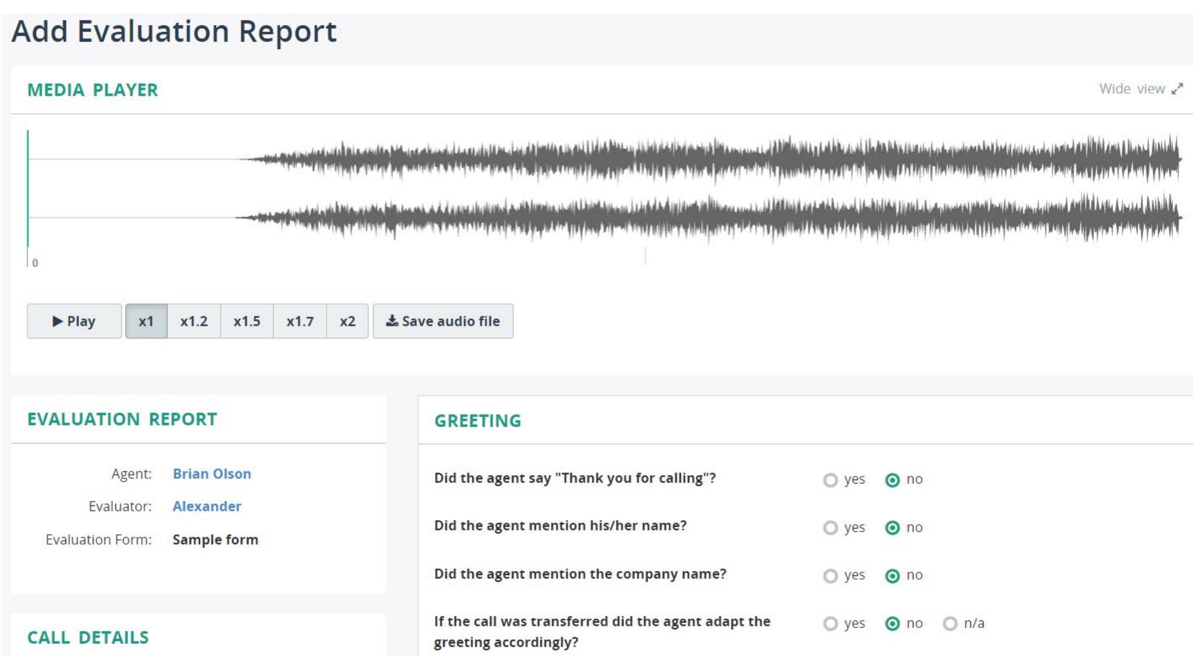
1. Select a call recording and click the **Evaluate** button in the call details view.



2. On the **Select Evaluation Form** page, fill in the following fields and click **Continue**.
   - In the **Evaluation form** field, select the appropriate evaluation form.
   - In the **Agent** field, select the user this evaluation will be performed for (this option is required when a call is assigned to multiple agents).



3. On the **Add Evaluation Report** page, listen to the call recording and answer the questions in the evaluation form.



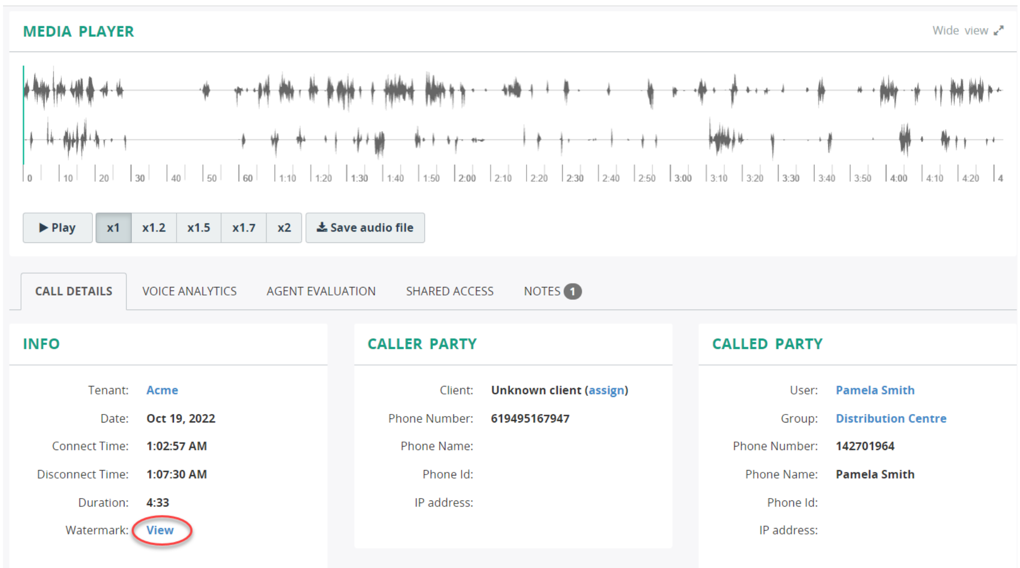
4. When finished, click the **Save** button.

Check Data Integrity

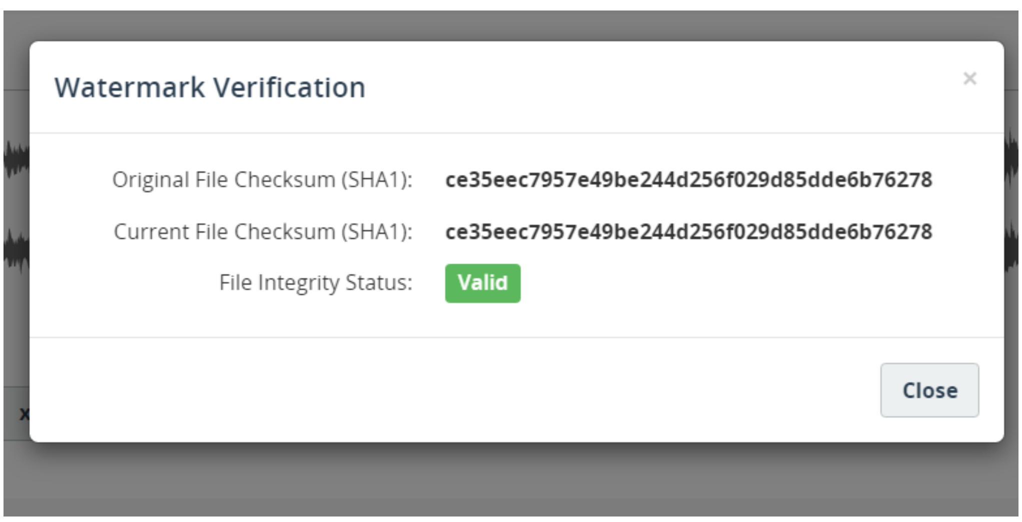
The application watermarks every file to ensure data integrity.

To verify the data integrity of an audio file:

1. Open the call recording
2. Open the extended Call Details page
3. Click **View** under the **Info** section.

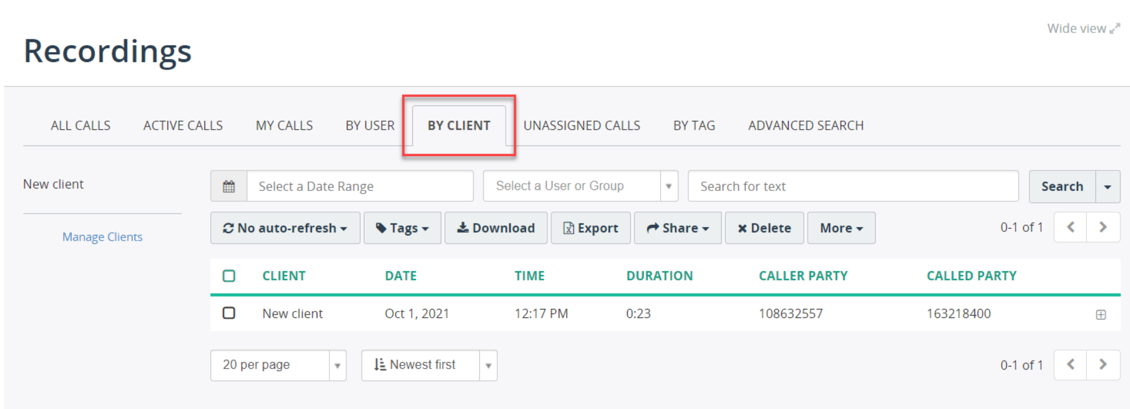


The pop-up window will provide the watermark verification status.



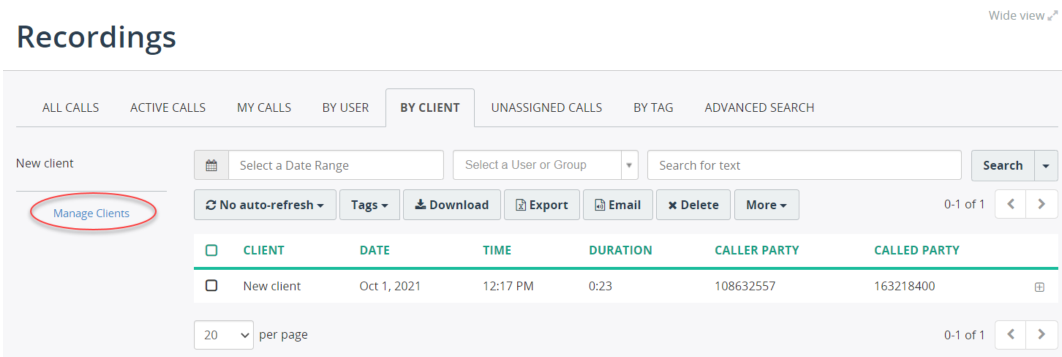
Client Filters

By navigating to the **By Client** tab, you can quickly filter call recordings associated with specific clients. You can register (create) new clients and then assign call recordings to these clients. This is useful for searching and reporting.

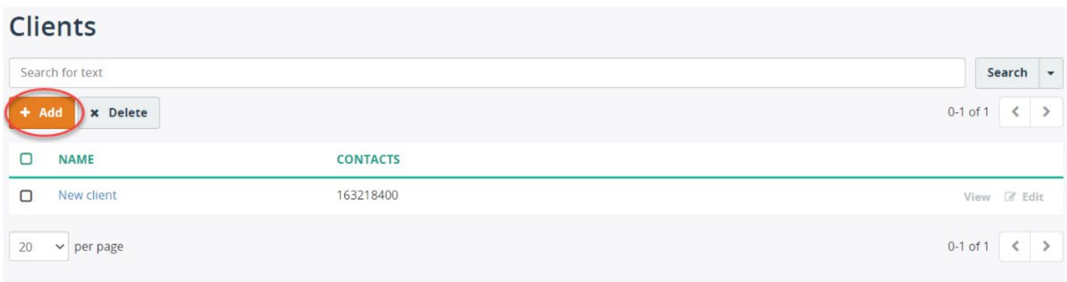


Create a New Client

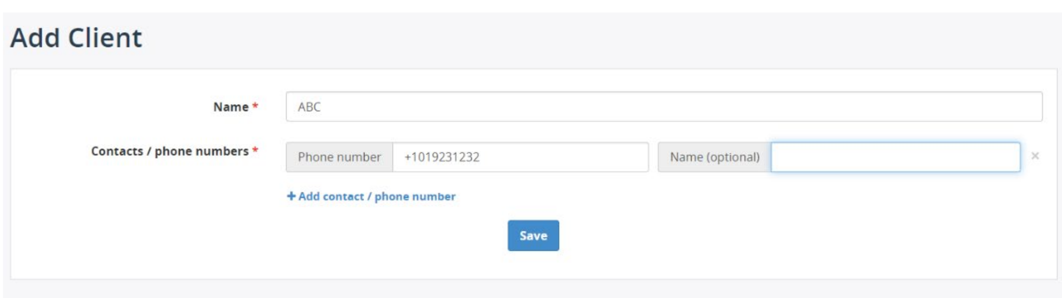
1. Navigate to the **By Client** call recording view and click **Manage Clients**.



