



**MOMENTUM**

# CALL RECORDING

## **Supervisor** **User Guide**

**MOMENTUM**

**T E L E C O M**

UC22Q4

## About the Guide

The Call Recording portal interface allows authorized users of the system to securely manage the recordings of calls to their number, or for Supervisors, the call recordings of others. Typical *Users* of the system might be characterized as Supervisors (or managers) of contact center agents, managers or supervisory employees in law offices or financial institutions, or others with special permission to notate and manage call recordings, as well as Administrators who manage setup and maintenance.

**Note:** In general, most of the individuals licensed to have calls to their extension or phone line recorded (agents in a call center, etc.) will not work in the Call Recording portal and access to do so should be restricted to those licensed as Supervisors or Administrators.

This guide provides information about the how a Supervisor (or someone who accesses the Call Recording portal) works with the Call Recording interface features, functions, and reports. It is focused on some of the most common tasks, such as accessing the portal, reviewing or adding notes to recorded calls, and managing or running reports, and offers step-by-step procedures and/or examples of how to complete tasks within the application where useful. *This guide does not describe setup of access or management of permissions for features or tools, as those are tasks performed by Administrators.*

Supervisors granted access to the Call Recording portal are assigned numbers and permissions by which they then may have access to review and annotate or report on the recording of calls to their number, or to the numbers of individuals assigned to them (groups, teams, etc.).

**Note:** Readers should be aware that their organization defines individual user access to the site, features, displays, and any Add-on tools purchased. Some information or features described within this guide may not have been purchased by the organization or may not be licensed and enabled for use by all permitted access to the portal. Contact your organization or group's Call Recording Administrator to learn more about which features you have access to use based on your role.

**Supervisors** – Those who have been assigned the Supervisor Add-On license and are authorized to review the calls for themselves, and/or others (groups or individuals besides themselves) will be able to work with call recordings for the individuals they are authorized to manage. The Dashboard offers at-a-glance statistic counts and chart views of useful historical and real-time data for the Supervisor's calls and those of the members of any managed Groups assigned to them. The toolbar at the top of the dialog offers quick access to work with the Call Recording portal sections the Supervisor has authorization to view. **Note:** Some sections, features, or tools may be read-only for Supervisors. The Call Recording portal will provide a notification message if a Supervisor attempts to access features or make changes to data without sufficient authorization.

**Administrators** – Those who have been assigned the Administrator Add-On license and are authorized to be Supervisors and to manage access to the Call Recording Portal for their organization's staff, define and assign groups, and manage user authorization for tools or sections for the organization will also see and use tools within a tab called Administration in the toolbar where those tasks may be performed.

**Note:** Where changes may only be made by the Service Provider, the Call Recording portal will display related data as read-only in the Administration tab to provide useful information. The Call Recording portal will provide a notification message if an Administrator attempts to make changes without sufficient authorization.

## 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.

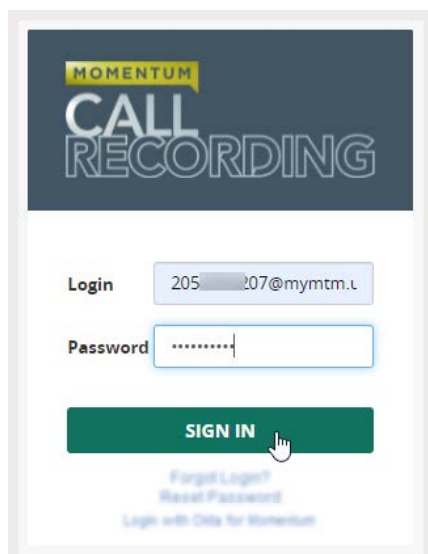
### Call Recording Portal Direct Access

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:

