CALL RECORDING

User 101

Quick Reference

Recorded User View
Agent User
User Self-View

MOMENTUM

Powered By: miarec

25Q1e

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Introduction

This User guide provides a helpful introduction to the tools and features available to those users who have been granted access to the Call Recording portal to work with their own Call Recordings on a limited basis. It offers useful instructions for getting started with the standard Call Recording portal access scope for users who are allowed to work with their own recordings.

Please Note: In order to be comprehensive, this guide may describe tools, features, and sections of the portal that may not have been made available to your account or the Role assigned to you by your organization. Contact your organization's Call Recording Admin to learn more about your organization's security protocols or call recording compliance requirements and how they impact your Role and access scope.

Log In

Call Recording portal uses a web interface, which can be accessed on any standard browser over your network or over the internet. Depending on how your admin set up your account, you will use one of the following ways to sign in:

- Sign into Call Recording directly with provided credentials (login and password)
- Sign into Call Recording directly with provided credentials (login and password) AND 2-factor or multi-factor authentication (MFA)
- Access Call Recording using secure Single Sign-On via a third-party provider site and multi-factor authentication using provided credentials.

Single Sign-On (SSO) Via Third-party Provider Site

If Single Sign-On (SSO) access is activated on the account, Users will be able to access the Call Recording portal using a third-party provider like Teams, Azure AD, Okta, Auth0, or your Service Provider's account access site and you will not be able to log into the portal directly.

SSO protocols are to ensure complete security and compliance.

Contact your organization's Call Recording Administrator for the secure third party site to use and your username and password credentials.

Sign In Directly Using Provided Credentials (Password)

1. Open a web browser and enter the Call Recording web portal URL provided to you by your Admin.
2. In the **Sign In** page, enter your username and password login credentials as requested.
3. Click **Sign In**.

   Depending on the way your admin set up the Call Recording platform, you may be required to reset your password on login or have the ability to reset your password when you forgot it. If you do not see the Forgot your password? link, then a password reset is not available in your account.

Sign In Using Provided credentials and Multi-factor Authentication

Follow the steps noted above to access the correct sign in page using the URL and login credentials provided.

When multi-factor authentication (MFA) is enabled in your account, you will use a combination of your login credentials at the correct URL and entry of a verification code to access the web portal.

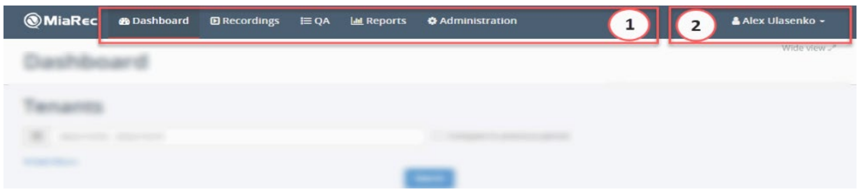
Follow the instructions to set up your multi-factor authentication protocol for receiving a secure 6-digit code to enter upon request during login.

Follow the instructions to enter and submit the secure 6-digit MFA code when it is requested.

Note: If the site URL you are given takes you to the Cloud Services Portal, when you get logged in, click on the Connect link adjacent to Call Recording in your Dashboard to be taken right to your Call Recording Portal Dashboard.

Call Recording Toolbar

At the top of the Call Recording page, you will find the **Navigation Toolbar** and your **My Profile** menu.



The toolbar displays navigation tabs for the Call Recording sections. Users may have full, partial, or read-only access to these areas.

- **Dashboard** - A helpful landing page displaying the user's call metrics and activity data history.
- **Recordings** - This is the area where you will access and work with your call recordings.
- **QA** - This area is for Quality Assurance and may be read-only if made available to Self-View Users – or it may be set for use by Supervisors and admins Only.
- **Reports** - This area offers report generation and review tools. Access may be limited or disabled for Self-View Users here.
- **Administration** - This area is for the organization's Call Recording Tenant Administrators.

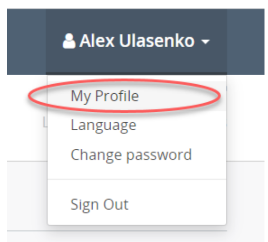
My Profile

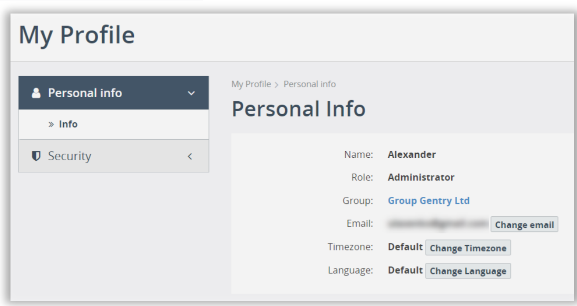
The user profile menu provides quick access to any available account settings your administrator enabled. These could include display language, time zone, and more.

To Access these basic User Profile Settings:

1. Click your name in the top right corner
2. Select **My Profile**

   On the **Personal Info** page, you can edit your email and change the default timezone or display language (where alternate options are enabled for selection). *The default language is English.*



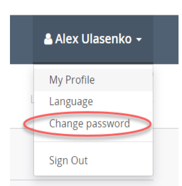


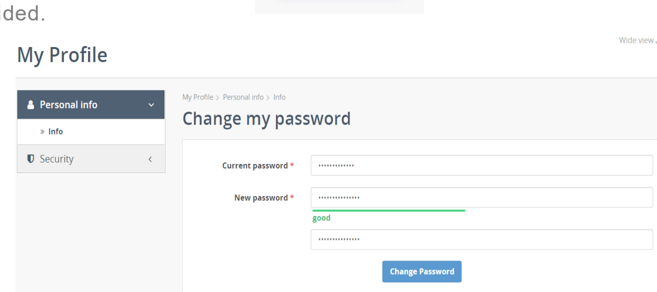
Change Password

To change a password, the ability to do so must be enabled for you by your admin.

If available for you:

1. Click on your name in the top right corner
2. Select the **Change Password** option (if available).
3. Enter your current and new passwords in the fields provided.
4. Click the **Change Password** button.





