

Supervisor User Guide





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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.

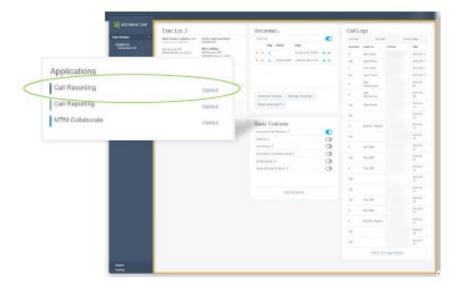
Getting Started

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
- 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.

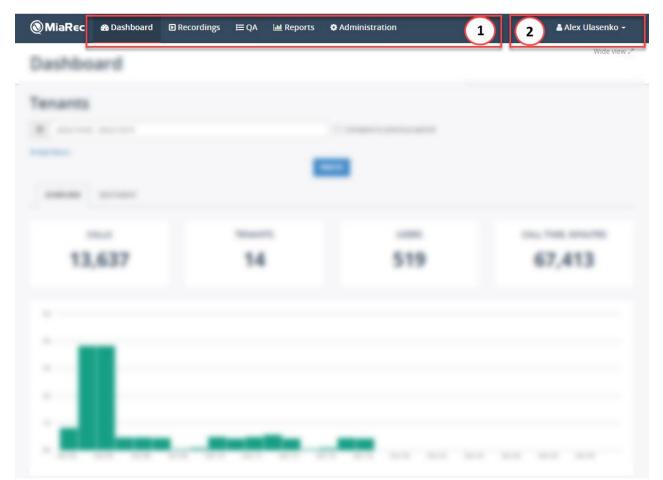
Once the login process is verified and successful, the Call Recording portal opens, and the Supervisor or User is presented with their Call Recording Dashboard and toolbar links to the areas they are authorized to access within the Call Recording Portal.

	L ORDING
Login	205 207@mymtm.i.
Password	
	SIGN IN
	PergetLagert

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:

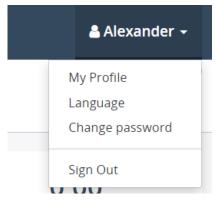
- Dashboard. Provides call metrics for your entire organization.
- **Recordings**. Provides to access call recordings.
- QA. Provides quality assurance (QA) metrics for your entire contact center.
- **Reports**. Provides access to build and run custom reports.
- Administration. Provides access to administration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



Wide view 🖉

MiaRec & Dashboa	rd 🗈 Recordings	⊞ QA 🔟 Repo	orts 🛛 🏟 Administrati	on	🐣 Alex Ulasenko	o -
Recordings					My Profile Language Change password	
ALL CALLS ACTIVE CALLS	MY CALLS BY US	ER BY CLIENT	UNASSIGNED CALLS	BY TAG ADVANCED SEARCH	Sign Out	
2022/10/03 - 2022/11/01	Se	lect a User or Group	• Search fo	or text	Search	•
𝔅 No auto-refresh ▾ 🔍 Գ Tags	- 🕹 Download	Export 🌈 Share 🗸	• X Delete More •		0-20 of many	>
USER	DATE TIME	DURATION CA	ALLER PARTY	CALLED PARTY	TAGS	
Alexis Barber	Oct 27, 2022 7:55 AM	1:23 60	05824224	466008291		æ
🔲 🔎 🗮 🎍 Lori Brennan	Oct 19, 2022 6:23 AM	5:18 41	10953772 (Lori Brennan)	8150259180	order cancellation evaluate	Ð
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🗋 🎍 Travis Martinez	Oct 19, 2022 2:50 AM	0:58 81	10893981518	792545867 (Travis Martinez)		Œ
D D Pamela Smith	Oct 19, 2022 1:02 AM	4:33 61	19495167947	142701964 (Pamela Smith)	evaluate	Ð

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.

My Profile

Personal info » Info	~	My Profile > Personal info Personal Info	
J Security	<	Name:	Alexander
		Role:	Administrator
		Group:	Group Gentry Ltd
		Email:	Change email
		Timezone:	Default Change Timezone
		Language:	Default Change Language

Change Portal Language Display

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

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Recor	dings					My Profile Language Change password
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𝔅 No auto-re	efresh 👻 💊 Tags	✓ ▲ Download	i 🖹 Export	Arr Share - X Delete More	•	0-20 of many 🔇 📏
0	USER	DATE T	TIME DURAT	ION CALLER PARTY	CALLED PARTY	TAGS
	Alexis Barber	Oct 27, 2022 7	7:55 AM 1:23	605824224	466008291	Đ
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	Amy Harris	Oct 19, 2022 3	3:57 AM 0:53	663889251060	217754290 (Amy Harris)	order cancellation
	Travis Martinez	Oct 19, 2022 2	2:50 AM 0:58	810893981518	792545867 (Travis Martinez)	Œ
	Pamela Smith	Oct 19, 2022 1	1:02 AM 4:33	619495167947	142701964 (Pamela Smith)	evaluate

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

Language

Language	English	
	1	٩
	English	
	French	
	German	
	Italian	
	Portuguese (Brazil)	
	Russian	
	Spanish	

Wide view 🖉

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.

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Recor	dings						My Profile Language Change password
ALL CALLS	S ACTIVE CALLS	MY CALLS	BY USER	BY CLIENT	UNASSIGNED CALLS	BY TAG ADVANCED SEARCH	Sign Out
2022/1	0/03 - 2022/11/01		Selec	t a User or Grou	ip 💌 Search	for text	Search -
€ No auto-r	refresh 🗸 💊 Tags	- ★ Downl	oad 🔀 Ex	kport 🏾 🏞 Sh	are 🕶 🗙 Delete 🛛 More	•	0-20 of many 🔇 📏
0	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
	Alexis Barber	Oct 27, 2022	7:55 AM	1:23	605824224	466008291	ŧ
□ ♀≡∮	Lori Brennan	Oct 19, 2022	6:23 AM	5:18	410953772 (Lori Brennan)	8150259180	order cancellation evaluate
	Amy Harris	Oct 19, 2022	3:57 AM	0:53	663889251060	217754290 (Amy Harris)	order cancellation
	Travis Martinez	Oct 19, 2022	2:50 AM	0:58	810893981518	792545867 (Travis Martinez)	Ð
	Pamela Smith	Oct 19, 2022	1:02 AM	4:33	619495167947	142701964 (Pamela Smith)	evaluate

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

My Profile

🛔 Personal info	~	My Profile > Personal info > Info	award
» Info		Change my pass	sword
Security	<	Current password *	
		New password *	
			good
			Change Password

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.

Verify it's you
An email with a verification code has just been sent to
To continue, enter the code
Didn't receive the code? You can resend the code in 0:31
Verification code * 561689
Verify Resend code
Switch to Profile Email

My Profile > Security Trusted Devices					
You will not be asked for a code when y be required	ou sign in to your acc	ount on the device y	rou trust. Only	y your usernam	ne and password will
FIRST ACCESS	LAST ACCESS	LOCATION	CLIENT	SYSTEM	
Jan 11, 2022, 12:40 PM This device	57 seconds ago	91.195.75.207	Chrome	Windows	Viev × Revoke

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

My Profile > Security Trusted Devices					
You will not be asked for a code when be required	you sign in to your acc	ount on the device y	ou trust. Onl	y your usernam	ne and password will
FIRST ACCESS	LAST ACCESS	LOCATION	CLIENT	SYSTEM	
Jan 11, 2022, 12:40 PM This device	57 seconds ago	91.195.75.207	Chrome	Windows	Viev(× Revoke

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.

/ly Profile							Wide view
Personal info	<						
Security	~	Your Devices					
» 2-Step Verification		You have recently signed in to your ac	count on these devices				
» Trusted Devices		FIRST ACCESS	LAST ACCESS	LOCATION	CLIENT	SYSTEM	
» Your Devices		Jan 10, 2022, 12:11 PM This device	22 seconds ago	50.203.213.38	Chrome	Windows	View 🗶 Revoke
» Your Web Sessions		Jan 10, 2022, 12:01 PM	10 minutes ago	50.203.213.38	Chrome	Windows	View 🗶 Revoke
		Dec 30, 2021, 5:21 PM	3 days ago	91.195.75.207	Chrome	Windows	View 🗶 Revoke
		Dec 24, 2021, 11:59 AM	10 days ago	91.195.75.207	Chrome	Windows	View 🗶 Revoke
		Nov 9, 2021, 12:33 PM	61 days ago	85.223.209.22	Chrome	Windows	View 🗶 Revoke
		Oct 25, 2021, 5:01 PM	76 days ago	91.195.75.206	Chrome	Windows	View 🗶 Revoke

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

My Profile > Security

You have recently signed in to your ac	count on these devices				
FIRST ACCESS	LAST ACCESS	LOCATION	CLIENT	SYSTEM	
Jan 10, 2022, 12:11 PM This device	22 seconds ago	50.203.213.38	Chrome	Windows	View × Revoke
Jan 10, 2022, 12:01 PM	10 minutes ago	50.203.213.38	Chrome	Windows	View 🗙 Revoke
Dec 30, 2021, 5:21 PM	3 days ago	91.195.75.207	Chrome	Windows	View 🗙 Revoke

Wide view 🖉

Wide view 🖉

Personal info	My Profile > Security > Your Devices	5	
Security	~ Device		Revoke
» 2-Step Verification		This device	
» Trusted Devices	Client:	Chrome	
» Husted Devices	Operating System:	Windows	
» Your Devices	Location:	50.203.213.38	
» Your Web Sessions	First access:	Jan 10, 2022, 12:11 PM (4 minutes ago)	
	Last access:	Jan 10, 2022, 12:11 PM (4 minutes ago)	
	Expiration time:	Jul 9, 2022, 12:11 PM (expires in 180 days)	

Your Web Sessions

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

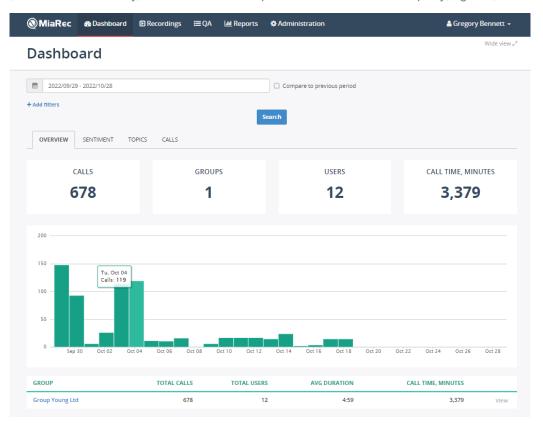
If you see any suspicious activity, click Terminate to terminate the session and change your password.