2. Click **Add**.



3. On the **Add Client** screen, fill out the following fields:
   - **Name** - provide a unique client name. Required field.
   - **Contacts/phone number** - provide the contact's phone number associated with this client. This phone number will be used to automatically associate calls to the client defined here.
   - **Name** - provide the contact's name. Optional field.

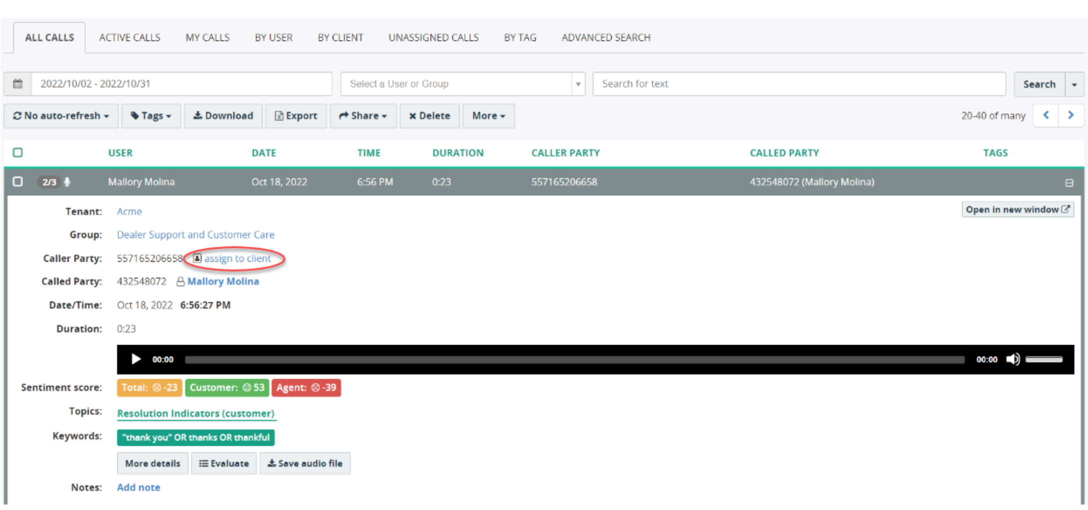


4. Click **Save**.

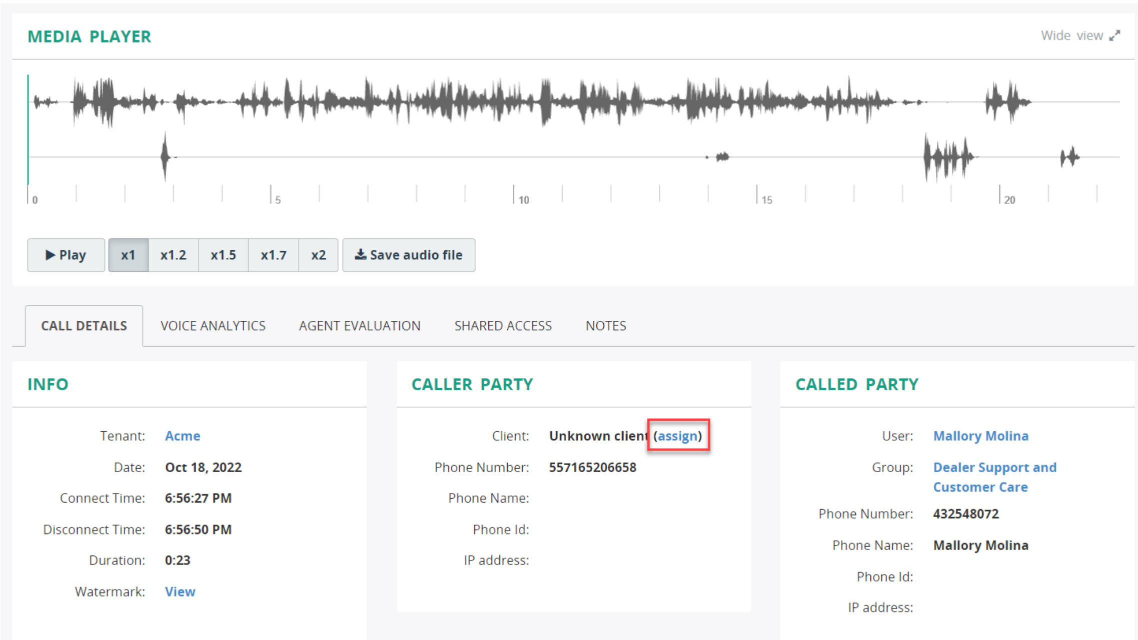
Calls can be assigned to clients either manually or automatically based on the known phone number of each client.

Manually Assign a Call to a Client

To associate a recorded call with a client, navigate to the inline or extended call details view and click the **assign to client** link.



In the extended call details page, click the **assign** link next to the **Unknown client** info.



Automatically Assign Client to Calls

To automatically assign calls to the client, you need to register the client's contact phone number in the application. When a call is received or made to the registered phone number, such a call will be automatically assigned to the client.

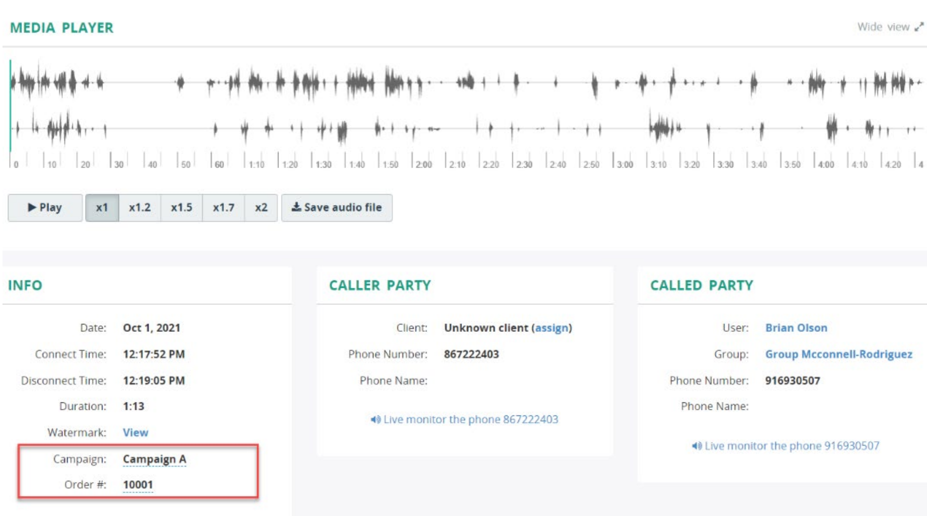
Multiple phone numbers can be registered to any client.

Custom Fields

With custom fields, users can store additional attributes with each call recording, like an order number, support ticket number, product name, shipping due date, etc.

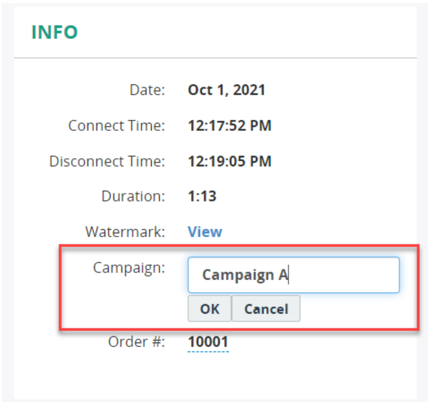
Note: The custom fields must be pre-configured by an administrator in the Admin portal.

The custom fields are shown on the **Call Details** page under the **Info** section.



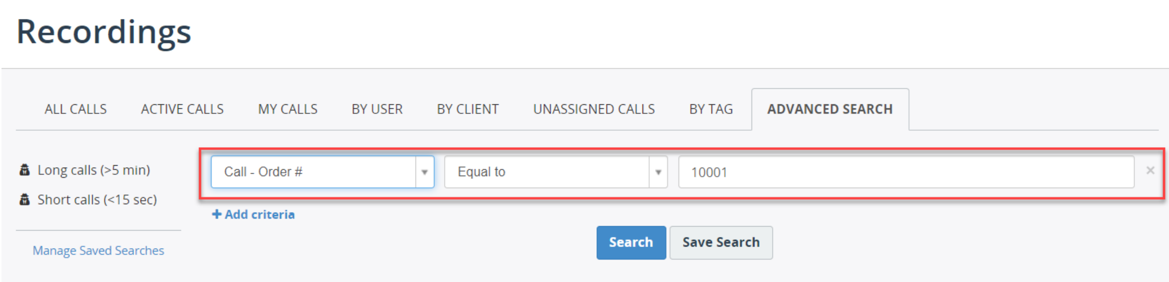
Edit Custom Fields

Users who are granted the appropriate permissions can edit the custom fields in the Info section for in-progress or completed calls on the **Call Details** page.



Searching by Custom Fields

Use Quick Search or Advanced Search to find the recordings by the value entered in the custom fields.



Share

Call Recording can be set to allow authorized users/admins to share call recording(s) with other users on the platform.

Restrictions:

- The number of actions for the recordings shared with you is limited. For instance, you can only view, playback, download and add notes to these recordings. Moreover, each action is regulated by specific permission set up by the administrator for the user's role.
- You can share call recordings only with users who can access the Call Recording web portal.
- If the call recording is marked as confidential, it cannot be shared with other users. Also, a call cannot be marked as confidential if other users have shared access to it.
- You cannot re-share the call recording that was shared with you.
  Only the user who originally shared the recording, can re-share it with other users.

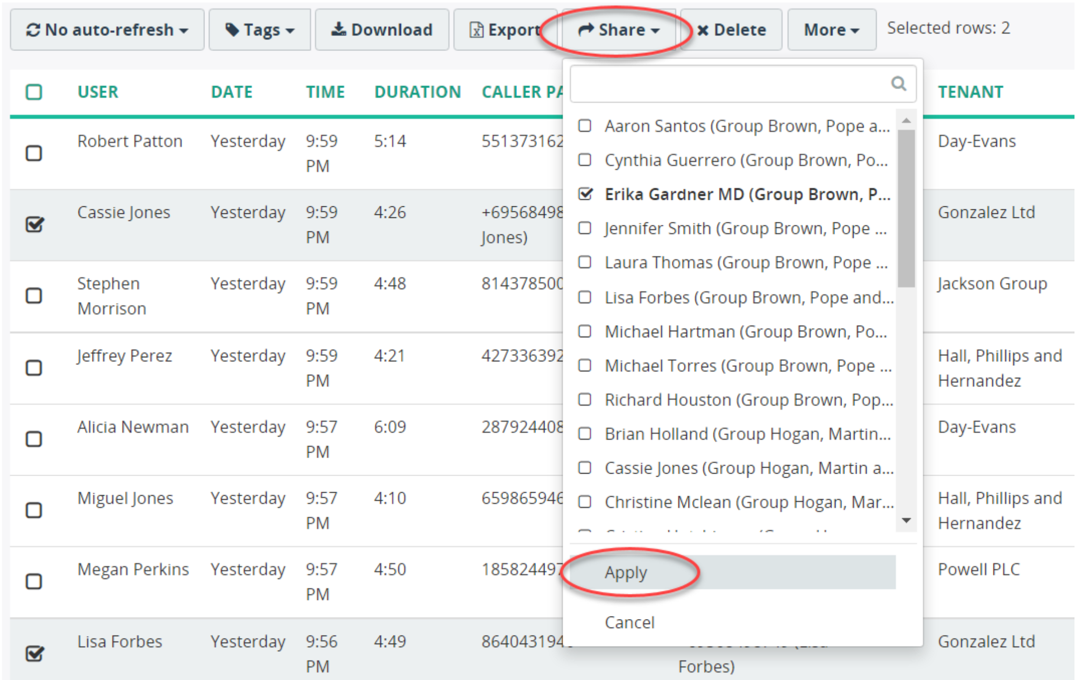
Depending on the role permissions set up by the administrator, the call recordings can be shared:

- with users who are part of your group only.
- with users who are part of your group, and with users who are your subordinates.
- with all users who are part of your 'Tenant' account (your organization).

