



CALL RECORDING

Supervisor User Guide

 **MOMENTUM**

Powered By:  **MiaRec**

1. Introduction

The user guide provides step-by-step instructions on how to get started with the call recording platform.

Note: If your organization does not utilize the optional (\$) advanced recording tools like Evaluate (QA) or Speech Analytics (Transcription and AI), please skip the sections related to those tools or features.

2. Getting started

2.1 Accessing the Call Recording Portal

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

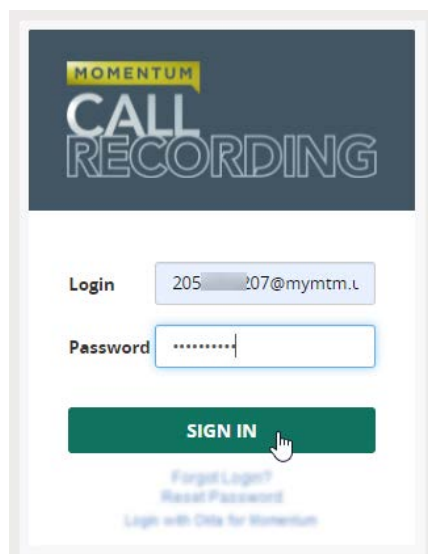
2.1.1 Call Recording Portal Direct Access

This level of access requires specialized authorization and specific advanced permissions to be set by the Organization. Authorized users with 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.momentumtelecom.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 access scenario, the access credentials to sign in may differ from the credentials used for other sites, applications, or service portals.



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

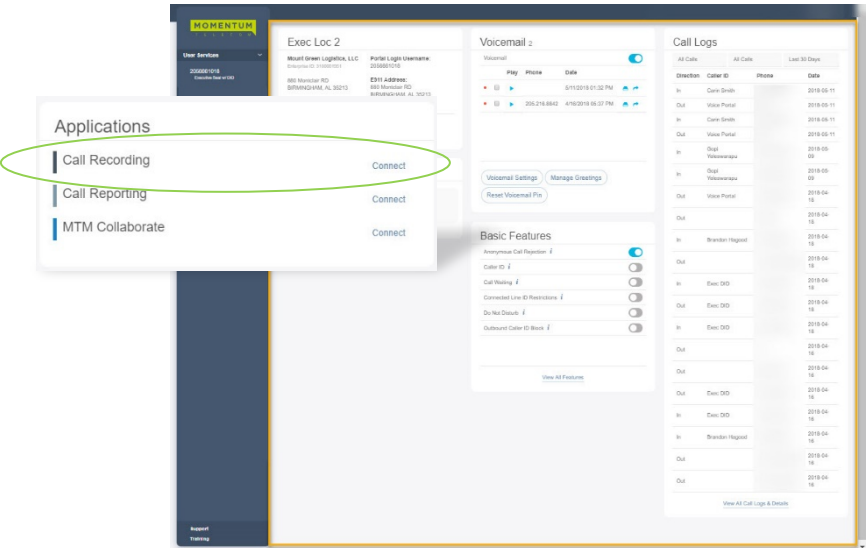
Simply enter the User Name (Login) and Password credentials provided to you and click **Login**.

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

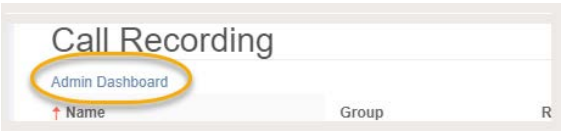
Once the login process is verified and successful, the Call Recording portal opens and the Supervisor is presented with their Call Recording Dashboard and toolbar links to the areas they are authorized to access within the Call Recording Portal.

2.1.2 Call Recording Portal Single Sign-On Access

The Cloud Services or DriveUC Portal offers a direct link to access the Call Recording Portal using your 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 or DriveUC 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. 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 or DriveUC 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 sections or tools in Call Recording.

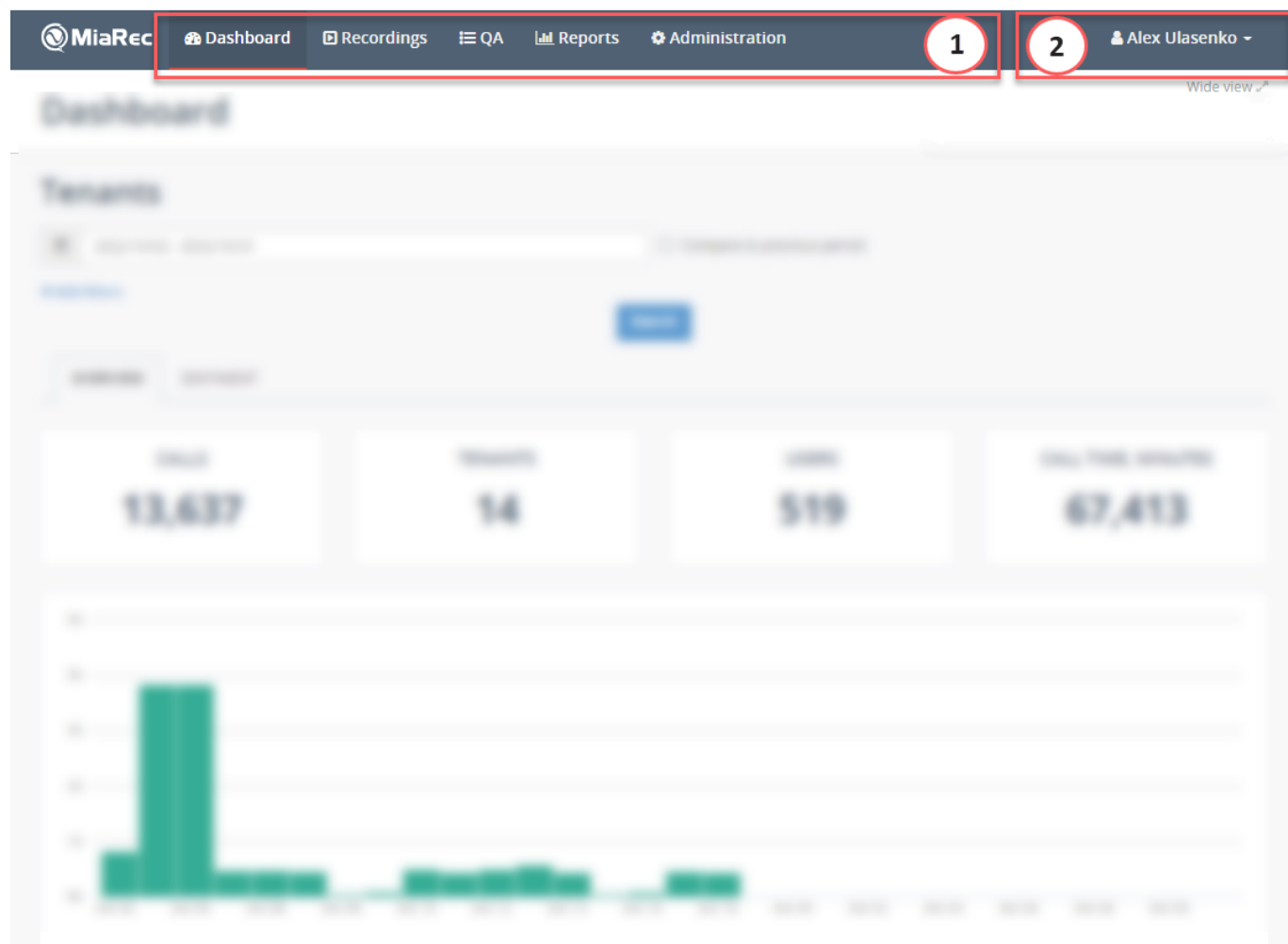
Non-Administrators will only see the sections they have been granted permission to view.

2.2 At a glance

This page provides a quick introduction to the Call Recording application.

2.2.1 Navigation options

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



Navigation menu

This toolbar displays navigation buttons you can use to access the following sections:

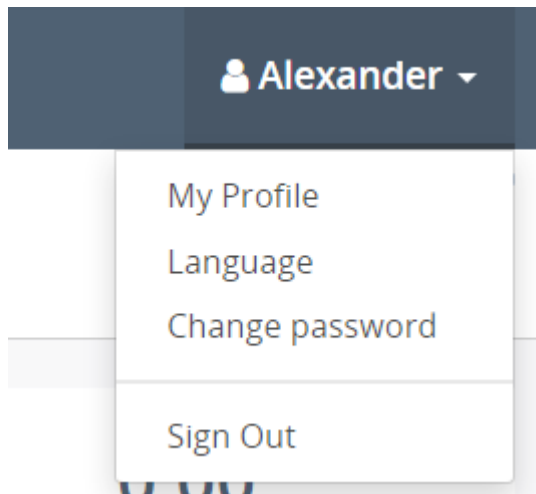
- **Dashboard.** Provides call metrics for your entire organization.
- **Recordings.** Allows you to access call recordings.
- **QA.** Provides quality assurance (QA) metrics for your entire contact center.
- **Reports.** Allows you to build and run custom reports.
- **Administration.** Gives you access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

Info

Some sections may not be available to you due to the permissions and licensing set up by the administrator.

My Profile menu

The user profile menu provides quick access to your account settings, like language, time zone, email address and others. For details, see [My profile](#).



2.2.2 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.

Recordings

ALL CALLS ACTIVE CALLS MY CALLS BY USER BY TAG ADVANCED SEARCH

2022/10/02 - 2022/10/31 Select a User or Group Search for text Search

No auto-refresh Export 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)	
Sean Taylor	Oct 18, 2022	2:47 PM	6:12	3523319768	3099253180 (Sean Taylor)	
Jeffrey Forbes	Oct 18, 2022	2:43 PM	5:59	3099253282 (Jeffrey Forbes)	1793617202	
Ross Benjamin	Oct 18, 2022	2:27 PM	5:52	4104911275	3099253867 (Ross Benjamin)	
Sean Taylor	Oct 18, 2022	2:13 PM	3:12	3099253180 (Sean Taylor)	6153928000	
James Huang DVM	Oct 18, 2022	11:27 AM	7:13	8079575722	3099258350 (James Huang DVM)	
Thomas Brown	Oct 18, 2022	11:08 AM	4:39	3099253415 (Thomas Brown)	5888836120	
Jasmine Anderson	Oct 18, 2022	10:53 AM	5:27	5258881440	3099251060 (Jasmine Anderson)	
Sean Taylor	Oct 18, 2022	10:37 AM	5:30	6562250998	3099253180 (Sean Taylor)	
Aaron Davidson	Oct 18, 2022	10:35 AM	4:08	6329886716	3099252510 (Aaron Davidson)	
Zachary Hayes	Oct 18, 2022	9:00 AM	6:17	6127138435	3099253105 (Zachary Hayes)	
Marissa Mcgee MD	Oct 18, 2022	8:48 AM	4:48	8578168799	3099253013 (Marissa Mcgee MD)	

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

MiaRecDashboardRecordingsAdministration

Aaron Davidson

Recordings

ALL CALLSACTIVE CALLSMY CALLSBY USERBY TAGADVANCED SEARCH

2022/10/02 - 2022/10/31

Select a User or Group

Search for text

Search

No auto-refreshExport

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)	
Sean Taylor	Oct 18, 2022	2:47 PM	6:12	3523319768	3099253180 (Sean Taylor)	
Jeffrey Forbes	Oct 18, 2022	2:43 PM	5:59	3099253282 (Jeffrey Forbes)	1793617202	
Ross Benjamin	Oct 18, 2022	2:27 PM	5:52	4104911275	3099253867 (Ross Benjamin)	
Sean Taylor	Oct 18, 2022	2:13 PM	3:12	3099253180 (Sean Taylor)	6153928000	
James Huang DVM	Oct 18, 2022	11:27 AM	7:13	8079575722	3099258350 (James Huang DVM)	
Thomas Brown	Oct 18, 2022	11:08 AM	4:39	3099253415 (Thomas Brown)	5888836120	
Jasmine Anderson	Oct 18, 2022	10:53 AM	5:27	5258881440	3099251060 (Jasmine Anderson)	
Sean Taylor	Oct 18, 2022	10:37 AM	5:30	6562250998	3099253180 (Sean Taylor)	
Aaron Davidson	Oct 18, 2022	10:35 AM	4:08	6329886716	3099252510 (Aaron Davidson)	
Zachary Hayes	Oct 18, 2022	9:00 AM	6:17	6127138435	3099253105 (Zachary Hayes)	
Marissa Mcgee MD	Oct 18, 2022	8:48 AM	4:48	8578168799	3099253013 (Marissa Mcgee MD)	
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	

2.2.3 Call recording view 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. For details, see [Recordings Overview](#).

Recordings

Wide view

ALL CALLSACTIVE CALLSMY CALLSBY USERBY CLIENTUNASSIGNED CALLSBY TAGADVANCED SEARCH

Select a Date Range

Select a User or Group

Search for text

Search

No auto-refreshTagsDownloadExportEmailDeleteMore

0-20 of many

USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
Brian Olson	Today	11:53 AM	0:49	593114340	212277933	
Brian Olson	Today	11:51 AM	1:50	560754402	385630388	
Brian Olson	Today	11:49 AM	1:51	205564237	985014613	
Brian Olson	Today	11:48 AM	0:55	215569134	196374262	
Brian Olson	Today	11:48 AM	0:28	197840975	285636461	

2.2.4 Search for specific calls

To search call recordings by parameters like date range, user and phone number, use the search panel. For details, see the [Quick Search](#) and [Advanced Search](#) sections.

MiaRec
Dashboard
Recordings
Speech Analytics
Reports
Administration
Alexander

Wide view

Recordings

ALL CALLS
ACTIVE CALLS
MY CALLS
BY USER
BY CLIENT
UNASSIGNED CALLS
BY TAG
ADVANCED SEARCH

2021/10/01 - 2021/10/31
Brian Olson (+2089551744, ...)
Search for text
Search

No auto-refresh
Tags
Download
Export
Share
Delete
More
0-20 of 31

	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	SHARED BY	SHARED WITH	
<input type="checkbox"/>	Brian Olson	Oct 21, 2021	10:26 AM	0:45	476229857	154410616	Alexander	Angela Potts	
<input type="checkbox"/>	Brian Olson	Oct 21, 2021	10:26 AM	0:30	872619377	644022167			
<input type="checkbox"/>	Brian Olson	Oct 21, 2021	10:24 AM	1:04	135034354	624867950			
<input type="checkbox"/>	Brian Olson	Oct 21, 2021	10:24 AM	0:51	419363452	353094099			
<input type="checkbox"/>	Brian Olson	Oct 21, 2021	10:23 AM	0:23	893466587	365819252			

2.2.5 Playback recordings

To playback a call recording, click the respective call in a list and use a built-in media player to listen to the recording.

Wide view

Recordings

ALL CALLS
ACTIVE CALLS
MY CALLS
BY USER
BY CLIENT
UNASSIGNED CALLS
BY TAG
ADVANCED SEARCH

Select a Date Range
Select a User or Group
Search for text
Search

No auto-refresh
Tags
Download
Export
Share
Delete
More
0-20 of many

	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	SHARED BY	SHARED WITH	
<input type="checkbox"/>	Brian Olson	Yesterday	12:42 PM	0:28	158684077	159992013			
<input type="checkbox"/>	Brian Olson	Yesterday	12:42 PM	0:38	908282866	445800501			

Group: Group McConnell-Rodriguez
Caller Party: 908282866 assign to client
Called Party: 445800501 Brian Olson
Date/Time: Yesterday 12:42:04 PM
Duration: 0:38

00:13
00:38
Save audio file

More details
Evaluate

Notes: Add note

Click **More details** or **Open in new window** buttons to switch to a detailed view of call recording, and playback it in an advanced media player. Such an advanced media player displays an audio waveform, which allows you to see visually the moments of silence or overtalk in a conversation. For details, see [Playback recordings](#).

Call 667499271343 -> 402068775

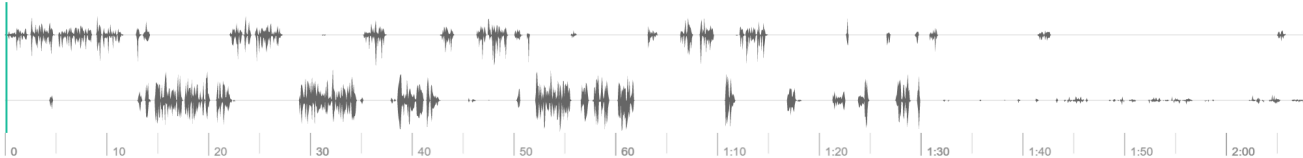
Mark as confidential
Delete Call

INTERACTION
CALL [1]
CALL [2]
CALL [3]

Edit Tags

MEDIA PLAYER

Wide view



Play
x1
x1.2
x1.5
x1.7
x2
Save audio file

CALL DETAILS
VOICE ANALYTICS
AGENT EVALUATION
SHARED ACCESS
NOTES

INFO

Tenant: **Acme**

Date: **Oct 18, 2022**

Connect Time: **6:58:38 PM**

CALLER PARTY

Client: **Unknown client (assign)**

Phone Number: **667499271343**

Phone Name:

CALLED PARTY

User: **Jessica Warren**

Group: **Performance Centre**

Phone Number: **402068775**

2.2.6 Monitor calls in real-time

As a supervisor, you can monitor employees' calls in real-time to guide and support agents to deliver optimum customer service. For details, see [Monitor a recorded call in real-time](#).

Call 810454788 -> 357590969

Mark as confidential

Edit Tags

CALL STATUS


Call State: **In progress...**

Duration: **18s**

Recording State: **Pause Recording**

LIVE MONITORING

Animation: ON

In progress...

18s

Stop live monitoring

INFO

Tenant: **System**

Date: **Today**

CALLER PARTY

Client: **Unknown client (assign)**

Phone Number: **810454788**

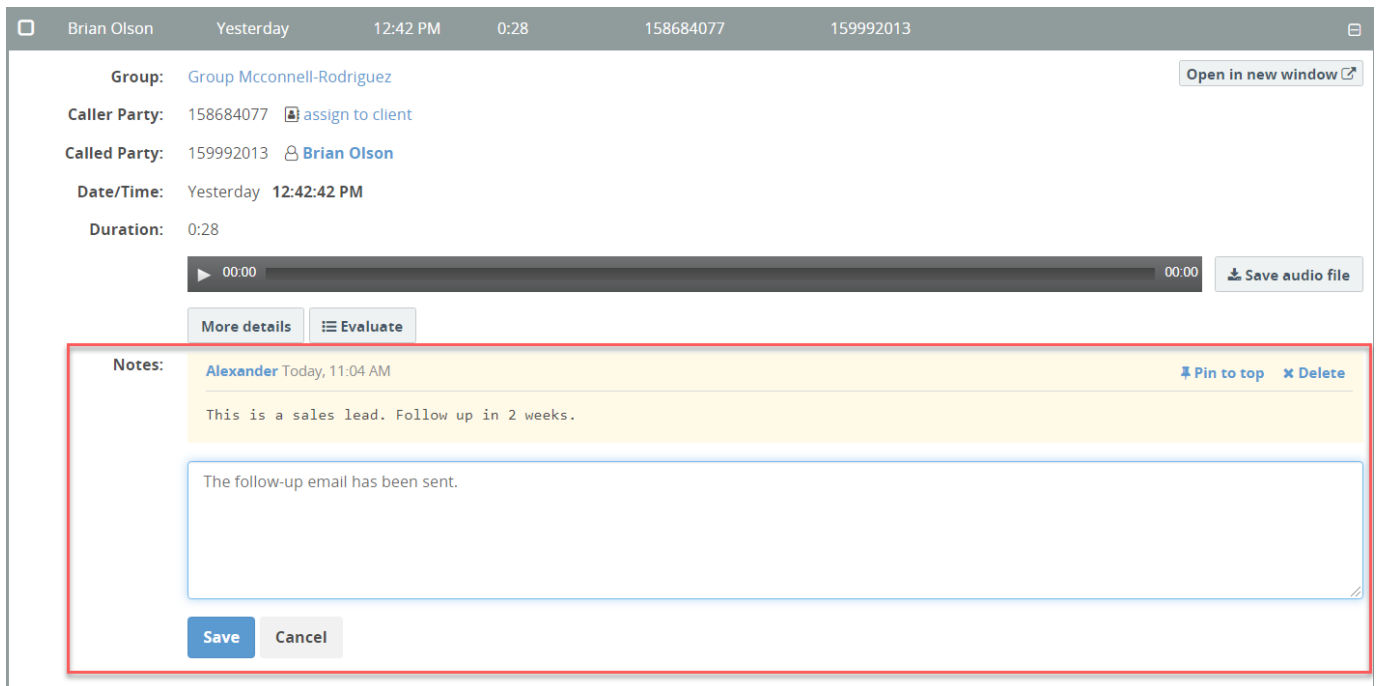
CALLED PARTY

User: **Test User**

Group: **Agents**

2.2.7 Create notes for call recordings

If you have the appropriate permissions, you can view and optionally add new notes for call recordings. This way, you can easily find the relevant call recordings by any keyword within the notes. For details, see [Add notes to a recorded call](#).



The screenshot shows a call recording interface for a call between Brian Olson and a Group McConnell-Rodriguez. The call details include the caller party (158684077), called party (159992013), date/time (Yesterday 12:42:42 PM), and duration (0:28). Below the details is an audio player with a play button, a progress bar, and a 'Save audio file' button. There are also buttons for 'More details' and 'Evaluate'. The 'Notes' section is highlighted with a red box and contains a note from Alexander dated Today, 11:04 AM. The note text is 'This is a sales lead. Follow up in 2 weeks.' and 'The follow-up email has been sent.' There are 'Save' and 'Cancel' buttons at the bottom of the notes section.