My Profile

Personal info	<	Your Web Sessions									
Security	~										
» 2-Step Verification		This lists all of your current active sessions. If you found a quickly	ny suspicious activity,	terminate th	e session and c	hange your password					
» Trusted Devices			y								
» Your Devices		SESSION START TIME	LOCATION	CLIENT	SYSTEM						
» Your Web Sessions		Jan 10, 2022, 12:11 PM (13 minutes ago) This session	50.203.213.38	Chrome	Windows	View × Termina					

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.

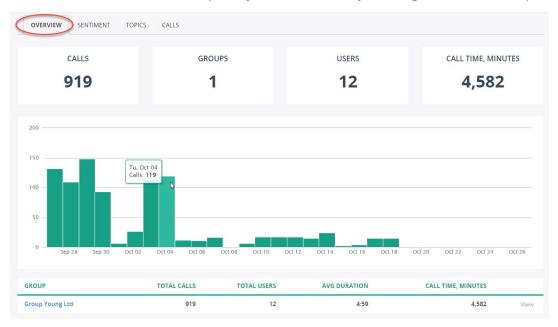
Dashboard Metrics

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.

OVERVIE	W SENT	TIMENT	TOPICS	CALLS					
C No auto	-refresh +	🗣 Tags 🔻	🕹 Down	oad 🖹 Export	A Share -	X Delete	More -	0-20 of 200	< >
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□ [●] •	Oct 19, 2022	3:57 AM	0:53	663889251060	21775429	0 (Amy Harris)	Resolution Indic 3 Resolution Indic 1	© 43	Œ
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•	Oct 19, 2022	1:02 AM	4:33	619495167947	14270196 Smith)	4 (Pamela	Problem 2 Agent insecuriti 1 Credit card 1	© -37	Ð
•	Oct 19, 2022	12:23 AM	0:16	474235319971	78282226 Morales)	1 (Mr. John	Resolution Indic	© 60	Ð
•	Oct 18, 2022	11:44 PM	9:23	207435901101	230696870 (Thomas Bell)		Resolution Indic 2 Credit card 1 Payment language 1	⊜ -12	æ
•	Oct 18, 2022	8:13 PM	0:34	252212587918	68529731 Carr)	9 (Johnathan	Resolution Indic 2 Payment language 1 Resolution Indic 1	© 30	Ð

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.



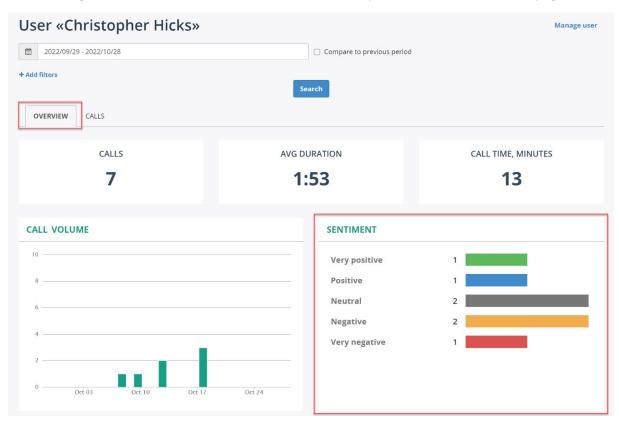
Depending on a drill-down level, the **Sentiment** page also shows a distribution of calls by sentiment for each group or user.

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.

GROUP	TOTAL CALLS	TOTAL USERS	SENTIMENT	
Claims and Warranty Operations	37	21	2 8 14 8 3	View
Dealer Support and Customer Care	20	13	7 9 2 2 Very positive	View
Distribution Centre	63	45	2 11 28 19 3	View
Performance Centre	81 †+81	53	2 29 22 24 4	View

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.

OVERVI	EW SENT	IMENT	TOPICS	CALLS				
₽ No auto	o-refresh -	🗣 Tags 🗸	z Down	load 🔀 Export	Arr Share - X Delete	More -	60-80 of 201	>
0	DATE	TIME	DURATION	CALLER PARTY		TOPICS	SENTIMENT SCORE	
•	Oct 16, 2022	12:25 AM	0:15	280729871226	277316596 (Jesse Thornton)		© 38	÷
•	Oct 15, 2022	10:49 PM	0:14	593454062269	928459268 (Kevin Johnson)	Resolution Indic 1	© 55	÷
□ [●]	Oct 15, 2022	9:04 PM	5:23	151012704193	649268264 (Steven Mann)	Broken Trust 2 Resolution Indic 2	© -18	÷
□ [●]	Oct 15, 2022	8:51 PM	2:38	864852586041	141135652 (Linda Miller)	Resolution Indic 3	© 27	÷
•	Oct 15, 2022	6:45 PM	4:13	3360900690	638899152 (Matthew Scott)	Resolution Indic 4 Agent insecuriti 1 Subsequent (repe 1	© 11	÷
•	Oct 15, 2022	6:28 PM	0:27	502501311263	382247525 (Jim Diaz)	Resolution Indic 1	© -39	÷
•	Oct 15, 2022	5:17 PM	10:16	454410584199	784368854 (Timothy Morton)	Resolution Indic 3 Resolution Indic 1	©-15	÷

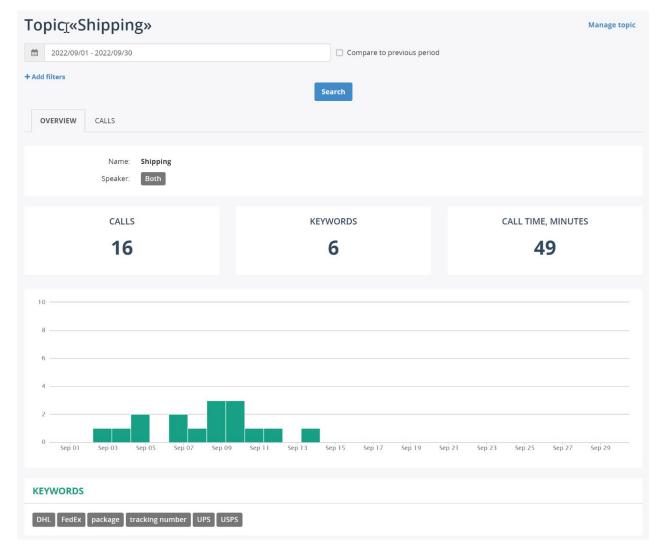
Topic Metrics

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.

OVERVIEW SENTIMENT TOPICS	CALLS						
TOPICS		BIGGEST TOPIC, CALLS		BIGGES	T TOPIC, MINUTE	S	
33		96			206		
		† +42 (77.8%)		1	+110 (115.6%)		
ТОРІС	TOTAL CALLS	s	AVG DURATION	CALI	. TIME, MINUTES		
Resolution Indicators (customer)	96) 2:	08 † +0:23 (21.9%)	206 1	+110 (115.6%)	View	
Agent insecurities	38 \$+26 (216.79	%) 2:0	9 \$\$\\$ -0:52 (28.7%)	82 1	+46 (126%)	View	
Payment language	15	4:	7 † +1:22 (42.1%)	69 1	+50 (254%)	View	
Resolution Indicators (agent)	15	3:	6 \$\$ -0:01 (0.5%)	49 1	+23 (86.6%)	View	
Shipping	12	3:	0 \$\frac{1}{2}-0:16 (8.2%)	36 1	+23 (174.9%)	View	
Credit card	9 †+9	3:	95	28 1	+28	View	
Cursing	6	5:	1 \$\phi +2:42 (108.7%)	31 1	+29 (1,153.7%)	View	
Problem	6	3:	1 +2:18 (219%)	20 1	+19 (1,814.3%)	View	
Subsequent (repeated) Call	6	4:	1 +2:39 (157.4%)	26 1	+21 (413.1%)	View	
Customer Aggravation-Repetition	4	4:	0 \$\$\\$-7:28 (64.2%)\$	17 1	+5 (43.7%)	View	
Broken Trust	3 (0%)	5:0	9 ↓-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.

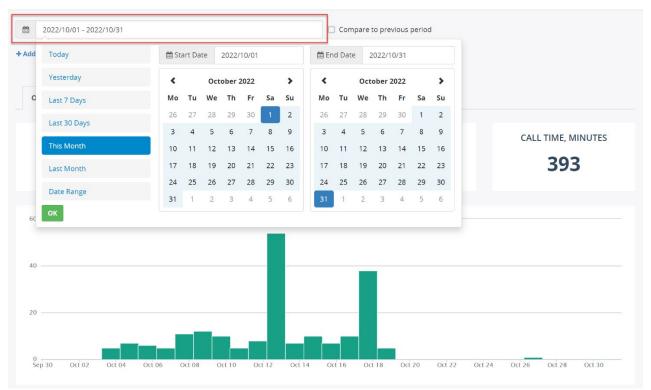


Dashboard Filter

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:

Dashboard



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).

Dashboard

2022/10/11 - 2022/10/22 🕑 Compare to previous period Call - Direction Is Inbound v v. × . Call - Duration Greater than Ŧ 0:15 v + Add filters OVERVIEW SENTIMENT TOPICS CALLS CALLS GROUPS USERS CALL TIME, MINUTES 122 132 4 264 **†** +69 (130.2%) **†** +176 (201.9%)

Wide view #7

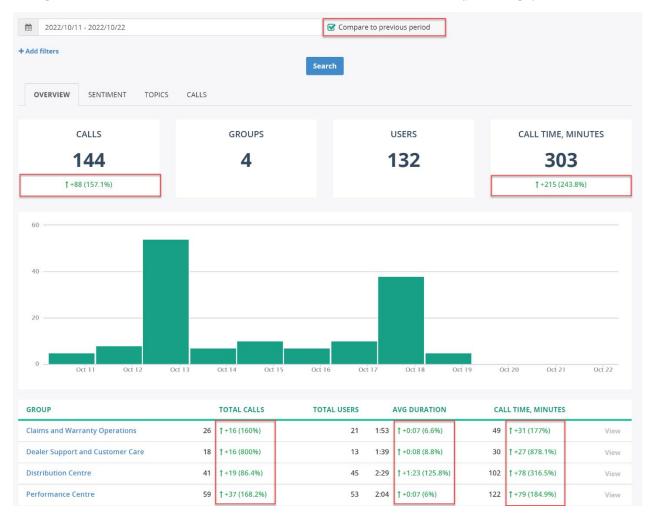
Wide view 🖉

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.