Share Recordings

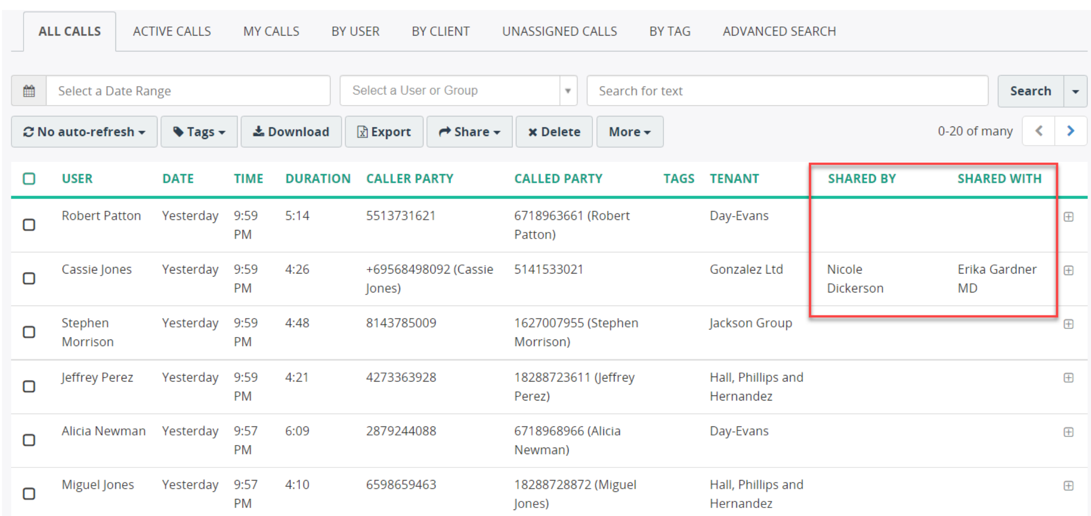
To share a call recording:

1. On the **Recordings** tab, select the call recording(s) that you want to share with other users.
2. Click the **Share** button, then select the users who you want to share the recordings with, and then click **Apply**.

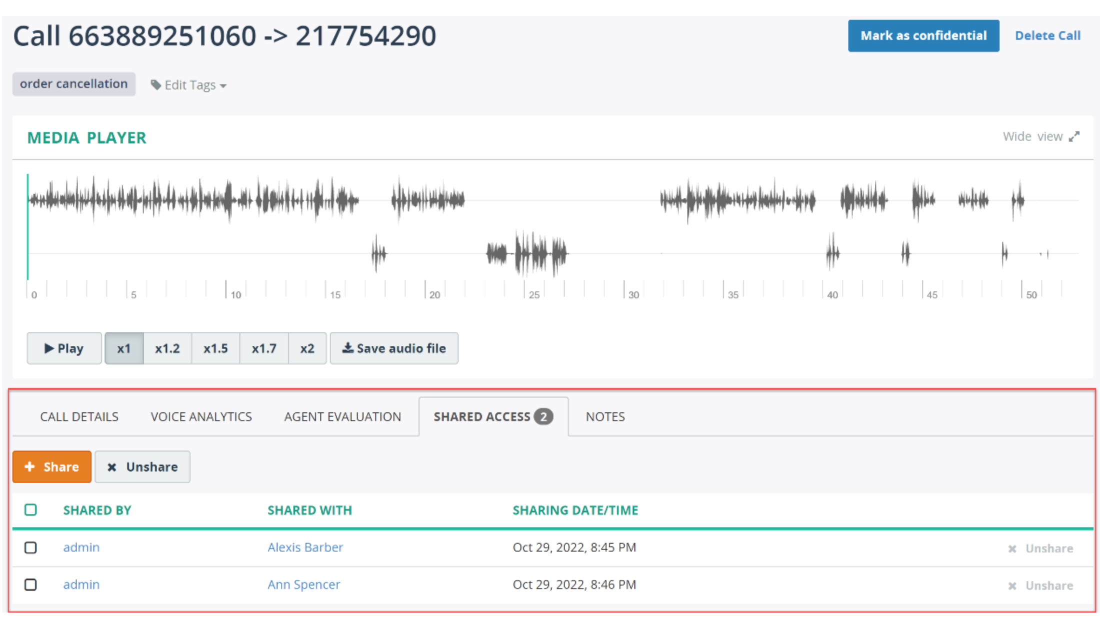


The user, with whom the call recording was shared, will receive an email notification if he/she has the email configured in the platform.

To review the details of who shared and with who, check the info in the columns **Shared By** and **Shared With**, respectively. Note, these columns are not visible by default and should be configured as visible by an administrator.



On the extended call details page, you can check and manage the sharing details under the **Shared access tab** section. For instance, you can view the names of the initiator and target user and a "sharing date/time" information.



Also, on this page, you can share the call recording with other users by clicking **Share**

You can stop sharing the recording by clicking the Unshare button.

Unshare Recordings

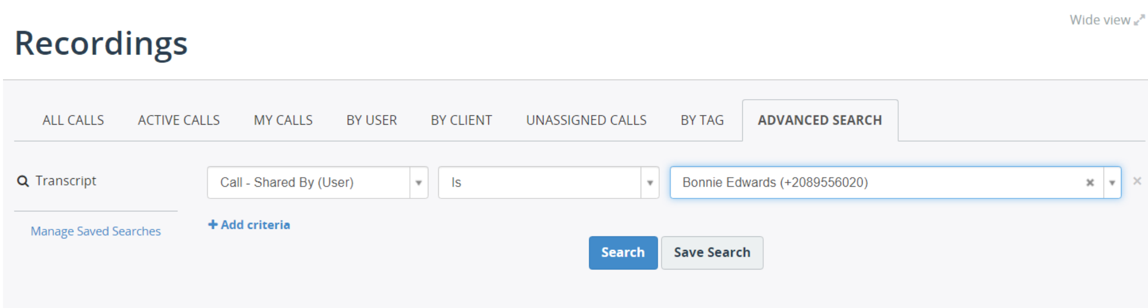
Note: To unshare a call recording, the user must have the **Unshare** permission.

1. Select the shared call recording(s) that you want to stop sharing.
2. Click the **Share** button, then remove checks to unselect the users who you want to stop sharing the recordings with
3. Click **Apply**.

Search Shared Recordings

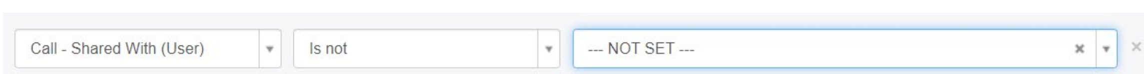
Using **Advanced Search**, you can find the call recordings that were shared with/by specific users. To do that:

1. On the **Recordings** page, click the **Advanced Search** tab.
2. In the **Select a parameter** field, choose **Shared By** or **Shared With** search criterion, select the user from the list and click **Search**.



If you want to search for all call recordings that were shared with anyone, use the following search criteria:

- In the Select a parameter dropdown box, select Call - Shared With (User)
- In the **Select a condition** dropdown box, select **Is not**.
- In the last dropdown box, select **--NOT SET ---**.

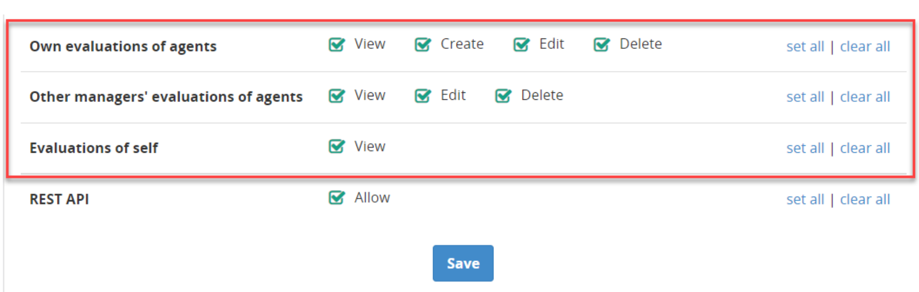


QA

The QA section offers access to tools that can allow supervisors to monitor and measure agent performance.

Prerequisites

Each user must have appropriate permissions to fully utilize the evaluation reporting functionality. Permissions settings specify what operations are permitted on the accessible evaluation reports. Administrators set permissions by Role assignment. Tasks can include view, create, edit, and in rare cases, delete.



Default settings are disabled. An authorized Administrator can typically modify these settings.

Own evaluations of agents

- **View** - if enabled, the user will be able to view the evaluations of agents under his/her supervision.
- **Create** – if enabled, the user will be able to create new evaluations of agents under his/her supervision .
- **Edit** - if enabled, the user will be able to modify the evaluations of agents under his/her supervision.
- **Delete** - if selected, the user will be able to delete the evaluations of agents under his/her supervision.

Other managers' evaluations of agents

- **View** - if enabled, the user will be able to view the evaluations of agents under other managers' supervision.
- **Edit** - if enabled, the user will be able to modify the evaluations of agents under other managers' supervision.
- **Delete** - if enabled, the user will be able to delete the evaluations of agents under other managers' supervision.

Evaluations of self

- **View** - if enabled, the user will be able to view only his/her evaluation reports and not of any other users.
- Click **Save**.

Call Recording supports both manual and automated Quality Assurance (QA) in tandem with the application of Evaluate licenses for those agents that need evaluations performed.

About Manual QA

With manual QA, supervisors listen to a random sample of calls and evaluate them according to a predefined scorecard. The goal here would be to look for coachable moments and find areas where agents can improve.

Manual QA is essential in monitoring and measuring the quality of customer service in contact centers. But it has its limitations. However, a manual QA process is time-consuming. Supervisors are able to listen to only a fraction of calls when evaluating an agent – leading to a less-than-accurate picture of their agents' performance.

Even worse, it can skew the evaluation of an employee if a supervisor only pays attention to a few bad calls.

A typical Evaluation scorecard consists of several sections, like "Greeting", "Verification", "Problem resolution", etc. that are defined and kept updated by the organization. Each section can include questions or metrics that are evaluated by the supervisor. Once done, these evaluations are available for reporting.

While Supervisors will always perform their own ad hoc agent interaction evaluations to be responsive to and responsible for their teams, the addition of Automated QA can greatly enhance their effectiveness and coverage.

About Automated QA

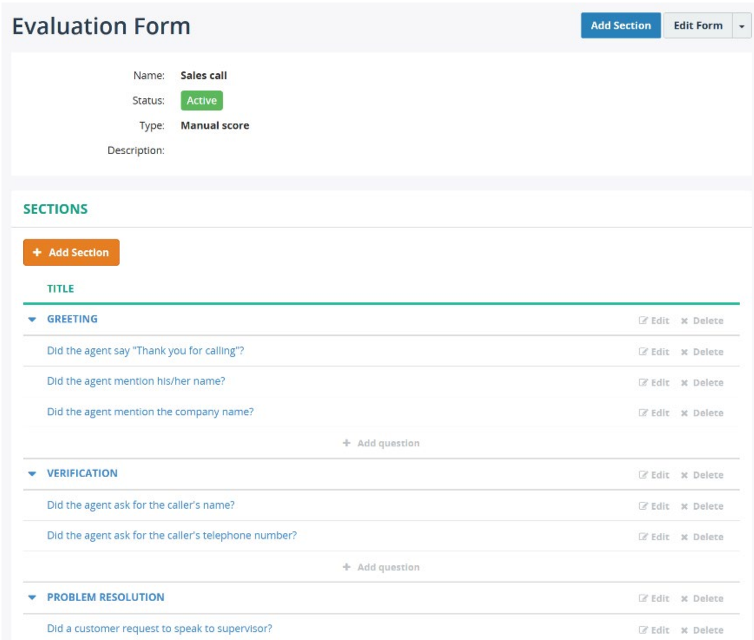
The Automated QA process utilizes the **Speech Analytics and Transcription** artificial intelligence (AI) to automatically score every evaluated agent interaction based on pre-defined criteria. This speeds up the evaluation process and can provide a fuller, less biased evaluation of agent performance. It also allows the system to capture, transcribe, and analyze 100% of agent interactions, vastly increasing insight into agent performance with a wealth of actionable information for call center improvement - while dramatically reducing the manual effort required of call center supervisors.