Note

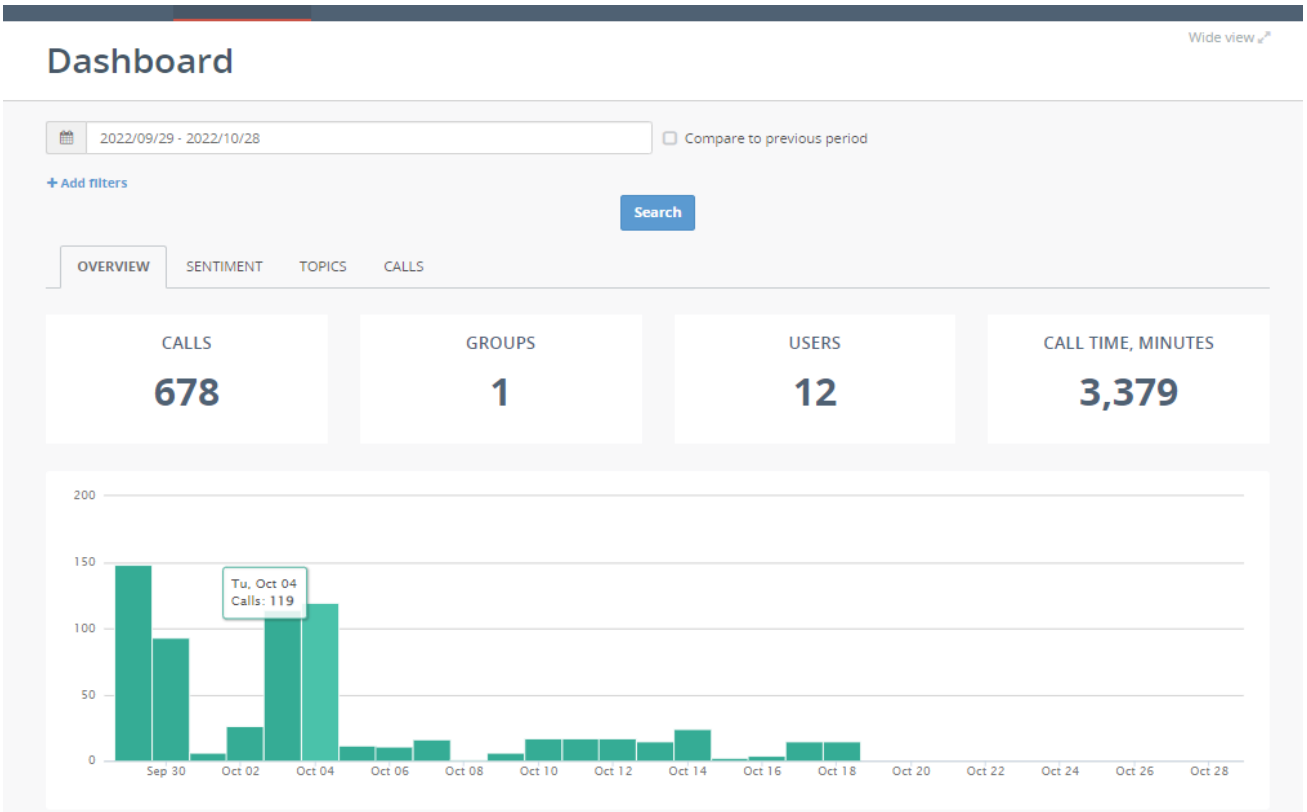
A password reset (by email or in your profile) may not be available for your account if:

- An email address is not configured for your user profile. Contact your system administrator for assistance.
- A Single Sign-On is activated for your user profile. In this case, you need to reset the password in the corresponding web portal (Identity Provider) rather than in Call Recording.

Contact your Administrator for assistance with Call Recording portal access issues.

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 that allow you to focus only on the data that is important to you.

Dashboard Metrics

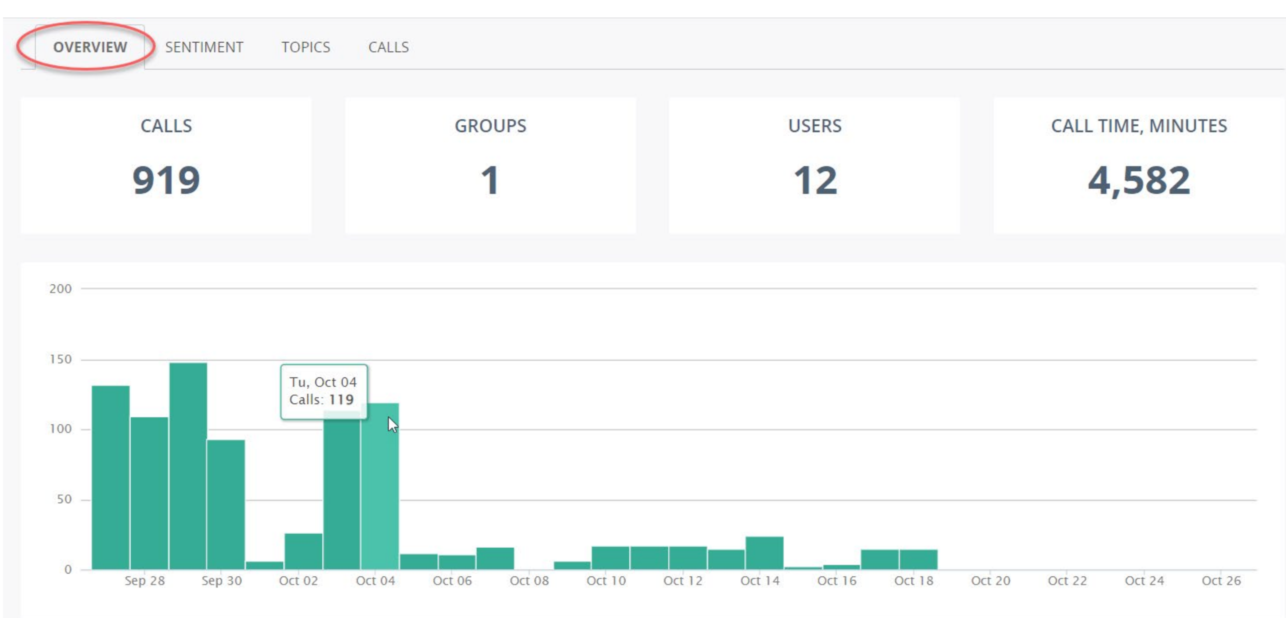
This section of the dashboard offers several views for different metrics.

Call Recording 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 times.

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



Sentiment Tab

The **Sentiment** tab provides easy yet granular visibility into the sentiment analysis and scoring used in calls with customer interactions.

Sentiment analysis uses the Artificial Intelligence (AI) and machine learning capabilities available with Speech Analytics and Transcription (Add-On) 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". Simply put, think of it as a call that got a score of good or bad – or neutral.

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

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

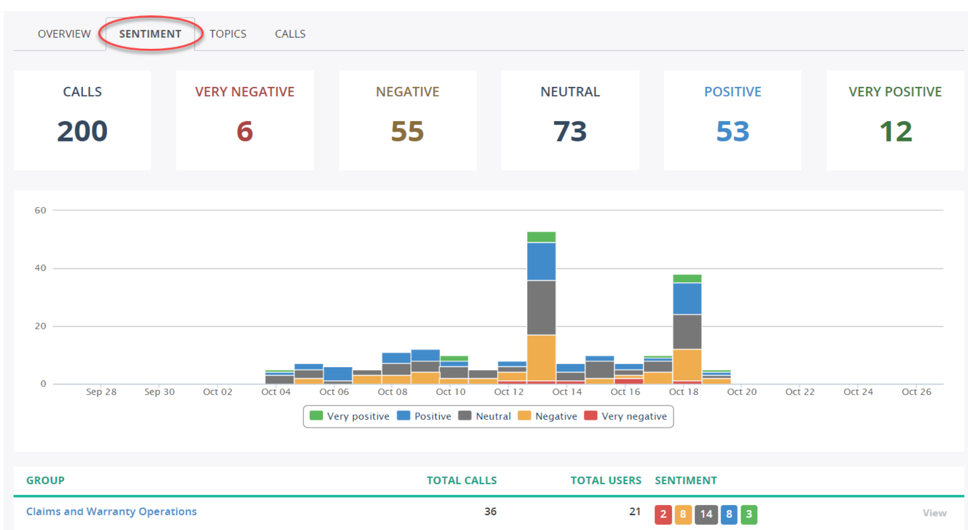
Sentiment score vs sentiment label

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)