2022/10/11 - 2022/10/22		Compare to previous period			
Add filters		Search			
OVERVIEW SENTIMENT TOP	Dashboard > Group «Distribution Centre»				
	Group «Distributio	n Centre»		Mar	age group
CALLS	2022/10/11 - 2022/10/22		Compare to previous period		
144	+ Add filters	s	earch		
60	OVERVIEW SENTIMENT CAL	LS Dashboard > Group «Distribution Centre» >	User «Mark Douglas»		
		User «Mark Dougla	s» 3		Manage use
40	CALLS	2022/10/11 - 2022/10/22		Compare to previous period	
	41	+ Add filters			
20			s	earch	
	20	OVERVIEW CALLS			
0 – od 11 od 12	15				
		CALLS		URATION	CALL TIME, MINUTES
GROUP	10	2	1:	:23	3
Claims and Warranty Operations	s				
Dealer Support and Custon Care		CALL VOLUME		SENTIMENT	
Performance Centre	0 - Oct 11 Oct 12	10		Very positive	0
		8		Positive	0
	USER 2	6		Neutral	2
	Mark Douglas			Negative	0
	Mark Nguyen	4		Very negative	0
		2			

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.

Dashboard		Wide view _e ^p
Dashboard > Group «Claims and Warranty Operations» > User «Amy Peters	S»	
User «Amy Peters»		Manage user
2022/10/11 - 2022/10/22	Compare to previous pe	riod
+ Add filters OVERVIEW CALLS	Search	
CALLS	AVG DURATION	CALL TIME, MINUTES
1	1:19	1
(0%)	↓-3:19 (71.6%)	↓-3 (71.6%)

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.

@N	liaR∈c 	oard 🗈 Record	lings 🌣	Administration	i	•	Aaron Davidson 👻
Re	cordings						Wide view 2*
AI	LL CALLS ACTIVE CAL	LS MY CALLS	BY USER	BY TAG A	DVANCED SEARCH		
2022/10/02 - 2022/10/31			Select	a User or Group	* Search for text		Search +
2 No	o auto-refresh 🛩 🖹 Ex	port					0-20 of 716 < >
O	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
0	Andrew Parker	Oct 18, 2022	2:50 PM	5:22	7387412619	3099259594 (Andrew Parker)	Ð
O	Sean Taylor	Oct 18, 2022	2:47 PM	6:12	3523319768	3099253180 (Sean Taylor)	۲
O	Jeffrey Forbes	Oct 18, 2022	2:43 PM	5:59	3099253282 (Jeffrey Forbes)	1793617202	Ð
0	Ross Benjamin	Oct 18, 2022	2:27 PM	5:52	4104911275	3099253867 (Ross Benjamin)	æ
0	Sean Taylor	Oct 18, 2022	2:13 PM	3:12	3099253180 (Sean Taylor)	6153928000	æ
O	James Huang DVM	Oct 18, 2022	11:27 AM	7:13	8079575722	3099258350 (James Huang DVM)	۲
0	Thomas Brown	Oct 18, 2022	11:08 AM	4:39	3099253415 (Thomas Brown)	5888836120	Ð
O	Jasmine Anderson	Oct 18, 2022	10:53 AM	5:27	5258881440	3099251060 (Jasmine Anderson)	æ
D	Sean Taylor	Oct 18, 2022	10:37 AM	5:30	6562250998	3099253180 (Sean Taylor)	⊞
O	Aaron Davidson	Oct 18, 2022	10:35 AM	4:08	6329886716	3099252510 (Aaron Davidson)	æ
O	Zachary Hayes	Oct 18, 2022	9:00 AM	6:17	6127138435	3099253105 (Zachary Hayes)	۲
0	Marissa Mcgee MD	Oct 18, 2022	8:48 AM	4:48	8578168799	3099253013 (Marissa Mcgee MD)	æ

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

MiaRec & Dashboa	rd 🗈 Recordings 🗢 Administ	ration				🛓 Aaron Davidson 🚽
ecordings						Normal view
ALL CALLS	MY CALLS BY USER BY TAG	ADVANCED SEARCH				
2022/10/02 - 2022/10/31			Select a User or Group	* Search for text		Search -
C No auto-refresh + 🔀 Expo	ort					0-20 of 716 < 🗲
USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
Andrew Parker	Oct 18, 2022	2:50 PM	5-22	7387412619	3099259594 (Andrew Parker)	8
) Sean Taylor	Oct 18, 2022	2:47 PM	6:12	3523319768	3099253180 (Sean Taylor)	Ð
] Jeffrey Forbes	Oct 18, 2022	2:43 PM	5:59	3099253282 (Jeffrey Forbes)	1793617202	Ð
Ross Benjamin	Oct 18, 2022	2:27 PM	5:52	4104911275	3099253867 (Ross Benjamin)	Ð
Sean Taylor	Oct 18, 2022	2:13 PM	3:12	3099253180 (Sean Taylor)	6153928000	E
James Huang DVM	Oct 18, 2022	11.27 AM	7:13	8079575722	3099258350 (James Huang DVM)	E
Thomas Brown	Oct 18, 2022	11:08 AM	4:39	3099253415 (Thomas Brown)	5888836120	B
Jasmine Anderson	Oct 18, 2022	10.53 AM	5.27	5258881440	3099251060 (Jasmine Anderson)	B
Sean Taylor	Oct 18, 2022	10.37 AM	5.30	6562250998	3099253180 (Sean Taylor)	B
Aaron Davidson	Oct 18, 2022	10:35 AM	4:08	6329886716	3099252510 (Aaron Davidson)	Đ
Zachary Hayes	Oct 18, 2022	9.00 AM	6:17	6127138435	3099253105 (Zachary Hayes)	E
Marissa Mcgee MD	Oct 18, 2022	8:48 AM	4:48	8578168799	3099253013 (Marissa Mcgee MD)	B
Douglas Wagner	Oct 18, 2022	8:21 AM	7:24	4834490335	3099254695 (Douglas Wagner)	₽
Andrew Parker	Oct 18, 2022	7:52 AM	3:57	3099259594 (Andrew Parker)	4189800153	

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.

Recordings

A	LL CALLS ACTI	VE CALLS MY CALI	LS BY USER	BY CLIENT UNASSI	GNED CALLS BY TAG A	DVANCED SEARCH	
*	Select a Date Ran	ge	Select a	User or Group	• Search for text		Search 👻
₿ N	o auto-refresh 🔻	Tags 🗸 📥 Down	lload 🔀 Export	🗟 Email 🗙 Delet	e More -		0-20 of many 🔇 📏
	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
	Brian Olson	Today	11:53 AM	0:49	593114340	212277933	Œ
	Brian Olson	Today	11:51 AM	1:50	560754402	385630388	Ð
	Brian Olson	Today	11:49 AM	1:51	205564237	985014613	Œ
	Brian Olson	Today	11:48 AM	0:55	215569134	196374262	Œ
	Brian Olson	Today	11:48 AM	0:28	197840975	285636461	ŧ

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.

Wide view 🖉

Wide view 🖉

- **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.

Recordings

ALL CALLS AC	TIVE CALLS	MY CALLS	BY USER	BY CLIENT	UNASSIGNE	D CALLS	BY TAG	ADVANCED SEARCH		
Select a Date Range Select a User or Group Select a Date Range						Search	1 -			
𝔅 No auto-refresh ▾	Tags 🗸	🛓 Download	Export	🗟 Email	x Delete	More 🕶			0-20 of many 🔇	>
O 11650		ATC TO		DUDATU		CALLER	DADTY	CALLED DADTY	TACC	

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.

Call 810454788 -> 35759096	9	Mark as confidential					
🗣 Edit Tags 🛩							
CALL STATUS							
Call State: In progress							
Duration: 18s Recording State: Pause Recording							
LIVE MONITORING		Animation: ON					
INFO	CALLER PARTY	CALLED PARTY					
Tenant: <mark>System</mark> Date: Today	Client: Unknown client (assign) Phone Number: 810454788	User: Test User Group: Agents					

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.

Call on Dec 13, 2024, 2:13:09 PM	Call on Dec 13, 2024, 2:13:09 PM				
& Edit Tags →	Section Togs →				
CALL STATUS	CALL STATUS				
Call State: In progress Duration: 14s Recording State: Pause Recording	Call State: In progress Duration: 21s Recording State: Recording is paused Resume Recording				
CALL DETAILS AGENT EVALUATION SHARED ACCESS NOTES	CALL DETAILS AGENT EVALUATION SHARED ACCESS NOTES				

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.