Despite the obvious benefits of automated QA, it should not be viewed as a complete replacement of the manual QA process. The best approach is to integrate both manual and automated scoring into QA process.

Evaluation forms are completely customizable and configurable. An administrator or manager can create different forms for each department, like Sales, Customer Service or Technical Support. Use Evaluation Form Designer to develop the questions and their answers.

Evaluation Forms

Evaluation reports use evaluation forms to assess and monitor each agent's performance. Authorized users can easily create an evaluation form with the Form Designer. Here is an example evaluation form:



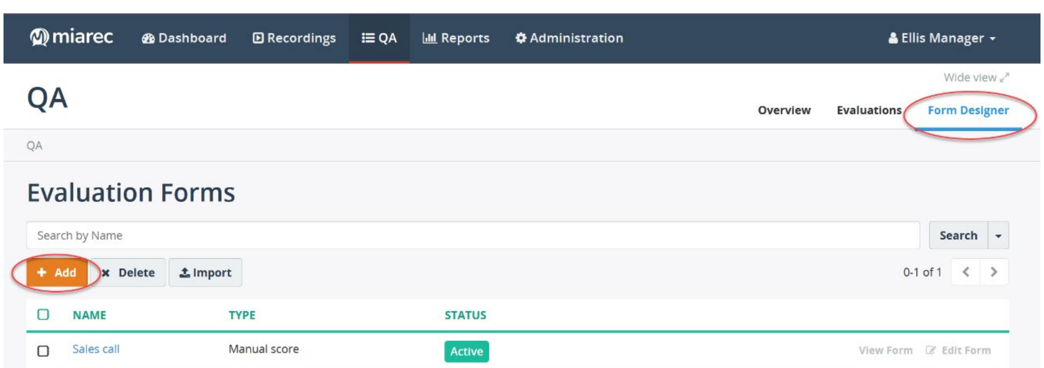
There are 3 ways of creating a new form:

1. Create a new Evaluation form
2. Clone an existing Evaluation form
3. Import a previously exported Evaluation file

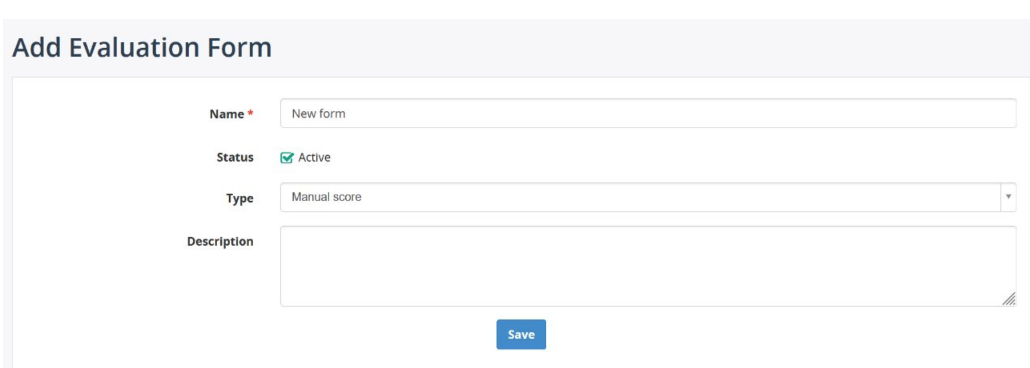
Create a New Form

Start Building an Evaluation Form

1. Navigate to **QA** > **Form Designer** and click **Add**.



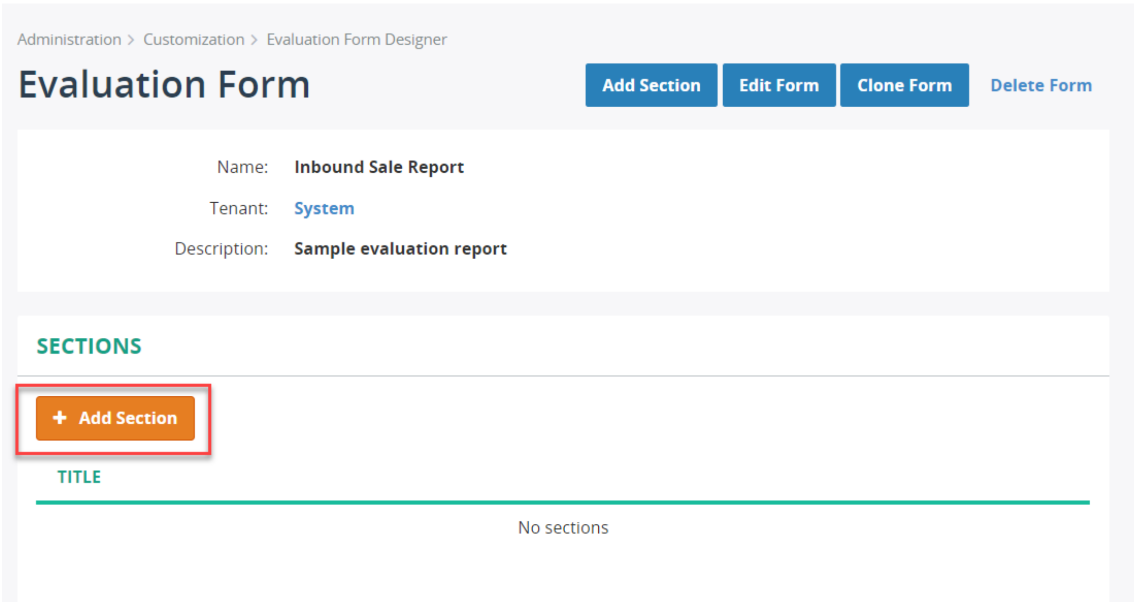
2. Enter the form name in the **Name** field and provide an optional **Description**.
3. Set the **Status** to **Active** to make the form available to users for evaluation.
   Clear this flag if the form is not ready yet.
4. Choose either **Manual score** or **Auto score** in the **Type** field.
   If the type is set to **Auto score**, then such a form will be used for automatic scoring of interactions.



5. Click **Save**.

Add Sections

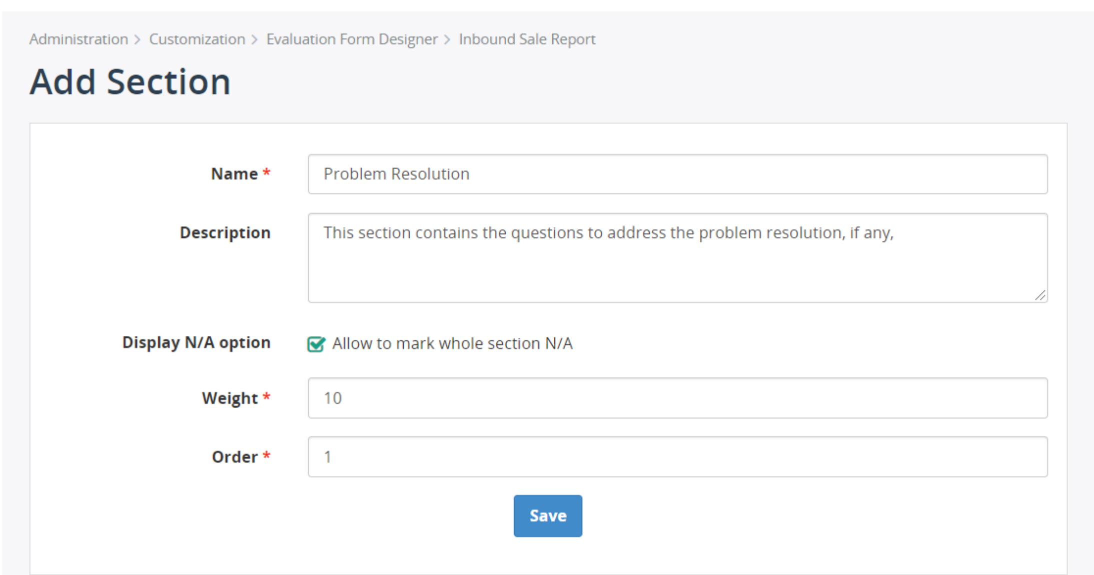
1. Open the evaluation form that you would like to edit.
2. Click Add section.



3. Enter the section name in the **Name** field and provide an optional description in the **Description** field.
4. To allow a supervisor to mark this whole section as not applicable, select the **Display N/A option** check box.

With such an option, a supervisor will be able to exclude a whole section from a score calculation, for example, when such a section contains questions that are not applicable for the evaluated interaction.

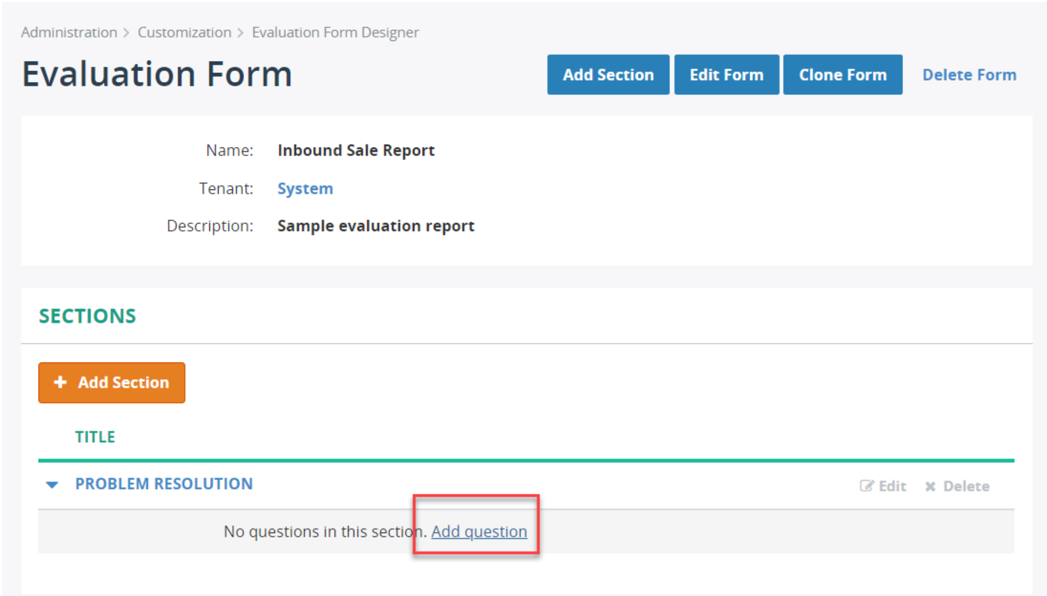
5. In the **Weight** field, enter how much the answers in this section will influence the report score. The integer value entered here can accept positive numbers within the range 1 to 1000.
6. In the **Order** field, specify the order in which this section appears in the report. The integer value entered here can accept positive and negative numbers within the range -1000 to +1000. Sections are ordered by lowest value displayed first. Example: 1 = first section displayed in the form.



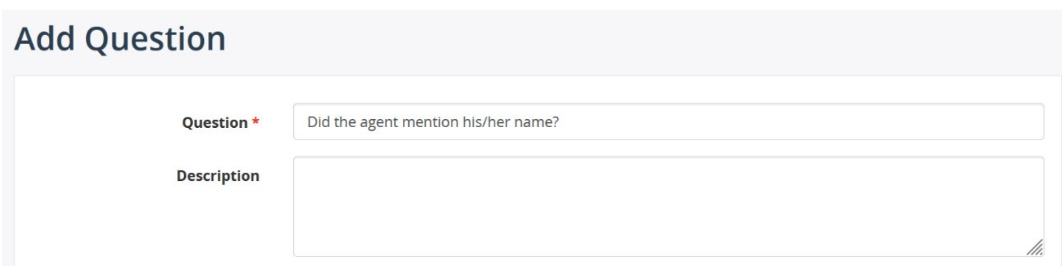
7. Click **Save**.
   Repeat to add more sections, as needed.