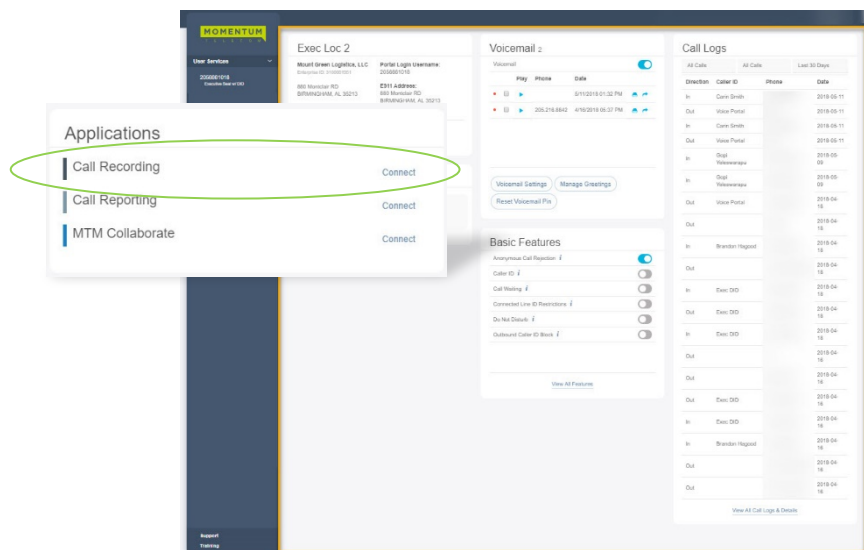
Simply enter the User Name (Login) and Password credentials provided to you and click **Login**.

- ❖ 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.

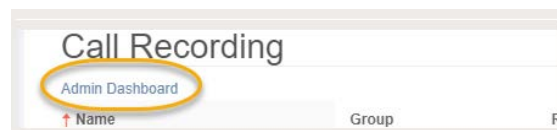
Once the login process is verified and successful, the Call Recording portal opens and the Supervisor is presented with their Call Recording Dashboard and toolbar links to the areas they are authorized to access within the Call Recording Portal.

## Call Recording Portal Single Sign-On Access

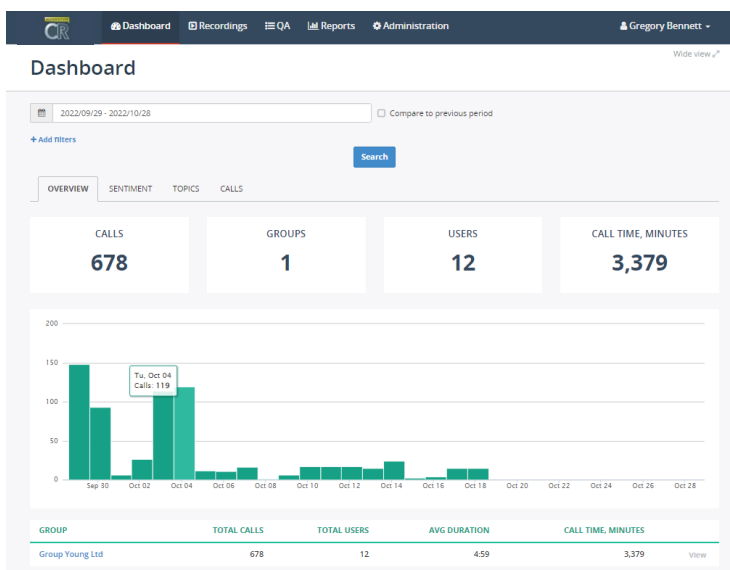
The Cloud Services Portal offers a direct link to access the Call Recording Portal using your system sign-in credentials. This link is found in the **Applications** card on your Dashboard within the Cloud Services Portal online. Once you log into the My Cloud Services Portal, you are ready to work in 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 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 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.