Call Details:

- Group: Group McConnell-Rodriguez
- Caller Party: 158684077 [assign to client](#)
- Called Party: 159992013 [Brian Olson](#)
- Date/Time: Yesterday 12:42:42 PM
- Duration: 0:28

Notes:

Alexander Today, 11:04 AM [Pin to top](#) [Delete](#)

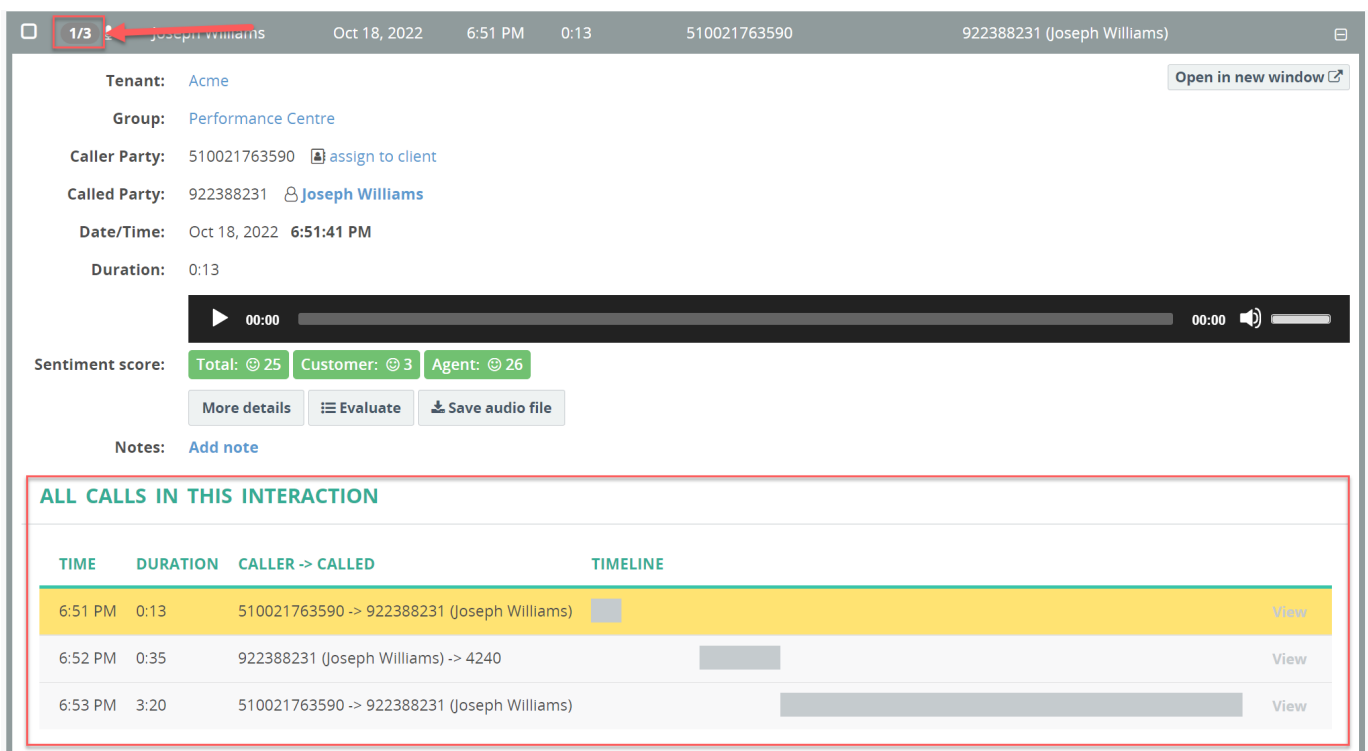
This is a sales lead. Follow up in 2 weeks.

The follow-up email has been sent.

[Save](#) [Cancel](#)

2.2.8 View multiple related call segments in one place

Call Recording groups all related calls 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, then a corresponding badge 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.



The screenshot shows a call recording interface for a call between Joseph Williams and a Performance Centre. The call details include the tenant (Acme), caller party (510021763590), called party (922388231), date/time (Oct 18, 2022 6:51:41 PM), and duration (0:13). Below the details is an audio player with a play button, a progress bar, and a 'Save audio file' button. There are also buttons for 'More details' and 'Evaluate'. The 'Sentiment score' section shows a total score of 25, a customer score of 3, and an agent score of 26. The 'Notes' section has an 'Add note' button. The 'ALL CALLS IN THIS INTERACTION' section is highlighted with a red box and contains a table with three rows of call segments.

Call Details:

- Tenant: Acme
- Group: Performance Centre
- Caller Party: 510021763590 [assign to client](#)
- Called Party: 922388231 [Joseph Williams](#)
- Date/Time: Oct 18, 2022 6:51:41 PM
- Duration: 0:13

Sentiment score: Total: 😊 25 Customer: 😊 3 Agent: 😊 26

[More details](#) [Evaluate](#) [Save audio file](#)

Notes: [Add note](#)

ALL CALLS IN THIS INTERACTION

TIME	DURATION	CALLER -> CALLED	TIMELINE	
6:51 PM	0:13	510021763590 -> 922388231 (Joseph Williams)	<div></div>	View
6:52 PM	0:35	922388231 (Joseph Williams) -> 4240	<div></div>	View
6:53 PM	3:20	510021763590 -> 922388231 (Joseph Williams)	<div></div>	View

To playback all the call segments at once, open **More details** for the call and navigate to the **Interaction** tab. For details, see [View multi-segment calls](#).

Interaction

INTERACTION CALL [1] CALL [2] CALL [3]

AUDIO Switch to basic player

▶ Play

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 3:20 3:30 3:40 3:50 4:00

510021763590 -> 922388231

922388231 -> 4240

Silence between call segments has been removed

Save audio file

2.2.9 Tag call recordings

You can assign tags to call recordings to organize and categorize them. To do so, select one or more recordings, click the **Tags** button, select the target tag from the list and click **Apply**.

Select a Date Range Group Gentry Ltd (group) Search for text Search

No auto-refresh Tags Download Export Share Delete More Selected rows: 2 0-20 of many


USER	CALLER PARTY	CALLED PARTY	TAGS
<input type="checkbox"/> Kristina Cooper	+2089552479 (Kristina Cooper)	8293266725	Refund Important
<input type="checkbox"/> Heidi Sullivan	1337694207	+2089558149 (Heidi Sullivan)	Important
<input checked="" type="checkbox"/> Angela Potts	5829792430	+2089551033 (Angela Potts)	
<input checked="" type="checkbox"/> Kristina Cooper	8749306937	+2089552479 (Kristina Cooper)	
<input type="checkbox"/> Michael Norris	8524578435	+2089551310 (Michael Norris)	
<input type="checkbox"/> Nicholas Blake	+2089553400 (Nicholas Blake)	4031026081	
<input type="checkbox"/> Michael Robinson	+2089553596 (Michael Robinson)	4654491101	
<input type="checkbox"/> Richard Barker	2921357479	+2089551486 (Richard Barker)	

Tags dropdown menu:

- ☐ aaron
- ☐ export
- ☐ Important
- ☐ michelle
- ☐ re-export
- ☐ Refund
- ☒ Sales
- ☒ Sales/Lead
- Apply
- Cancel

To quickly filter the recordings by tag, navigate to the **By Tag** view and select the target tag from the list on the left. For details, see [Categorize call recordings](#).

Recordings

Wide view 

ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS **BY TAG** ADVANCED SEARCH

Refund





▼ Sales

Lead

Manage Tags

Select a Date Range Select a User or Group Search for text Search

No auto-refresh Tags Download Export Share Delete More 0-3 of 3

	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
<input type="checkbox"/>	Brian Olson	Sep 10, 2021	11:53 AM	0:49	593114340	212277933	Lead 
<input type="checkbox"/>	Brian Olson	Sep 10, 2021	11:51 AM	1:50	560754402	385630388	Lead 
<input type="checkbox"/> 	Brian Olson	Sep 10, 2021	11:49 AM	1:51	205564237	985014613	Lead 

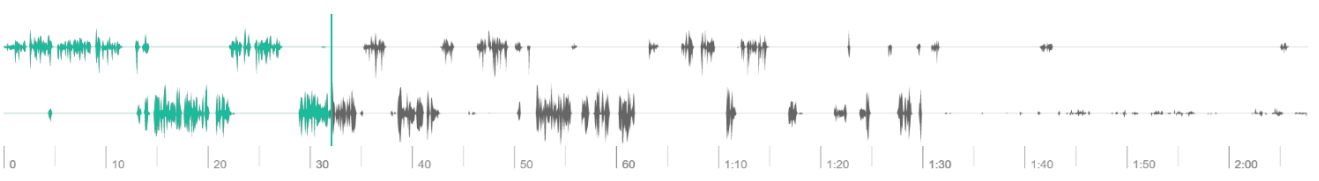
20 per page Newest first 0-3 of 3

2.2.10 Transcription and speech analytics

The Call Recording application can automatically transcribe call recordings, analyze them for sentiment, extract keywords and categorize calls into topics

MEDIA PLAYER

Wide view



► Play

x1

x1.2

x1.5

x1.7

x2

Save audio file

CALL DETAILS

VOICE ANALYTICS

AGENT EVALUATION

SHARED ACCESS

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 on your order and the

Customer [0:04]: Right?

Agent [0:05]: the only thing you could do is go to the store where you placed the order and have them fix that for you.

Because

Customer [0:13]: Ah, I live.

Agent [0:13]: on my end.

Customer [0:14]: I live in Canada and my mom is at work, so I'm not gonna send her again to the store. That's why I'm calling you.

To search call recordings by transcript text:

1. On the **Recordings** page, click the **Advanced Search** tab.
2. In the **Select a parameter** field, choose **Call - Transcript**.
3. Type the text you are interested to search for, and click **Search**.

Recordings

Wide view 

License expires in 322 days

ALL CALLS
ACTIVE CALLS
MY CALLS
BY USER
BY CLIENT
UNASSIGNED CALLS
BY TAG
ADVANCED SEARCH

Call - Transcript
Search query
refund

+ Add filters

Search
Save Search

No auto-refresh
Tags
Download
Export
Share
Delete
More
0-12 of 12

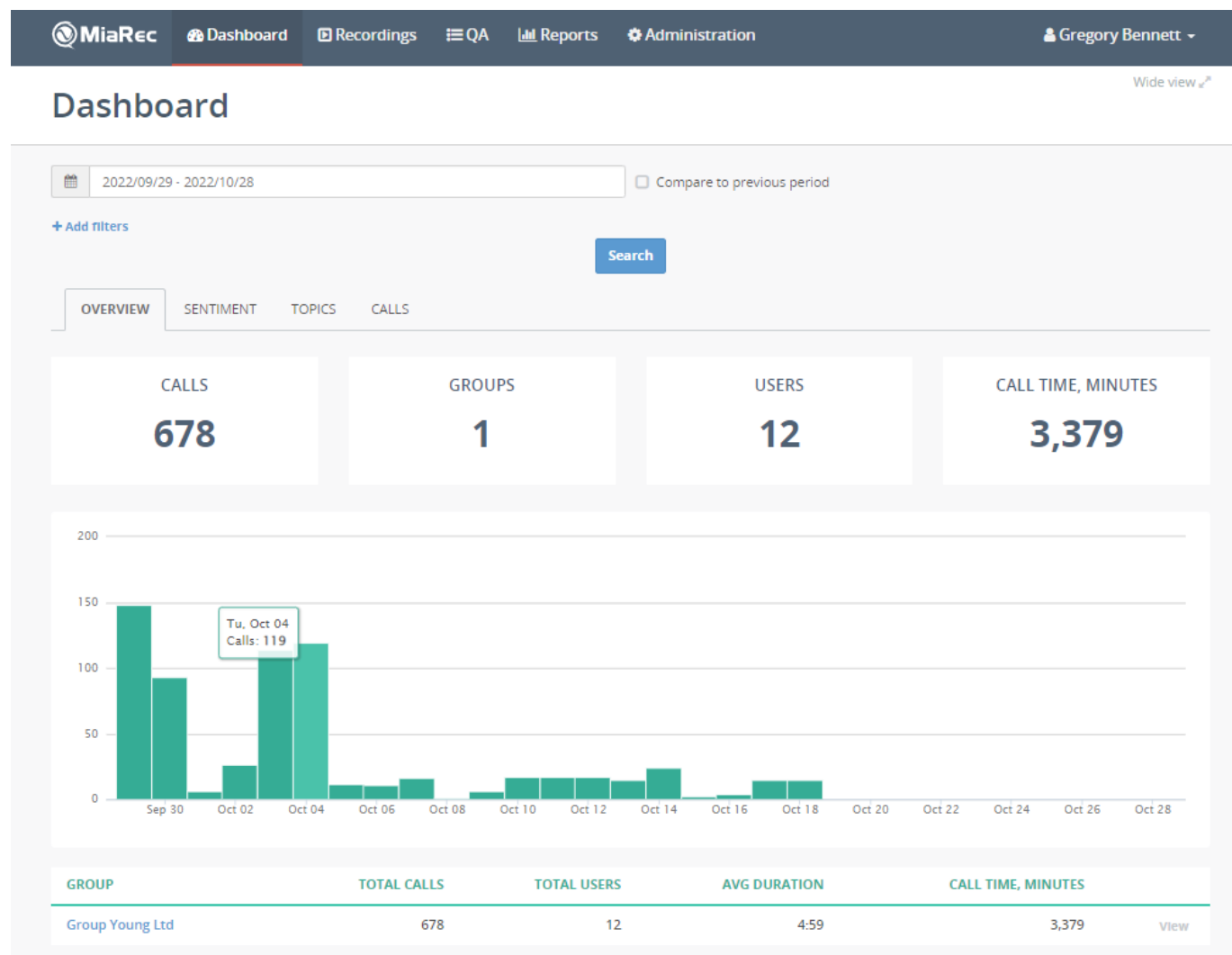
	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TOPICS	SENTIMENT SCORE
<input type="checkbox"/>	Oct 19, 2022	2:50 AM	0:58	810893981518	792545867 (Travis Martinez)	Subsequent (repe... 1	-57
have you call me back so I can be able to go in it and refund it, because right now I'm not. I can't see anything because it's not in our system							
<input type="checkbox"/>	Oct 18, 2022	6:57 PM	1:47	623441916396	542243175 (Tracy Butler)		-16
five forty three for it looks like it might be a shipping charge whenever you got your refund. U M A shipping charge for what? Uhm, did you return something? U M i mean							
<input type="checkbox"/>	Oct 15, 2022	10:49 PM	0:14	593454062269	928459268 (Kevin Johnson)	Resolution Indic... 1	55
just got confirmation from two supervisors and they said that they will give you a full refund if you have the receipt. Hallelujah, thank you very much Jennifer. No problem, thank you. Have a good							

This concludes an introduction section to the Call Recording platform. In the next chapters, we will discuss each of these topics in detail.

3. Dashboard

3.1 Dashboard Overview

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.

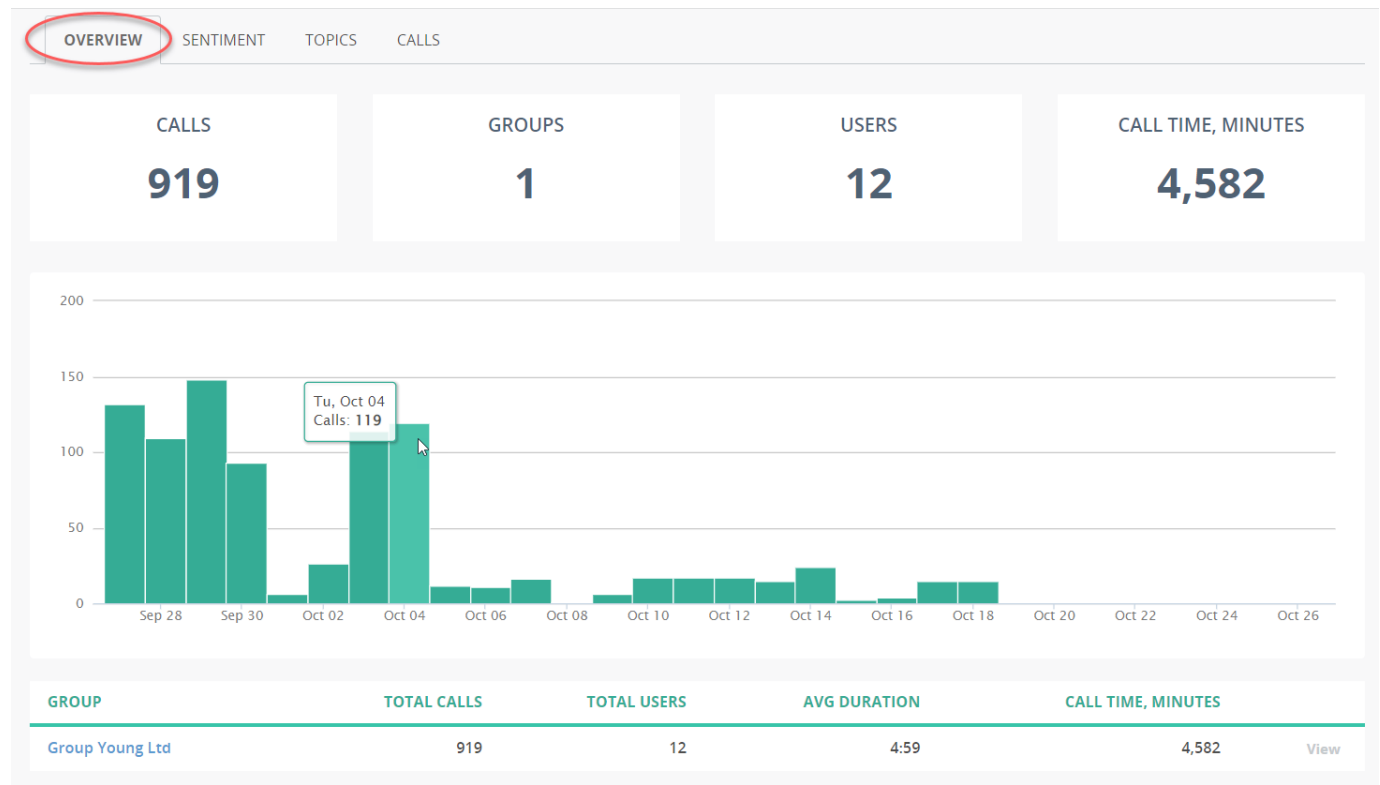
3.2 Dashboard metrics

3.2.1 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.

OVERVIEW

SENTIMENT

TOPICS

CALLS

No auto-refresh

Tags

Download






















Export

Share

Delete

More

0-20 of 200

	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TOPICS	SENTIMENT SCORE	
<input type="checkbox"/>	 Oct 19, 2022	6:23 AM	5:18	410953772 (Lori Brennan)	8150259180	Shipping 14 Resolution Indic... 6	 7	
<input type="checkbox"/>	 Oct 19, 2022	3:57 AM	0:53	663889251060	217754290 (Amy Harris)	Resolution Indic... 3 Resolution Indic... 1	 43	
<input type="checkbox"/>	 Oct 19, 2022	2:50 AM	0:58	810893981518	792545867 (Travis Martinez)	Subsequent (repe... 1	 -57	
<input type="checkbox"/>	 Oct 19, 2022	1:02 AM	4:33	619495167947	142701964 (Pamela Smith)	Problem 2 Agent insecuriti... 1 Credit card 1	 -37	
<input type="checkbox"/>	 Oct 19, 2022	12:23 AM	0:16	474235319971	782822261 (Mr. John Morales)	Resolution Indic... 1	 60	
<input type="checkbox"/>	 Oct 18, 2022	11:44 PM	9:23	207435901101	230696870 (Thomas Bell)	Resolution Indic... 2 Credit card 1 Payment language 1	 -12	
<input type="checkbox"/>	 Oct 18, 2022	8:13 PM	0:34	252212587918	685297319 (Johnathan Carr)	Resolution Indic... 2 Payment language 1 Resolution Indic... 1	 30	

Info

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

3.2.2 Sentiment Metrics

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

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

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

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

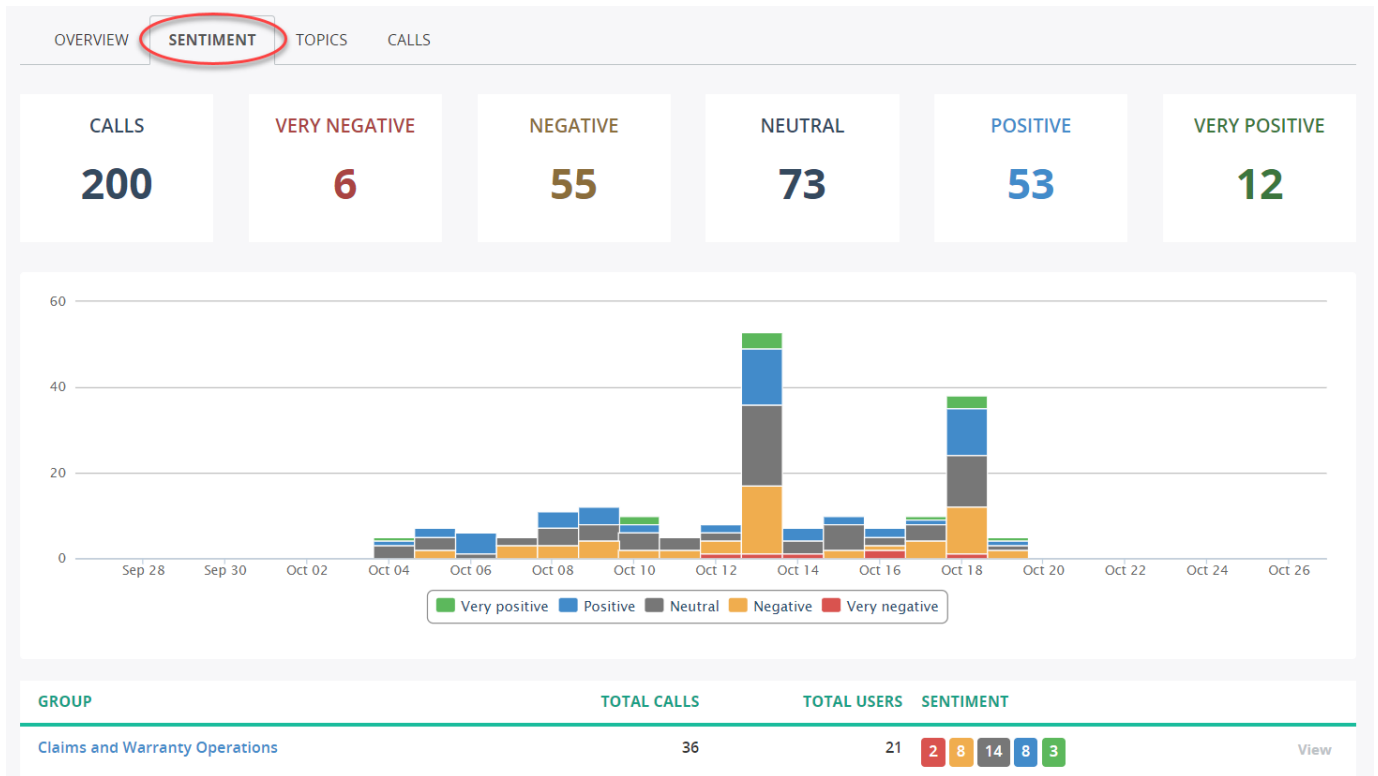
Sentiment score vs sentiment label

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

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

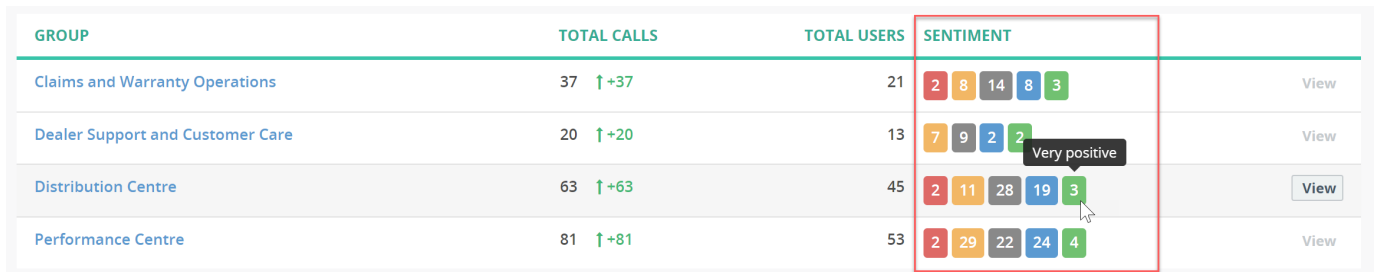
- **Very negative** (scores below -60)
- **Negative** (scores between -60 and -20)
- **Neutral** (scores between -20 and +20)
- **Positive** (scores between +20 to +60)
- **Very positive** (scores above +60)