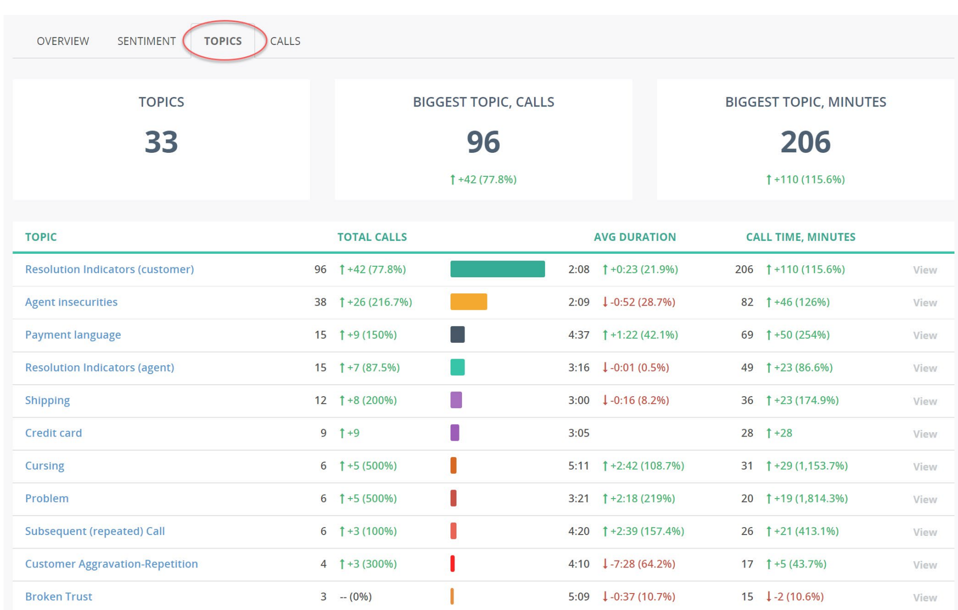
The **Sentiment** tab shows the overall distribution of calls by sentiment as well as the chart, which represents daily sentiment trends through a selected period.



Topics Tab

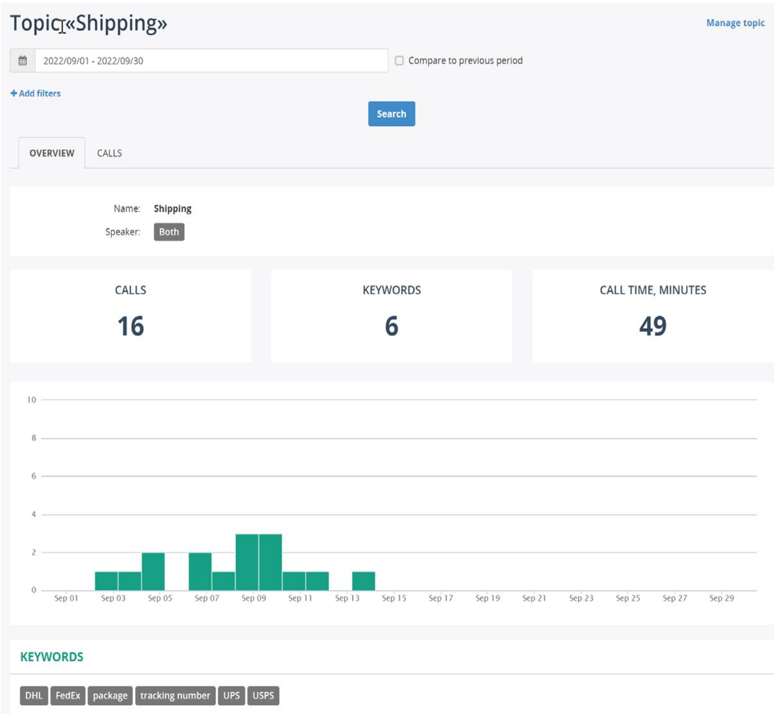
The **Topics** page shows the call distribution by topic. For example, as a supervisor, you can easily and quickly analyze call volume trends per topic over time, e.g., changes in the number of calls related to shipping issues from last month to this month.

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



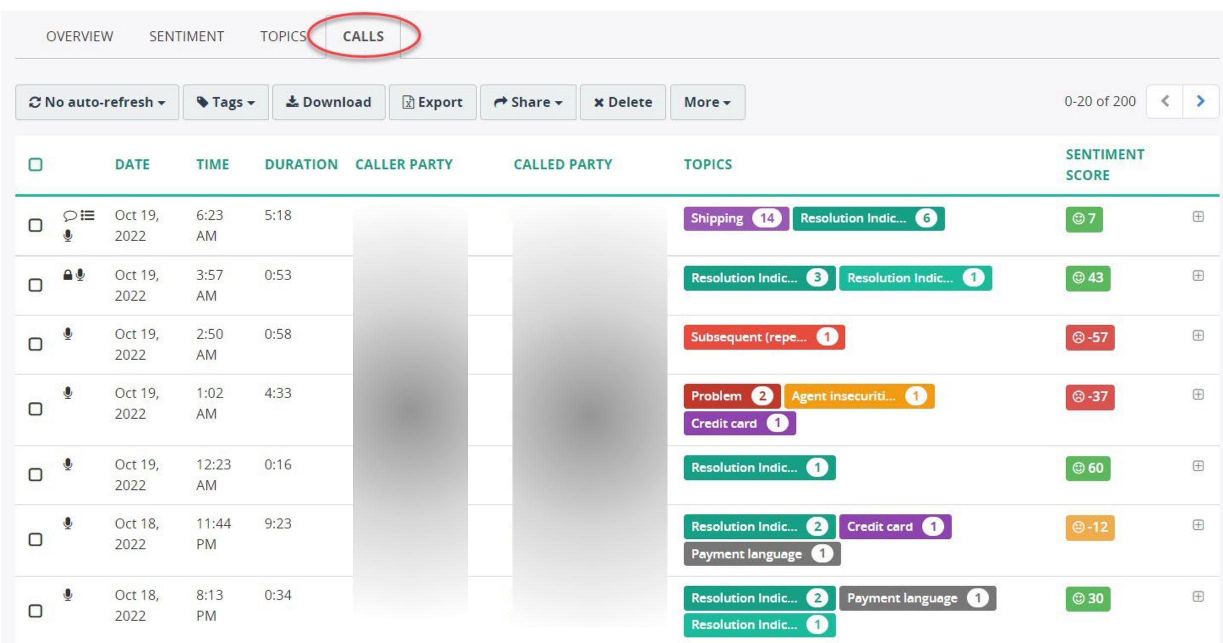
By drilling down to the individual topic, you can view trends of such a topic in a chart.

This page also shows a list of keywords that are used to categorize calls with this topic.