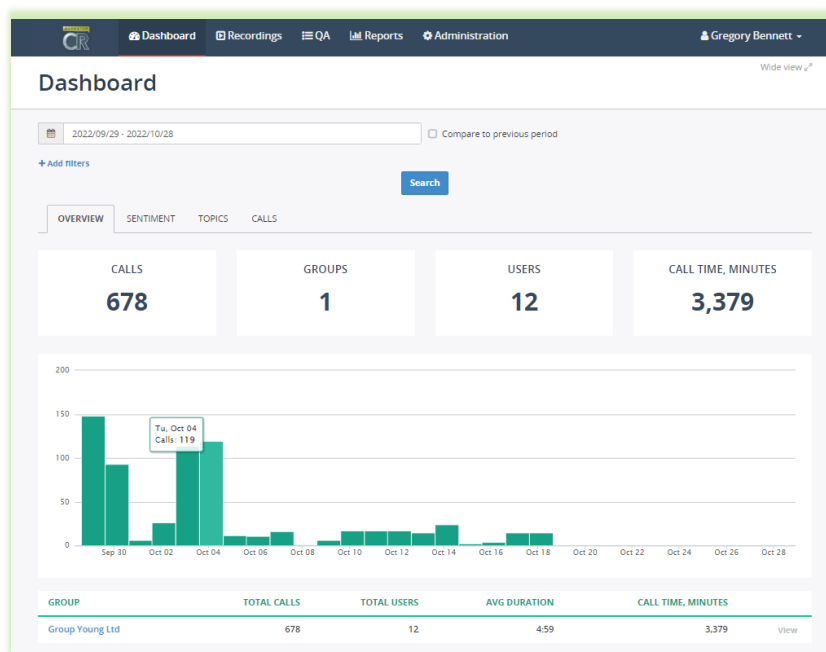
This example shows a Dashboard view for a Supervisor who has access to view the Recordings and Reports and see information in Administration for her groups.

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



## Call Recording Portal Dashboard

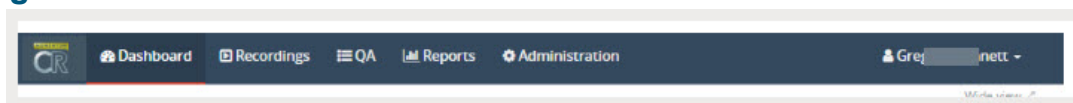
Once a Supervisor accesses the Call Recording Portal, the Dashboard provides a thorough overview of the calls-per-day, average call duration, and current active calls in helpful graphical displays. The Dashboard page allows Supervisors and Admins to gain an accurate and evolving picture of their entire call center's performance. With all key metrics available on a single screen, Supervisors have quick access to tools that can help them 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 a total number of recorded calls, calls' duration, calls per day and other useful data points.
- A drill-down (filtered) view that allows you to dive deep into your data and lets you explore your data at a more granular level.
- Trend analysis views with the ability to compare key metrics over time to instantly see trends.
- Powerful filtering capabilities, which allows you to focus only on the data that is important to you in the toolbar above the Dashboard where those tasks may be performed.

### Navigation Toolbar



The toolbar at the top of the page displays navigation buttons you can use to access the following sections:

- **Dashboard:** Provides call metrics from the group level to the enterprise level, based on access permissions.
- **Recordings:** Access and manage the call recordings authorized for your review.
- **QA:** Access to the tools and features for quality assurance (QA) metrics inherent to the Speech Analytics add-on.
- **Reports:** Build, run, and manage both the provided and customized reports
- **Administration:** Provides access to view administration settings for Supervisors, and the configuration tools for authorized Admins.

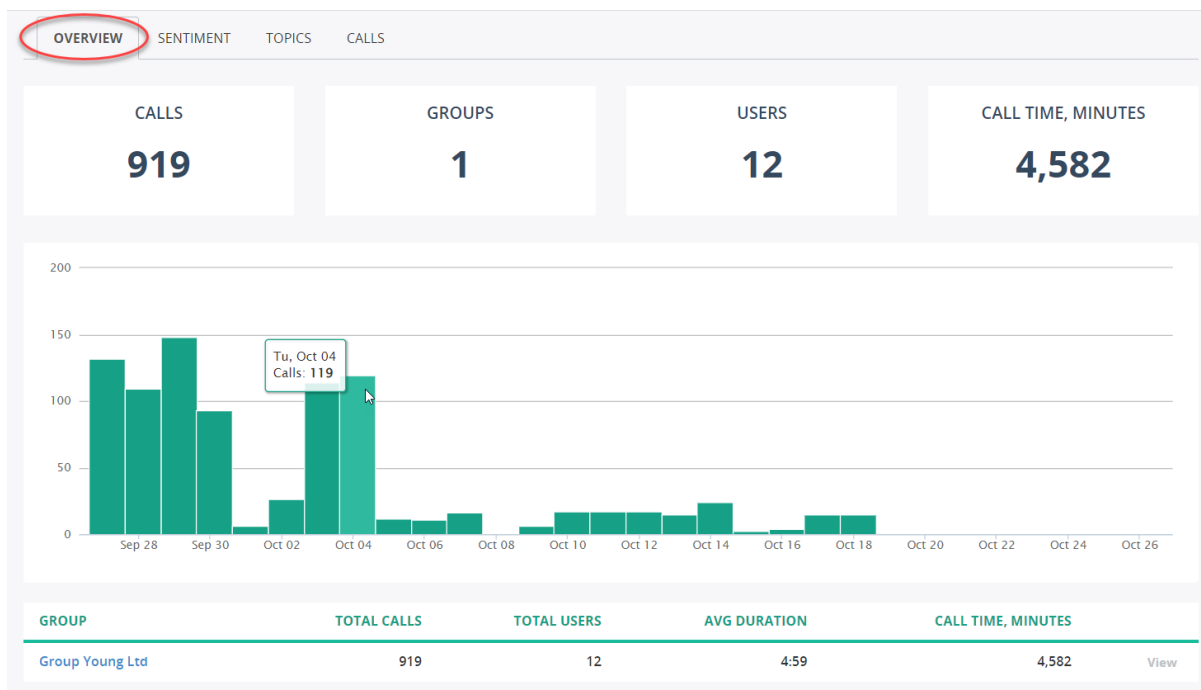
**Note:** Some sections may not be available to every user due to licensing limitations and the permissions defined by your organization. See: [Add-Ons \(\\$\)](#)