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



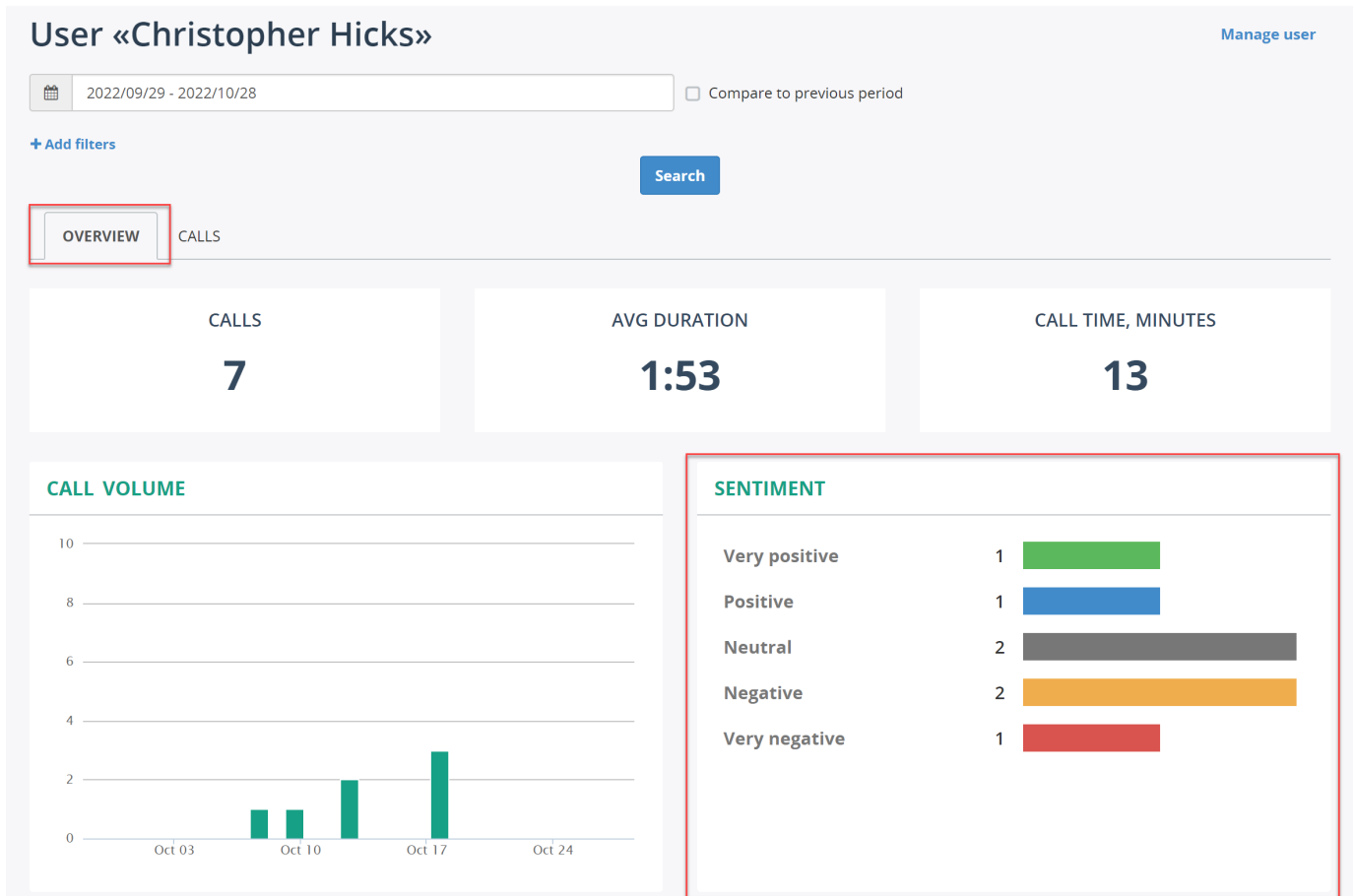
Depending on a drill-down level, the **Sentiment** page also shows a distribution of calls by sentiment for each group or user.

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



Sentiment metrics on a user level

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



Sentiment score in Calls tab

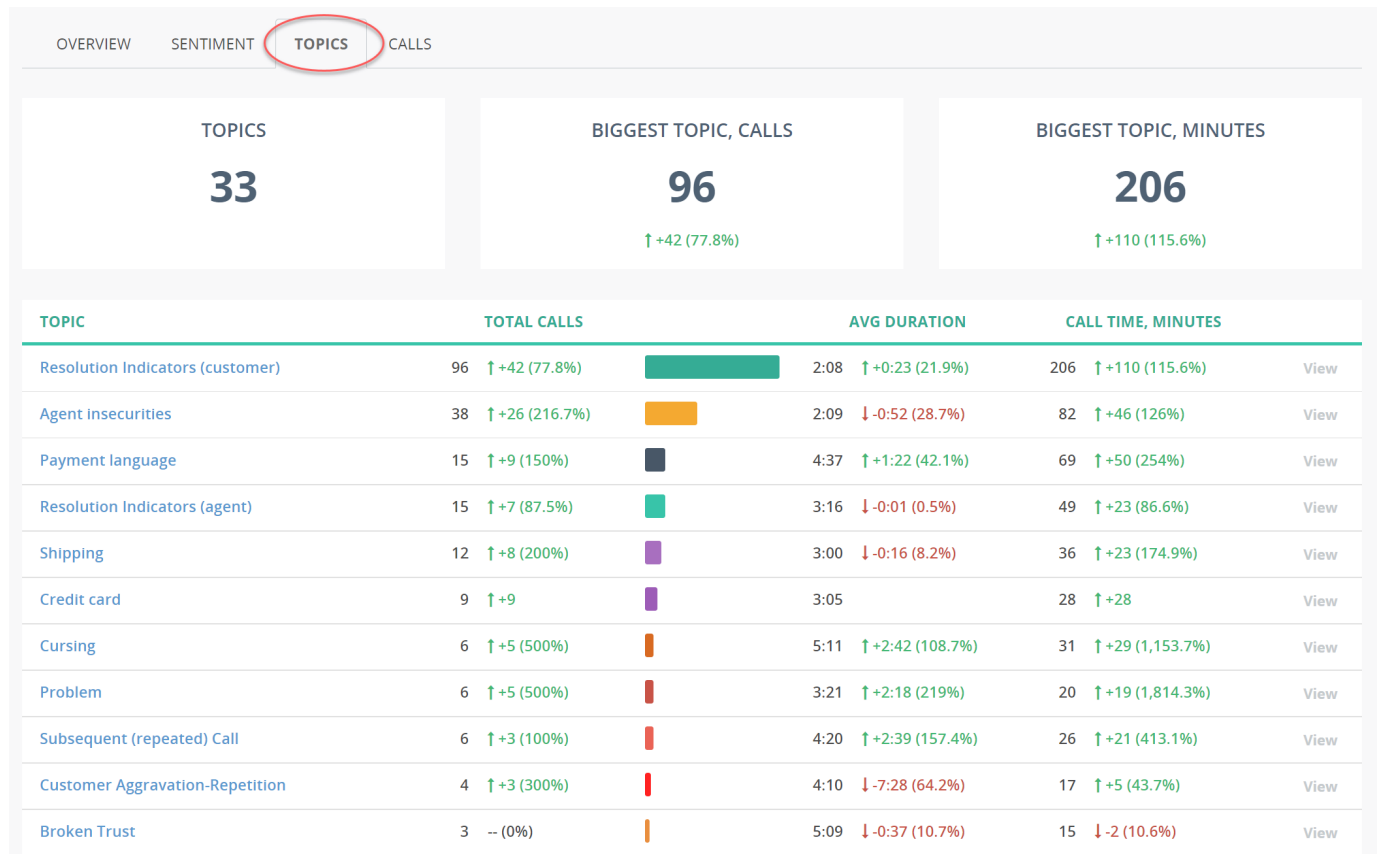
By navigating to the **Calls** tab, you can view the sentiment score in the corresponding column of the calls list.

OVERVIEW SENTIMENT TOPICS CALLS							
<div> No auto-refresh Tags Download Export Share Delete More </div> <div>60-80 of 201</div>							
	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TOPICS	SENTIMENT SCORE
<input type="checkbox"/>	Oct 16, 2022	12:25 AM	0:15	280729871226	277316596 (Jesse Thornton)		☺ 38
<input type="checkbox"/>	Oct 15, 2022	10:49 PM	0:14	593454062269	928459268 (Kevin Johnson)	Resolution Indic... 1	☺ 55
<input type="checkbox"/>	Oct 15, 2022	9:04 PM	5:23	151012704193	649268264 (Steven Mann)	Broken Trust 2 Resolution Indic... 2	☹ -18
<input type="checkbox"/>	Oct 15, 2022	8:51 PM	2:38	864852586041	141135652 (Linda Miller)	Resolution Indic... 3	☺ 27
<input type="checkbox"/>	Oct 15, 2022	6:45 PM	4:13	3360900690	638899152 (Matthew Scott)	Resolution Indic... 4 Agent insecuriti... 1 Subsequent (repe... 1	☺ 11
<input type="checkbox"/>	Oct 15, 2022	6:28 PM	0:27	502501311263	382247525 (Jim Diaz)	Resolution Indic... 1	☹ -39
<input type="checkbox"/>	Oct 15, 2022	5:17 PM	10:16	454410584199	784368854 (Timothy Morton)	Resolution Indic... 3 Resolution Indic... 1	☹ -15

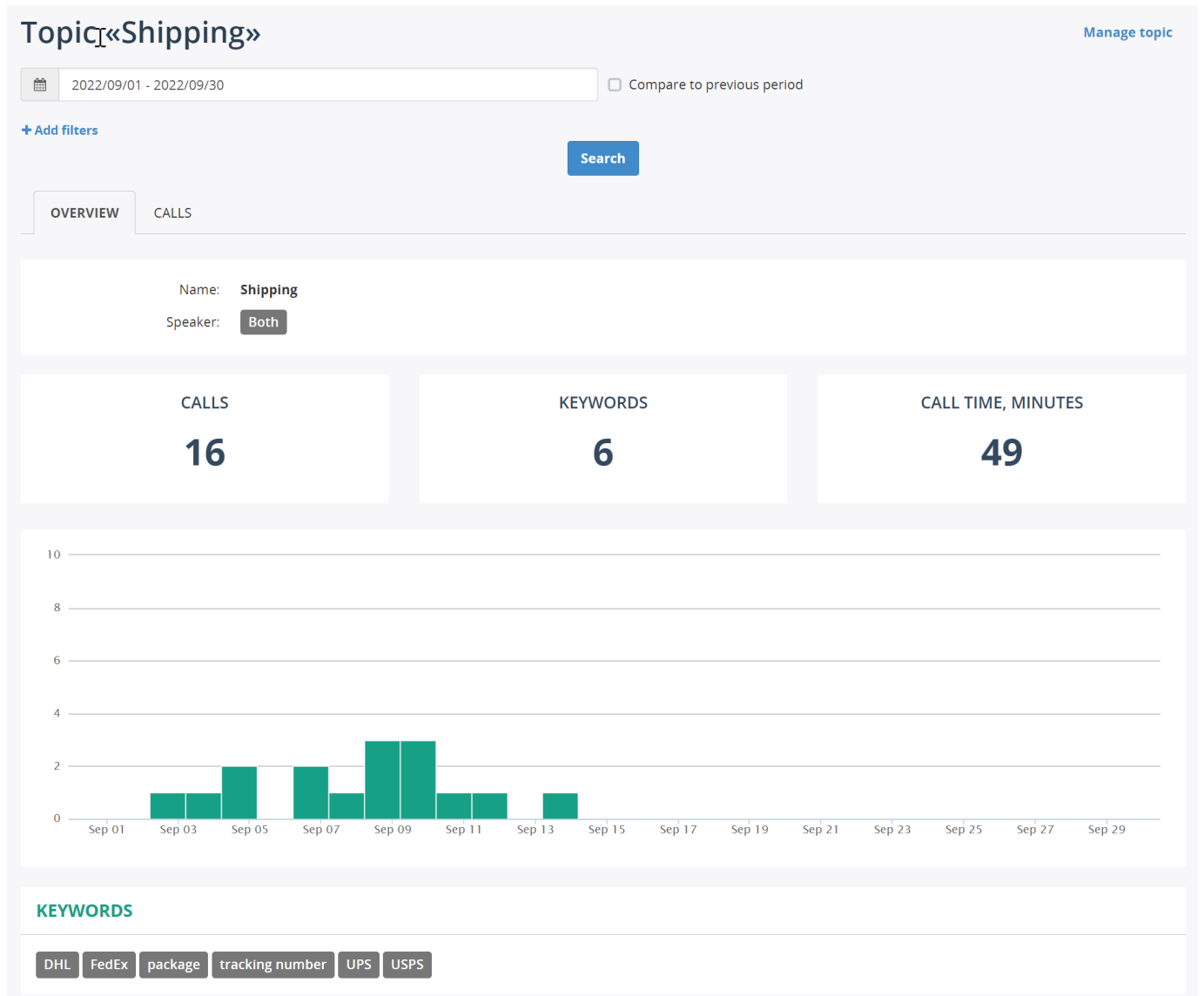
3.2.3 Topic Metrics

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.



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.



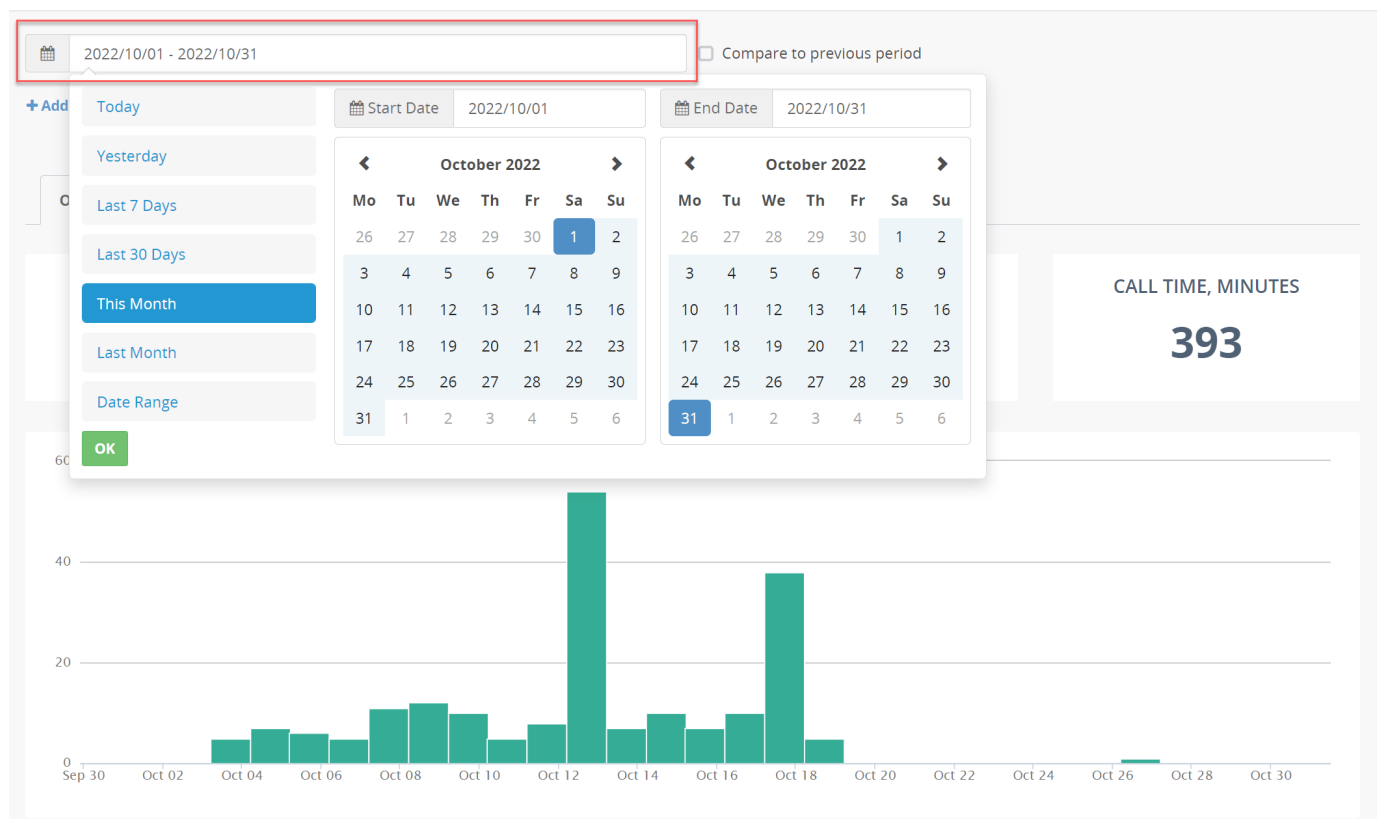
3.3 Filter Data in Dashboard

3.3.1 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:

Wide view 

Dashboard




3.3.2 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).

Wide view 

Dashboard

 2022/10/11 - 2022/10/22

☒ Compare to previous period

Call - Direction

Is

Inbound

×

×

Call - Duration

Greater than

0:15

×

[+ Add filters](#)

Search

OVERVIEW

SENTIMENT

TOPICS

CALLS

CALLS

122

↑ +69 (130.2%)

GROUPS

4

USERS

132

CALL TIME, MINUTES

264

↑ +176 (201.9%)

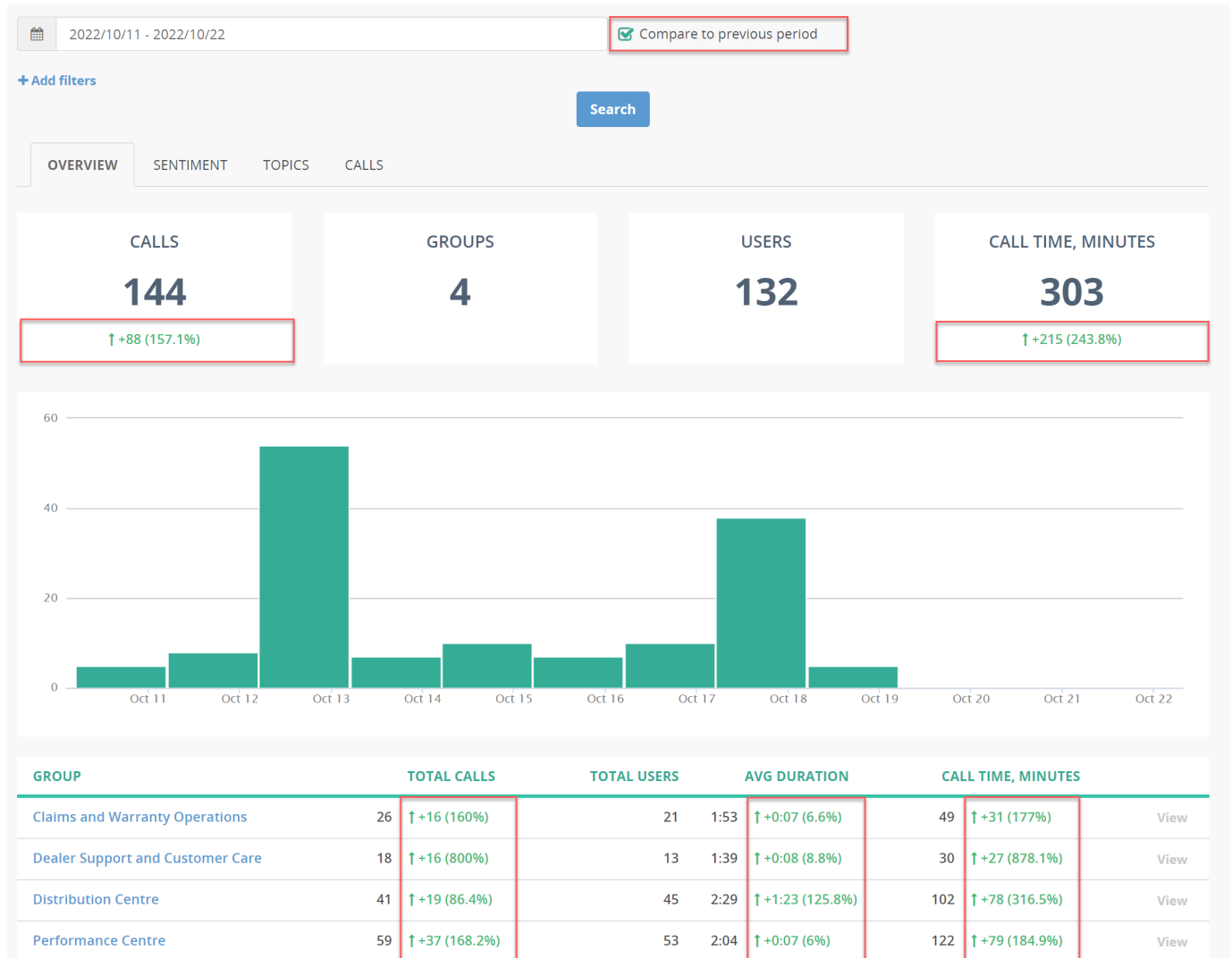
Click **Add filters** to add filtering criteria to the input data.

3.4 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).