Calls Tab

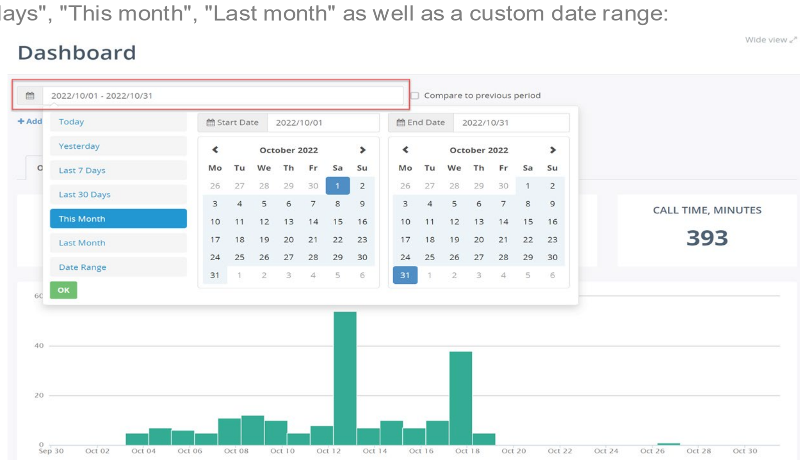
The **Calls** tab shows the call recordings, which relate to the selected period in the Dashboard and the applied filters. Use this tab to review the individual call recordings, from which the aggregated call metrics were calculated.



As you can see, **Sentiment** scores can also be viewed in the **Calls** tab.

Dashboard Filters

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



Add Filters

Click **+Add filters** to add filtering criteria to the input data.

Compare to Previous Period

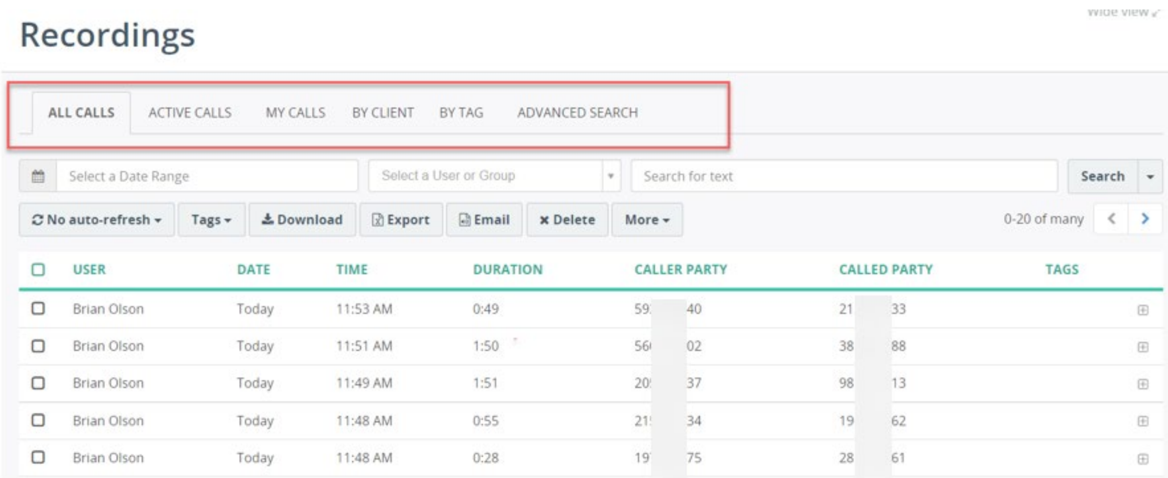
Comparing metrics over time is a great way to benchmark progress and identify issues as they come up.

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).

Recordings

Call Recording Views

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.



Call Recording typically offers the following views for Self-View Users:

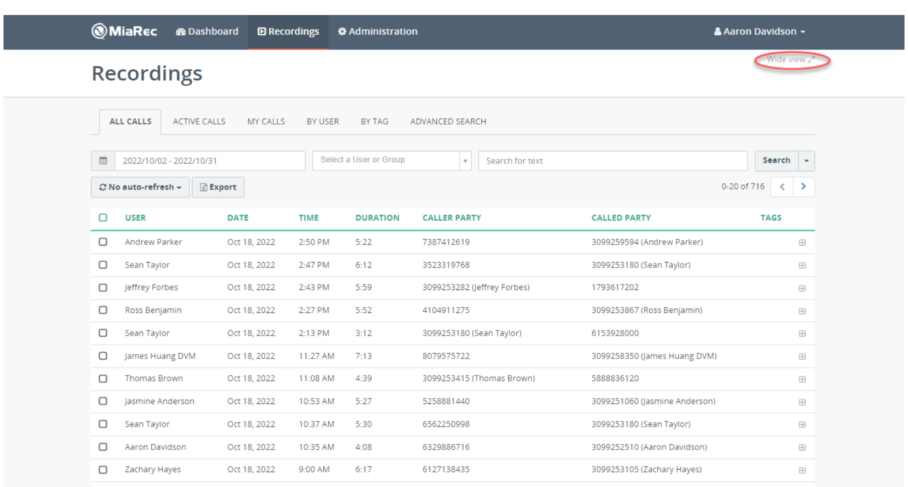
- **All calls** - Displays all of your available call recordings (including active ones).
  Note, depending on your role permissions and the access scope, some call recordings might not be accessible to you.
- **Active Calls** – Displays in-progress calls being recorded.
- **My Calls** – Also displays your recorded calls.
- **By Client** – Offers a list of historical call recordings tagged with Client flag. This list is searchable.
- **By Tag** – Offers tools to locate call recordings in history that have a tag added to them to categorize.
- **Advanced search** – If visible, this tab offers more advanced search tools.

> **Inf**
>
> Each view may have a different set of visible columns, which are configured by the Tenant Administrator.

Wide / Normal View Controls

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

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



Playback Recordings

Users can play their call recordings either on the **Recordings** page using the basic media player or in the **Call Details** page using the advanced media player.

Recordings Page Inline Basic Media Player

To view the basic inline player for a call listed on the **Recordings** page:

1. Click in an item in the list of recordings to display an inline basic audio player.
2. Click Play. Once the audio is playing, you may pause, stop the playback, etc.

Call Details Page Advanced Media Player

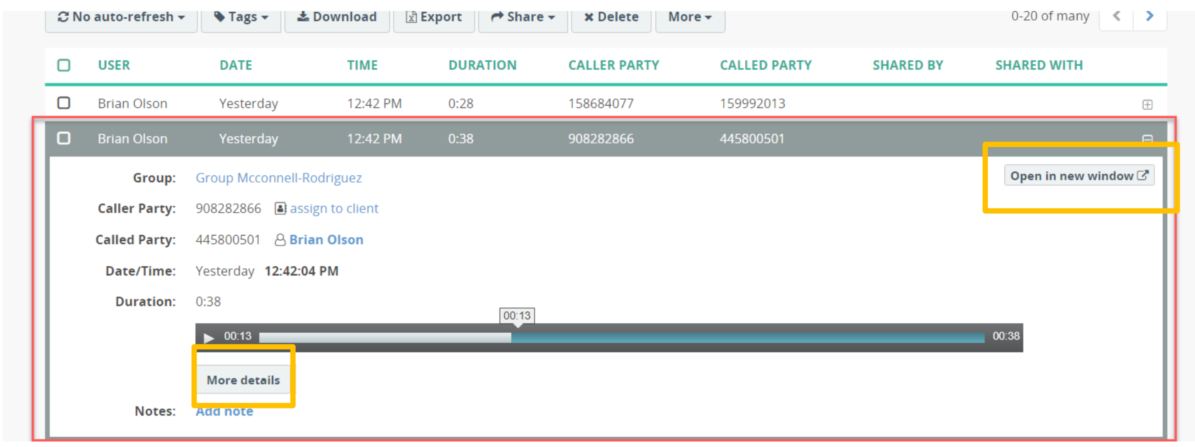
The **Advanced Media Player** is shown on the Call Details page.