Recordings

1	Select a Date Ra	nge		Select a User	or Group	×	Search fo	r text			Search	
CN	o auto-refresh +	🗣 Tags 🕶	& Download	Export	🔿 Share 🗸	× Delete	More -			0-20 of mar	iy <	
	USER	DATE	TIME	DUR	ATION	CALLER PAR	тү	CALLED PARTY	SHARED BY	SHARED WITH	i i	
	Brian Olson	Yesterday	12:42 PM	0:28		158684077		159992013				8
٦												
	Group:	Group Mcconnell	I-Rodriguez							Open in new	window	2
	Caller Party:	908282866 a	ssign to client									
	Called Party:	445800501 & B	rian Olson									
	Date/Time:	Yesterday 12:42	::04 PM									
	Duration:	0:38			00:13							
		▶ 00:13			00.15					00:38 ± Sav	e audio fi	

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

0					8
	Group:	Group Mcconnell-Ro	driguez		Open in new window 🗷
	Caller Party:	908282866 assig	gn to client		
	Called Party:	445800501 Bria	n Olson		
	Date/Time:	Yesterday 12:42:04	PM		
	Duration:	0:38			
		▶ 00:13		 	00:38 🕹 Save audio file
		More details 🗄	Evaluate		
	Notes:	Add note			

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

Call 667499271343 -> 40206	8775	Mark as confidential Delete Call
INTERACTION CALL [1] CALL [2] CALL [3]		
♦ Edit Tags -		
MEDIA PLAYER		Wide view v *
-beinded unlaged filme for addit latter	47 41471 - 1- 1- 14 feb 1944	y 1 4
0 10 20 30 40	ve audio file	1.30 1.40 1.50 2.00
CALL DETAILS VOICE ANALYTICS AGENT EVALUA	ATION SHARED ACCESS NOTES	
INFO	CALLER PARTY	CALLED PARTY
Tenant: Acme Date: Oct 18, 2022 Connect Time: 6:58:38 PM	Client: Unknown client (assign) Phone Number: 667499271343 Phone Name:	User: Jessica Warren Group: Performance Centre Phone Number: 402068775

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)

19

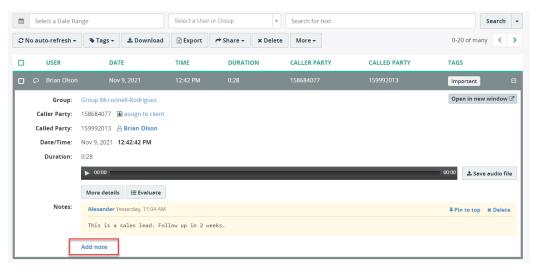
Add Notes

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.

D	♀ Brian Olson	Nov 9, 2021	12:42 PM	0:28	158684077	159992013	Important
	Group:	Group Mcconnell-Rodriguez					Open in new window 🗷
	Caller Party:	158684077 🔳 assign to client					
	Called Party:	159992013 🛛 Brian Olson					
	Date/Time:	Nov 9, 2021 12:42:42 PM					
	Duration:	0:28					
		▶ 00:00					00:00 ± Save audio file
		More details 🛛 🗄 Evaluate					
	Notes:	Alexander Yesterday, 11:04 AM					∓ Pin to top ★ Delete
		This is a sales lead. Fol	low up in 2 wee	ks.			
	Г	The email has been sent to the	e user.				
		Save Cancel					

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**.

D		Nov 9, 2021	12:42 PM		158684077	Important
	Group:	Group Mcconnell-Rodriguez				Open in new window 🗷
	Caller Party:	158684077 Assign to client				
	Called Party:	159992013 🛛 Brian Olson				
	Date/Time:	Nov 9, 2021 12:42:42 PM				
	Duration:	0:28				
		▶ 00:00				00:00 📩 Save audio file
		More details 🛛 🗄 Evaluate				
	Notes:	Alexander Yesterday, 11:04 AM				∓ Pin to top ★ Delete
		This is a sales lead. Fol	low up in 2 week	ς.		
		Alexander Today, 3:19 PM				Fin to top X Delete
		The email has been sent to	the user.			
		Add note				

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.

Call 619495167947 -> 142701964	Mark as confidential Delete Call
evaluate 👒 Edit Tags 🛩	
MEDIA PLAYER	Wide view 🖋
Image: Second	• • • • • • • • • • • • • • • • • • •
CALL DETAILS VOICE ANALYTICS AGENT EVALUATION SHARED ACCESS	
NOTES	
admin Today, 2:59 PM customer requested a refund because the package was damaged	¥ Pin to top X Delete
Add note	

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 <u>Download recordings</u> 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.

	correction correctio	COL	n	TC
Re	LUI	u	112	20

V	Vi	d	e	Vİ	e	W	2

A	LL CALLS ACTI	VE CALLS MY CALLS B	Y USER BY CLIENT	UNASSIGNED CALLS	BY TAG ADVANCED SEAF	RCH
Ê	Select a Date Ran	ge	Select a User or Group	🔻 Sea	rch for text	Search
2 N	o auto-refresh 🕶	Tags 🗸 🕹 Download 🤇	🖹 Export 🗟 Email	× Delete More	Selected rows: 2	0-20 of many <
0	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY
S	Brian Olson	Oct 1, 2021	12:17 PM	1:13	867222403	916930507 🕀
	Brian Olson	Oct 1, 2021	12:17 PM	0:23	108632557	163218400 🗄
	Brian Olson	Oct 1, 2021	12:16 PM	1:20	849183393	993111344 🕀

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

🚯 Dashboard	Recordings	≣QA	Hil Reports_	🖨 Admi	nistration			×	L	
ngs			Export 2 calls to Excel (CSV) file							
ACTIVE CALLS	MY CALLS BY USE	ER BY						Close		
2022/10/31			Select a User	or Group		¥	Search for text			
n → 🏾 🗣 Tags →	🛓 Download 🕅	Export	🕈 Share 👻 🔉	x Delete	More +	Selected rows: 2				

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.

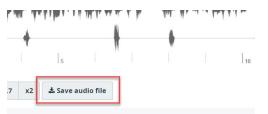
Download Audio File from the Recordings Page

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.

😴 ♀≡ 🖢 Lor						order cancellation e	valuate
Tenant:	Acme						Open in new window 🗷
Group:	Dealer Suppor	t and Customer Care					
Caller Party:	410953772 8	Lori Brennan					
Called Party:	8150259180	assign to client					
Date/Time:	Oct 19, 2022	5:23:25 AM					
Duration:	5:18						
	00:00						00:00 🛋
Sentiment score:	Total: 🕲 7	Customer: © 15 Agen	t: @-1				
Topics:	Shipping (14)	Resolution Indicators	(customer) (6) Red	direction Requests (2)			
Keywords:	FedEx 7	thank you" OR thanks OR t	hankful 6 packag	c 5 transfer to 2	tracking number 2		
	More details	i≣ Evaluate 🛓 Sav	e audio file				
Notes:	John Ortiz Se	ep 22, 2022, 12:45 AM					∓Pin to top X Delete
	Great call	I					
	Add note						

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.

Re	cordir	ngs					WILLE	41C 44 2
AL	LCALLS	ACTIVE CALLS MY CALLS	BY USER BY CLIENT	UNASSIGNED CALLS	BY TAG ADVANCED SEA	RCH		
Ê	Select a Date	Range	Select a User or Group	▼ Sea	rch for text		Search	n 💌
€ No	auto-refresh	Tags ✓ Lownload	🖹 Export 🛛 🗟 Email	× Delete More	Selected rows: 2	0-20 of ma	ny <	>
0	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY		
S	Brian Olson	Oct 1, 2021	12:17 PM	1:13	867222403	916930507		ŧ
	Brian Olson	Oct 1, 2021	12:17 PM	0:23	108632557	163218400		Ð
	Brian Olson	Oct 1, 2021	12:16 PM	1:20	849183393	993111344		Ð

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

Recordings	i≡ QA	Hel Reports Administration MiaRec	×
MY CALLS BY	USER BY	Download 2 calls (9.7 MB zip file)	Close
		Select a User or Group	

Wide view 🖉

Wide view 🦨

Wide view 🖉

Delete

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

Bulk Delete

Recordings

- 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.

AI	LL CALLS ACTI	VE CALLS MY CALLS	BY USER BY	CLIENT UNASSIC	GNED CALLS BY TAG	ADVANCED SEARCH		
m	Select a Date Ran	ge	Select a User	or Group		Se	arch 👻	
æ No	o auto-refresh -	Tags → Lownlo	ad 🖹 Export	🕈 Share 🗸 🗙 D	elete More - Selecte	d rows: 1	0-20 of many	< >
0	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS	
	Brian Olson	Nov 9, 2021	12:42 PM	0:28	158684077	159992013	Important	Ð
	Brian Olson	Nov 9, 2021	12:42 PM	0:38	908282866	445800501	Important	Œ
	Brian Olson	Nov 9, 2021	12:41 PM	0:26	582795822	237035792		Ð
	Brian Olson	Nov 9, 2021	12:40 PM	1:27	637178504	926618829		Đ

The popup message will appear informing you that the selected recordings have been deleted. Clicking the **UNDO** link will restore the call recordings

Recordings

Call	Call recording has been deleted UNDO ×										
AI	ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG ADVANCED SEARCH										
Ê	Select a Date Ran	ge	Select a Use	r or Group	Search for text		Se	arch 👻			
2 No	o auto-refresh 🕶	🗣 Tags 👻 🕹 Down	nload 🔀 Export	Arr Share - X De	elete More -		0-20 of many	< >			
	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS				
	Brian Olson	Nov 9, 2021	12:42 PM	0:28	158684077	159992013	Important	÷			
	Brian Olson	Nov 9, 2021	12:42 PM	0:38	908282866	445800501	Important	Ð			
0	Brian Olson	Nov 9, 2021	12:40 PM	1:27	637178504	926618829		ŧ			

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:

⊚ MiaR∈c	🚯 Dashboard	Recordings	≣ QA	🔟 Reports	Administration			🛓 admin 👻
Call 4109	953772 ->	8150259 ²	180				Mark as confidential	Delete Call
order cancellation	evaluate 🗣 Ec	lit Tags 👻						
MEDIA PLAY	ER							Wide view $\mathbf{x}^{\mathbf{a}}$
+		• • •	** ***	Hinda H	, , <u>, , , , , , , , , , , , , , , , , </u>	4-1444 #11	1#141 · 1419 · 119	***
11444 +1444	o pisakila kari palipi kaliku se opertu bakku	i delete bet he celete	W1 +1 1	***			+ +++++ ++	
0 10 20	30 40 50 60	1:10 1:20 1:30	1:40 1:50 2:00	2:10 2:20 2:	30 2:40 2:50 3:00 3:10	0 3:20 3:30 3:40 3:50	4:00 4:10 4:20 4:30 4:40	4:50 5:00 5:10
▶ Play x	1 x1.2 x1.5	x1.7 x2 🛓 S	ave audio file					

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.