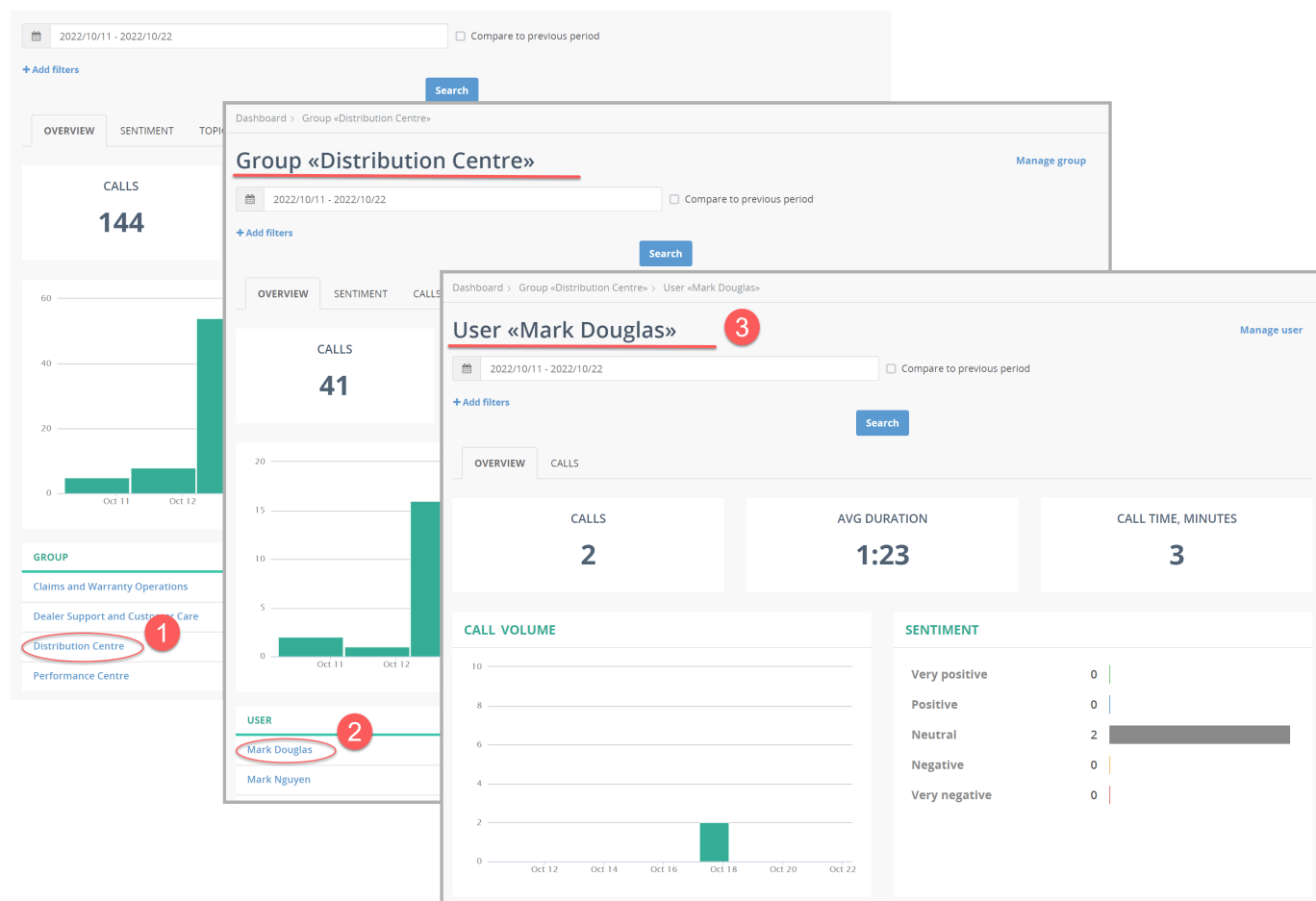
A magnitude of increase or decrease is shown in both absolute and relative (percentage) measures.



3.5 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.



3.5.1 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.

What are breadcrumbs?

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 in the Breadcrumbs.

Wide view 

Dashboard

[Dashboard](#) > [Group «Claims and Warranty Operations»](#) > [User «Amy Peters»](#)

User «Amy Peters»

[Manage user](#) 2022/10/11 - 2022/10/22☒ Compare to previous period[+ Add filters](#)[Search](#)

OVERVIEW

CALLS

CALLS

1

-- (0%)

AVG DURATION

1:19

↓ -3:19 (71.6%)

CALL TIME, MINUTES

1

↓ -3 (71.6%)

4. Recordings

4.1 Recordings overview

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

Wide view 

Recordings

ALL CALLS

ACTIVE CALLS

MY CALLS

BY USER

BY CLIENT

UNASSIGNED CALLS

BY TAG

ADVANCED SEARCH

Select a Date Range

Select a User or Group

Search for text

Search

No auto-refresh

Tags

Download

Export

Email

Delete

More

0-20 of many

<div></div>	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
<div></div>	Brian Olson	Today	11:53 AM	0:49	593114340	212277933	<div></div>
<div></div>	Brian Olson	Today	11:51 AM	1:50	560754402	385630388	<div></div>
<div></div>	Brian Olson	Today	11:49 AM	1:51	205564237	985014613	<div></div>
<div></div>	Brian Olson	Today	11:48 AM	0:55	215569134	196374262	<div></div>
<div></div>	Brian Olson	Today	11:48 AM	0:28	197840975	285636461	<div></div>

Call Recording 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 the in-progress call recordings.
- **My calls** - Displays call recordings associated with the currently logged-in user.
- **By user** - Displays call recordings by a group or user.
- **By client** - Displays call recordings by a client. For details, see [Filter calls by a client](#).
- **Unassigned calls** - Displays call recordings that are not assigned to any user; this view is visible to administrators only.
- **By tag** - Displays call recordings by a tag. For details, see [Categorize call recordings](#).
- **Advanced search** - Provides access to an advanced search form. For details, see [Advanced search](#).

Info

Each view may have a different set of visible columns, which are configured by an administrator.

4.2 Playback recordings

4.2.1 Overview

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

4.2.2 Inline basic media player on the Recordings page

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.

i Info

To download files, your user account must have the Download permission.

Recordings

Wide view

The screenshot shows the 'Recordings' page interface. At the top, there are tabs for 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY USER', 'BY CLIENT', 'UNASSIGNED CALLS', 'BY TAG', and 'ADVANCED SEARCH'. Below the tabs are search filters: 'Select a Date Range', 'Select a User or Group', and 'Search for text'. A 'Search' button is on the right. Below the filters are action buttons: 'No auto-refresh', 'Tags', 'Download', 'Export', 'Share', 'Delete', and 'More'. A pagination bar shows '0-20 of many' with navigation arrows.

<input type="checkbox"/>	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	SHARED BY	SHARED WITH
<input type="checkbox"/>	Brian Olson	Yesterday	12:42 PM	0:28	158684077	159992013		
<input type="checkbox"/>	Brian Olson	Yesterday	12:42 PM	0:38	908282866	445800501		

The second row is expanded to show an inline media player. The details shown are:

- Group:** Group McConnell-Rodriguez
- Caller Party:** 908282866 [assign to client](#)
- Called Party:** 445800501 [Brian Olson](#)
- Date/Time:** Yesterday 12:42:04 PM
- Duration:** 0:38

The media player includes a progress bar with a play button, a '00:13' time indicator, and a '00:38' total duration. A 'Save audio file' button is located to the right of the progress bar. Below the media player are 'More details' and 'Evaluate' buttons. At the bottom, there is a 'Notes' section with an 'Add note' link.

4.2.3 Advanced media player on the Call Details page

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

☐ Brian Olson Yesterday 12:42 PM 0:38 908282866 445800501 Open in new window

Group: [Group McConnell-Rodriguez](#)
Caller Party: 908282866 [assign to client](#)
Called Party: 445800501 [Brian Olson](#)
Date/Time: Yesterday 12:42:04 PM
Duration: 0:38

00:13 00:38 [Save audio file](#)

[More details](#) [Evaluate](#)

Notes: [Add note](#)

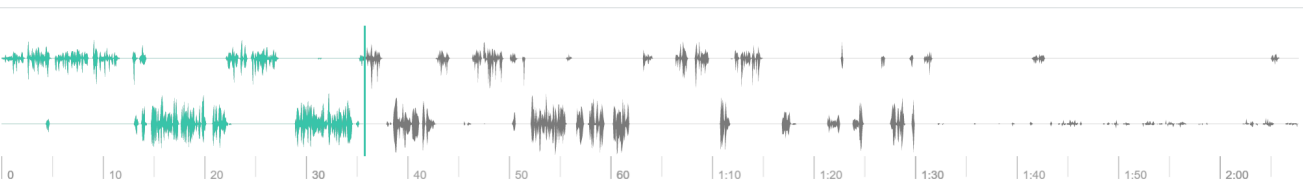
An audio waveform in the Advanced Media Player, which allows you to visually see the moments of silence or overtalk in a conversation.

Call 667499271343 -> 402068775
Mark as confidential
Delete Call

INTERACTION **CALL [1]** CALL [2] CALL [3]

Edit Tags

MEDIA PLAYER Wide view



0 10 20 30 40 50 60 1:10 1:20 1:30 1:40 1:50 2:00

Pause x1 x1.2 x1.5 x1.7 x2 [Save audio file](#)

CALL DETAILS VOICE ANALYTICS AGENT EVALUATION SHARED ACCESS NOTES

INFO	CALLER PARTY	CALLED PARTY
Tenant: Acme	Client: Unknown client (assign)	User: Jessica Warren
Date: Oct 18, 2022	Phone Number: 667499271343	Group: Performance Centre
Connect Time: 6:58:38 PM	Phone Name:	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 click **Save audio file** button.

Info

To download files, your user account must have the Download permission.

4.3 Add notes to call recordings

4.3.1 Overview

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.

4.3.2 Add notes from the Recordings page

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

The screenshot shows the inline call details view for a call by Brian Olson on Nov 9, 2021 at 12:42 PM, lasting 0:28. The call details include the caller party (158684077) and called party (159992013). The call is tagged as 'Important'. Below the call details, there is a section for notes. A note from Alexander, dated Yesterday, 11:04 AM, is displayed: 'This is a sales lead. Follow up in 2 weeks.' At the bottom of the notes section, the 'Add note' button is highlighted with a red box.

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

The screenshot shows the same inline call details view, but with a new note being added. The note text 'The email has been sent to the user.' is entered into the text area. The 'Save' button is highlighted with a red box, indicating the next step is to click it.

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**.

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

Notes:

- Alexander** Yesterday, 11:04 AM Pin to top Delete
This is a sales lead. Follow up in 2 weeks.
- Alexander** Today, 3:19 PM Pin to top Delete
The email has been sent to the user.

[Add note](#)

4.3.3 Add notes from the Call Details page

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

[Play](#) [x1](#) [x1.2](#) [x1.5](#) [x1.7](#) [x2](#) [Save audio file](#)

[CALL DETAILS](#) [VOICE ANALYTICS](#) [AGENT EVALUATION](#) [SHARED ACCESS](#) **NOTES 1**

NOTES

- admin** Today, 2:59 PM Pin to top Delete
customer requested a refund because the package was damaged

[Add note](#)

4.3.4 Search in notes

You can use a Quick Search as well as Advanced Search to find 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.

Recordings

Wide view

License expires in 322 days

ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG ADVANCED SEARCH

2022/09/29 - 2022/10/28 Select a User or Group package was damaged Search

No auto-refresh Tags Download Export Share Delete More 0-1 of 1

USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
Pamela Smith	Oct 19, 2022	1:02 AM	4:33	619495167947	142701964 (Pamela Smith)	evaluate

Tenant: Acme [Open in new window](#)

Group: Distribution Centre

Caller Party: 619495167947 [assign to client](#)

Called Party: 142701964 [Pamela Smith](#)

Date/Time: Oct 19, 2022 1:02:57 AM

Duration: 4:33

00:00 00:00

Sentiment score: Total: -37 Customer: -51 Agent: -30

Topics: [Problem \(2\)](#) [Agent insecurities](#) [Credit card](#)

Keywords: [problem NOTIN \("no problem" | "n... 2](#) [put on hold](#) ["card number"](#)

[More details](#) [Evaluate](#) [Save audio file](#)

Notes:

admin Today, 2:59 PM [Pin to top](#) [Delete](#)

customer requested a refund because the package was damaged

[Add note](#)

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.

Recordings

Wide view 

License expires in 322 days

ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG **ADVANCED SEARCH**

Manage Saved Searches

Call - Notes Includes package was damaged

+ Add filters

Search Save Search

No auto-refresh Tags Download Export Share Delete More

0-1 of 1

	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TOPICS	SENTIMENT SCORE
<input type="checkbox"/>	Oct 19, 2022	1:02 AM	4:33	619495167947	142701964 (Pamela Smith)	Problem (2) Agent insecuriti... (1) Credit card (1)	-37

Tenant: Acme [Open in new window](#)

Group: Distribution Centre

Caller Party: 619495167947 [assign to client](#)

Called Party: 142701964 [Pamela Smith](#)

Date/Time: Oct 19, 2022 1:02:57 AM

Duration: 4:33

Sentiment score: Total: -37 Customer: -51 Agent: -30

Topics: Problem (2) Agent insecurities Credit card

Keywords: problem NOTIN ("no problem" | "n... (2) put on hold "card number"

More details Evaluate Save audio file

Notes:

admin Today, 2:59 PM [Pin to top](#) [Delete](#)

customer requested a refund because the package was damaged

[Add note](#)

Info

The found text is not highlighted in the Advanced Search results by design.

4.3.5 Alternatives for Call Notes

Adding notes is a powerful tool for users who needs 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 to call notes:

- [Tags](#)
- [Custom fields](#)

4.4 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.

Note

The CSV file contains metadata only. If you need to export audio files as well, then use the [Download recordings](#) option.

To export call details to a CSV file, select the call recordings on the **Recordings** page, and click the **Export** button.

Recordings Wide view

ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG ADVANCED SEARCH

Select a Date Range Select a User or Group Search for text Search

No auto-refresh Tags Download **Export** Email Delete More Selected rows: 2 0-20 of many

	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY
<input checked="" type="checkbox"/>	Brian Olson	Oct 1, 2021	12:17 PM	1:13	867222403	916930507
<input checked="" type="checkbox"/>	Brian Olson	Oct 1, 2021	12:17 PM	0:23	108632557	163218400
<input type="checkbox"/>	Brian Olson	Oct 1, 2021	12:16 PM	1:20	849183393	993111344

In the pop-up dialog, click the link to download the CSV file.

Dashboard Recordings QA Reports Administration

MiaRec

Export 2 calls to Excel (CSV) file

Close

ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG ADVANCED SEARCH

2022/10/31 Select a User or Group Search for text

Tags Download Export Share Delete More Selected rows: 2

4.5 Download audio files

You can download an individual audio file or multiple audio files in bulk.

Info

A download option may be unavailable to you if the Download permission is not granted by your administrator to your user account.

4.5.1 Download the 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.

The screenshot shows a call recording interface for a call with Lori Brennan on Oct 19, 2022, at 6:23 AM. The call duration is 5:18. The interface includes a play button, a progress bar, and a volume icon. Below the audio player, there are sentiment scores (Total: 7, Customer: 15, Agent: -1) and topics (Shipping (14), Resolution Indicators (customer) (6), Redirection Requests (2)). Keywords include FedEx (7), "thank you" OR thanks OR thankful (6), package (5), transfer to (2), and tracking number (2). A red box highlights the "Save audio file" button. The notes section shows a note from John Ortiz dated Sep 22, 2022, at 12:45 AM, stating "Great call!".

4.5.2 Download the 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.

The screenshot shows the Call Details page for call 474235319971 -> 782822261. The page includes buttons for "Mark as confidential" and "Delete Call". Below the call ID, there are buttons for "order cancellation" and "Edit Tags". A "MEDIA PLAYER" section displays a waveform of the audio recording. A red box highlights the "Save audio file" button. The playback controls include a play button, speed options (x1, x1.2, x1.5, x1.7, x2), and the "Save audio file" button.

4.5.3 Download multiple audio files in bulk


On the **Recordings** page, you 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.

Wide view 

Recordings

ALL CALLS
ACTIVE CALLS
MY CALLS
BY USER
BY CLIENT
UNASSIGNED CALLS
BY TAG
ADVANCED SEARCH


Select a Date Range

Select a User or Group

Search for text

Search

No auto-refresh
Tags
Download
Export
Email
Delete
More

Selected rows: 2
0-20 of many

	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY
<input checked="" type="checkbox"/>	Brian Olson	Oct 1, 2021	12:17 PM	1:13	867222403	916930507
<input checked="" type="checkbox"/>	Brian Olson	Oct 1, 2021	12:17 PM	0:23	108632557	163218400
<input type="checkbox"/>	Brian Olson	Oct 1, 2021	12:16 PM	1:20	849183393	993111344

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

Recordings
QA
Reports
Administration

MiaRec

Download 2 calls (9.7 MB zip file)

Close

MY CALLS
BY USER
BY

Select a User or Group

Search for text

4.6 Delete call recordings

The page describes how you can remove call recordings from the Call Recording platform.

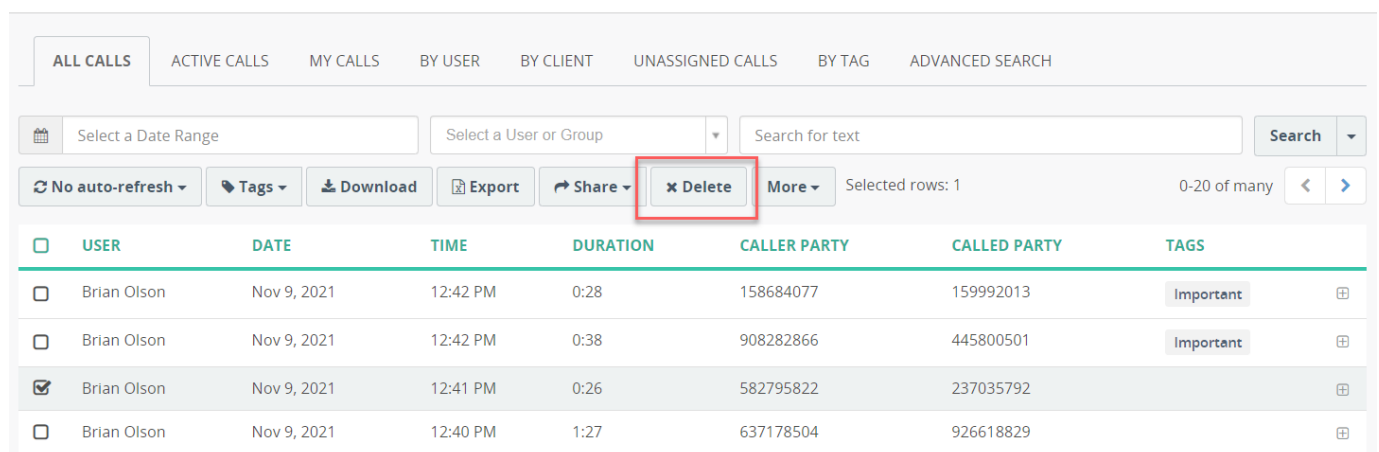
4.6.1 Delete recordings in bulk

To delete a recorded call:

1. Click the **Recordings** tab.
2. Select the call(s) that you want to delete.
3. Click the **Delete** button.

Recordings

Wide view 



The screenshot shows the 'Recordings' page interface. At the top, there are tabs: ALL CALLS, ACTIVE CALLS, MY CALLS, BY USER, BY CLIENT, UNASSIGNED CALLS, BY TAG, and ADVANCED SEARCH. Below the tabs are filters: 'Select a Date Range', 'Select a User or Group', and 'Search for text'. A toolbar contains buttons: No auto-refresh, Tags, Download, Export, Share, Delete (highlighted with a red box), and More. Below the toolbar is a table with columns: USER, DATE, TIME, DURATION, CALLER PARTY, CALLED PARTY, and TAGS. The table contains four rows of call recordings. The third row is selected, and the 'Delete' button is highlighted.

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
Brian Olson	Nov 9, 2021	12:41 PM	0:26	582795822	237035792	
Brian Olson	Nov 9, 2021	12:40 PM	1:27	637178504	926618829	

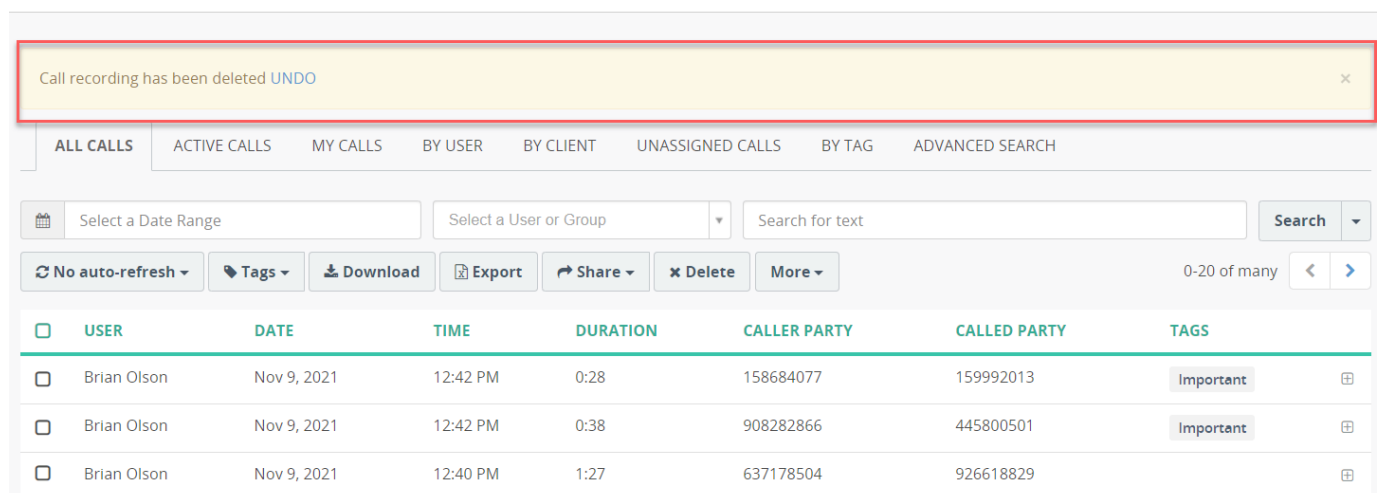
The popup message will appear informing you that the recording has been deleted. Clicking the **Undo** link will restore the call recording.

Info

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

Recordings

Wide view 



The screenshot shows the 'Recordings' page with a confirmation message at the top: 'Call recording has been deleted UNDO'. The message is highlighted with a red box. Below the message is the same interface as the previous screenshot, but the 'Delete' button is no longer highlighted.