To access that view while looking at the Recordings list:

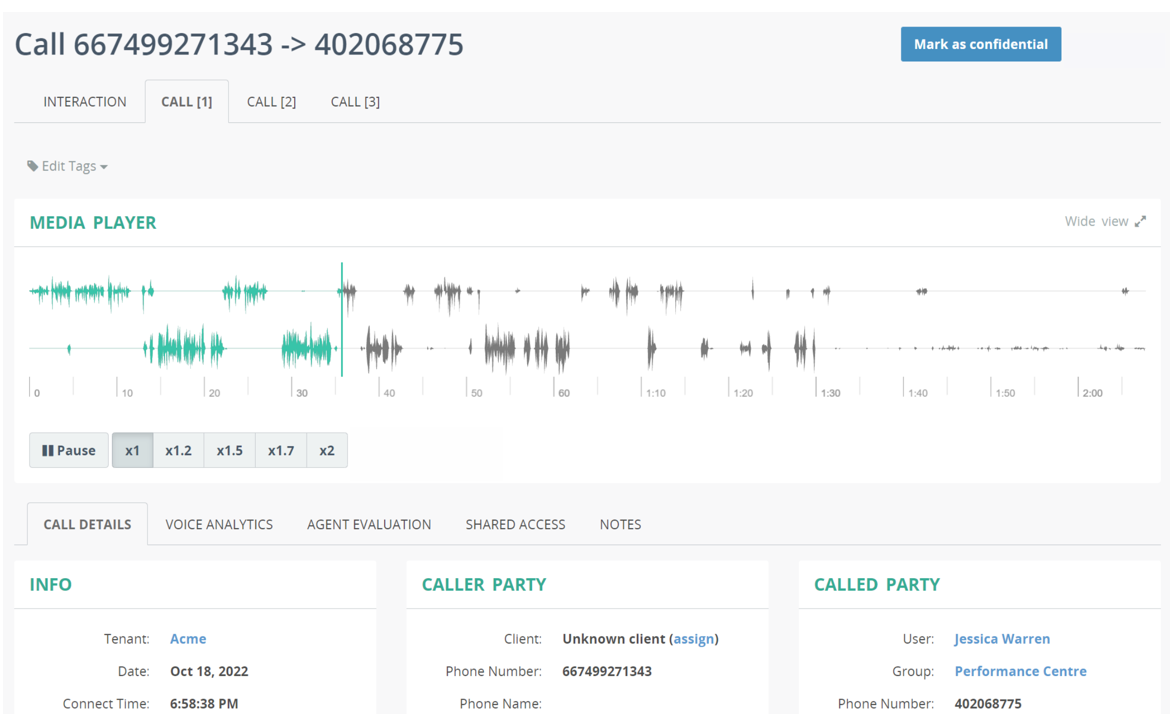
1. Choose an item in the list to see the basic inline player.
2. Click on the **More Details** button below the audio bar

   OR

3. click on the **Open in new window** button above and to the right in this view.



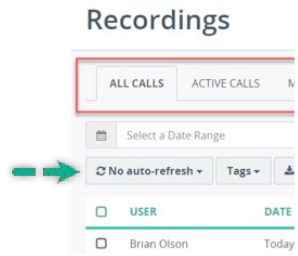
An audio waveform displays within the Advanced Media Player, which allows you to visually see the moments of silence or overtalk in a conversation.



Tools are provided to control playback – you may pause, start, speed up the playback using options from x1 to x2 normal speed. *Speeding up the playback will allow you to listen to the recording faster to save time.*

Live Calls

Call List Auto-Refresh



To set your list to Auto-Refresh:
Click on the drop-down next to the Auto-refresh tool displayed just above the list and select Auto-Refresh.
This tells the system to refresh the data shown here constantly to help display live calls quickly for access.

Please note: This setting selection is not persistent across sessions and must be set each time you want to quickly access live calls.

For Self-View Users on Teams Tenants (or Recorded User View users in Broadsoft) who are granted access to the Call Recording portal in order to utilize the live call compliance tools (Pause/Resume or On Demand) in order to manage recorded data in their live calls, the compliance tool assigned to your account displays for use when viewing a live call in the Call Details view.

Pause/Resume

Pause/Resume is an available recording compliance tool for users. The user's call is recorded and saved for future review unless the service is told by the user to Pause Recording.

When Pause Recording is clicked during a live call, the system will not save the audio (or screen recording if in use) of the call until told by the user to Resume Recording.

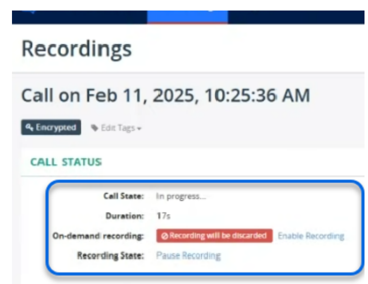
When Resume Recording is clicked, call recording starts again. These two actions can be repeated as needed during the live call to secure private data and then start recording again until the live call ends.

Note: Pause/Resume is very manual, so the user MUST remember to click Pause Recording to secure private data in the call and then click Resume Recording to continue recording the call when appropriate.

Once the recording renders, the audio tracks/screen recording (if in use) are blank during Paused periods.

On Demand

Some BroadSoft tenants only at this time. Check with your organizations Call Recording Administrator.



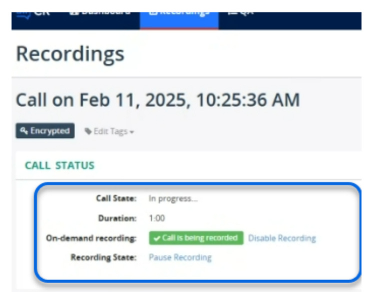
If **On Demand** recording is the enabled recording compliance tool set in the user profile, the user's calls are always recorded by the service but the user can tell the service to either keep the recording by manually clicking on the Enable Recording button or discard the recording without saving for future review if the Disable Recording is enabled at call end.

Enable Recording tells the system the user wants to KEEP the recording for future review.

Disable Recording tells the system the user wants to discard the recording of the call.

The Admin may also set the user's On Demand to Always Record or Always Discard (Default)... but the user may override the secondary setting by manually clicking the available compliance tool buttons during the live call.

- If the recording of the call is desired to be kept for future review, the user MUST have Enable Recording turned on prior to the end of the call.
- The call recording will not be saved for future review if the call ends with Disable Recording turned on.



Also, during a live call, the user can press the available Pause Recording and Resume Recording buttons as needed to halt and restart recording in order to secure or record specific portions of the conversation - and the user can repeat these actions as needed until call completion. Doing so with Enable Recording set to ON at call completion will save a recording of the call with appropriate sections either available for review or unavailable and secured.

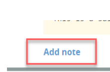
Add Notes

Users can enter notes to save important information related to call recordings with the record for review.
Notes contents are searchable, so you can easily find the recordings that have certain text in their notes for review or reporting.