	Select a Date Ran	ge		Group Gentry I	td (group)	Search	•			
2 No	No auto-refresh 🕶 🗣 Tags 👻 Download		🛓 Download	Export	🕈 Share 🛨	Share - X Delete More -		Selected rows: 2	0-20 of many	>
0	USER			Q	CALLER P	ARTY		CALLED PARTY	TAGS	
0	Kristina Cooper	 aaron export 		^	+2089552	479 (Kristina (looper)	8293266725	Refund Important	æ
	Heidi Sullivan	□ Importa	nt		13376942	.07		+2089558149 (Heidi Sullivan)	Important	Ð
	Angela Potts	michelle re-expo			58297924	30		+2089551033 (Angela Potts)		ŧ
S	Kristina Cooper	Refund			87493069	37		+2089552479 (Kristina Cooper)		ŧ
	Michael Norris	Sales			85245784	35		+2089551310 (Michael Norris)		Ð
	Nicholas Blake	☑ Sales/Le	ead	Ŧ	+2089553400 (Nicholas Blake)		Blake)	4031026081		Ð
	Michael Robinscr	Apply			+2089553	596 (Michael I	Robinson)	4654491101		Ð
	Richard Barker	Cancel			29213574	79		+2089551486 (Richard Barker)		Ð

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

Recordings								Wide	view
ALL CALLS ACTIVE CA	LLS	MY CALLS BY	USER BY CLIEN	NT UNASSIGNED	CALLS BY TAG	ADVANCED SEAR	CH		
Refund	Ê	Select a Date Ran	ge	Select a User or G	Group 💌 Se	arch for text		Search	n -
Sales	2 No	auto-refresh -	🗣 Tags 👻 🕹 I	Download 🕅 🖹 Exp	oort 🌈 Share 🗸	X Delete More	2 -	0-3 of 3 🔇	>
	O	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS	
Manage Tags	0	Brian Olson	Sep 10, 2021	11:53 AM	0:49	593114340	212277933	Lead	Ð
	0	Brian Olson	Sep 10, 2021	11:51 AM	1:50	560754402	385630388	Lead	Ð
		🔳 Brian Olson	Sep 10, 2021	11:49 AM	1:51	205564237	985014613	Lead	Ð
			LE Newest first					0-3 of 3	>

Create a New Tag

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

ALL CALLS	ACTI	/E CALLS MY CALLS	BY USER B	BY (CLIENT UI	NASSIGNED C	ALLS BY	TAG AI	OVANCED SEARCH
2022/10/	02 - 2022	/10/31			Select a Us	er or Group			• Search for
€ No auto-ref	resh 👻	🗣 Tags 👻 🕹 Down	load 🔀 Export		Are 🕈	X Delete	More -		
0	USER		a	٤	DU	RATION	CALLER P	ARTY	
	Alexis E	 evaluate order cancellation 		-	M 1:2	3	60582422	4	
□ େ≣≹	Lori Bre				M 5:1	8	41095377	'2 (Lori Bren	nan)
0	Amy Ha	□ sample/tag1		Ŧ	M 0:5	3	66388925	1060	
	Travis N	New Tag			M 0:5	8	81089398	1518	
□ ₽!	Pamela				M 4:3	3	61949516	7947	
	Mr. Joh	Cancel			AM 0:1	6	47423531	9971	

- 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.

⊚ MiaR∈c	🚯 Dashboard	E Recordings	≣ QA	🔟 Reports	Administration	🛔 Alex Ulasenko 🗸
Add Tag						
	Nam	ne * Sales				
	Parent	tag order cano	cellation			X Y
	Visibili	ty * 🔘 Private	O Public			
					Save	

Manage Existing Tags

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

ALL CALLS	ACTI	VE CALLS MY CALLS	BY USER BY	CLIENT U	NASSIGNED C	ALLS BY TAG	ADVANCED SEARCH
2022/10	/02 - 2022	2/10/31		Select a U	ser or Group		Search for 1
C No auto-re	fresh 🔻	🗞 Tags 🗸 🕹 Download	d 🔀 Export	A Share 🗸	x Delete	More -	
0	USER		Q	DU	IRATION	CALLER PARTY	
0	Alexis E	 evaluate order cancellation 	*	VM 1:2	13	605824224	
∎∎Q □	Lori Br			M 5:1	8	410953772 (Lori B	rennan)
•	Amy Ha	□ sample/tag1	-	M 0:5	3	663889251060	
	Travis I			M 0:5	8	810893981518	
	Pamela			M 4:3	33	619495167947	
	Mr. Joh	Cancel		AM 0:1	6	474235319971	

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

⊚ MiaR∈c	🚳 Dashboard	Recordings	📥 Speech Analytics	🔟 Reports	Administration		🔒 Alexander 🚽
Tags							Add Tag
aaron						+ Add sub-tag	🕼 Edit 🗙 Delete
export						+ Add sub-tag	🕼 Edit 🗙 Delete
Important						+ Add sub-tag	🕼 Edit 🗙 Delete
Refund						🕂 Add sub-tag	🕑 Edit 🗙 Delete
✓ Sales						🕂 Add sub-tag	🕑 Edit 🗙 Delete
Lead						+ Add sub-tag	🕼 Edit 🗙 Delete

Wide view 🚽

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.

Recordings

AL	LL CALLS ACTI	VE CALLS MY CALLS	5 BY USER B'	Y CLIENT UNAS	SIGNED CALLS BY TAG AI	DVANCED SEARCH	
#	Select a Date Ran	ge	Select a Use	r or Group	Search for text		Search 👻
2 No	o auto-refresh v	🗣 Tags 👻 🕹 Down	nload 🖹 Export	🕈 Share 👻 🗙	Delete More - Selected ro	ows: 2	0-20 of many < 📏
0	USER	DATE	TIME	DURATION	C Mark as confidential Clear confidential fla	CALLED PARTY	TAGS
S	Brian Olson	Nov 9, 2021	12:42 PM	0:28	158684077	159992013	Important 🕀
	Brian Olson	Nov 9, 2021	12:42 PM	0:38	908282866	445800501	Important 🕀
	Brian Olson	Nov 9, 2021	12:40 PM	1:27	637178504	926618829	Đ

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

Call 252212587918 -	Mark as confidential Delete Ca				
Sedit Tags →					
MEDIA PLAYER		Wide view "*			
	KANANANANANANANANANANANANANANANANANANAN	en likeles staas fan d			
0	10 15 20	25 30			
▶ Play x1 x1.2 x1.5 x1.7	y x2 ▲ Save audio file				

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

Call 252212587918 -> 685297319								e Call					
Confidenti	•	Edit Tags	Ŧ										
MEDIA P	LAYE	2										Wide vie	* y ₩
		H+++	+			-	-		411101-1110-11110-11		11+++		
	•	+			,			. ,		 ł₩			
0		<mark> </mark>				10		15	20	25	30		
► Play	x1	x1.2	x1.5	x1.7	x2	🕹 Save audio	o file						

Remove Confidential Flag

Click Clear confidential flag.

Call 252212587918 -> 685297319	Clear confidential flag Delete Call
Confidential Sedit Tags -	
MEDIA PLAYER	Wide view **
· · · · · · · · · · · · · · · · ·	
0 10 15 20	25 30
▶ Play x1 x1.2 x1.5 x1.7 x2 🕹 Save audio file	

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.

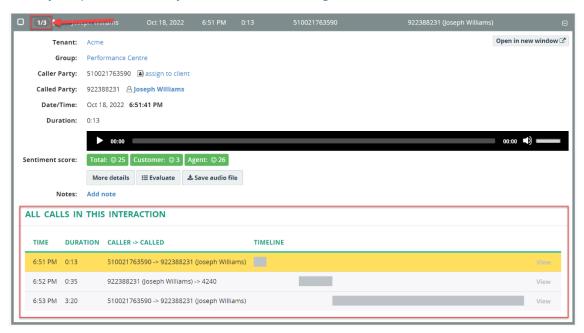
RECORDING SETTINGS

Record	Always On-demand ONever ODefault										
Recording direction	🕑 Inbound 🛛 😴 Outbound										
Extension	+2089558517	×									
	User2	×									
	+ Add Extension										
Confidential calls	ls 🕼 Automatically mark all calls of this user as confidential										
Screen Recording											
Username	Supported formats: NETBIOS\login, DOMAIN\login, login										

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.

Interaction

INTERACTION CALL [1]	CALL [2] CALL [3]
AUDIO	
► Play	
510021763590 -> 922388231 922388231 -> 4240	
	Silence between call segments has been removed

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. (\$\$)

MEDIA PLAYER			Wide view 🖉
	1 1 <th1< th=""> <th1< th=""> <th1< th=""> <th1< th=""></th1<></th1<></th1<></th1<>		1.40 1.50 2.60
CALL DETAILS VOICE AN	NALYTICS AGENT EVALUATION SHARED ACCES	SS NOTES	
SENTIMENT SCORE			
-36 🔅 Total Score	-53 😒 Agent Score	2 🙂 Customer Score	0 / 2 Positive / Negative Sentences
TOPICS			
Agent Insecurities (1)			
KEYWORDS			
put on hold			
TRANSCRIPT			
Agent [0:00]:	I'm sorry to 📕 put you on hold on. I see three items of	n your order and the	
Customer [0:04]:	Right?		
Agent [0:05]:	the only thing you could do is go to the store where yo Because	ou placed the order and have them fix that for you	ι.
Customer [0:13]:	Ah, I live.		
Agent [0:13]:	on my end.		
Customer [0:14]:	l live in Canada and my mom is at work, so I'm not	t gonna send her again to to the store. That's w	rhy I'm calling you.

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.

Re	cordin	gs						Wide view " [#] License expires in 360 days
AI	LI CALLS ACT	TIVE CALLS MY	CALLS BY U	SER BY CLIENT UN	NASSIGNED C	ALLS BY TAG A	DVANCED SEARCH	
*	Select a Date Ra	nge	s	elect a User or Group	×	Search for text		Search 👻
2 No	o auto-refresh 👻	🗣 Tags 👻 🛓	Download [🖹 Export 🛛 🏞 Share 👻	X Delete	More -		0-20 of many 🔇 💙
	USER	DATE	TIME	DURATION		CALLER PARTY	CALLED PARTY	TAGS
D	Jason Smith	Today		In progress		527868648		8
	Tenant:	System						Open in new window 🖉
	Group:	Agents						
	Caller Party:	527868648 👌 Jas	on Smith					
	Called Party:	631627969 🔺 ass	sign to client					
	Call State:	In progress						
I	Date/Time:	Today 9:13:01 AM	1					
	(More details	i≣ Evaluate					
	Notes:	Add note						

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

Call 810454788 -> 357590969	Mark as confidential
Sedit Tags →	
CALL STATUS	
Call State: In progress Duration: 18s Recording State: Pause Recording	
LIVE MONITORING	Animation: ON
In progress	

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

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

LIVE MONITORING		Animation: ON
	49 Start live monitoring	

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.