Add Questions to the Section

1. Click **Add question** under the section, for which you would like to add new question.



2. Required: In the **Question** field, enter the text of the question.
3. Optional: Provide a description in the **Description** field that would help users of this form to understand the meaning or purpose of this question.

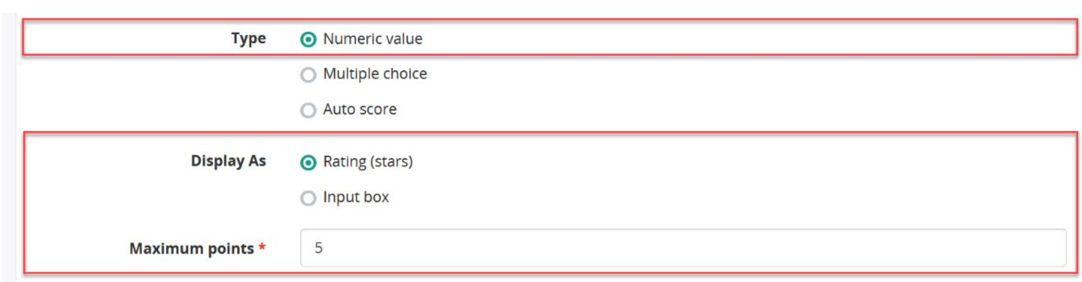


4. Choose a question type. Three options are available:
   - Numeric value, Multiple choice, or Auto score

     Depending on the selected question type, the system offers different options to define.

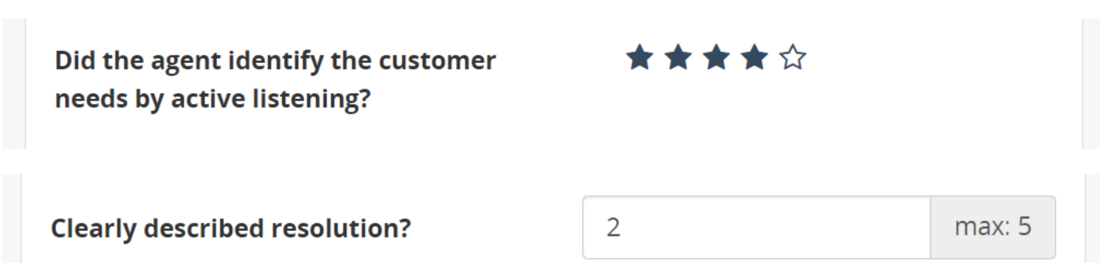
Numeric value question type

For the **Numeric value** type, the following attributes are available:



- **Display As** option specifies how to display this question in the report, either as **Rating (stars)** or **Input box**.

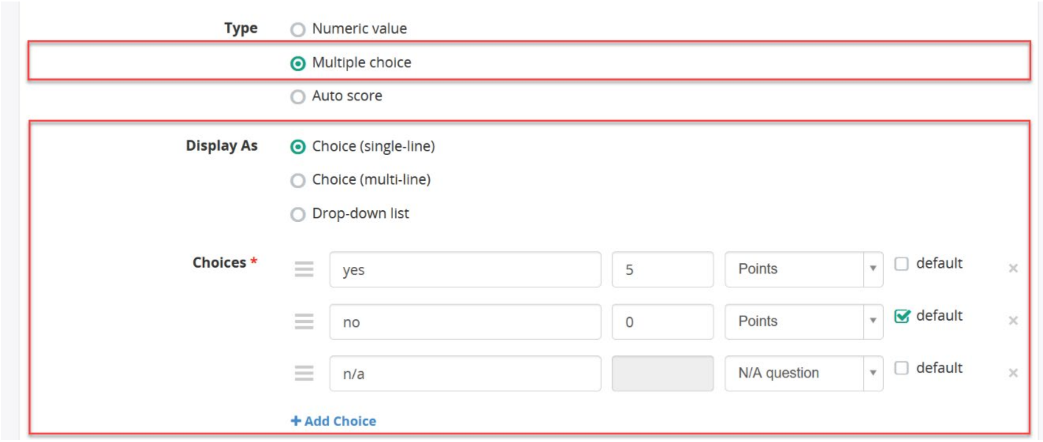
The following screenshot demonstrates all of these options in a report:



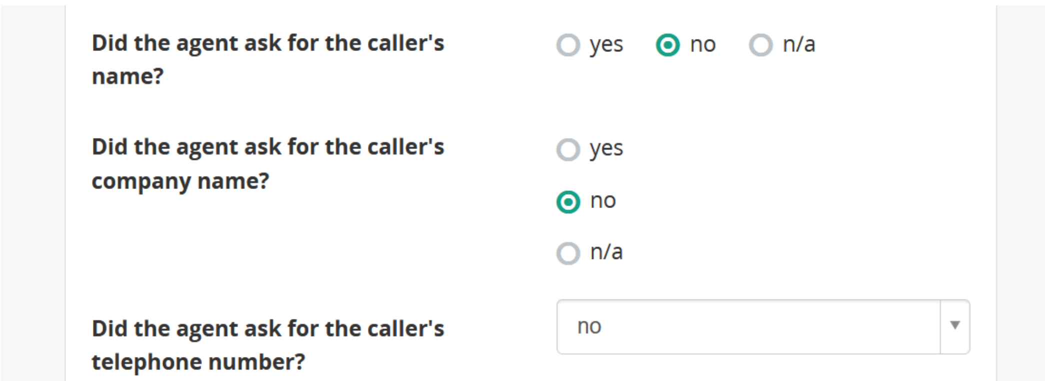
- **Maximum points** option specifies a maximum value that can be entered by evaluator for this question

Multiple Choice Question Type

For the **Multiple choice** type, the following attributes are available:



- **Display As** option specifies how to display this question in the report, either as: **Choice (single-line)**, **Choice (multi-line)** or **Drop-down list**. Here are examples of all three displays:



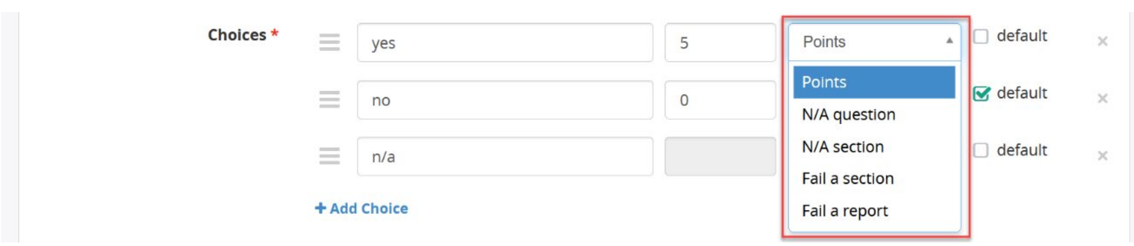
- The **Choices** option specifies a list of all possible answers to the question.

Each choice has a title, and an outcome that will be applied to a report when such an answer is chosen.

The outcome can be one of the following values:

- **Points**. When such a choice is selected in a report, the specified number of points will be granted this question
- **N/A question**. When such a choice is selected in a report, the question will be excluded from the score calculation
- **N/A section**. When such a choice is selected in a report, a whole section will be excluded from the score calculation
- **Fail a section**. When such a choice is selected in a report, a whole section will be marked as failed, i.e. the section gets 0 score
- **Fail a report**. when such a choice is selected in a report, a whole report will be marked as failed, i.e. the report gets 0 score

The following screenshot demonstrates these outcome variants:

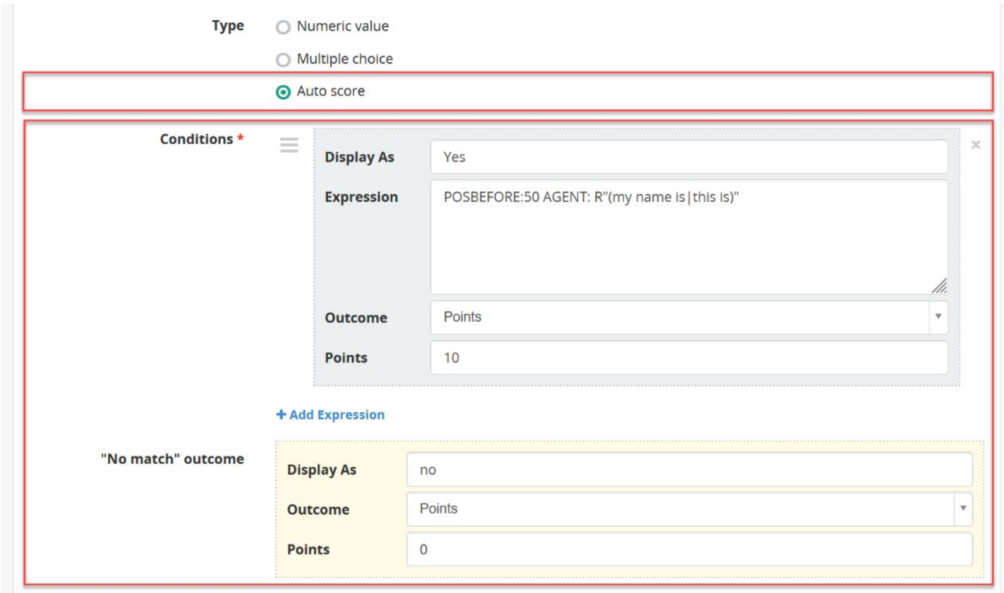


Optionally, you can mark one of choices as default. In such a case, when an evaluator creates a report, the question will be set to a default answer.

Note: If none of choices selected here are marked as the default answer, then a human evaluator must explicitly answer this question, otherwise the report cannot be saved as **Completed**.

Auto Score Question Type

For the **Auto Score** type, the following attributes are available:



- **Conditions** option specifies one or multiple conditions that will be checked by the auto scoring engine.

The **Expression** field contains a query expression that will be applied to transcript. For example, expression POSBEFORE:50 AGENT: R"(my name|this is)" means:

- search in the first 50 words of the transcript (POSBERFORE:50)
- a speaker must be agent (AGENT: operator)
- search for key phrases "my name" or "this is" (regex expression R"(my name|this is)")

For detailed syntax information, reference the MQL Quick Reference Guide.

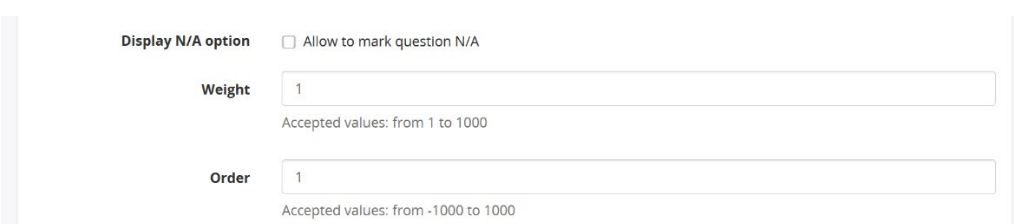
The **Outcome** option may have one of the following values:

- **Points**. When such a condition matches in an interaction, the specified number of points will be granted this question
- **N/A question**. When such a condition matches in an interaction, the question will be excluded from the score calculation
- **N/A section**. When such a condition matches in an interaction, a whole section will be excluded from the score calculation
- **Fail a section**. When such a condition matches in an interaction, a whole section will be marked as failed, i.e. the section gets 0 score
- **Fail a report**. when such a condition matches in an interaction, a whole report will be marked as failed, i.e. the report gets 0 score

If multiple conditions match, then the first one in an order will be chosen.

- **No match** outcome specifies a default outcome if none of the conditions matches

Other question attributes



- The **Display N/A option**, if selected, allows evaluators to mark this question as not applicable. Such an option is useful for **Numeric value** type. For **Multiple choice** and **Auto-score** question types, there is an alternative option to use the **N/A question** outcome.
- The **Weight** field specifies how this question influences the overall section and report scores. The integer value can accept positive numbers within the range 1 to 1000.

For details on calculating the weighted score, see Score Calculation Logic.

- The **Order** field specifies the order in which such a question appears in a report. Questions are ordered by lowest value first.