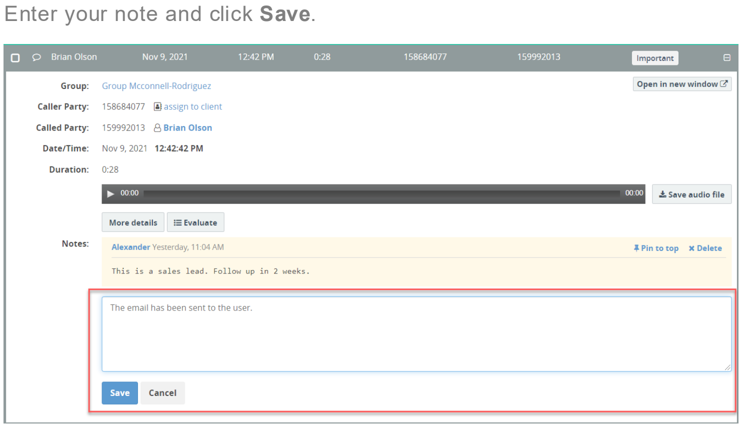
The notes can be added to a Call Recording in either the Recordings page view or the Call Details view.

Recordings Page - Add Notes

1. Navigate to the inline call details view and click **Add note**.

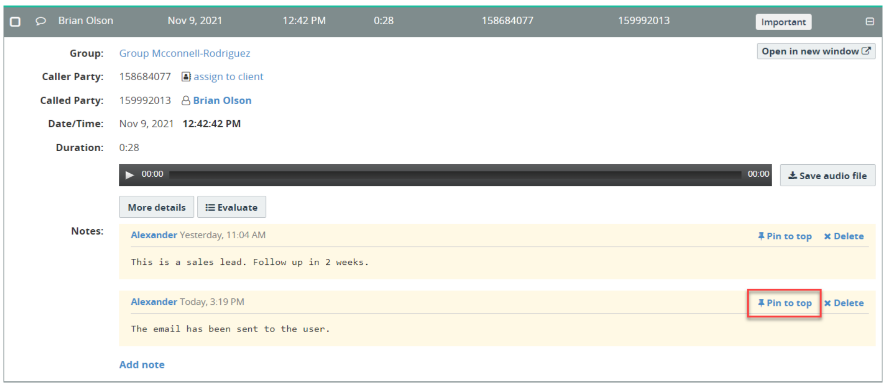


2. Enter your note and click **Save**.



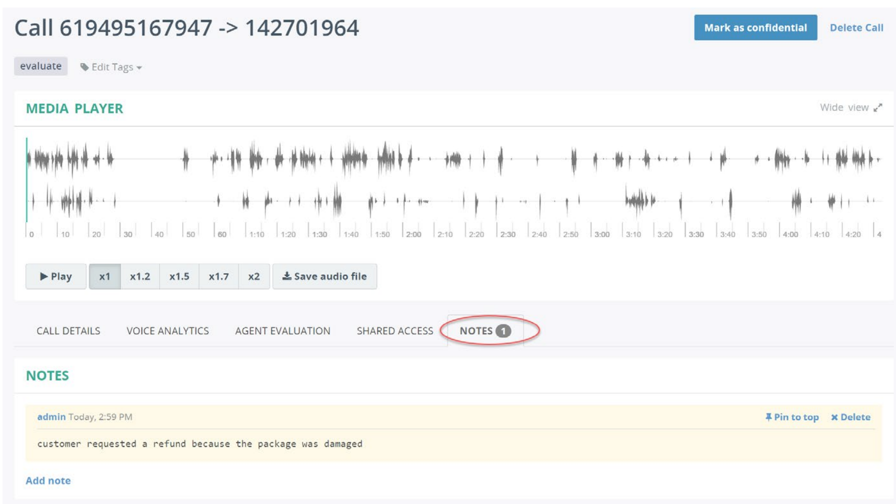
The notes that are saved are displayed in a sorting order from the oldest entered to the newest.

However, it is possible to pin any note to the top (out of order) by clicking on **Pin to top**.



Call Details Page - Add Notes

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



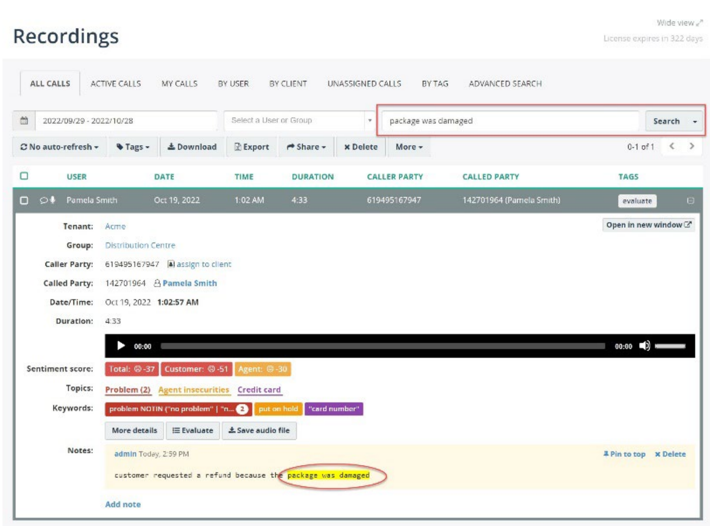
Search Within Notes

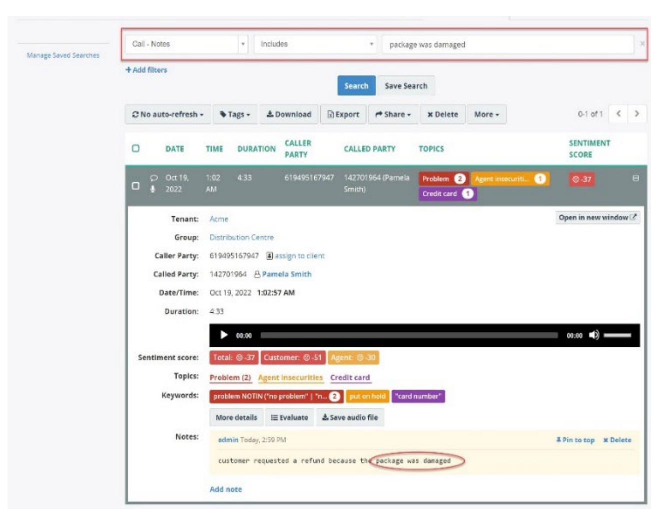
You can use a Quick Search as well as Advanced Search to find the call recordings with certain text in notes.

To use Quick Search, type the search text input control and hit the **Search** button.
The results will be highlighted in the Notes section of the call info.

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.