Re	Wide view «* License expires in 360 days							
AI	LL CALLS ACT	IVE CALLS MY C/	ALLS BY USE	R BY CLIENT UNASS	IGNED	CALLS BY TAG	ADVANCED SEARCH	
	Select a Date Ran	ige	Sele	ect a User or Group	*	Search for text		Search 👻
2 No	o auto-refresh +	🗣 Tags 👻 🕹 D	ownload jaso	em - Agents (group)	٩,	More -		0-20 of many
0	USER	DATE		son Smith (User)		CALLER PARTY	CALLED PARTY	TAGS
	Jason Smith	Today	9:43 AM	🔅 In progress	_	289324099	273109828	æ
	Jason Smith	Today	9:37 AM	6:00		300119006	334044722	Ð
	Jason Smith	Today	9:31 AM	6:00		736725534	322988703	Ð

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

0	Jason Smith	Today	9:37 AM	6:00	300119006	334044722	Θ
	Tenant:	System				0	pen in new window 🖄
	Group:	Agents					
	Caller Party:	300119006 8 Jasor	Smith				
	Called Party:	334044722 🗈 assig	n to client				
	Date/Time:	Today 9:37:03 AM					
	Duration:	6:00					
		▶ 00:00				00:00	🕹 Save audio file
		More details i≡	Evaluate				
	Notes:	Add note					

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.

User «Jason S	Smith»				Wide view ⊮ [#] License expires in 360 days
INFO			ACTIVE CALL		
User Name:	Jason Smith (View profile)		Call:	View	
Tenant:	System		Started At:	May 09, 2022 12:55 pm	
Group:	Agents		Duration:	4:08	
Role:	Agent		From:	764997885	
Recording Settings:	always		To:	583239438	
Extension(s):	User				
Web login:				A Monitor this call	
LIVE MONITORING					Animation: ON
	\langle	4) Start continuo	us monitoring		

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.

🔲 🎍 Jerome Benn	ett Oct 18, 2022	2:15 PM 1:27	410489614776	639495950 (Jerome Bennett)	
Tenant:	Acme				Open in new window 🕑
Group:	Performance Centre				
Caller Party:	410489614776 🛯 assign to clie	ent			
Called Party:	639495950 👌 Jerome Bennet	t			
Date/Time:	Oct 18, 2022 2:15:59 PM				
Duration:	1:27				
	00:00				00:00 🌒 🚛
Sentiment score:	Total: 😑 -24 Customer: 🕲 4	Agent: 🙂 -32			
	More details 🛛 🗄 Evaluate	Lave audio file			
Notes:	Add note				

- 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).

Select Evaluation For	m	
Evaluation form *	Sample form	v
Agent *	Brian Olson	٣
	Continue	

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

Add Evaluation Report

MEDIA PLAYER							Wide view $\mathbf{x}^{\mathbf{x}}$
o ▶ Play x1 x	(1.2 x1.5		na a dalama shekara.	n far han fan it en de ferste fan de ferste fers In de ferste men an de ferste fers	n na sa	ullilalje Versijes	n an de anternen her en periode a les personans aux des ense des find periods (bereil period) en period a period (berein periode a les periodes aux des ense des periodes (bereil periode) half de periode aux des ensements des les periodes aux des ensements des periodes (berein des periodes). per periodes aux des ensements des les periodes aux des ensements des periodes (bereindes) periodes).
EVALUATION REPO	ORT		GREETIN	G			
Ū	rian Olson exander		Did the age	ent say "Thank you for calling"?	C) yes	⊙ no
	ample form		Did the age	nt mention his/her name?	C) yes	⊙ no
			Did the age	ent mention the company name?	C) yes	o no
CALL DETAILS			lf the call w greeting ac	vas transferred did the agent adap cordingly?	ot the C) yes	⊙ no ⊃ n/a

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:

- Open the call recording
 Open the extended Call Details page
- 3. Click View under the Info section.

MEDIA PLAYER		Wide view 🖉
**************************************	· þafler f fallere flater eg	
	• • ₩ ₩ • • • • • • • • • • • • •	 300 3-10 320 330 340 350 400 4-10 420 4
Play x1 x1.2 x1.5 x1.7 x2	🛓 Save audio file	
CALL DETAILS VOICE ANALYTICS AGENT E	VALUATION SHARED ACCESS NOTES	
INFO	CALLER PARTY	CALLED PARTY
Tenant: Acme	Client: Unknown client (assign)	User: Pamela Smith
Date: Oct 19, 2022	Phone Number: 619495167947	Group: Distribution Centre
Connect Time: 1:02:57 AM	Phone Name:	Phone Number: 142701964
Disconnect Time: 1:07:30 AM	Phone Id:	Phone Name: Pamela Smith
Duration: 4:33	IP address:	Phone Id:
Watermark: View		IP address:

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

Watermark Verification	×
Original File Checksum (SHA1) Current File Checksum (SHA1) File Integrity Status	ce35eec7957e49be244d256f029d85dde6b76278
×	Close

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.

Recordings

New client Elect a Date Range		lect a User or Group	Search for tex	ct	Sear	ch 👻
Manage Clients						
	🗣 Tags 👻 🕹 Downl	oad 🔀 Export	🕈 Share 🗸 🗙 Dele	te More 🗸	0-1 of 1	: >
CLIENT	DATE	TIME DI	URATION CA	LLER PARTY C/	ALLED PARTY	
New client	Oct 1, 2021	12:17 PM 0::	:23 108	632557 16	63218400	Ŧ

Wide view 🖉

Create a New Client

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

Recordings

ALL CALLS ACTIVE C	ALLS MY CALLS	BY USER BY CLIEN	IT UNASSIGNED	CALLS BY TAG	ADVANCED SEARCH		
New client	🗯 Select a Date F	ange	Select a User or Gr	oup 🔻 Sear	ch for text	Sea	arch +
Manage Clients	𝔅 No auto-refresh ·	Tags 👻 📥 Dov	vnload 🔀 Export	Email 🗙 I	Delete More -	0-1 of 1	< >
		DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	
	New client	Oct 1, 2021	12:17 PM	0:23	108632557	163218400	Ð
	20 🗸 per page					0-1 of 1	< >

2. Click Add.

Clients Search for text		Search 👻
+ Add × Delete		0-1 of 1 🔇 🔪
	CONTACTS	
New client	163218400	View 🕼 Edit
20 🗸 per page		0-1 of 1 🔇 📏

- 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.

Add Client

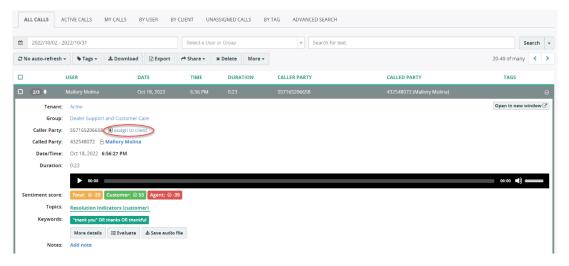
Name *	ABC			
Contacts / phone numbers *	Phone number	+1019231232	Name (optional)	
	+ Add contact / ph	one number		

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.

	↓.'				11			<i>y</i> .	1/1					,		+++++		++
0	1	5					10					15				l la l	20	
▶ Play x1	x1.2 x1.5	x1.7	x2	+ Cau	e audio	file												
CALL DETAILS	VOICE ANALY	fics ,	AGENT	EVALUA ⁻		SHARE	ED ACCE	ESS	NOTES				CALI	ED PA	RTY			
	VOICE ANALY	FICS A	AGENT	EVALUA		LER P			NOTES	ent (ass	ign)		CALI		\RTY User:	Mallory	/ Molina	
INFO			AGENT	EVALUA	CAL	LER P	ARTY Client:	Unk		_	ign)		CALI	I		Dealer	Support a	and
INFO Tenant:	Acme		AGENT	EVALUA	CAL	LER P	ARTY Client: umber:	Unk	known cli	_	ign)			Gr	User: roup:	Dealer Custom	Support a ter Care	and
INFO Tenant: Date:	Acme Oct 18, 2022		AGENT	EVALUA	CAL	LER PA	ARTY Client: umber:	Unk	known cli	_	ign)		Pŕ	I	User: roup: nber:	Dealer Custom 4325480	Support a ter Care	and

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.

M 14 4 4 4 4 4	+ +	·H·BANK++ANNA NAMAAA ····	- + + + + + + + + + + + + + + + + + + +
4 auld . s	. بك د	h + + + + + = h + + +	halle
10 20			a state of the sta
10 20	30 40 50 60 1:10	1:20 1:30 1:40 1:50 2:00 2:10 2:20 2:30 2:40	2:50 3:00 3:10 3:20 3:30 3:40 3:50 4:00 4:10 4:20
▶ Play x1	x1.2 x1.5 x1.7 x2	2. 📥 Save audio file	
IFO		CALLER PARTY	CALLED PARTY
Date:	Oct 1, 2021	Client: Unknown client (assign)	User: Brian Olson
Connect Time:	12:17:52 PM	Phone Number: 867222403	Group: Group Mcconnell-Rodriguez
	12:19:05 PM	Phone Name:	Phone Number: 916930507
Disconnect Time:			Phone Name:
Disconnect Time: Duration:	1:13		
	1:13 View	Live monitor the phone 867222403	
Duration:		Live monitor the phone 867222403	A Live monitor the phone 916930507

Edit Custom Fields

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

INF	0			
	Date:	Oct 1, 2021		
Connect Time:		12:17:52 PM		
Disconnect Time:		12:19:05 PM		
Duration:		1:13		
	Watermark:	View		
	Campaign:	Campaign A OK Cancel		
	Order #:	10001		

Searching by Custom Fields

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

Recordings

ALL CALLS ACTIVE	CALLS MY CALLS	BY USER BY CLIENT	UNASSIGNED CALLS B	TAG ADVANCED SEARCH	
 Long calls (>5 min) Short calls (<15 sec) 	Call - Order #	▼ Equal to	•	001	×
Manage Saved Searches	+ Add criteria		Search Sa	e Search	

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**.