Delete an Evaluation Form

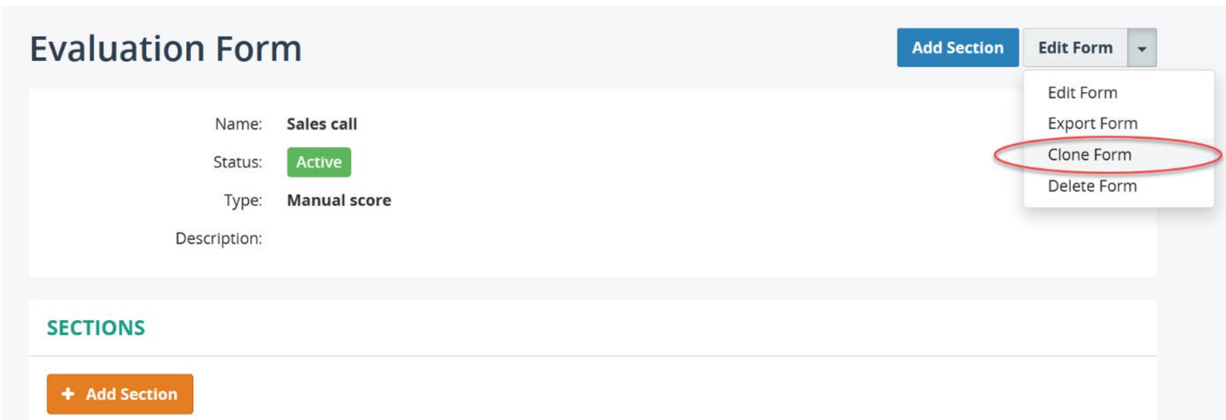
Use Caution. Deleting an evaluation form will delete all of the reports that are based on this form, as well.

Clone an Existing Evaluation Form

The system may be implemented with sample forms you can clone and edit. This means authorized users can create an exact copy of an existing form and use it as the basis for a new, different evaluation form.

1. Navigate to **QA** > **Form Designer**.
2. Open the evaluation form that you want to copy.
3. Click **Clone Form** in the dropdown menu of the **Edit Form** button.

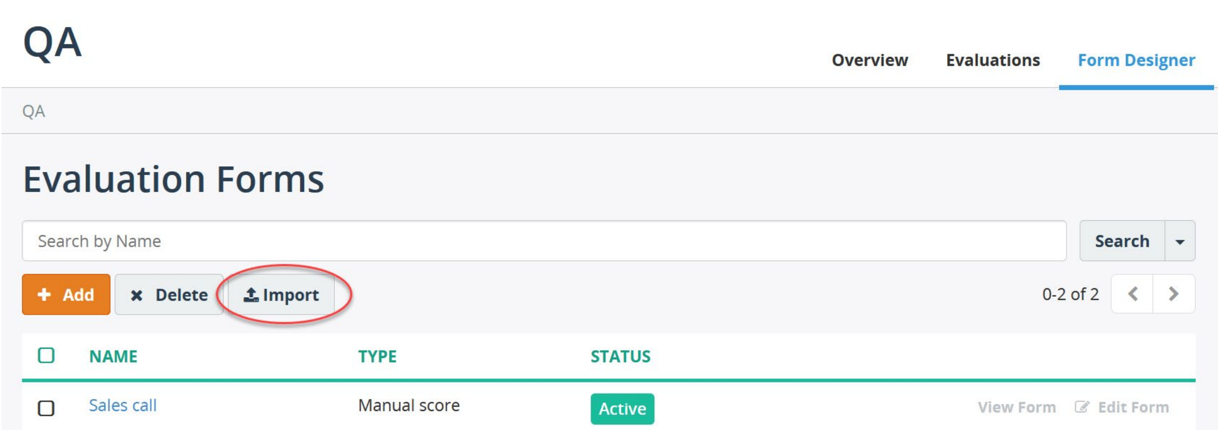
The new copy of the selected Evaluation opens allowing customization.

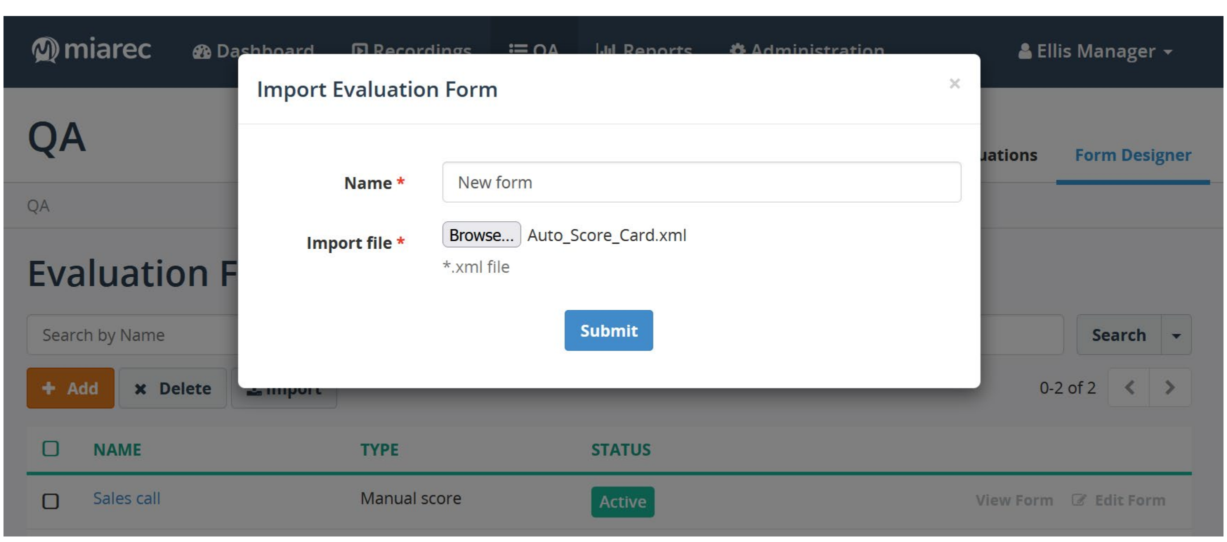


Import From an Exported File

Provided the user has appropriate permissions, a previously exported form can be imported from the Call Recording application.

1. Navigate to **QA** > **Form Designer**.
2. Click **the Import** button.
3. Provide the **Name** and file to import.

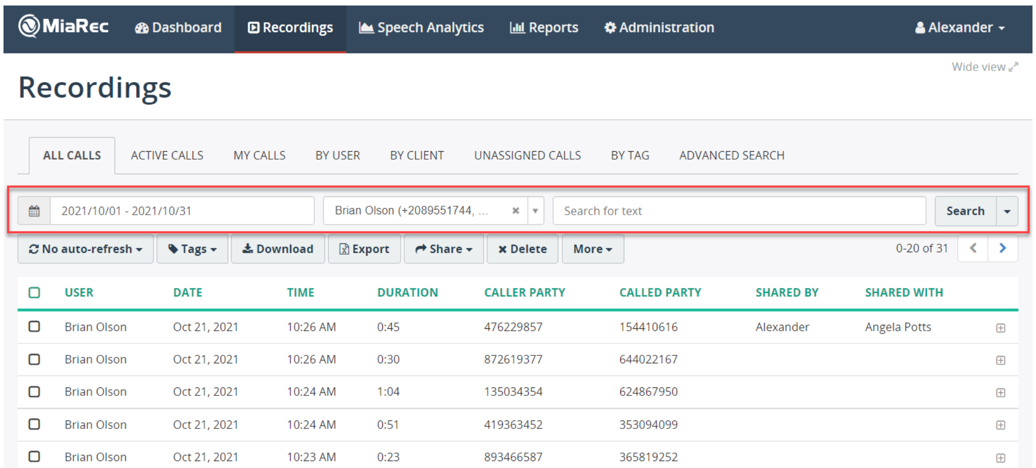




Search

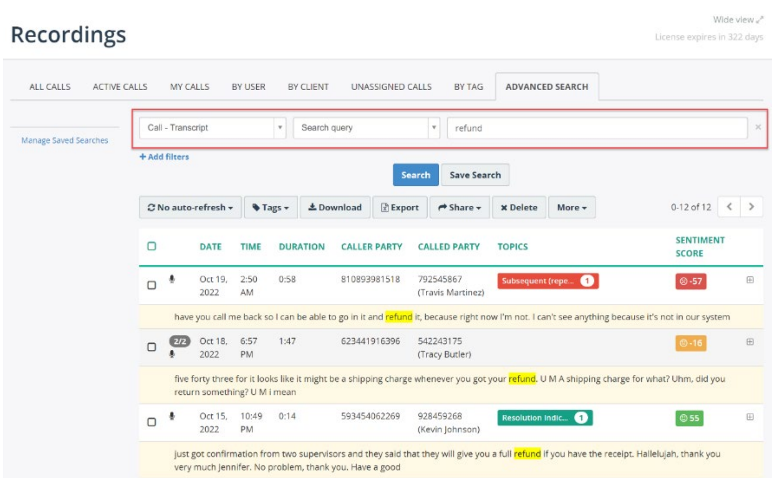
Search for Specific Calls

Use the Search tool features to find call recordings by parameters like date range, user, and phone number.



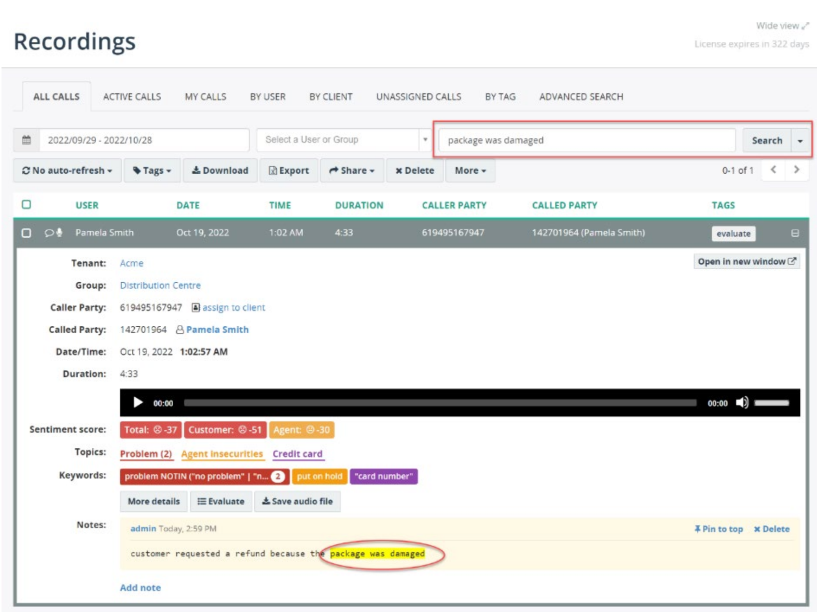
Search Text in Transcripts

1. In the **Recordings** page, click the **Advanced Search** tab.
2. In the Select a parameter field, choose Call - Transcript.
3. Type the text and click **Search.** The system will list and highlight any matches in completed transcripts.