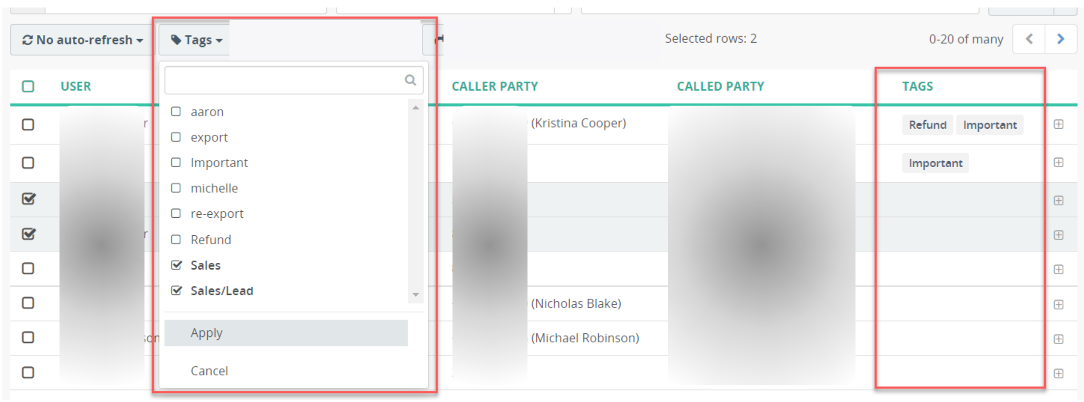


Tag Call Recordings

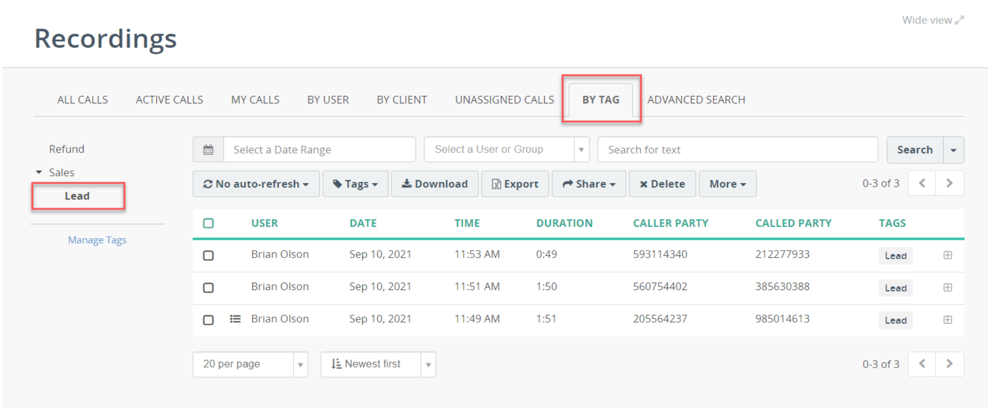
Tags allow users to identify and categorize calls.
Tags may be available in a list to select from and assign to call recordings in your list or while you are adding notes.

If this feature is made available to Users by their organization, a User can assign a tag to call recordings.
Select one or more recordings, click the **Tags** button, select the target tag from the list and click **Apply**.

Or while in the *Call Details*, click on the **Tag** drop-down find and select the appropriate Tag.
Multiple tags can be assigned to the same call recording.



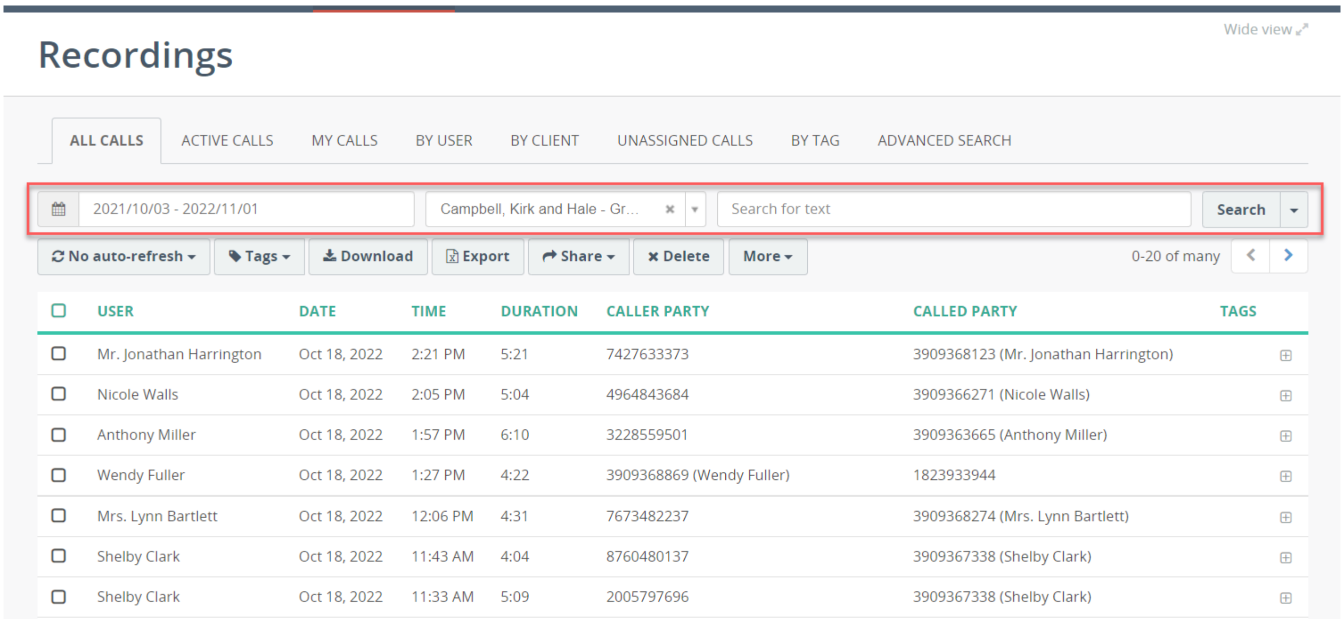
To quickly filter the recordings by assigned tag, navigate to the **By Tag** tab (if visible and select the target tag from a list on the left.



Search Call Recordings

Quick Search

Quick search options are the easiest way to locate call recordings by applying the search criteria in the Quick Search panel on the **Recordings** page.



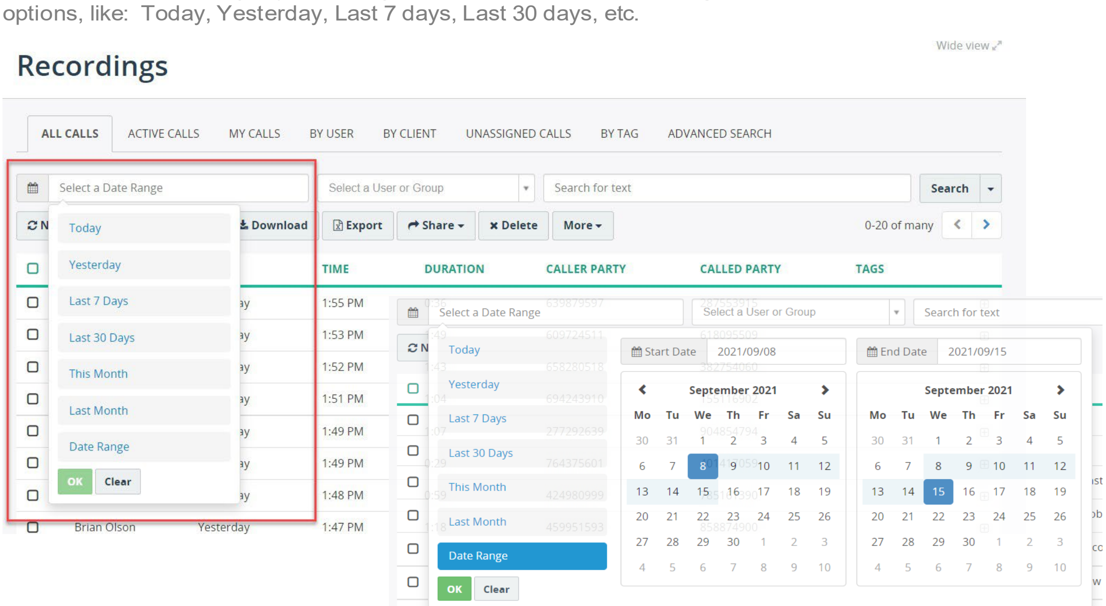
The panel includes the most frequently used search criteria:

- Date Range
- User or Group
- Search for text in phone number, caller-id, call notes and custom fields

Quick Search by Date Range

This search option lets you find call recordings created within a specific range of dates.