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
Brian Olson	Nov 9, 2021	12:40 PM	1:27	637178504	926618829	

4.6.2 Delete individual recording

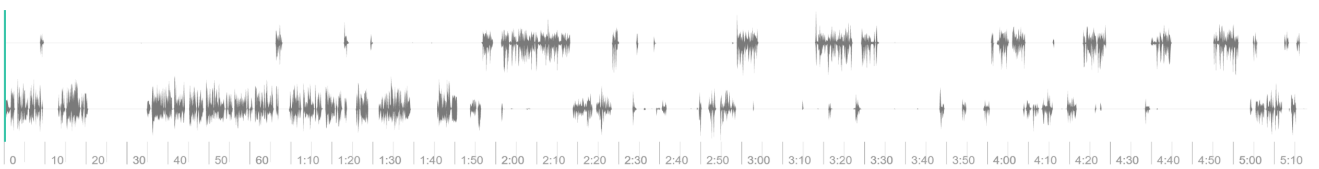
You can delete an individual call recording on the extended **Call Details** page by clicking the **Delete Call** button:

MiaRecDashboardRecordingsQAReportsAdministrationadmin

Call 410953772 -> 8150259180Mark as confidentialDelete Call

order cancellationevaluateEdit Tags

MEDIA PLAYERWide view



Playx1x1.2x1.5x1.7x2Save audio file

4.7 Categorize call recordings

4.7.1 Overview

The tags allow you to easily identify and group associated call recordings in Call Recording. You can create your tags, and then assign these tags to call recordings.

Note

Tagging recordings and creating/managing tags requires setting up appropriate permissions by an administrator.

To 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**. You can assign multiple tags to the same call recording.

The screenshot shows the Call Recording interface. At the top, there are filters for 'Select a Date Range', 'Group Gentry Ltd (group)', and a 'Search for text' field. Below these are action buttons: 'No auto-refresh', 'Tags', 'Download', 'Export', 'Share', 'Delete', and 'More'. A table lists call recordings with columns: USER, CALLER PARTY, CALLED PARTY, and TAGS. The 'Tags' dropdown menu is open, showing a list of tags: aaron, export, Important, michelle, re-export, Refund, Sales, and Sales/Lead. The 'Apply' button is highlighted. The 'TAGS' column in the table shows 'Refund' and 'Important' tags assigned to the first row.

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

The screenshot shows the Recordings interface. At the top, there are tabs: 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY USER', 'BY CLIENT', 'UNASSIGNED CALLS', 'BY TAG', and 'ADVANCED SEARCH'. The 'BY TAG' tab is selected. Below the tabs are filters for 'Select a Date Range', 'Select a User or Group', and a 'Search for text' field. Below these are action buttons: 'No auto-refresh', 'Tags', 'Download', 'Export', 'Share', 'Delete', and 'More'. A table lists call recordings with columns: USER, DATE, TIME, DURATION, CALLER PARTY, CALLED PARTY, and TAGS. The 'TAGS' column shows 'Lead' tags assigned to the first three rows. On the left, there is a 'Manage Tags' section with a list of tags: 'Refund', 'Sales', and 'Lead'. The 'Lead' tag is selected and highlighted.

4.7.2 Create a new tag

1. On the toolbar, click the **Tags** button.

2. Select **New Tag**.

The screenshot shows the 'ALL CALLS' tab in the MiaRec interface. A dropdown menu is open over the 'Tags' button, with 'New Tag' highlighted. The background shows a table of calls with columns for USER, DURATION, and CALLER PARTY.

USER	DURATION	CALLER PARTY
Alexis E	1:23	605824224
Lori Brennan	5:18	410953772 (Lori Brennan)
Amy H	0:53	663889251060
Travis M	0:58	810893981518
Pamela	4:33	619495167947
Mr. John	0:16	474235319971

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.

Then click **Save**.

The screenshot shows the 'Add Tag' form in the MiaRec interface. The form has fields for Name, Parent tag, and Visibility. The 'Name' field contains 'Sales', the 'Parent tag' dropdown shows 'order cancellation', and 'Public' is selected for visibility. A 'Save' button is at the bottom.

4.7.3 Manage existing tags

1. On the toolbar, click the **Tags** button.

2. Select **Manage Tags**.

ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG ADVANCED SEARCH

2022/10/02 - 2022/10/31 Select a User or Group Search for

No auto-refresh Tags Download Export Share Delete More

USER	DURATION	CALLER PARTY
Alexis E	1:23	605824224
Lori Br	5:18	410953772 (Lori Brennan)
Amy Ha	0:53	663889251060
Travis M	0:58	810893981518
Pamela	4:33	619495167947
Mr. Joh	0:16	474235319971

evaluate
order cancellation
sample
sample/tag1
New Tag
Manage Tags
Cancel

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

MiaRec 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

4.8 Mark recordings as confidential

4.8.1 Overview

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 of these 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.

4.8.2 Manually mark calls as confidential

Note

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

To manually mark call recordings as confidential:

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

Wide view 

Recordings

ALL CALLS							
ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG ADVANCED SEARCH							
Select a Date Range		Select a User or Group		Search for text			Search
No auto-refresh	Tags	Download	Export	Share	Delete	More	Selected rows: 2 0-20 of many
USER	DATE	TIME	DURATION	CALL ID	CALLER	CALLLED PARTY	TAGS
<input checked="" type="checkbox"/> Brian Olson	Nov 9, 2021	12:42 PM	0:28	158684077		159992013	Important
<input checked="" type="checkbox"/> Brian Olson	Nov 9, 2021	12:42 PM	0:38	908282866		445800501	Important
<input type="checkbox"/> Brian Olson	Nov 9, 2021	12:40 PM	1:27	637178504		926618829	

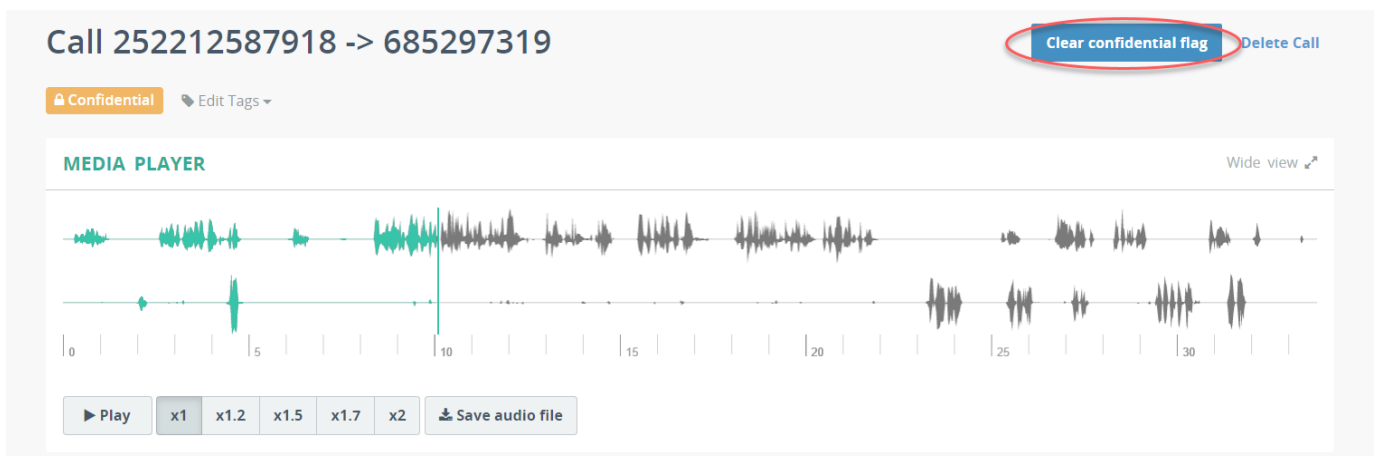
Alternatively, you can click the **Mark as confidential** button from an extended call details view.



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



To reset a call to non-confidential, click **Clear confidential flag**.



4.8.3 Automatically mark calls as confidential



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**. Then, **Save** the changes.

RECORDING SETTINGS

Record ☒ Always ☐ On-demand ☐ Never ☐ Default

Recording direction ☒ Inbound ☒ Outbound

Extension  
 

[+ Add Extension](#)

Confidential calls ☒ Automatically mark all calls of this user as confidential

**Screen Recording
Username**

Supported formats: NETBIOS\login, DOMAIN\login, login

4.9 View multi-segment calls

4.9.1 Overview

Call Recording groups all related calls 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, then a corresponding badge 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.

1/3 Joseph Williams Oct 18, 2022 6:51 PM 0:13 510021763590 922388231 (Joseph Williams)

Tenant: Acme [Open in new window](#)

Group: Performance Centre

Caller Party: 510021763590 [assign to client](#)

Called Party: 922388231 [Joseph Williams](#)

Date/Time: Oct 18, 2022 6:51:41 PM

Duration: 0:13

00:00 00:00

Sentiment score: Total: 😊 25 Customer: 😊 3 Agent: 😊 26

[More details](#) [Evaluate](#) [Save audio file](#)

Notes: [Add note](#)

ALL CALLS IN THIS INTERACTION

TIME	DURATION	CALLER -> CALLED	TIMELINE
6:51 PM	0:13	510021763590 -> 922388231 (Joseph Williams)	View
6:52 PM	0:35	922388231 (Joseph Williams) -> 4240	View
6:53 PM	3:20	510021763590 -> 922388231 (Joseph Williams)	View

What are related calls?

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 Call Recording 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. Call Recording 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. Call Recording 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

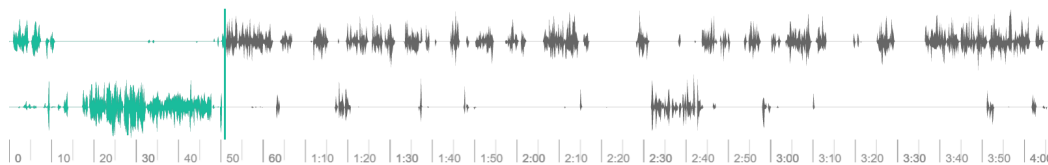
CALL [1]

CALL [2]

CALL [3]

AUDIO

▶ Play



510021763590 -> 922388231

922388231 -> 4240

Silence between call segments has been removed

⬇ Save audio file

4.10 Live monitor calls

4.10.1 Overview

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 Call Recording recording core. It doesn't require the support of live monitoring from the phone system, thus, it works with all the phone platforms that Call Recording supports.

The live monitoring supports two use cases:

- Monitoring of a single call
- Monitoring of consecutive calls of a particular user

In the first case, a monitoring session automatically ends when the monitored call ends.

In the second 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.

4.10.2 Prerequisites

- The monitored calls should be assigned to a user.
- The "Live monitoring" license should be allocated to the monitored user (menu **Administration > User Management > Users**).
- 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 WebRTC.

Note

The live monitoring license must be allocated to the user who is being monitored, not the user who is monitoring!

4.10.3 Monitor a single call

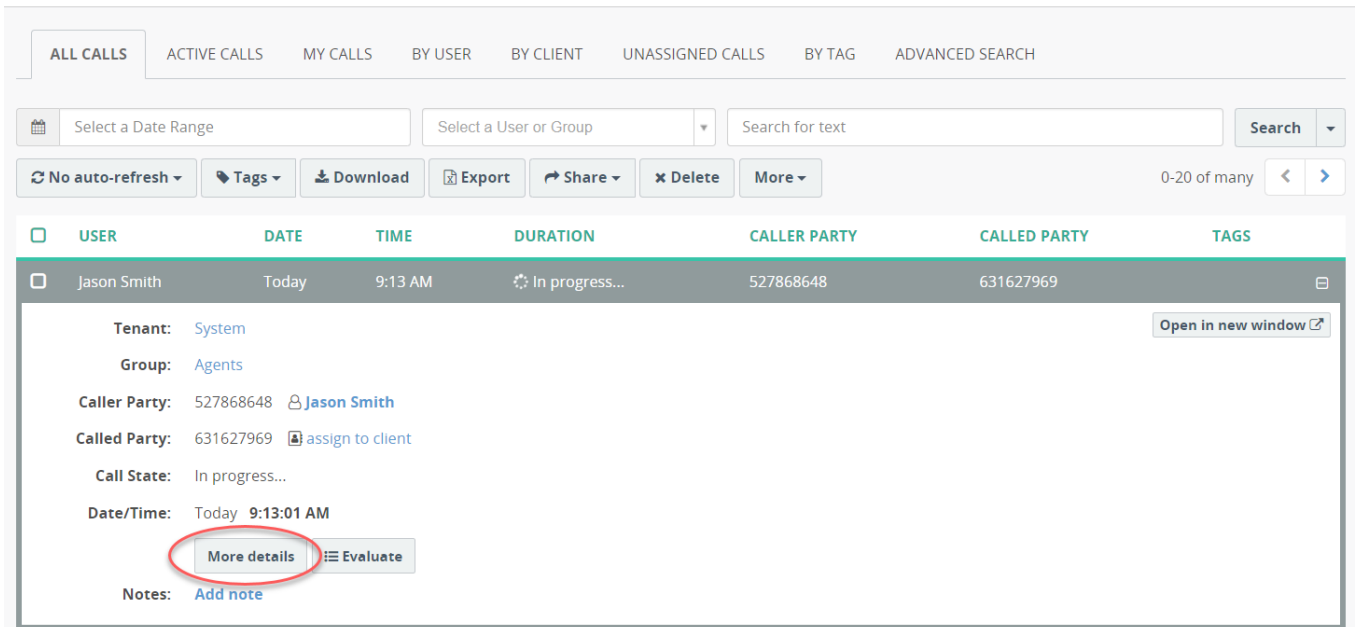
To monitor an active call:

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

Recordings

Wide view 

License expires in 360 days



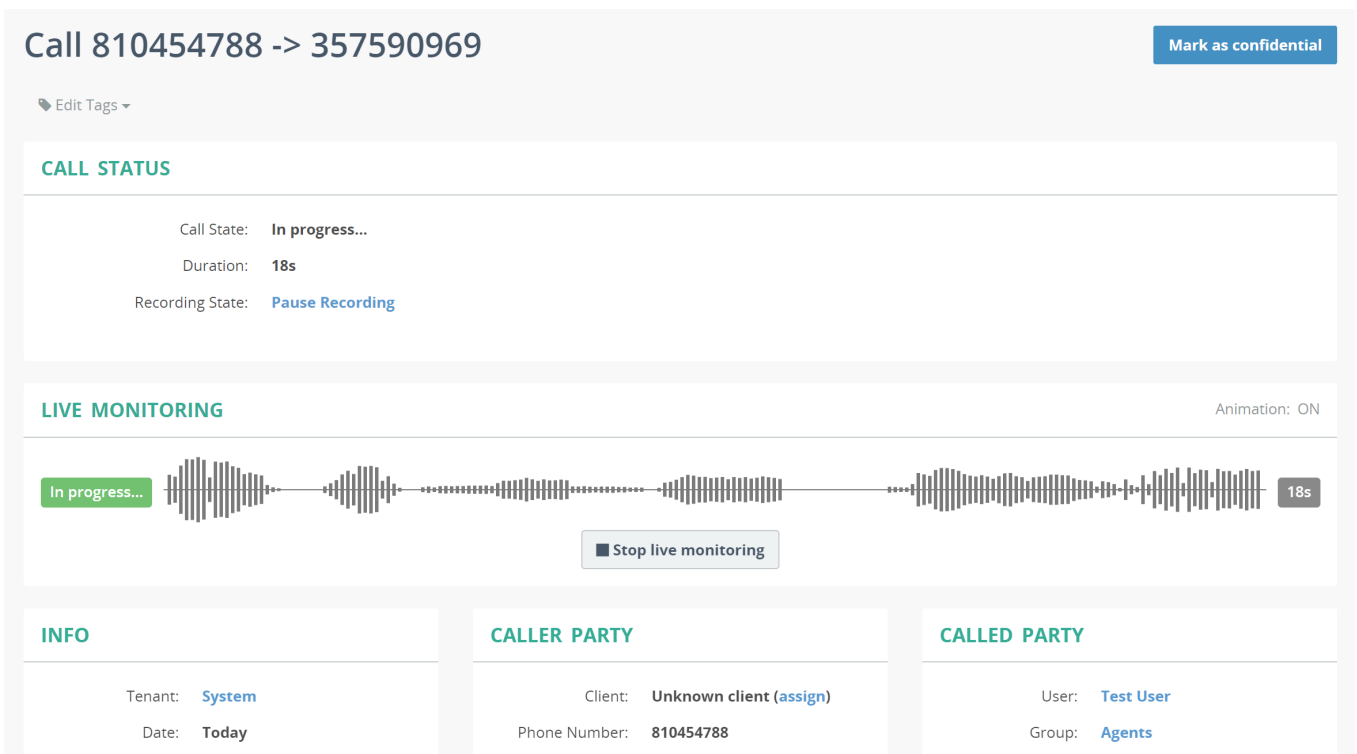
The screenshot shows the 'Recordings' interface with a table of calls. The first call is by Jason Smith, dated Today at 9:13 AM, with a duration of 'In progress...'. The 'More details' button for this call is circled in red. The interface includes filters for 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY USER', 'BY CLIENT', 'UNASSIGNED CALLS', 'BY TAG', and 'ADVANCED SEARCH'. There are also search filters for date range, user/group, and text, along with buttons for 'No auto-refresh', 'Tags', 'Download', 'Export', 'Share', 'Delete', and 'More'.

USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
Jason Smith	Today	9:13 AM	In progress...	527868648	631627969	

Call details for Jason Smith:

- Tenant: System
- Group: Agents
- Caller Party: 527868648 [Jason Smith](#)
- Called Party: 631627969 [assign to client](#)
- Call State: In progress...
- Date/Time: Today 9:13:01 AM
- Buttons: **More details** (circled), 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.



The screenshot shows the 'Call 810454788 -> 357590969' page. It includes a 'Mark as confidential' button and an 'Edit Tags' dropdown. The 'CALL STATUS' section shows 'Call State: In progress...', 'Duration: 18s', and 'Recording State: [Pause Recording](#)'. The 'LIVE MONITORING' section features an audio waveform and a 'Stop live monitoring' button. The 'INFO' section shows 'Tenant: System' and 'Date: Today'. The 'CALLER PARTY' section shows 'Client: Unknown client (assign)' and 'Phone Number: 810454788'. The 'CALLED PARTY' section shows 'User: Test User' and 'Group: Agents'.

Call 810454788 -> 357590969

Mark as confidential

Edit Tags


CALL STATUS

Call State: In progress...

Duration: 18s

Recording State: [Pause Recording](#)

LIVE MONITORING Animation: ON

In progress...  18s

Stop live monitoring

INFO

Tenant: System

Date: Today

CALLER PARTY

Client: Unknown client (assign)

Phone Number: 810454788

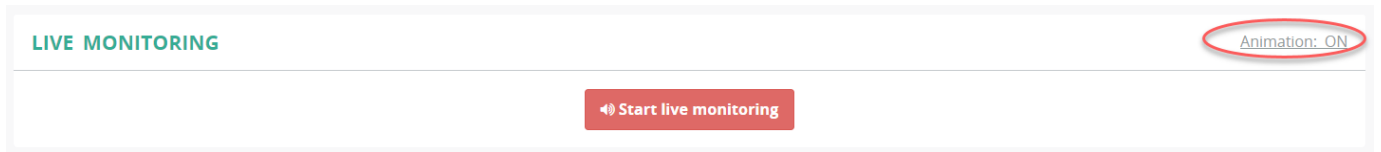
CALLED PARTY

User: Test User

Group: Agents

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

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















4.10.4 Monitor consecutive calls

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.

Recordings

Wide view 
License expires in 360 days

ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG ADVANCED SEARCH							
	Select a Date Range			Select a User or Group		Search for text	
	No auto-refresh		Tags		Download		More
	USER	DATE	TIME		CALLER PARTY	CALLED PARTY	TAGS
	Jason Smith	Today	9:43 AM	In progress...	289324099	273109828	
	Jason Smith	Today	9:37 AM	6:00	300119006	334044722	
	Jason Smith	Today	9:31 AM	6:00	736725534	322988703	

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

 Jason Smith Today 9:37 AM 6:00 300119006 334044722 

Tenant: [System](#)




Group: [Agents](#)

Caller Party: 300119006 [Jason Smith](#)

Called Party: 334044722 [assign to client](#)

Date/Time: Today 9:37:03 AM

Duration: 6:00

 00:00  00:00  Save audio file

[More details](#) [Evaluate](#)

Notes: [Add note](#)

3. On the **User** page, click **Start continuous monitoring** to monitor all calls of this user consequently. Note, clicking **Monitor this call** will monitor only the currently active call.

User «Jason Smith»

Wide view 
License expires in 360 days

INFO

User Name: **Jason Smith** [\(View profile\)](#)

Tenant: [System](#)

Group: [Agents](#)

Role: [Agent](#)

Recording Settings: [always](#)

Extension(s): [User](#)

Web login:

ACTIVE CALL


Call: [View](#)

Started At: **May 09, 2022 12:55 pm**

Duration: **4:08**


From: **764997885**

To: **583239438**

 Monitor this call

LIVE MONITORING

Animation: ON

 Start continuous monitoring

**Note**

If a user has multiple active calls at the same time, live monitoring will always use the most recent one.

4.11 Evaluate call recordings

4.11.1 Overview

The Agent Evaluation module 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.

4.11.2 Evaluate an agent

To evaluate an agent:

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

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

Select Evaluation Form

Evaluation form *

Sample form

Agent *

Brian Olson

Continue

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

Add Evaluation Report

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

4.12 Check the integrity of an audio file

The application watermarks every file to ensure data integrity.

To verify the data integrity of an audio file, open the call recording in the extended call details page and click **View** under the **Info** section.

The screenshot shows a 'MEDIA PLAYER' interface at the top with a waveform and a timeline from 0 to 4 minutes. Below the player are controls: a 'Play' button, volume sliders (x1, x1.2, x1.5, x1.7, x2), and a 'Save audio file' button. Below the player is a 'CALL DETAILS' section with tabs for 'CALL DETAILS', 'VOICE ANALYTICS', 'AGENT EVALUATION', 'SHARED ACCESS', and 'NOTES 1'. The 'CALL DETAILS' tab is active, showing three columns: 'INFO', 'CALLER PARTY', and 'CALLED PARTY'. In the 'INFO' column, the 'Watermark' field has a 'View' link circled in red. The 'CALLER PARTY' column shows client information, and the 'CALLED PARTY' column shows user and phone information.

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.

The screenshot shows a 'Watermark Verification' pop-up window. It displays the 'Original File Checksum (SHA1)' and 'Current File Checksum (SHA1)' as 'ce35eec7957e49be244d256f029d85dde6b76278'. The 'File Integrity Status' is 'Valid', indicated by a green button. A 'Close' button is at the bottom right.