## Dashboard Metrics

The Dashboard in Call Recording offers tab views that allow for an easy search of calls and data.

### 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. Supervisors (and Admins) can view the number of calls per day within the chart in this tab by hovering the cursor over a point on the graph.



Tools are also offered to drill down to the Group level.

Click on a different tab to see more useful data.

## Sentiment Tab

Where licensed to view this data, 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:

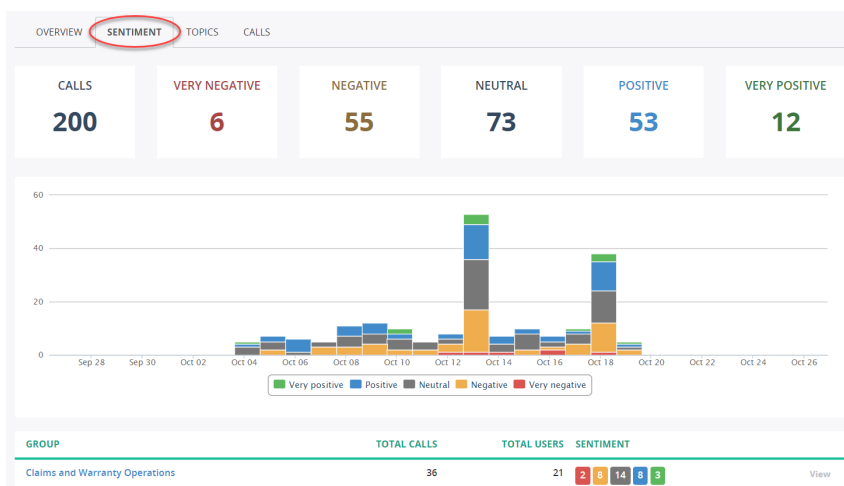
### **i** Sentiment score vs sentiment label

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

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

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

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

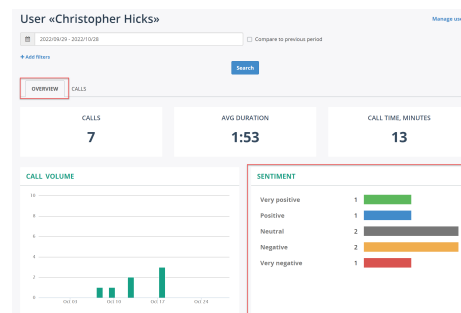


Depending on a drill-down level, the Sentiment tab display also shows a distribution of calls by sentiment for each group or user.

GROUP	TOTAL CALLS	TOTAL USERS	SENTIMENT	
Claims and Warranty Operations	37 1+37	21	2 8 14 8 3	View
Dealer Support and Customer Care	20 1+20	13	7 9 2 3	View
Distribution Centre	63 1+63	45	2 11 28 19 3	View
Performance Centre	51 1+81	53	2 29 22 24 4	View

The in-line labels show the total number of calls in each sentiment category. Hover the cursor over a label in the Sentiment column to view the sentiment category name.