2 No	o auto-refresh 🔻	🗣 Tags 🗸	± 0	ownload	Export	← Share → X Delete More → Selected rows: 2
0	USER	DATE	TIME	DURATION	CALLER PA	Q TENANT
0	Robert Patton	Yesterday	9:59 PM	5:14	551373162	Aaron Santos (Group Brown, Pope a Day-Evans Cynthia Guerrero (Group Brown, Po
S	Cassie Jones	Yesterday	9:59 PM	4:26	+69568498 Jones)	C Erika Gardner MD (Group Brown, P Jennifer Smith (Group Brown, Pope Gonzalez Ltd
	Stephen Morrison	Yesterday	9:59 PM	4:48	814378500	 Laura Thomas (Group Brown, Pope Lisa Forbes (Group Brown, Pope and Michael Hartman (Group Brown, Po
	Jeffrey Perez	Yesterday	9:59 PM	4:21	427336392	 Michael Tartman (Group Brown, Po Michael Torres (Group Brown, Pope Richard Houston (Group Brown, Pop
0	Alicia Newman	Yesterday	9:57 PM	6:09	287924408	Brian Holland (Group Hogan, Martin Cassie Jones (Group Hogan, Martin a
	Miguel Jones	Yesterday	9:57 PM	4:10	659865946	Christine Mclean (Group Hogan, Mar
	Megan Perkins	Yesterday	9:57 PM	4:50	185824497	Apply Powell PLC
	Lisa Forbes	Yesterday	9:56 PM	4:49	864043194	Cancel Gonzalez Ltd

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.

A	LL CALLS ACT	IVE CALLS	MY C	ALLS BY U	JSER BY CLIENT I	UNASSIGNED CALLS BY TAG	ADVANCED SEA	RCH		
#	Select a Date Rar	ige			Select a User or Group	• Search for text			Search	•
2 N	o auto-refresh -	🗣 Tags 🗸	± 0	ownload	🖹 Export 📑 Share 🗸	X Delete More -			0-20 of many	>
0	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY TAG	S TENANT	SHARED BY	SHARED WITH	
	Robert Patton	Yesterday	9:59 PM	5:14	5513731621	6718963661 (Robert Patton)	Day-Evans			Ð
	Cassie Jones	Yesterday	9:59 PM	4:26	+69568498092 (Cassie Jones)	5141533021	Gonzalez Ltd	Nicole Dickerson	Erika Gardner MD	Ð
	Stephen Morrison	Yesterday	9:59 PM	4:48	8143785009	1627007955 (Stephen Morrison)	Jackson Group			Ð
0	Jeffrey Perez	Yesterday	9:59 PM	4:21	4273363928	18288723611 (Jeffrey Perez)	Hall, Phillips and Hernandez			Ð
0	Alicia Newman	Yesterday	9:57 PM	6:09	2879244088	6718968966 (Alicia Newman)	Day-Evans			Ð
	Miguel Jones	Yesterday	9:57 PM	4:10	6598659463	18288728872 (Miguel Jones)	Hall, Phillips and Hernandez			Ð

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.

Call 66388925	1060 -> 21775429	0	Mark as confidential Delete Call
order cancellation Sedit	Tags 🗸		
MEDIA PLAYER			Wide view e ^x
\sim + + + + + + + + + + + + + + + + + + +	16]m104[-41+6184414-1161n]48	ana bh bh th	neuth file finderen fan in de state file an
0 5	10 15	20 25 30	35 40 45 50
Play x1 x1.2	x1.5 x1.7 x2 Save audio	o file	
CALL DETAILS VOICE A	ANALYTICS AGENT EVALUATION	SHARED ACCESS 2 NOTES	
+ Share × Unshare			
SHARED BY	SHARED WITH	SHARING DATE/TIME	
admin	Alexis Barber	Oct 29, 2022, 8:45 PM	¥ Unshare
admin	Ann Spencer	Oct 29, 2022, 8:46 PM	¥ Unshare

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**.

Recordings		le view ⊮ [#]
ALL CALLS ACTIVE	CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG ADVANCED SEARCH	
Q Transcript	Call - Shared By (User) Is Bonnie Edwards (+2089556020) Is Is Is Is Is Is <lis< th=""><th>¢ 🔻 ×</th></lis<>	¢ 🔻 ×
Manage Saved Searches	+ Add criteria Search Save 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 ---.

Call - Shared With (User) 🔹 Is not 🔹 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.

Own evaluations of agents	🐨 View 🐨 Create 🐨 Edit 🐨 Delete	set all clear all
Other managers' evaluations of agents	🐨 View 🐨 Edit 🐨 Delete	set all clear all
Evaluations of self	♂ View	set all clear all
REST API	S Allow	set all clear all
	Save	

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:

Va	luation Form	Add Section	Edit Form
	Name: Sales call Status: Active Type: Manual score Description:		
SEC	TIONS		
	Add Section TITLE		
•	GREETING	🕼 Edit	× Delete
	Did the agent say "Thank you for calling"?	🕼 Edit	× Delete
	Did the agent say "Thank you for calling"? Did the agent mention his/her name?		X Delete
		[∦ Edit	
	Did the agent mention his/her name?	[∦ Edit	X Delete
	Did the agent mention his/her name? Did the agent mention the company name?	læ Edit	X Delete
•	Did the agent mention his/her name? Did the agent mention the company name? + Add question	(2 Edic	X Delete X Delete
•	Did the agent mention his/her name? Did the agent mention the company name? Add question VERIFICATION	C# Edit	x Delete x Delete x Delete
•	Did the agent mention his/her name? Did the agent mention the company name?	C# Edit	x Delete x Delete x Delete x Delete
•	Did the agent mention his/her name? Did the agent mention the company name?	27 Edit 27 Edit 27 Edit 27 Edit 27 Edit	x Delete x Delete x Delete x Delete

There are 3 ways of creating a new form:

- Create a new Evaluation form
 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**.

∕ ⊉ miarec	🚳 Dashboard	Recordings	⊞ QA	📶 Reports	Administration		🛔 Ellis	Manager	
QA						Overview	Evaluations	Wide vie	_
QA									
Evaluati	on Forms								
Search by Name	9							Search	-
+ Add	Delete 🛓 Import						0-1 o	f1 <	>
	T	YPE		STATUS					
Sales call	M	anual score		Active			View Form G	8 Edit Fori	m

- 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.

New form
☑ Active
Manual score *
Save

5. Click Save.

Add Sections

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

valuation Form Designer				
m	Add Section	Edit Form	Clone Form	Delete Form
Inbound Sale Report				
System				
Sample evaluation report				
No sec	tions			
	Sample evaluation report	M Add Section Inbound Sale Report System	M Add Section Edit Form Inbound Sale Report System Sample evaluation report	Add Section Edit Form Clone Form Inbound Sale Report System

- 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.

Name *	Problem Resolution
Description	This section contains the questions to address the problem resolution, if any,
	▼ Allow to mark whole section N/A
Display N/A option	
Display N/A option Weight *	10

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.

Administration > Customization > Ev	valuation Form Designer				
Evaluation For	m	Add Section	Edit Form	Clone Form	Delete Form
Name:	Inbound Sale Report				
Tenant:	System				
Description:	Sample evaluation report				
SECTIONS					
+ Add Section					
TITLE					
▼ PROBLEM RESOLUTION				🕑 Edit	× Delete
Νοαι	lestions in this section. <u>Add question</u>				

- 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.

Add Question	
Question *	Did the agent mention his/her name?
Description	

- 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:

Туре	O Numeric value
	O Multiple choice
	O Auto score
Display As	Rating (stars) Input box
Maximum points *	5

• **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:

Did the agent identify the customer needs by active listening?	★★★☆☆	
Clearly described resolution?	2	max: 5

 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:

Туре	 Numeric value 			
	 Multiple choice 			
	 Auto score 			
Display As	 Choice (single-line) Choice (multi-line) Drop-down list 			
Choices *	yes	5	Points	🔹 🗆 default 🛛 🗙
	no	0	Points	🔹 🗹 default 🛛 🗙
	n/a		N/A question	🔻 🗆 default 🛛 🗙
	+ Add Choice			

 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:

Did the agent ask for the caller's name?	🔿 yes 💿 no 🕥 n/a
Did the agent ask for the caller's	O yes
company name?	o no
	🔿 n/a
Did the agent ask for the caller's telephone number?	no 🔻

• 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:

Choices *	\equiv	yes	5	Points	🗌 default	×
	_			Points	🕑 default	
	=	no	0	N/A question		×
	\equiv	n/a		N/A section	🗌 default	×
	+ Add	Choice		Fail a section Fail a report		

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:

Туре	O Numeric value		
	O Multiple choice		
	 Auto score 		
Conditions *	Display As	Yes	×
	Expression	POSBEFORE:50 AGENT: R"(my name is this is)"	
	Outcome	Points •	
	Points	10	
	+ Add Expression		
"No match" outcome	Display As	no	
	Outcome	Points	v
	Points	0	

• **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

Display N/A option	Allow to mark question N/A
Weight	t
	Accepted values: from 1 to 1000
Order	1
	Accepted values: from -1000 to 1000

- 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.

Evaluation For	n	Add Section	Edit Form 👻
Name: Status: Type: Description:	Sales call Active Manual score		Edit Form Export Form Clone Form Delete Form
SECTIONS			
+ Add Section			

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.