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

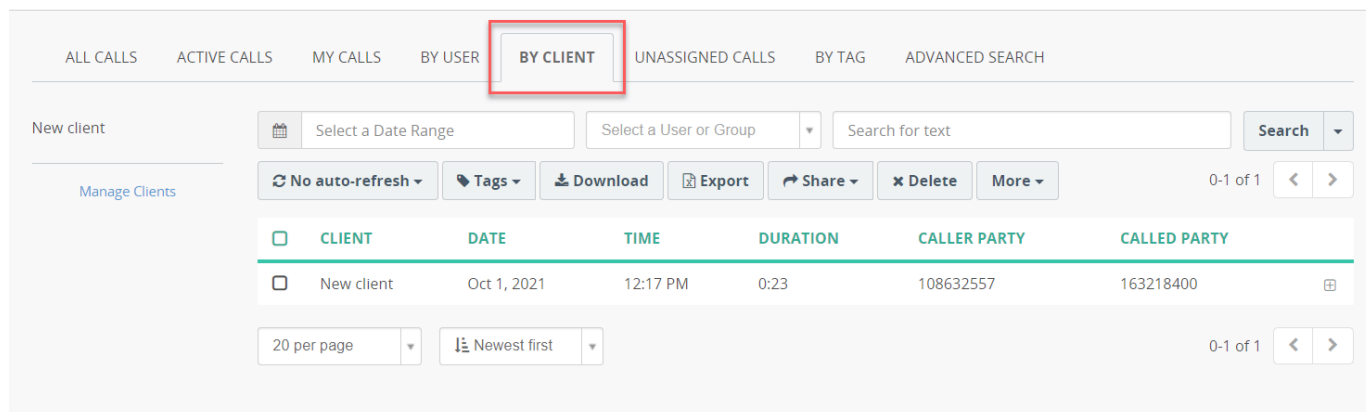
4.13 Filter by client

4.13.1 Overview

By navigating to the **By Client** tab, you can quickly filter call recordings associated with specific clients. You can register new clients in Call Recording, and then assign call recordings to these clients.

Wide view 

Recordings

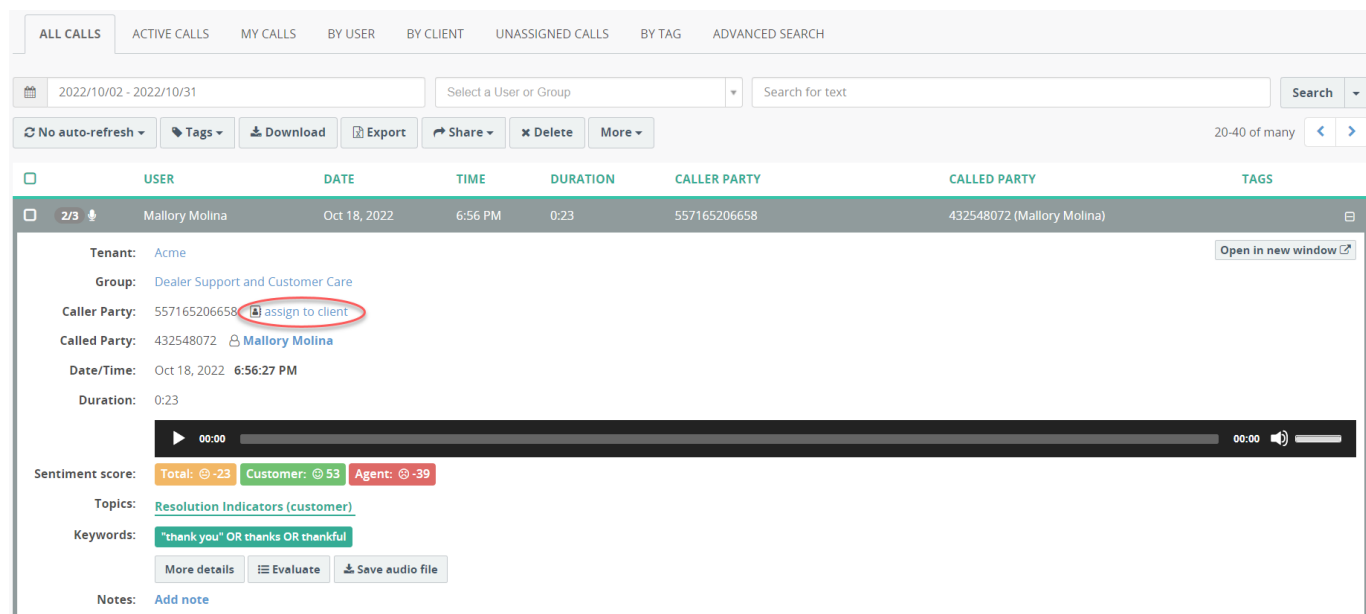


The screenshot shows the 'Recordings' interface. At the top, there are tabs: ALL CALLS, ACTIVE CALLS, MY CALLS, BY USER, **BY CLIENT** (highlighted with a red box), UNASSIGNED CALLS, BY TAG, and ADVANCED SEARCH. Below the tabs, there's a 'New client' link and a 'Manage Clients' link. A search bar is present with 'Select a Date Range', 'Select a User or Group', and 'Search for text' fields, followed by a 'Search' button. Below the search bar, there are action buttons: No auto-refresh, Tags, Download, Export, Share, Delete, and More. A table displays call recordings with columns: CLIENT, DATE, TIME, DURATION, CALLER PARTY, and CALLED PARTY. The first row shows a call for 'New client' on 'Oct 1, 2021' at '12:17 PM' with a duration of '0:23'. At the bottom, there are pagination controls showing '20 per page' and 'Newest first'.

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

4.13.2 Manually assign a call to the 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.



The screenshot shows the 'extended call details' page. At the top, there are tabs: ALL CALLS, ACTIVE CALLS, MY CALLS, BY USER, BY CLIENT, UNASSIGNED CALLS, BY TAG, and ADVANCED SEARCH. Below the tabs, there's a search bar with '2022/10/02 - 2022/10/31' and 'Select a User or Group' fields, followed by a 'Search' button. Below the search bar, there are action buttons: No auto-refresh, Tags, Download, Export, Share, Delete, and More. A table displays call recordings with columns: USER, DATE, TIME, DURATION, CALLER PARTY, CALLED PARTY, and TAGS. The first row shows a call for 'Mallory Molina' on 'Oct 18, 2022' at '6:56 PM' with a duration of '0:23'. Below the table, there's a detailed view of the call. It includes fields for Tenant (Acme), Group (Dealer Support and Customer Care), Caller Party (557165206658), and Called Party (432548072). The 'assign to client' link is highlighted with a red circle. Below these fields, there's a 'Date/Time' field (Oct 18, 2022 6:56:27 PM) and a 'Duration' field (0:23). A video player shows the call recording. Below the video player, there's a 'Sentiment score' section with 'Total: -23', 'Customer: 53', and 'Agent: -39'. There are also 'Topics' (Resolution Indicators (customer)) and 'Keywords' ('thank you' OR thanks OR thankful). At the bottom, there are buttons for 'More details', 'Evaluate', and 'Save audio file', and a 'Notes' section with an 'Add note' link.

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

MEDIA PLAYER Wide view

0 5 10 15 20

► Play x1 x1.2 x1.5 x1.7 x2 Save audio file

CALL DETAILS VOICE ANALYTICS AGENT EVALUATION SHARED ACCESS NOTES

INFO

Tenant: **Acme**

Date: **Oct 18, 2022**

Connect Time: **6:56:27 PM**

Disconnect Time: **6:56:50 PM**

Duration: **0:23**

Watermark: **View**

CALLER PARTY

Client: **Unknown client** **(assign)**

Phone Number: **557165206658**

Phone Name:

Phone Id:

IP address:

CALLED PARTY

User: **Mallory Molina**

Group: **Dealer Support and Customer Care**

Phone Number: **432548072**

Phone Name: **Mallory Molina**

Phone Id:

IP address:

4.13.3 Automatically assign calls to the client

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 a client.

4.13.4 Create a new client

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

Recordings Wide view

ALL CALLS ACTIVE CALLS MY CALLS BY USER **BY CLIENT** UNASSIGNED CALLS BY TAG ADVANCED SEARCH

New client

Manage Clients

Select a Date Range Select a User or Group Search for text Search

No auto-refresh Tags Download Export Email Delete More 0-1 of 1

CLIENT	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY
<input type="checkbox"/> New client	Oct 1, 2021	12:17 PM	0:23	108632557	163218400

20 per page 0-1 of 1

2. Click **Add**.

Clients

0-1 of 1

<input type="checkbox"/>	NAME	CONTACTS	
<input type="checkbox"/>	New client	163218400	View <input type="button" value="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.
- **Name** - provide the contact's name. Optional field.

Add Client

Name *

Contacts / phone numbers *

Phone number

Name (optional)

+ Add contact / phone number

4. Click **Save**.

4.14 Save custom fields

4.14.1 Overview

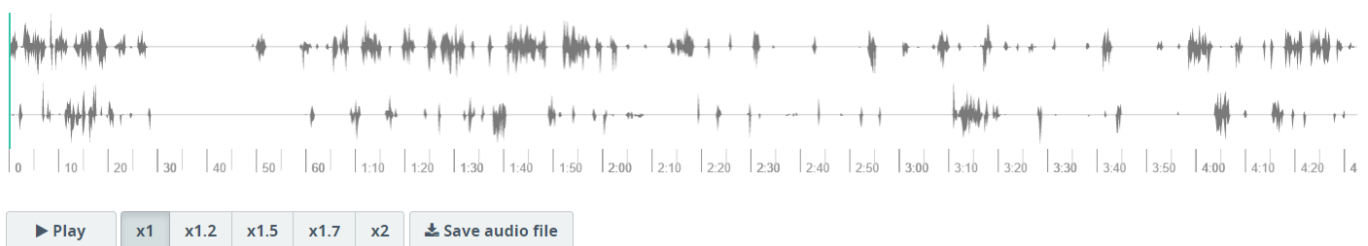
With custom fields, users can store additional attributes with each call recording, like an order number, support ticket number, product name, shipping due date, etc.

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.

MEDIA PLAYER

[Wide view](#)


INFO	CALLER PARTY	CALLED PARTY
Date: Oct 1, 2021 Connect Time: 12:17:52 PM Disconnect Time: 12:19:05 PM Duration: 1:13 Watermark: View Campaign: Campaign A Order #: 10001	Client: Unknown client (assign) Phone Number: 867222403 Phone Name: Live monitor the phone 867222403	User: Brian Olson Group: Group McConnell-Rodriguez Phone Number: 916930507 Phone Name: Live monitor the phone 916930507

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

INFO

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

4.14.2 Searching in custom fields

You may use the Quick Search or the Advanced Search to find the recordings by value in the custom fields.

Recordings

ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG **ADVANCED SEARCH**

🔒 Long calls (>5 min)

🔒 Short calls (<15 sec)

Call - Order #

Equal to

10001

×

[+ Add criteria](#)

[Manage Saved Searches](#)

Search

Save Search

4.15 Share recordings with other users

4.15.1 Overview

Call Recording allows you 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.
- 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.

4.15.2 Share recordings

To share a call recording:

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

The screenshot shows the 'Recordings' tab interface. At the top, there are buttons: 'No auto-refresh', 'Tags', 'Download', 'Export', 'Share' (circled in red), 'Delete', and 'More'. To the right of these buttons, it says 'Selected rows: 2'. Below the buttons is a table with columns: 'USER', 'DATE', 'TIME', 'DURATION', 'CALLER PA', and 'TENANT'. The table contains several rows of call recordings. One row, 'Cassie Jones', is selected with a checkbox. A dropdown menu is open from the 'Share' button, showing a list of users with checkboxes. The user 'Erika Gardner MD (Group Brown, P...' is selected. At the bottom of the dropdown menu, the 'Apply' button is circled in red, and the 'Cancel' button is also visible.

	USER	DATE	TIME	DURATION	CALLER PA	TENANT
<input type="checkbox"/>	Robert Patton	Yesterday	9:59 PM	5:14	551373162	Day-Evans
<input checked="" type="checkbox"/>	Cassie Jones	Yesterday	9:59 PM	4:26	+69568498 Jones)	Gonzalez Ltd
<input type="checkbox"/>	Stephen Morrison	Yesterday	9:59 PM	4:48	814378500	Jackson Group
<input type="checkbox"/>	Jeffrey Perez	Yesterday	9:59 PM	4:21	427336392	Hall, Phillips and Hernandez
<input type="checkbox"/>	Alicia Newman	Yesterday	9:57 PM	6:09	287924408	Day-Evans
<input type="checkbox"/>	Miguel Jones	Yesterday	9:57 PM	4:10	659865946	Hall, Phillips and Hernandez
<input type="checkbox"/>	Megan Perkins	Yesterday	9:57 PM	4:50	185824497	Powell PLC
<input checked="" type="checkbox"/>	Lisa Forbes	Yesterday	9:56 PM	4:49	864043194 Forbes)	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.

ALL CALLS

ACTIVE CALLS

MY CALLS

BY USER

BY CLIENT

UNASSIGNED CALLS

BY TAG

ADVANCED SEARCH

Select a Date Range

Select a User or Group

Search for text

Search

No auto-refresh

Tags

Download

Export

Share

Delete

More

0-20 of many

	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS	TENANT	SHARED BY	SHARED WITH	
<input type="checkbox"/>	Robert Patton	Yesterday	9:59 PM	5:14	5513731621	6718963661 (Robert Patton)		Day-Evans			<div></div>
<input type="checkbox"/>	Cassie Jones	Yesterday	9:59 PM	4:26	+69568498092 (Cassie Jones)	5141533021		Gonzalez Ltd	Nicole Dickerson	Erika Gardner MD	<div></div>
<input type="checkbox"/>	Stephen Morrison	Yesterday	9:59 PM	4:48	8143785009	1627007955 (Stephen Morrison)		Jackson Group			<div></div>
<input type="checkbox"/>	Jeffrey Perez	Yesterday	9:59 PM	4:21	4273363928	18288723611 (Jeffrey Perez)		Hall, Phillips and Hernandez			<div></div>
<input type="checkbox"/>	Alicia Newman	Yesterday	9:57 PM	6:09	2879244088	6718968966 (Alicia Newman)		Day-Evans			<div></div>
<input type="checkbox"/>	Miguel Jones	Yesterday	9:57 PM	4:10	6598659463	18288728872 (Miguel Jones)		Hall, Phillips and Hernandez			<div></div>

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 663889251060 -> 217754290

Mark as confidential

Delete Call

order cancellation

Edit Tags

MEDIA PLAYER

Wide view

Play

x1

x1.2

x1.5

x1.7

x2

Save audio file

CALL DETAILS VOICE ANALYTICS AGENT EVALUATION SHARED ACCESS 2 NOTES

+ Share

x Unshare

SHARED BY	SHARED WITH	SHARING DATE/TIME	
<input type="checkbox"/> admin	Alexis Barber	Oct 29, 2022, 8:45 PM	x Unshare
<input type="checkbox"/> admin	Ann Spencer	Oct 29, 2022, 8:46 PM	x Unshare

Also, on this page, you can share the call recording with other users by clicking **Share**, and stop sharing the recording by clicking **Unshare**.

4.15.3 Unshare recordings

Note

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

To unshare the call recording:

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

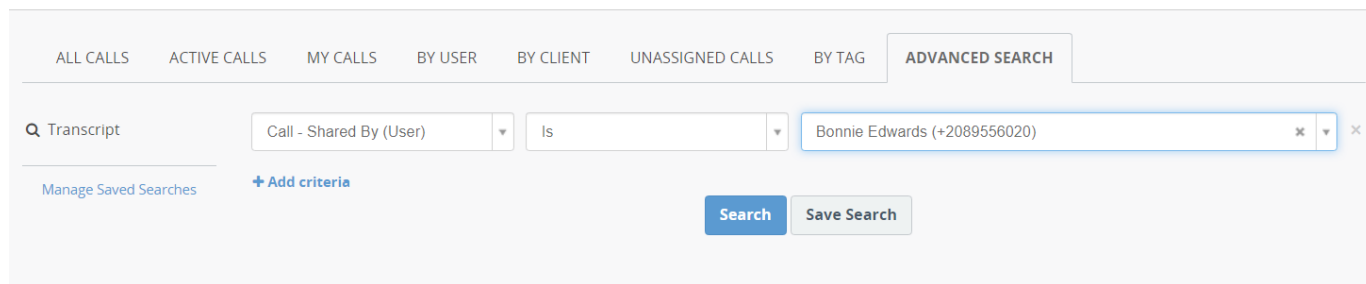
4.15.4 Search shared recordings

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**.

Wide view 

Recordings



ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG **ADVANCED SEARCH**

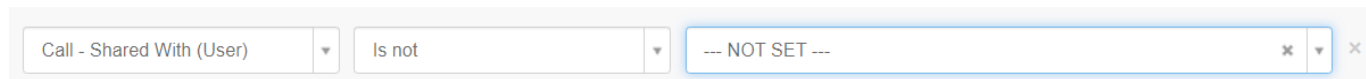
Q Transcript

[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 --**.

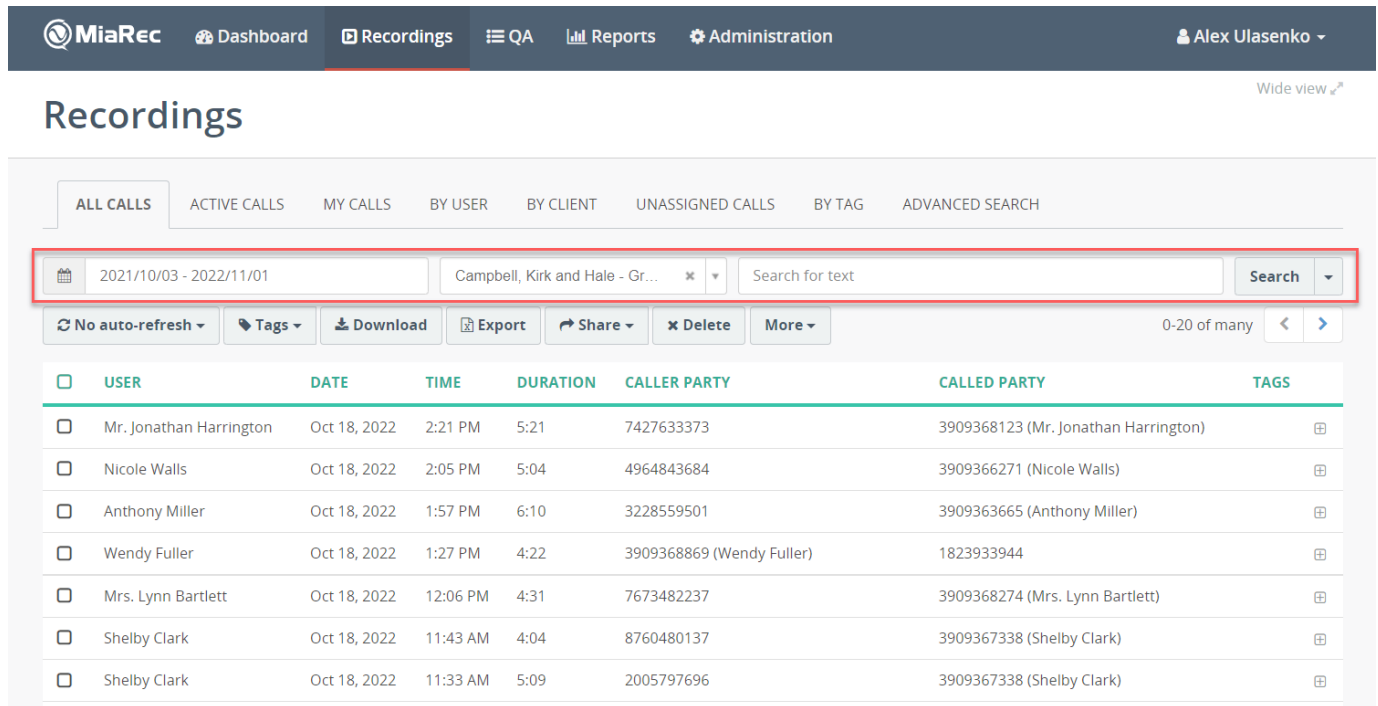


5. Search

5.1 Quick search

5.1.1 Overview

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.



Recordings Wide view

ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG ADVANCED SEARCH

2021/10/03 - 2022/11/01 Campbell, Kirk and Hale - Gr... Search for text **Search**

No auto-refresh Tags Download Export Share Delete More 0-20 of many

USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
Mr. Jonathan Harrington	Oct 18, 2022	2:21 PM	5:21	7427633373	3909368123 (Mr. Jonathan Harrington)	
Nicole Walls	Oct 18, 2022	2:05 PM	5:04	4964843684	3909366271 (Nicole Walls)	
Anthony Miller	Oct 18, 2022	1:57 PM	6:10	3228559501	3909363665 (Anthony Miller)	
Wendy Fuller	Oct 18, 2022	1:27 PM	4:22	3909368869 (Wendy Fuller)	1823933944	
Mrs. Lynn Bartlett	Oct 18, 2022	12:06 PM	4:31	7673482237	3909368274 (Mrs. Lynn Bartlett)	
Shelby Clark	Oct 18, 2022	11:43 AM	4:04	8760480137	3909367338 (Shelby Clark)	
Shelby Clark	Oct 18, 2022	11:33 AM	5:09	2005797696	3909367338 (Shelby Clark)	

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

5.1.2 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.

Wide view

Recordings

The screenshot shows the 'Recordings' interface with a navigation bar at the top containing tabs: ALL CALLS, ACTIVE CALLS, MY CALLS, BY USER, BY CLIENT, UNASSIGNED CALLS, BY TAG, and ADVANCED SEARCH. Below the navigation bar, there is a search section with a 'Select a Date Range' dropdown, a 'Select a User or Group' dropdown, and a 'Search for text' input field with a 'Search' button. A red box highlights the 'Select a Date Range' dropdown menu, which is open and shows options: Today, Yesterday, Last 7 Days, Last 30 Days, This Month, Last Month, and Date Range. Below these options are 'OK' and 'Clear' buttons. The main table displays call recordings with columns: TIME, DURATION, CALLER PARTY, CALLED PARTY, and TAGS. The first row shows a call by Brian Olson on Yesterday at 1:47 PM with a duration of 1:18.