When drilling down to a User level from here, the user's sentiment metrics are presented on the user's Overview tab



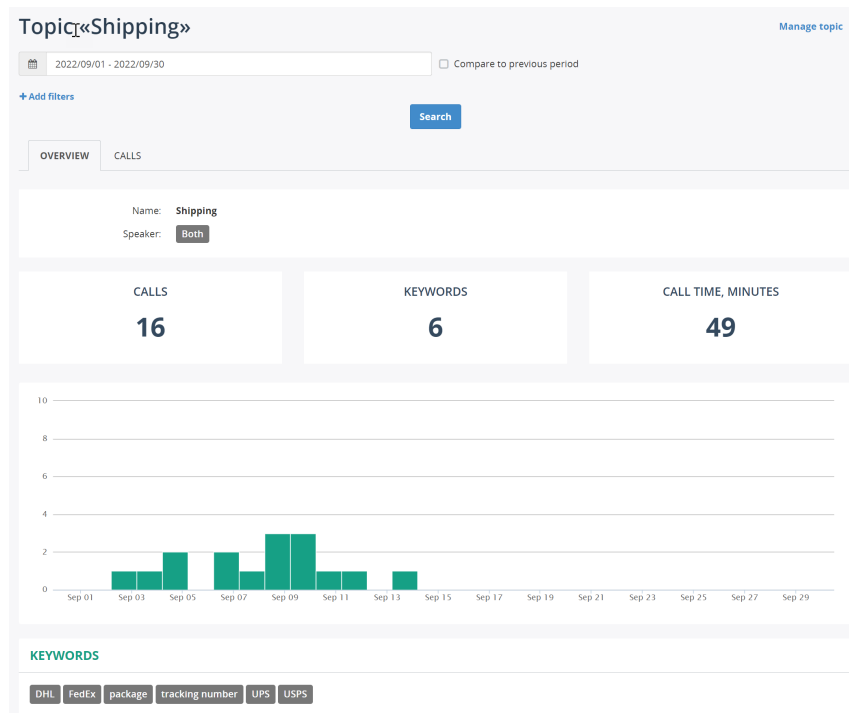
## Topics Tab

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

OVERVIEW	SENTIMENT	TOPICS	CALLS
TOPICS		BIGGEST TOPIC, CALLS	
33		96	
		↑ +42 (77.8%)	
		BIGGEST TOPIC, MINUTES	
		206	
		↑ +110 (115.6%)	
TOPIC	TOTAL CALLS	AVG DURATION	CALL TIME, MINUTES
Resolution Indicators (customer)	96 ↑ +42 (77.8%)	2:08 ↑ +0:23 (21.9%)	206 ↑ +110 (115.6%)
Agent insecurities	38 ↑ +26 (216.7%)	2:09 ↓ -0:52 (28.7%)	82 ↑ +46 (126%)
Payment language	15 ↑ +9 (150%)	4:37 ↑ +1:22 (42.1%)	69 ↑ +50 (254%)
Resolution Indicators (agent)	15 ↑ +7 (87.5%)	3:16 ↓ -0:01 (0.5%)	49 ↑ +23 (86.6%)
Shipping	12 ↑ +8 (200%)	3:00 ↓ -0:16 (8.2%)	36 ↑ +23 (174.9%)
Credit card	9 ↑ +9	3:05	28 ↑ +28
Cursing	6 ↑ +5 (500%)	5:11 ↑ +2:42 (108.7%)	31 ↑ +29 (1,153.7%)
Problem	6 ↑ +5 (500%)	3:21 ↑ +2:18 (219%)	20 ↑ +19 (1,814.3%)
Subsequent (repeated) Call	6 ↑ +3 (100%)	4:20 ↑ +2:39 (157.4%)	26 ↑ +21 (413.1%)
Customer Aggravation-Repetition	4 ↑ +3 (300%)	4:10 ↓ -7:28 (64.2%)	17 ↑ +5 (43.7%)
Broken Trust	3 -- (0%)	5:09 ↓ -0:37 (10.7%)	15 ↓ -2 (10.6%)

By drilling down to an individual topic, a trend view of the selection displays in an easy to read chart format.