To search the recordings by date range, click the **Select a Date Range** field and choose from one of the available options, like: Today, Yesterday, Last 7 days, Last 30 days, etc.

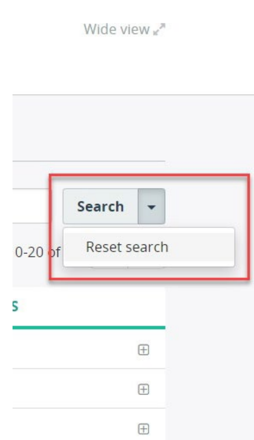


If you choose the **Date Range** option, you can specify the start and end dates in the calendar.

Quick Search by Text

The **Search for text** field lets you use the free-text search for matching terms within the list.

Matching search results will be highlighted.



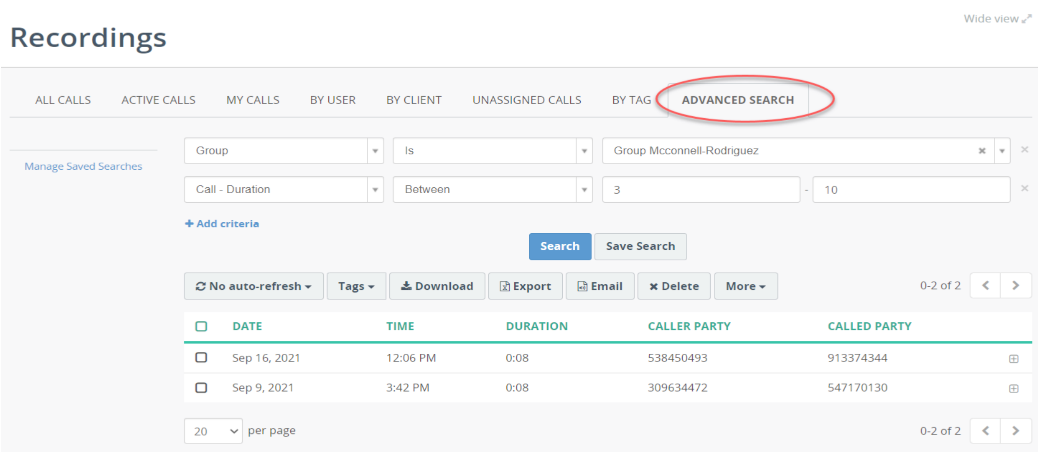
Reset Search Criteria

To reset search criteria, click the **Search** button and then select **Reset search**.

Advanced Search

The Advanced Search allows you to mix and match multiple criteria in the search input.

1. On the **Recordings** page, click the **Advanced Search** tab.
2. Select the appropriate call attribute in the **Select a Parameter** list
3. Select the appropriate condition in the **Select a condition** list
4. Enter the searched value in the **Value** input, if applicable
5. Click **Add criteria** to add more attributes for searching.

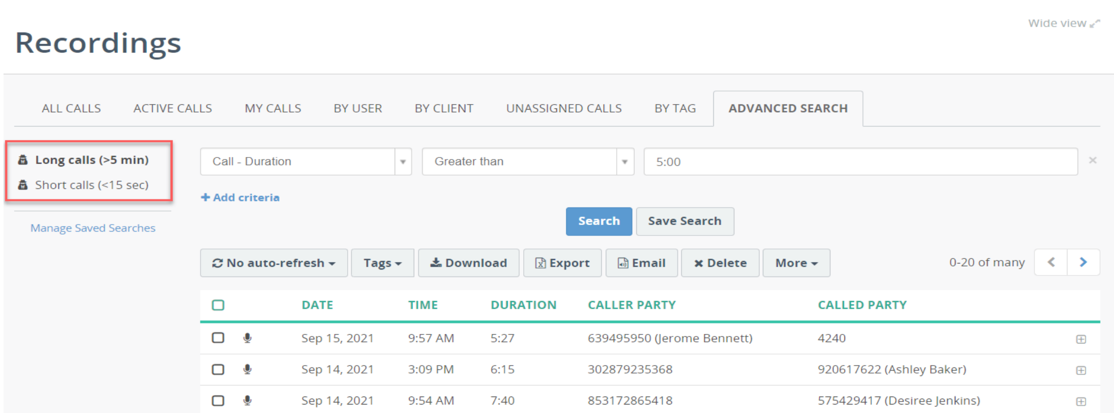


6. Click **Search** to run the search query.

Save Search Criteria

Users may be able to save advanced search criteria for reuse in the future.

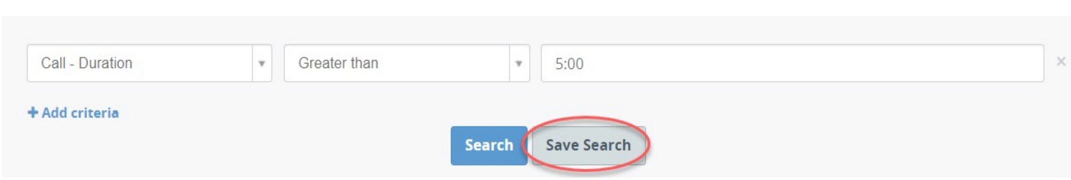
The saved searches are shown in the left pane, from where you can load them in one click.



Create a Saved Search

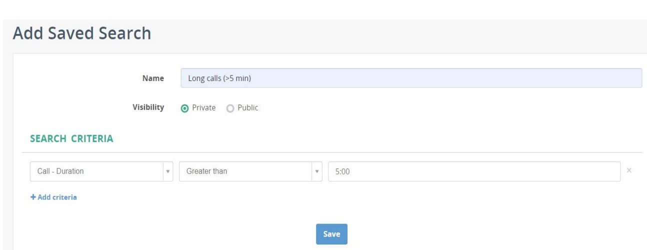
To save the advanced search criteria:

1. Navigate to the **Advanced Search** page.
2. Enter the search criteria and click **Save Search**.



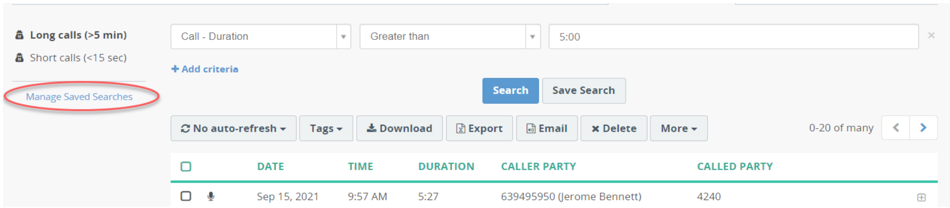
3. On the **Add Saved Search** page, specify the following parameters:
   - **Name** - provide the unique name
   - **Visibility** - decide whether you want to share this search with all users or use it privately only.
   - Refine your search criteria, if needed.

4. Click **Save**.



Manage Saved Searches

To manage a saved search, click the **Manage Saved Searches** link while viewing Advanced Search.



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