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

This screenshot shows the 'Recordings' interface with the 'Date Range' option selected in the dropdown menu. The 'Start Date' is set to 2021/09/08 and the 'End Date' is set to 2021/09/15. Two calendar views for September 2021 are displayed. The left calendar shows the date 8th highlighted, and the right calendar shows the date 15th highlighted. The 'Date Range' button is highlighted in blue. The 'OK' and 'Clear' buttons are also visible.

5.1.3 Quick search by user or group

To search recordings by user or group, click the **Select a User or Group** field, then select the user or group (highlighted in bold) from the list.

The drop-down list includes an inline search box, which you can use to quickly locate the user or group in the long list.

2021/09/08 - 2021/09/15

Select a User or Group

Search for text

Search

0-20 of 134

USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
Barbara Smith	Sep 15, 2021	11:13 AM	1:01	244299712	244940771	aaron export
Michael Robinson	Aug 17, 2021	10:41 AM	5:46	+2089553596 (Michael Robinson)	1724499891	aaron export
Cody Lawson	Aug 17, 2021	5:28 AM	6:05	6855244987	+2089557583 (Cody Lawson)	aaron export
Cody Lawson	Aug 6, 2021	9:54 AM	4:58	+2089557583 (Cody Lawson)	5538244950	aaron export
Joseph Sanchez	Jul 30, 2021	12:51 PM	4:38	2449552277	+2089557883 (Joseph Sanchez)	aaron export

5.1.4 Quick search by text

The **Search for text** field lets you use the free-text search in the following call attributes:

- caller and called-party phone number,
- caller and called-party name (aka CALLER ID) as provided by the phone system,
- original caller number, if available,
- originally dialed digits, if available,
- call note,
- custom fields, when the **Free Text Search** option is enabled for the relevant custom field

The search results will be highlighted as shown in the screenshot below.

2021/09/08 - 2021/09/15

Select a User or Group

2449

Search

0-10 of 10

USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
Barbara Smith	Sep 15, 2021	11:13 AM	1:01	244299712	244940771	aaron export
Michael Robinson	Aug 17, 2021	10:41 AM	5:46	+2089553596 (Michael Robinson)	1724499891	aaron export
Cody Lawson	Aug 17, 2021	5:28 AM	6:05	6855244987	+2089557583 (Cody Lawson)	aaron export
Cody Lawson	Aug 6, 2021	9:54 AM	4:58	+2089557583 (Cody Lawson)	5538244950	aaron export
Joseph Sanchez	Jul 30, 2021	12:51 PM	4:38	2449552277	+2089557883 (Joseph Sanchez)	aaron export

5.1.5 Reset search criteria

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

Recordings

Wide view

ALL CALLS

ACTIVE CALLS

MY CALLS

BY USER

BY CLIENT

UNASSIGNED CALLS

BY TAG

ADVANCED SEARCH

2021/10/18 - 2021/11/16

Group McConnell-Rodriguez (...)

Search for text

Search

Reset search

No auto-refresh

Tags

Download

Export

Share

Delete

More

0-20 of

	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
<input type="checkbox"/>	Brian Olson	Yesterday	1:55 PM	0:36	639879597	287553915	
<input type="checkbox"/>	Brian Olson	Yesterday	1:53 PM	1:49	609724511	618095509	
<input type="checkbox"/>	Brian Olson	Yesterday	1:52 PM	1:43	658280518	382754060	

5.2 Advanced search

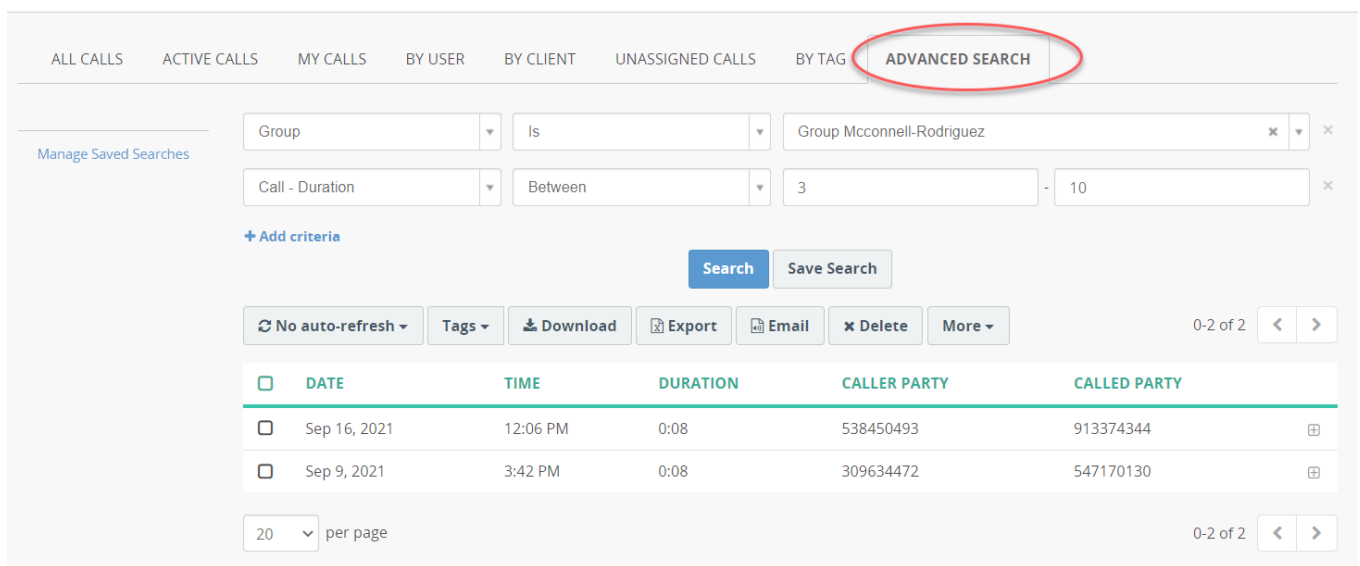
5.2.1 Overview

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.

Wide view 

Recordings



ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG **ADVANCED SEARCH**

Manage Saved Searches

Group

Call - Duration -

[+ Add criteria](#)

0-2 of 2

<input type="checkbox"/>	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY
<input type="checkbox"/>	Sep 16, 2021	12:06 PM	0:08	538450493	913374344
<input type="checkbox"/>	Sep 9, 2021	3:42 PM	0:08	309634472	547170130

20 per page 0-2 of 2

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

5.3 Save search criteria

5.3.1 Overview

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

Wide view 

ALL CALLS
ACTIVE CALLS
MY CALLS
BY USER
BY CLIENT
UNASSIGNED CALLS
BY TAG
ADVANCED SEARCH

Long calls (>5 min)
Short calls (<15 sec)

Manage Saved Searches

Call - Duration
Greater than
5:00

+ Add criteria

Search
Save Search

No auto-refresh
Tags
Download
Export
Email
Delete
More

0-20 of many

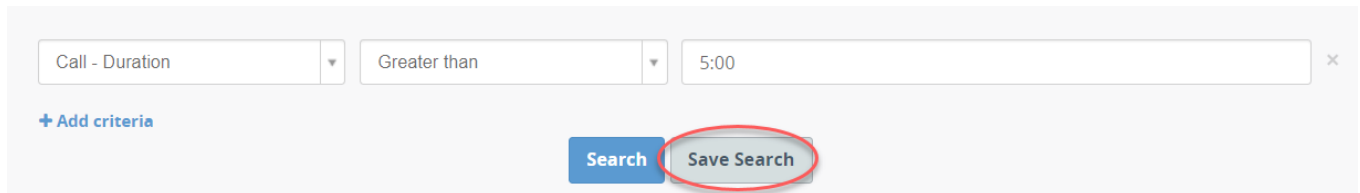
	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY
<input type="checkbox"/>	Sep 15, 2021	9:57 AM	5:27	639495950 (Jerome Bennett)	4240
<input type="checkbox"/>	Sep 14, 2021	3:09 PM	6:15	302879235368	920617622 (Ashley Baker)
<input type="checkbox"/>	Sep 14, 2021	9:54 AM	7:40	853172865418	575429417 (Desiree Jenkins)

71

5.3.2 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**.



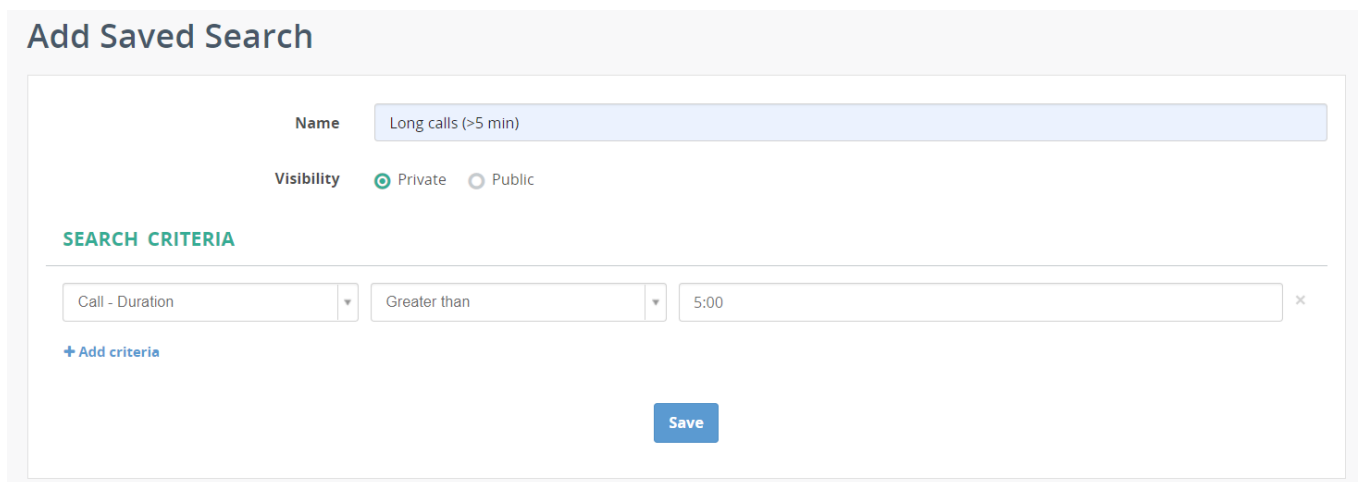
Call - Duration Greater than 5:00

+ Add criteria

Search 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.



Add Saved Search

Name Long calls (>5 min)

Visibility ☒ Private ☐ Public

SEARCH CRITERIA

Call - Duration Greater than 5:00

+ Add criteria

Save

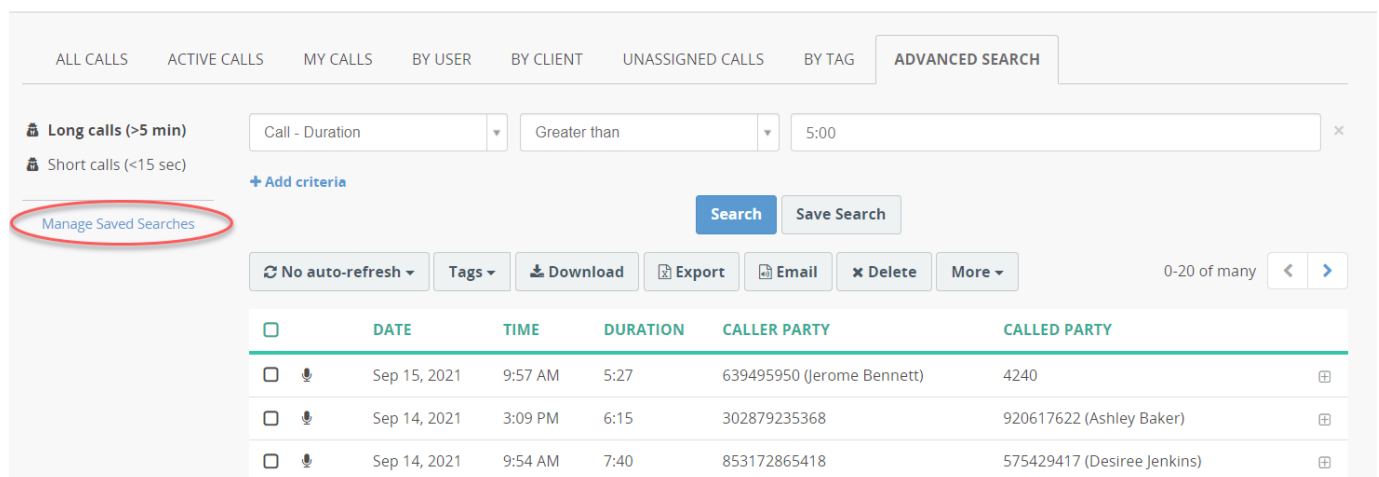
4. Click **Save**.

5.3.3 Manage a saved search

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

Wide view

Recordings



ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT UNASSIGNED CALLS BY TAG **ADVANCED SEARCH**

Long calls (>5 min)
Short calls (<15 sec)

Call - Duration Greater than 5:00

+ Add criteria

Search Save Search

No auto-refresh Tags Download Export Email Delete More

0-20 of many

	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY
<input type="checkbox"/>	Sep 15, 2021	9:57 AM	5:27	639495950 (Jerome Bennett)	4240
<input type="checkbox"/>	Sep 14, 2021	3:09 PM	6:15	302879235368	920617622 (Ashley Baker)
<input type="checkbox"/>	Sep 14, 2021	9:54 AM	7:40	853172865418	575429417 (Desiree Jenkins)

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

Saved Searches

+ Add

x Delete

0-2 of 2<>

<input type="checkbox"/>	NAME	VISIBILITY	
<input type="checkbox"/>	Long calls (>5 min)	Private	Edit
<input type="checkbox"/>	Short calls (<15 sec)	Private	Edit

20 per page

0-2 of 2<>

6. Reports

6.1 Overview

For details on reporting, check the [Reporting User Guide](#).

7. My Profile

7.1 My Profile Overview

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

[Dashboard](#)
[Recordings](#)
[QA](#)
[Reports](#)
[Administration](#)

Alex Ulasenko ▾

Recordings

ALL CALLS

ACTIVE CALLS

MY CALLS

BY USER

BY CLIENT

UNASSIGNED CALLS

BY TAG

ADVANCED SEARCH

2022/10/03 - 2022/11/01

Select a User or Group ▾

Search for text

Search ▾

No auto-refresh ▾

Tags ▾

Download

Export

Share ▾

Delete

More ▾

0-20 of many

	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
<input type="checkbox"/>	Alexis Barber	Oct 27, 2022	7:55 AM	1:23	605824224	466008291	
<input type="checkbox"/>	Lori Brennan	Oct 19, 2022	6:23 AM	5:18	410953772 (Lori Brennan)	8150259180	order cancellation evaluate
<input type="checkbox"/>	Amy Harris	Oct 19, 2022	3:57 AM	0:53	663889251060	217754290 (Amy Harris)	order cancellation
<input type="checkbox"/>	Travis Martinez	Oct 19, 2022	2:50 AM	0:58	810893981518	792545867 (Travis Martinez)	
<input type="checkbox"/>	Pamela Smith	Oct 19, 2022	1:02 AM	4:33	619495167947	142701964 (Pamela Smith)	evaluate

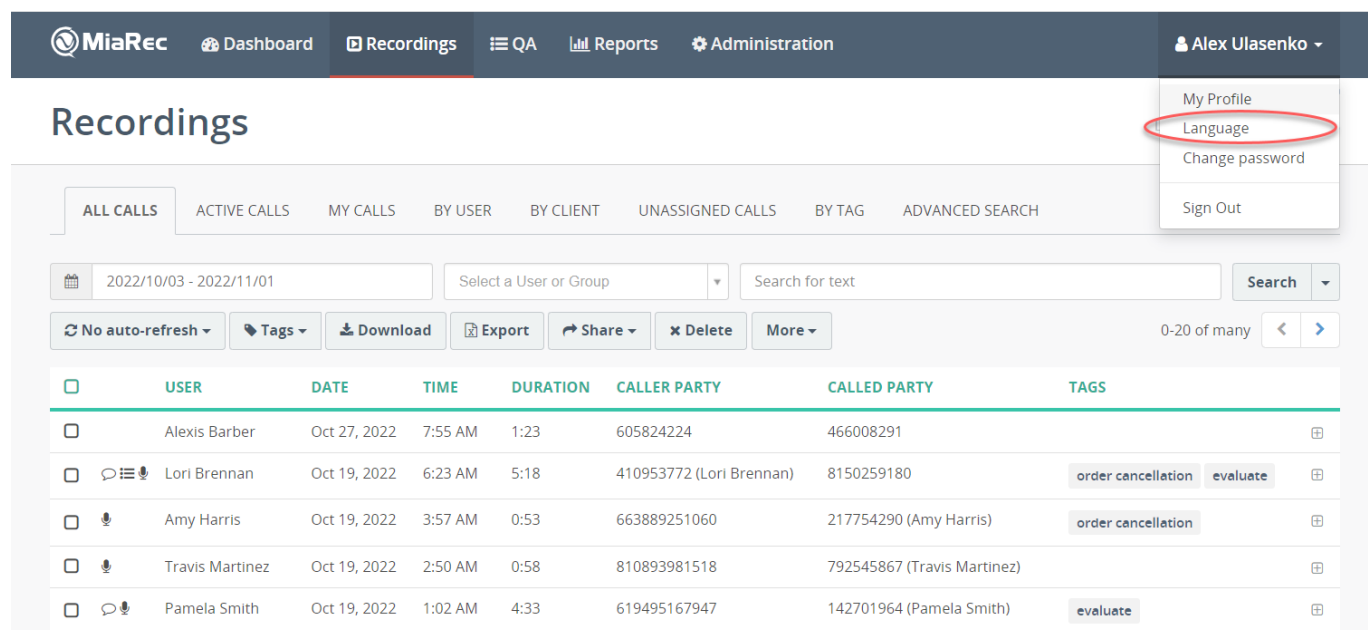
On the **Personal Info** page, you can edit your email, and change the default timezone and language.

Note

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

7.2 Change language

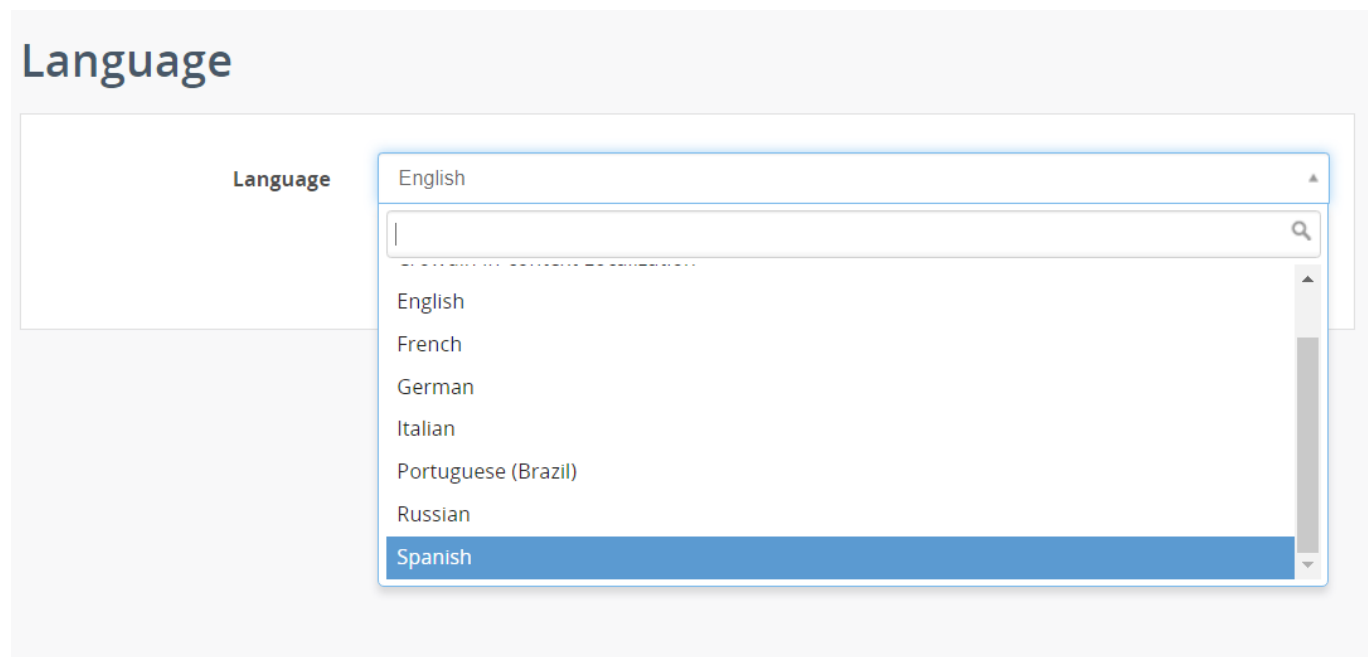
To change the web portal language, click your name in the top right corner and select **Language**.



The screenshot shows the MiaRec web portal interface. The top navigation bar includes links for Dashboard, Recordings, QA, Reports, and Administration. The user's name, Alex Ulasenko, is in the top right corner. A dropdown menu is open, showing options: My Profile, Language (highlighted with a red circle), Change password, and Sign Out. Below the navigation bar, the 'Recordings' section is active, displaying a table of call recordings. The table has columns for User, Date, Time, Duration, Caller Party, Called Party, and Tags. The first row shows a call by Alexis Barber on Oct 27, 2022. The second row shows a call by Lori Brennan on Oct 19, 2022, with tags 'order cancellation' and 'evaluate'.

USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
Alexis Barber	Oct 27, 2022	7:55 AM	1:23	605824224	466008291	
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)	
Pamela Smith	Oct 19, 2022	1:02 AM	4:33	619495167947	142701964 (Pamela Smith)	evaluate

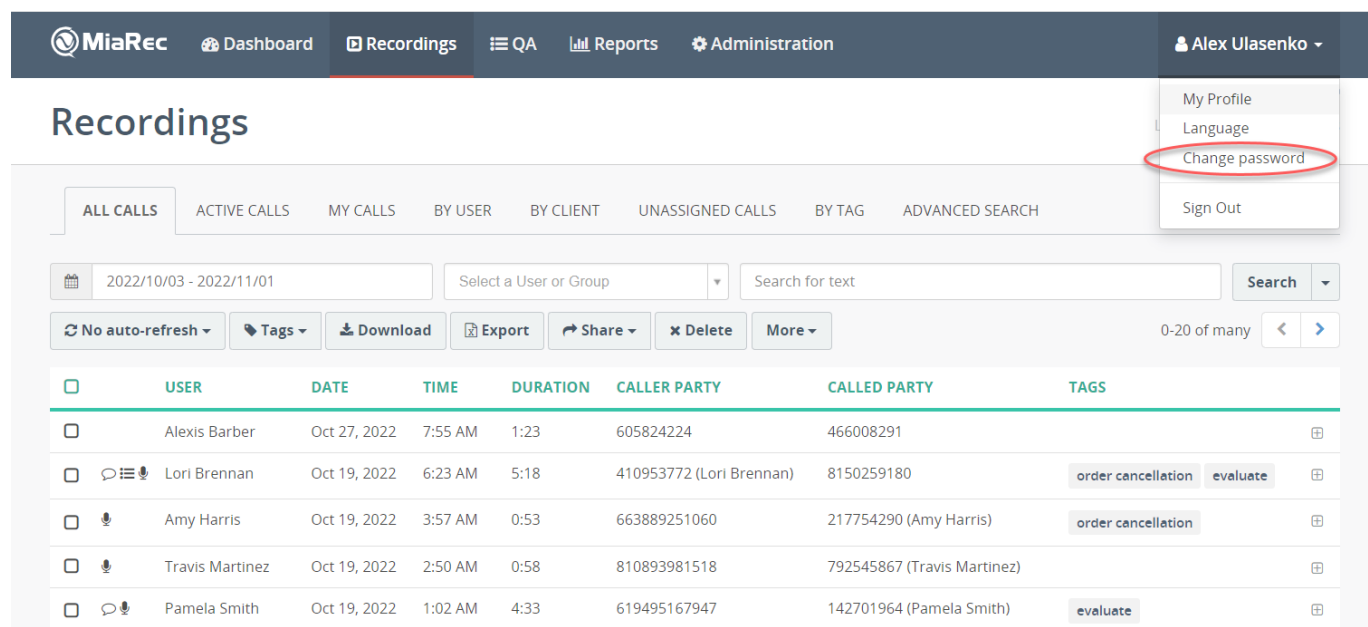
In the **Language** dropdown box, select your preferred language and click **Save**.



The screenshot shows the 'Language' dropdown menu. The menu is open, displaying a list of languages: English, French, German, Italian, Portuguese (Brazil), Russian, and Spanish. The 'Spanish' option is highlighted in blue. The dropdown menu has a search bar at the top and a scroll bar on the right.

7.3 Change password

To change your password, click your name in the top right corner and select the **Change Password** option.



The screenshot shows the MiaRec application interface. At the top, there is a navigation bar with links to Dashboard, Recordings, QA, Reports, and Administration. The user 'Alex Ulasenko' is logged in, and a dropdown menu is open, showing options: 'My Profile', 'Language', 'Change password' (highlighted with a red circle), and 'Sign Out'.

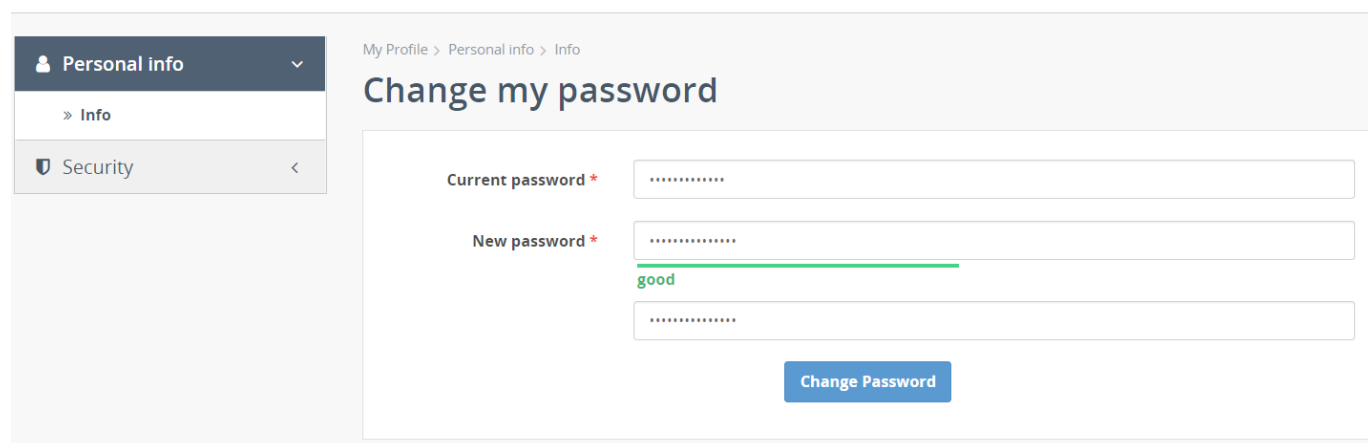
Below the navigation bar, the 'Recordings' page is displayed. It includes filters for 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY USER', 'BY CLIENT', 'UNASSIGNED CALLS', 'BY TAG', and 'ADVANCED SEARCH'. There are also search filters for date range (2022/10/03 - 2022/11/01), user/group selection, and text search. Action buttons include 'No auto-refresh', 'Tags', 'Download', 'Export', 'Share', 'Delete', and 'More'. A table of recordings is shown below, with columns for USER, DATE, TIME, DURATION, CALLER PARTY, CALLED PARTY, and TAGS.

USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
Alexis Barber	Oct 27, 2022	7:55 AM	1:23	605824224	466008291	
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)	
Pamela Smith	Oct 19, 2022	1:02 AM	4:33	619495167947	142701964 (Pamela Smith)	evaluate

Enter your current and new passwords, and click the **Change Password** button.

My Profile

Wide view



The screenshot shows the 'My Profile' page with a sidebar containing 'Personal info' and 'Security'. The main content area is titled 'Change my password' and contains a form with three password fields: 'Current password', 'New password', and a confirmation field. A 'Change Password' button is located at the bottom of the form.

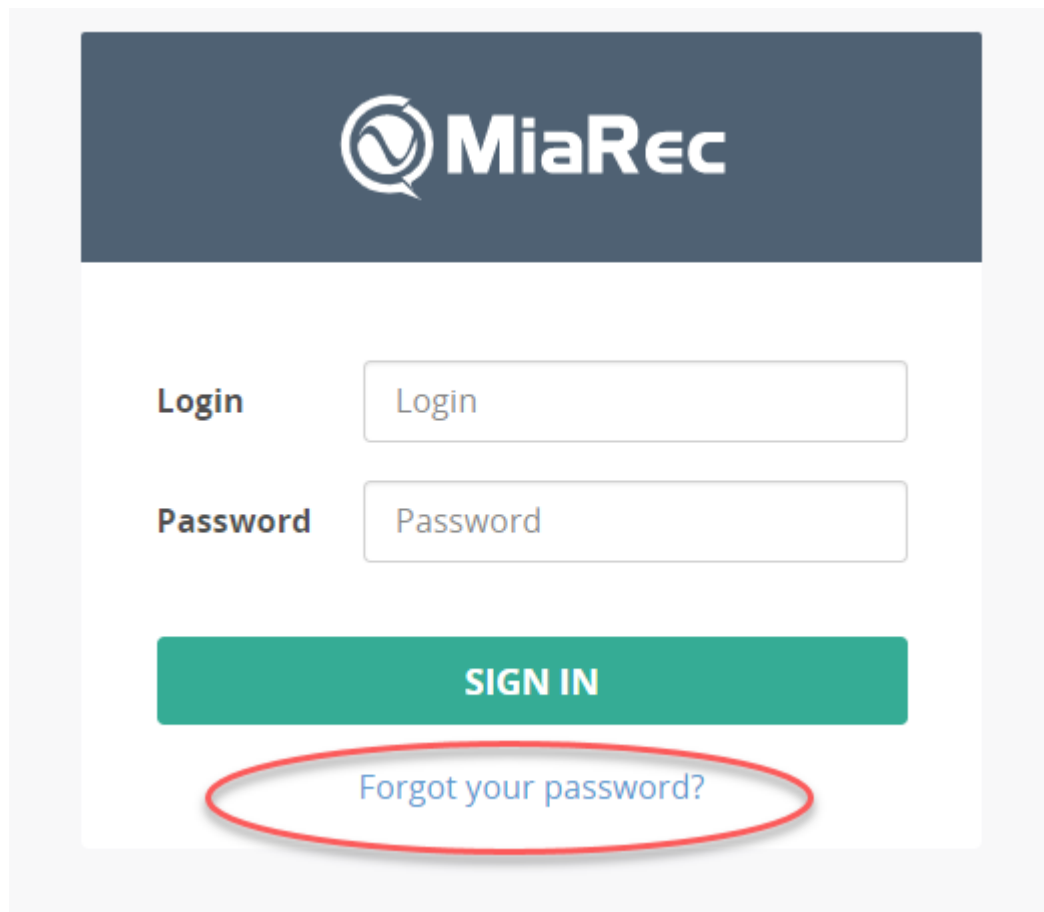
7.3.1 Reset password by email

Note

A password reset by email 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.

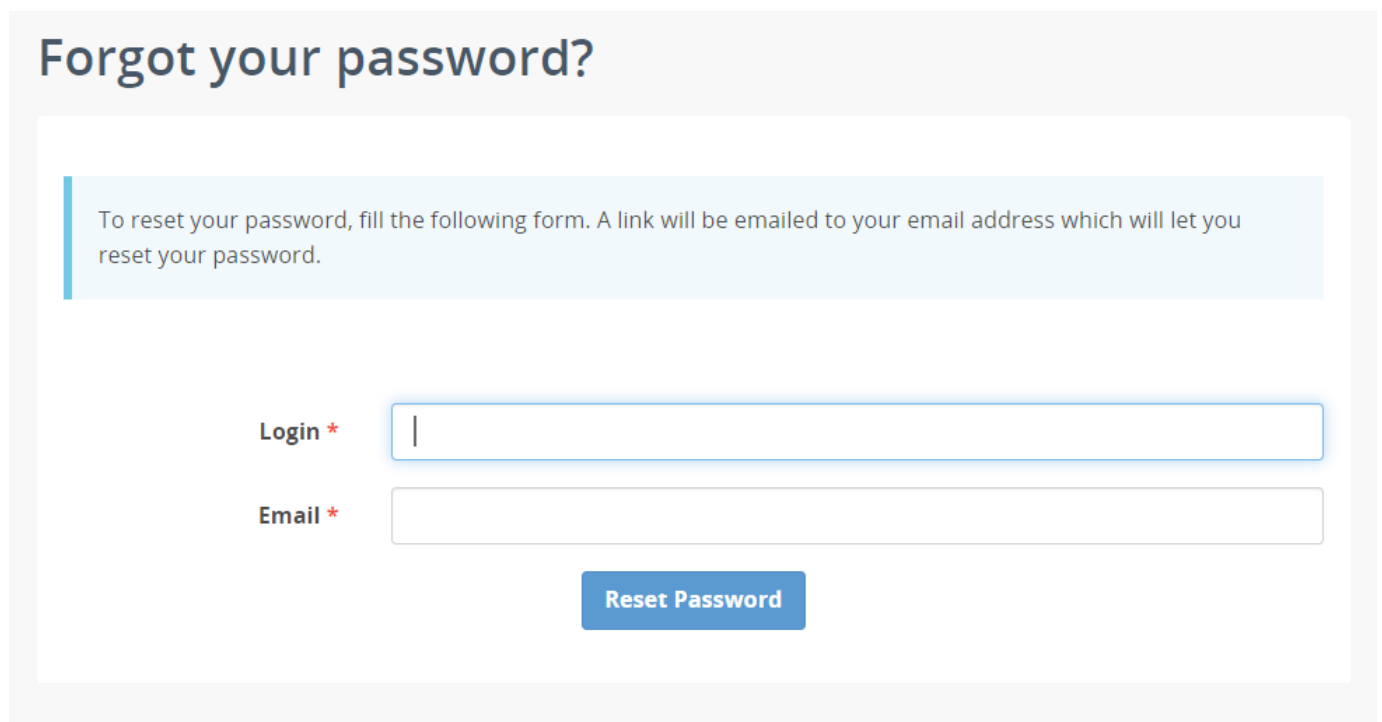
If you forgot your password, you can request to reset your password by clicking the **Forgot your password?** link on the login page.



The image shows the MiaRec login interface. At the top is the MiaRec logo. Below it are two input fields: 'Login' and 'Password'. A green 'SIGN IN' button is positioned below the password field. At the bottom, the text 'Forgot your password?' is circled in red, indicating it is a clickable link.

On the **Forgot your password?** page, provide your login and email and click the **Reset Password** button.

A password reset link will be emailed to you.



The image shows the 'Forgot your password?' page. The title 'Forgot your password?' is at the top. Below it is a light blue box with the text: 'To reset your password, fill the following form. A link will be emailed to your email address which will let you reset your password.' Below this box are two input fields: 'Login *' and 'Email *'. At the bottom is a blue button labeled 'Reset Password'.

7.4 Security settings

7.4.1 2-Step Verification

A multi-factor authentication, also referred to as two-factor authentication (2FA), is a combination of your login credentials and a verification code to access the web portal. Each time you sign into your account, you'll require to enter a one-time verification code that is sent to you via email or SMS.

To activate 2-step verification in your account:

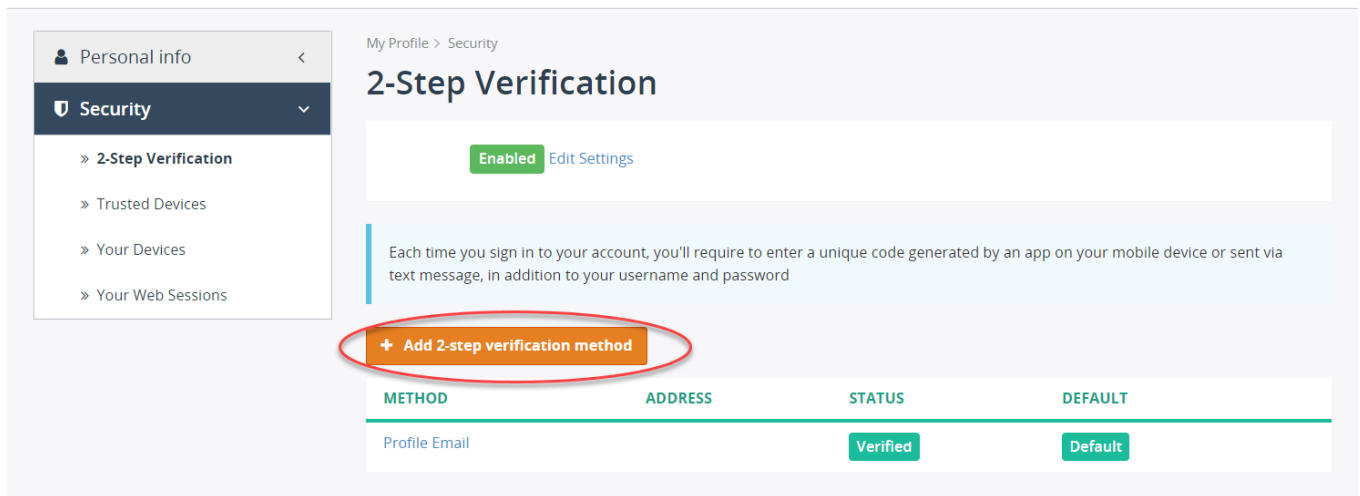
1. Click your name in the top right corner and select **My Profile**.

2. Expand the **Security** pane and click **2-Step Verification**.

3. Click the **Add 2-step verification method** button. You will be prompted to enter the password for your account.

Wide view 

My Profile



My Profile > Security

2-Step Verification

Enabled [Edit Settings](#)

Each time you sign in to your account, you'll require to enter a unique code generated by an app on your mobile device or sent via text message, in addition to your username and password

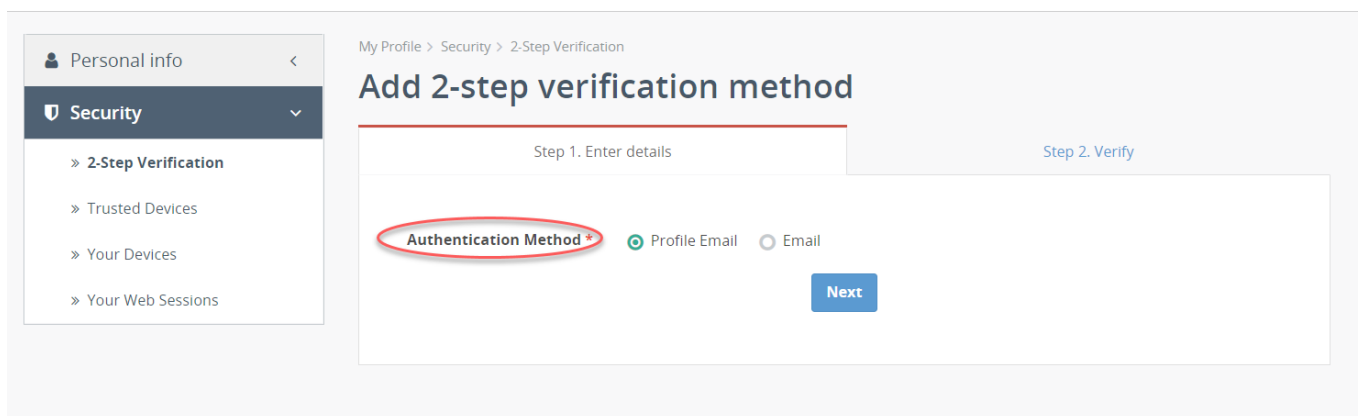
+ Add 2-step verification method

METHOD	ADDRESS	STATUS	DEFAULT
Profile Email		Verified	Default

4. In **Step 1**, in the **Authentication method** field, specify the email address type to which the verification code will be sent. This could be either the profile email or an alternative email address. After that, click **Next**.

Wide view 

My Profile



My Profile > Security > 2-Step Verification

Add 2-step verification method

Step 1. Enter details

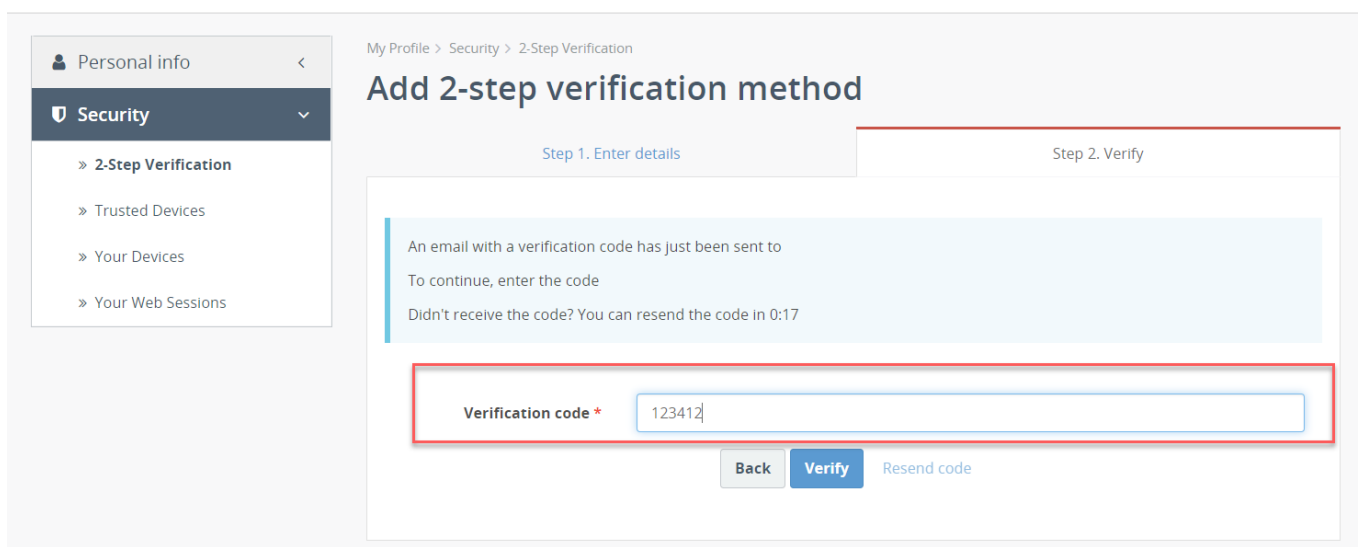
Authentication Method * ☒ Profile Email ☐ Email

Next

5. Under **Step 2**, in the **Verification code** field, enter the code that was sent to your email address.

Wide view 

My Profile



My Profile > Security > 2-Step Verification

Add 2-step verification method

Step 1. Enter details

Step 2. Verify

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 0:17

Verification code *

Back **Verify** [Resend code](#)

7.4.2 Trusted Devices

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

What is a trusted device?

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

☒ Don't ask again on this computer

Verify

[Resend code](#)

[Switch to Profile Email](#)

My Profile > Security

Trusted Devices

You will not be asked for a code when you sign in to your account on the device you trust. Only your username and password will be required

FIRST ACCESS	LAST ACCESS	LOCATION	CLIENT	SYSTEM	
Jan 11, 2022, 12:40 PM	This device	57 seconds ago	91.195.75.207	Chrome	Windows
					View ✕ 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 you sign in to your account on the device you trust. Only your username and password will be required

FIRST ACCESS	LAST ACCESS	LOCATION	CLIENT	SYSTEM		
Jan 11, 2022, 12:40 PM	This device	57 seconds ago	91.195.75.207	Chrome	Windows	View ✕ Revoke

7.4.3 Your Devices

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

Wide view 

My Profile

My Profile > Security

Your Devices

You have recently signed in to your account 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
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

Your Devices

You have recently signed in to your account 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

My Profile

Personal info <

Security ▾

» 2-Step Verification

» Trusted Devices

» **Your Devices**

» Your Web Sessions

My Profile > Security > Your Devices

Device [Revoke](#)

[This device](#)

Client: **Chrome**

Operating System: **Windows**

Location: **50.203.213.38**

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)**

7.4.4 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.

Wide view

My Profile

Personal info <

Security ▾

» 2-Step Verification

» Trusted Devices

» Your Devices

» **Your Web Sessions**

My Profile > Security

Your Web Sessions

This lists all of your current active sessions. If you found any suspicious activity, terminate the session and change your password quickly

SESSION START TIME		LOCATION	CLIENT	SYSTEM	
Jan 10, 2022, 12:11 PM (13 minutes ago)	This session	50.203.213.38	Chrome	Windows	View ✕ Terminate

Contact Us

A team of expert Momentum product customer support professionals are here to assist with technical issues, questions related to billing, feature usage, and service upgrades, as well as any other general inquiries you may have. Simply contact us and a friendly representative will help you with your request.

In order to provide optimal support, we recommend that the account owner (or a fully Authorized Contact) contact us via our toll-free support number regarding any critical or timely issues that may require troubleshooting or impact billing, and submit support ticket for questions or requests. A phone call is always the fastest way to get expert assistance. And always keep your account number handy to help us better assist you right when you need us.

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Live phone support is available 24/7 for fast emergency assistance.

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