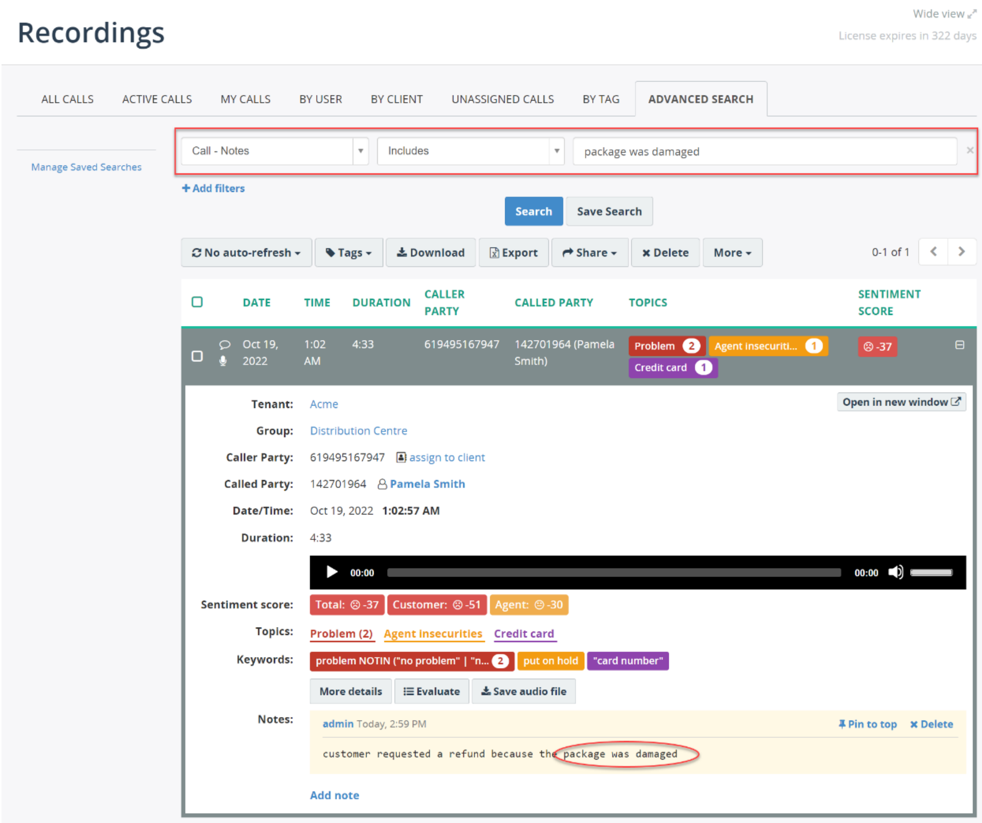
Search Notes

You can also use **Quick Search** or **Advanced Search** to find call recordings with certain text within the Notes. Type the search text input control and hit the **Search** button. The results will be highlighted in the Notes section of the call info.



Advanced Search

To use **Advanced Search**, select the **Call - Notes** in the Parameter list, choose the appropriate operator, enter the text to search and hit the **Search** button. In the **Advanced Search form**, you can mix and match multiple criteria for searching, like Date/time range, user/group, call direction, duration etc.

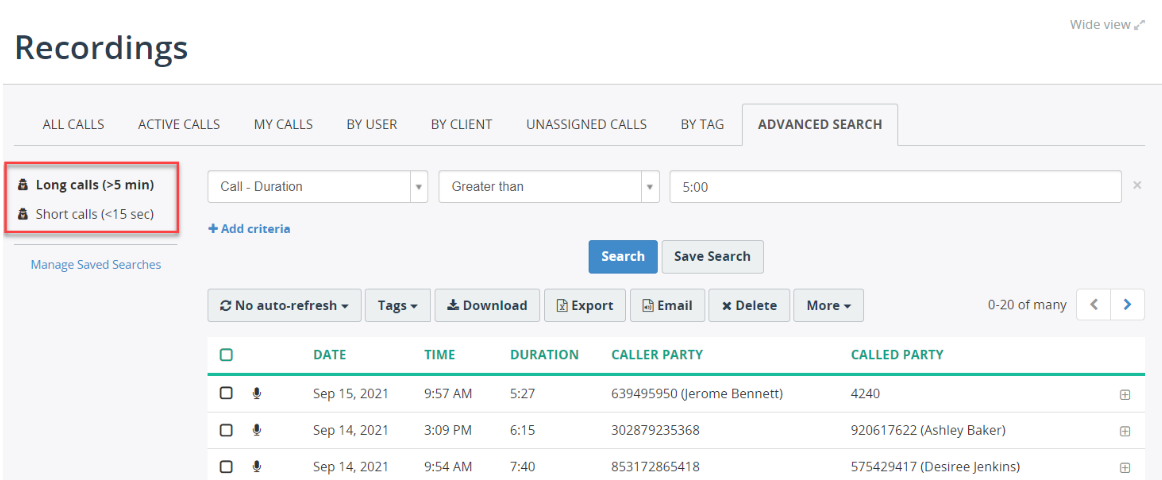


Note: The Advanced Search results will not include highlights of your search parameter.

Save Search Criteria

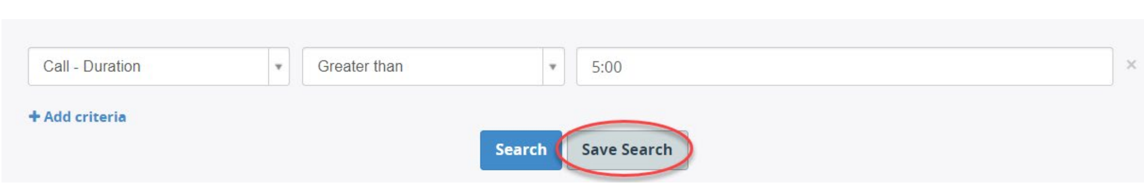
You can save the advanced search criteria so that you can reuse them in the future.

The saved searches are shown in the left pane, from where you can load them in one click.

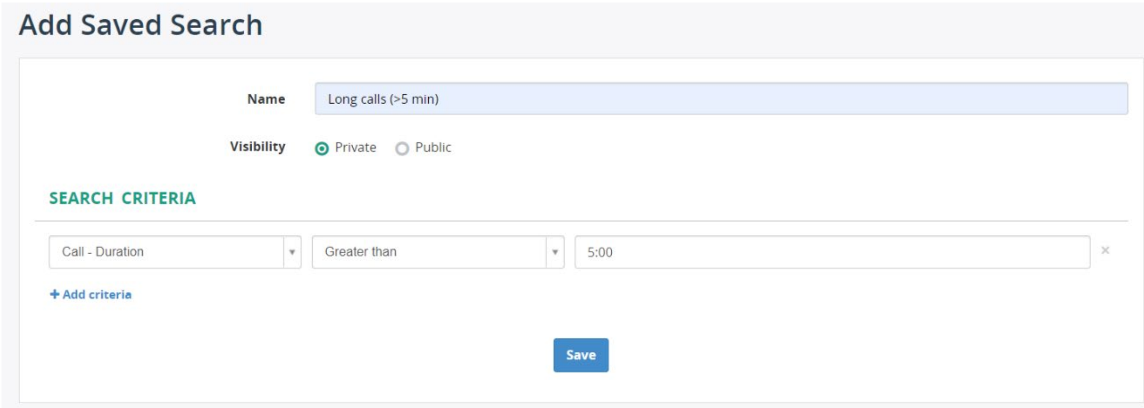


Create a Saved Search

1. To save the advanced search criteria:
2. Navigate to the Advanced Search page.
3. Enter the search criteria and click Save Search.



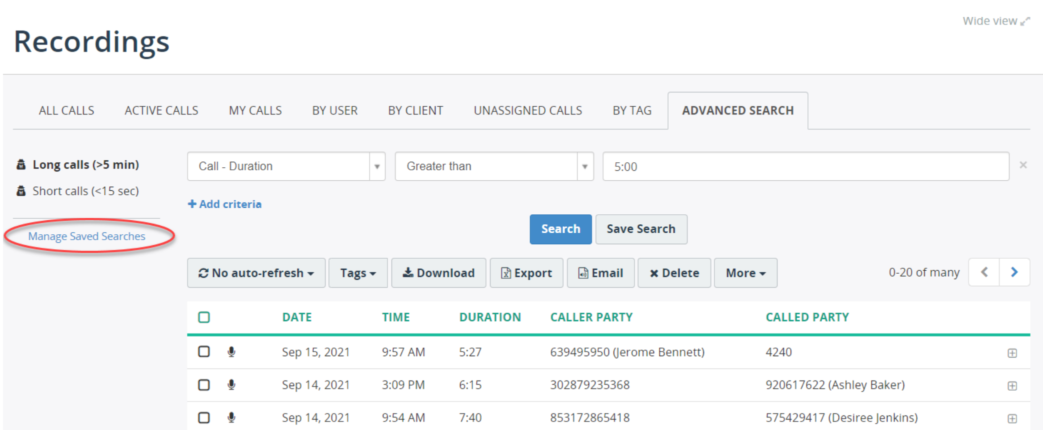
4. On the Add Saved Search page, specify the following parameters:
   - Name - provide the unique name
   - Visibility - decide whether you want to share this search with all users or use it privately only.
5. Refine your search criteria, if needed.



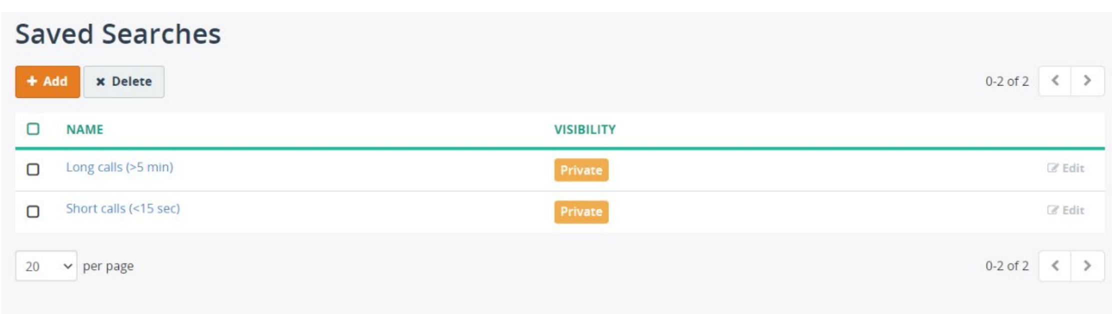
6. Click Save.

Manage a Saved Search

To manage a saved search, click the Manage Saved Searches link in the left-side pane.



On the **Saved Searches** page, you can add, edit or delete the existing saved searches.

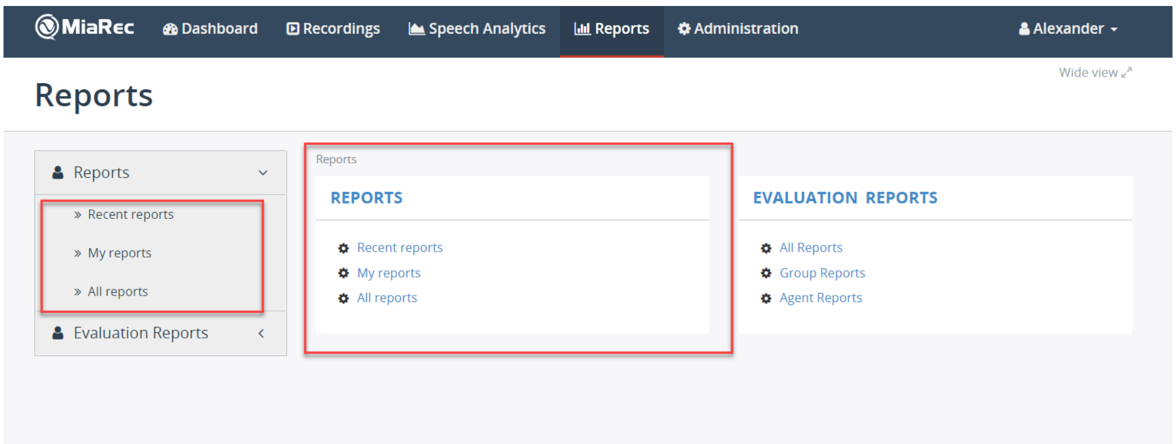


Reports

This section has the following structure:

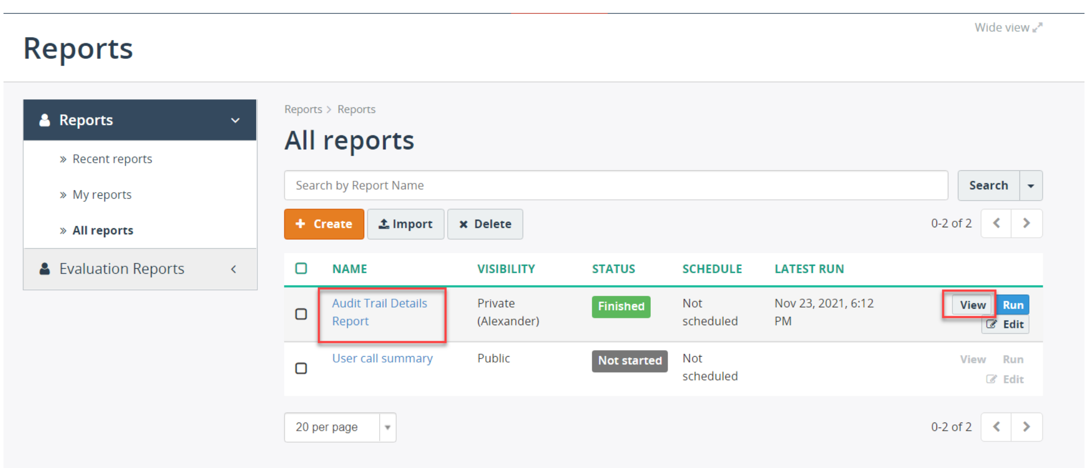
- **Recent Reports** - lists the reports that were recently created in Call Recording.
- **My Reports** - lists only those reports that you have created.
- **All Reports** - lists all available reports.