QA			Overview	Evaluations	Form Designer
QA					
Evaluation Fo	rms				
Search by Name					Search 🝷
+ Add × Delete	Import			0	2 of 2 < 📏
	ТҮРЕ	STATUS			
Sales call	Manual score	Active		View Form	🖉 Edit Form
miarec B Dashi	mport Evaluation Form Name * New form		dministration	Lations	s Manager 👻
Evaluation F	Import file * Browse *.xml file	Auto_Score_Card.xml			Search +
	Import		_	0-2	of 2 < >
	ТҮРЕ	STATUS			
Sales call	Manual score	Active		View Form	C Edit Form

Search

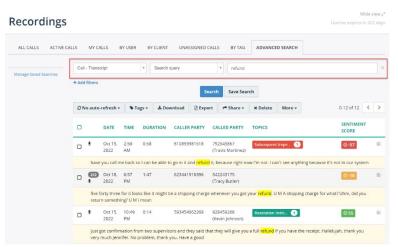
Search for Specific Calls

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

@n	liaRec	🚯 Dashboard	Recordings	📥 Speech Analytics	s 🛄 Reports ·	🌣 Administration		🚨 Alexa	nder -
Re	cordi	ngs						W	ide view 🖉
A	2021/10/01 -		IY CALLS BY USI	ER BY CLIENT U an Olson (+2089551744, .	INASSIGNED CALLS		ED SEARCH	Sea	arch 👻
2 N	o auto-refresi	h 🕶 💊 Tags 👻	🕹 Download 🛛	Export 🛛 🏕 Share 🗸	× Delete More	•		0-20 of 31	< >
0	USER	DATE	ТІМЕ	DURATION	CALLER PARTY	CALLED PARTY	SHARED BY	SHARED WITH	
0	Brian Olson	Oct 21, 2021	10:26 AM	0:45	476229857	154410616	Alexander	Angela Potts	÷
0	Brian Olson	Oct 21, 2021	10:26 AM	0:30	872619377	644022167			Ð
0	Brian Olson	Oct 21, 2021	10:24 AM	1:04	135034354	624867950			Ð
0	Brian Olson	Oct 21, 2021	10:24 AM	0:51	419363452	353094099			÷
0	Brian Olson	Oct 21, 2021	10:23 AM	0:23	893466587	365819252			÷

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.



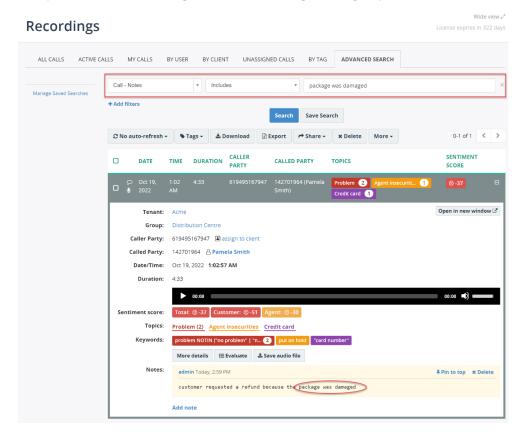
Search Notes

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.

Recording	gs						Wide vie License expires in 322
ALL CALLS AC	TIVE CALLS	MY CALLS B	IY USER B'	Y CLIENT UNA	SSIGNED CALLS BY TA	AG ADVANCED SEARCH	
2022/09/29 - 20	22/10/28		Select a Use	r or Group	• package was c	Jamaged	Search
C No auto-refresh 🗸	🗣 Tags 🕶	🛓 Download	Export	🕈 Share 🗸	x Delete More -		0-1 of 1 🔍
USER	D	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
🗆 🔎 🖗 Pamela S							evaluate
Caller Party: Called Party: Date/Time: Duration:			nt				o:co 🜒 🗕
Sentiment score: Topics:	Total: @ -37 Problem (2)	Customer: ©-5					
Keywords:	problem NOTIN More details	N ("no problem" "	n 2 put o	n hold Card num	ber"		
Notes:	admin Today, customer re		nd because t	package was di	amaged		¥ Pin to top × Delete
	Add note						

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.

Recordings

ALL CALLS ACTIVE CA	ALLS MY CA	LLS BY USER	BY CLIENT	UNASSIGNE	D CALLS BY TAG	ADVANCED SEARCH	
 Long calls (>5 min) Short calls (<15 sec) 	Call - Duratio		* Greate	r than	• 5:00		×
Manage Saved Searches	+ Add criteria				Search Save Search		
	€ No auto-	refresh 👻 Tags	. → Low	nload 🔀 Exp	ort 🗟 Email 🗙 De	elete More - 0-20	of many < >
	0	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	
		Sep 15, 2021	9:57 AM	5:27	639495950 (Jerome Be	nnett) 4240	Ŧ
		Sep 14, 2021	3:09 PM	6:15	302879235368	920617622 (Ashley Baker)	æ
		Sep 14, 2021	9:54 AM	7:40	853172865418	575429417 (Desiree Jenkins) 🕀

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.

Call - Duration		5:00		
	Greater than	Greater than 💌	Greater than * 5:00	Greater than + 5:00
¥		×	▼ 5:00	* 5:00

- 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.

Wide view 🖉

Wide view #"

	earch	Long calls (>5 min)		
SEARCH CRITERIA	Visibility	Private O Public		
Call - Duration	,	Greater than	¥ 5:00	×
+ Add criteria			Save	

6. Click Save.

Manage a Saved Search

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

Recordings

ALL CALLS ACTIVE	CALLS MY CALLS	BY USER	BY CLIENT	UNASSIGNE	D CALLS BY TAG ADVANC	ED SEARCH	
Long calls (>5 min)	Call - Duration		Greater	than	× 5:00		×
Short calls (<15 sec)	+ Add criteria						
Manage Saved Searches	>				Search Save Search		
	𝔅 No auto-refr	resh 👻 🛛 Tags 👻	🕹 Down	load 🔀 Expo	rt 🗟 Email 🗙 Delete 🛛	More - 0-20 of many	< >
	0	DATE	ТІМЕ	DURATION	CALLER PARTY	CALLED PARTY	
		Sep 15, 2021	9:57 AM	5:27	639495950 (Jerome Bennett)	4240	Ð
		Sep 14, 2021	3:09 PM	6:15	302879235368	920617622 (Ashley Baker)	Ð
		Sep 14, 2021	9:54 AM	7:40	853172865418	575429417 (Desiree Jenkins)	ŧ

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

Saved Searches + Add x Delete 0-2 of 2 > NAME VISIBILITY Long calls (>5 min) Private @ Edit Short calls (<15 sec)</td> Private @ Edit 20 per page 0-2 of 2 >

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.

	🖻 Recordings 🛛 🕍 Speech Analytics	🔟 Reports 🛛 🌣 Adm	inistration	🛔 Alexander 👻			
Reports				Wide view $\mathbf{z}^{^{\mathrm{H}}}$			
▲ Reports ~	Reports		EVALUATION REPORTS				
» Recent reports» My reports	Recent reports My reports		All Reports				
» All reports Evaluation Reports	All reports		 Group Reports Agent Reports 				
			1				

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.

Reports

Reports		All	reports					
» Recent reports								
» My reports		Sear	ch by Report Name					Search -
» All reports		+ 0	reate 🛓 Import	× Delete				0-2 of 2 < >
Evaluation Reports	<	0	NAME	VISIBILITY	STATUS	SCHEDULE	LATEST RUN	
			Audit Trail Details Report	Private (Alexander)	Finished	Not scheduled	Nov 23, 2021, 6:12 PM	View Run
		0	User call summary	Public	Not started	Not scheduled		View Run 3 Edit
		20 -	er page 💌					0-2 of 2 < >

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.

🛓 Reports 🛛 🗸 🗸 🖌 🗸 🖌 🖌		reports					
 » Recent reports » My reports 		rch by Report Name					Search
» All reports	+	Create 🛃 Import 🗙 D	elete				0-5 of 5 <
Levaluation Reports <	0	NAME	VISIBILITY	STATUS	SCHEDULE	LATEST RUN	
	0	Audit Trail Details Report	Private (Alexander)	Finished	Not scheduled	Nov 23, 2021, 6:12 PM	View Run & Edit
	0	Calls Summary Report	Public	Not started	Not scheduled		View Run 3 Edit
	0	Calls Summary Report	Private (Alexander)	Not started	Not scheduled		View Run 🕼 Edit
	0	Calls Summary Report by Group	Private (Alexander)	Not started	Not scheduled		View Run

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

Reports	~	Reports > Reports > All reports Run of Report «Calls Summary Report»	
» Recent reports			C
» My reports		LATEST RUN ALL REPORT RUNS TEMPLATE	
» All reports			
Evaluation Reports	<	No data available 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.

Report Period *	Last week	
Timezone	(UTC) GMT	
FILTERING CRITERIA		
Group *	Is * Group Gentry Ltd	× ×
+ Add criteria		
+Add criteria	IL	
	Send report by email	
SEND REPORT BY EMA	Send report by email	
SEND REPORT BY EMA	Send report by email Excel	

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.

SCHEDULE

Run this job *	O Manually
	O Every Hour
	Every Day
	O Every Week
	O Every Month
	• Custom (crontab)
Minute (0-59)	12
Hour (0-23)	22
Day (1-31)	5
Month (1-12)	6
Weekday (0-6)	

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**.

Reports		Reports > Reports All reports							
» My reports		Search by Report Name						Search	
» All reports		+ Create 🕹 Import	× Delete Select	ed rows: 1			0-2 of 2	<	>
Evaluation Reports	<		VISIBILITY	STATUS	SCHEDULE	LATEST RUN			
		Audit Trail Details Report	Private (Alexander)	Finished	Not scheduled	Nov 23, 2021, 6:12 PM	V	iew Ru (2 Ed	
		User call summary	Public	Not started	Not scheduled		V	iew Ru (2 Ed	

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 <i>Call Details Report</i> 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 <i>Calls Summary Report</i> provides the call/minutes totals for each group/user for the selected time frame.
Calls Summary Report By Group	The <i>Calls Summary Report by Group</i> 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 <i>Calls Summary Report by Interval</i> 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 <i>Calls Summary Report by Tenants</i> displays a summary of call statistics across all tenants available to the Admin.
Tenant Details Report	The <i>Tenant Details Report</i> provides the details of tenant record data, including the licensing and storage information per specific tenant.
Calls Summary Report by Users	The <i>Calls Summary Report by Users</i> displays a summary of call statistics of all users.
User Details Report	The <i>User Details Report</i> 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.