You can access each report group via the Reports navigation tree or clicking a specific group on the Reports
home page.



View Report

You can open the most recently executed version of a report by clicking the report name or the **View** button next to the report.



Run Report

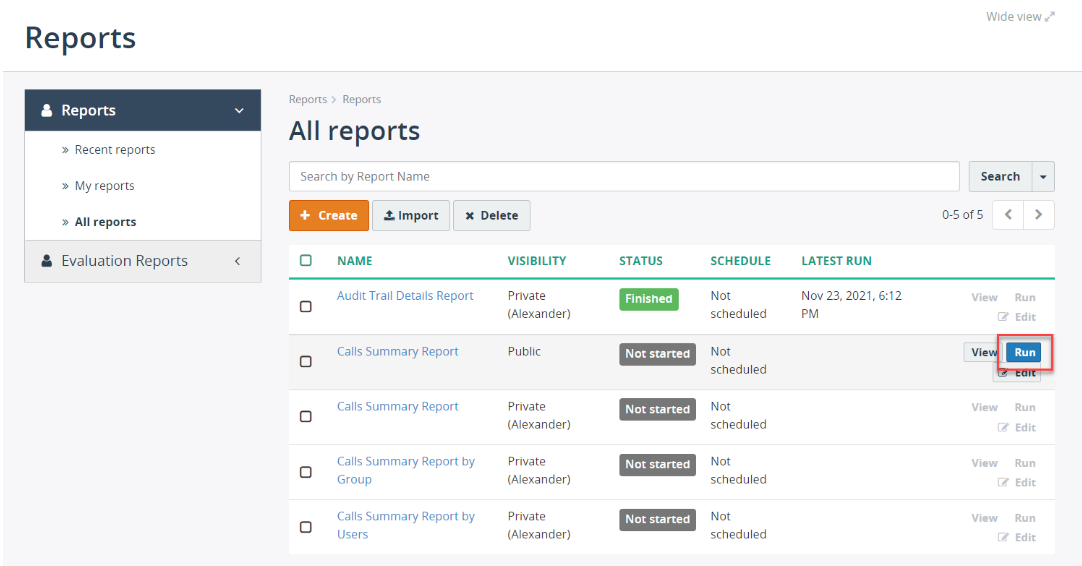
You can produce reports in two ways:

- **On-Demand** Produce reports manually by a user specifying report parameters.
- **Automatically** Produce reports in the background according to a pre-defined schedule.

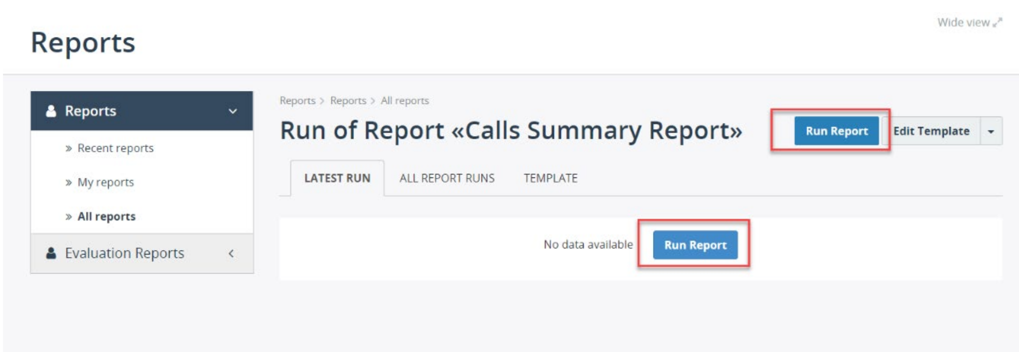
Info: The report results can vary depending on the user who runs the report. For example, if the report is executed by the administrator, who can access all user groups, the report will contain the users from all groups. If another user, who can access only one user group, runs the same public report, the report data will be limited only to users from that one group.

Run a Report Manually

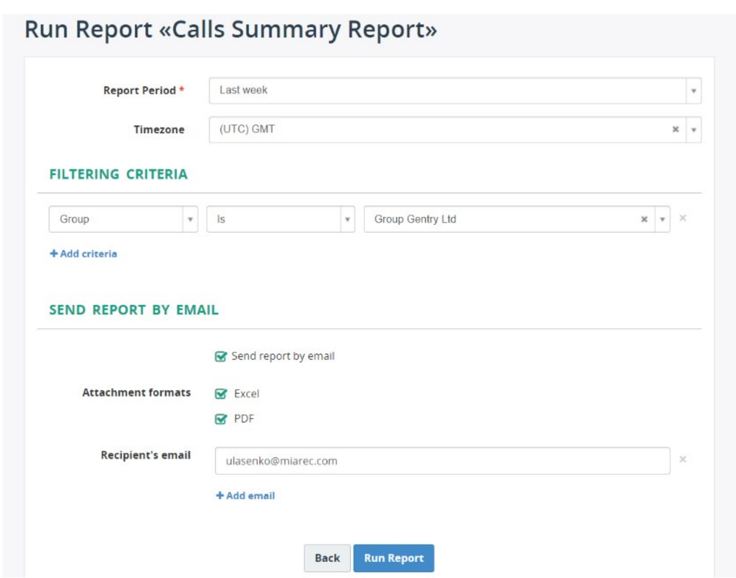
1. Navigate to the list of reports and click **Run** next to the report of your choice.



2. Alternatively, you can click the report name and then click **Run Report**.



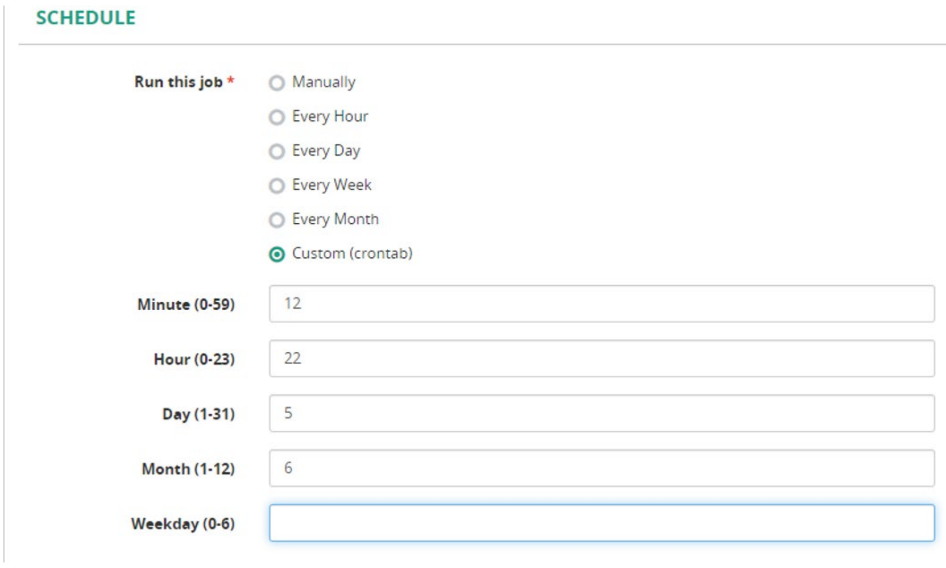
3. In the **Run Report** dialog box, configure the following options:
   - **Report Period** - select the time period for the report to limit report data to a specific timeframe. Required field.
   - **Timezone -** select the appropriate value from the list, if you wish to run the report in a different timezone.
   - **Filtering Criteria** - apply filtering criteria to the reports. For example, you can limit data to specific groups, duration, date, etc.
   - **Send Report By Email** - optionally, you can send the report results by email after the report has been executed.



4. Click on **Run Report** when ready.

Schedule a Report

You can schedule any report that you can access to be automatically generated and emailed at regular intervals. The scheduling options are defined when creating a report template.

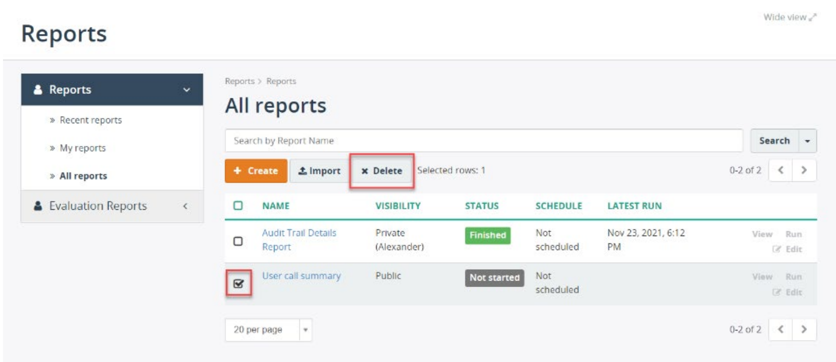


Delete a Report

You can delete any report that you created, or any report that you have sufficient permission to delete.

To delete a report:

Select the check box next to the report of your choice and click **Delete**.



Report Types

The following report types are available:

Audit Trail Details Report	An *Audit Trail Details Report* is a non-call based report, which lists the activities of a system user performed in the portal. The report contains information on the type of activity, the user that performed the activity, the date and time, etc. Customize using available columns and apply filtering criteria to view a subset of the log records that satisfy your needs.
Audit Trail Summary Report	The *Audit Trail Summary Report* displays a summary of the audit events, which users performed in the portal.
Call Details Summary Report	The *Call Details Report* provides detailed records of call interactions in chronological order, including an overview with the total duration of calls, number of inbound and outbound calls, internal and not-assigned calls.
Calls Summary Report	The *Calls Summary Report* provides the call/minutes totals for each group/user for the selected time frame.
Calls Summary Report By Group	The *Calls Summary Report by Group* displays a summary of call statistics of all user groups.
Calls Summary Report By Group (drill-down)	The *Calls Summary Report By Group with drill-down* is a two-level report that first displays call summary data for all groups. Clicking the group name will navigate you to a second level report, which displays call summary data of all users within the selected group.

Calls Summary Report by Interval	The *Calls Summary Report by Interval* displays the call/minutes totals for each interval within the report period. Data could be displayed per year, month, week, day, hour interval.
System Log Details Report	The *System Log Details Report* displays system error messages sent from different service/portal components. Review the details of each message, including the date and time the error occurred and the component that reported the message.
System Log Summary Report	The *System Log Summary Report* displays the summary information about the system events that occurred within the call recording environment. Data could be displayed using year/month/week/day/hour intervals.
Calls Summary Report By Tenant	The *Calls Summary Report by Tenants* displays a summary of call statistics across all tenants available to the Admin.
Tenant Details Report	The *Tenant Details Report* provides the details of tenant record data, including the licensing and storage information per specific tenant.
Calls Summary Report by Users	The *Calls Summary Report by Users* displays a summary of call statistics of all users.
User Details Report	The *User Details Report* provides the detailed information about every user in your environment.

Administration

This area may be visible, but with read-only access to most contents and tools for non-Administrators.

Access to perform tasks within this section is made available to those who have been given an Administrator license/Role for the Call Recording portal.