This view also shows a list of the keywords used to categorize calls with this topic assignment.

## Calls Tab

The Calls tab shows the call recordings as they 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 <b>CALLS</b>							
<div> <span>No auto-refresh</span> <span>Tags</span> <span>Download</span> <span>Export</span> <span>Share</span> <span>Delete</span> <span>More</span> </div> <div>0-20 of 200</div>							
	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 insecuri... 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

**Note:** The data columns displayed in the Calls tab are configured by an Admin. The setup can be managed in [Administration > Customization > Field Visibility](#)

Where licensed appropriately, the Calls tab also displays useful Sentiment scores.

OVERVIEW SENTIMENT TOPICS <b>CALLS</b>							
<div> <span>No auto-refresh</span> <span>Tags</span> <span>Download</span> <span>Export</span> <span>Share</span> <span>Delete</span> <span>More</span> </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 insecuri... 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

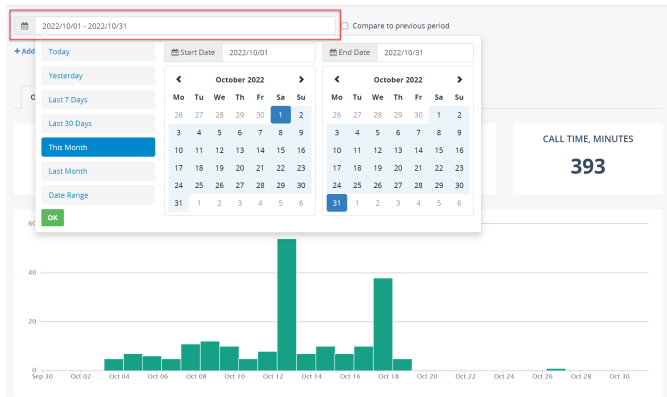
## Filter Dashboard Data

The Dashboard in Call Recording offers tab views that allow for an easy search of calls and data.

### Select a Date Range

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

Dashboard

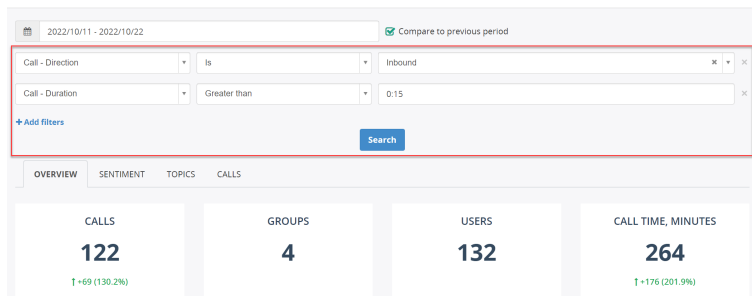


### Add Filters

Additional tools are provided to filter data that is presented in a dashboard.

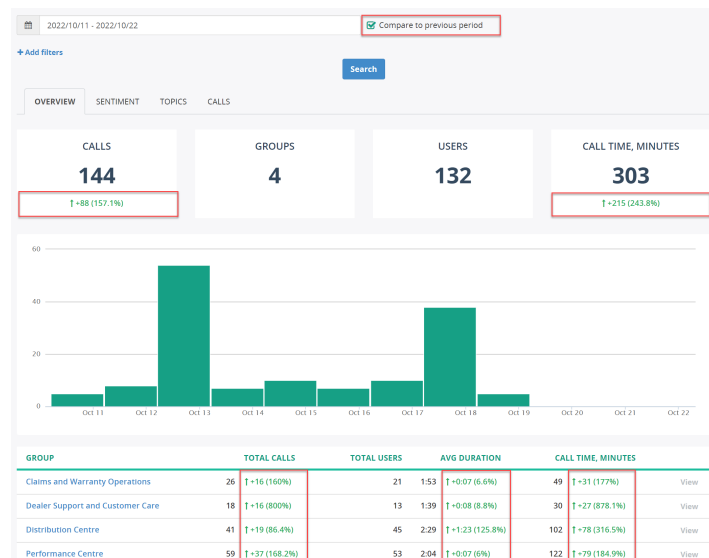
For example, you may filter calls by direction (inbound only) and duration (longer than 0:15).

Dashboard



### Compare to Previous Period

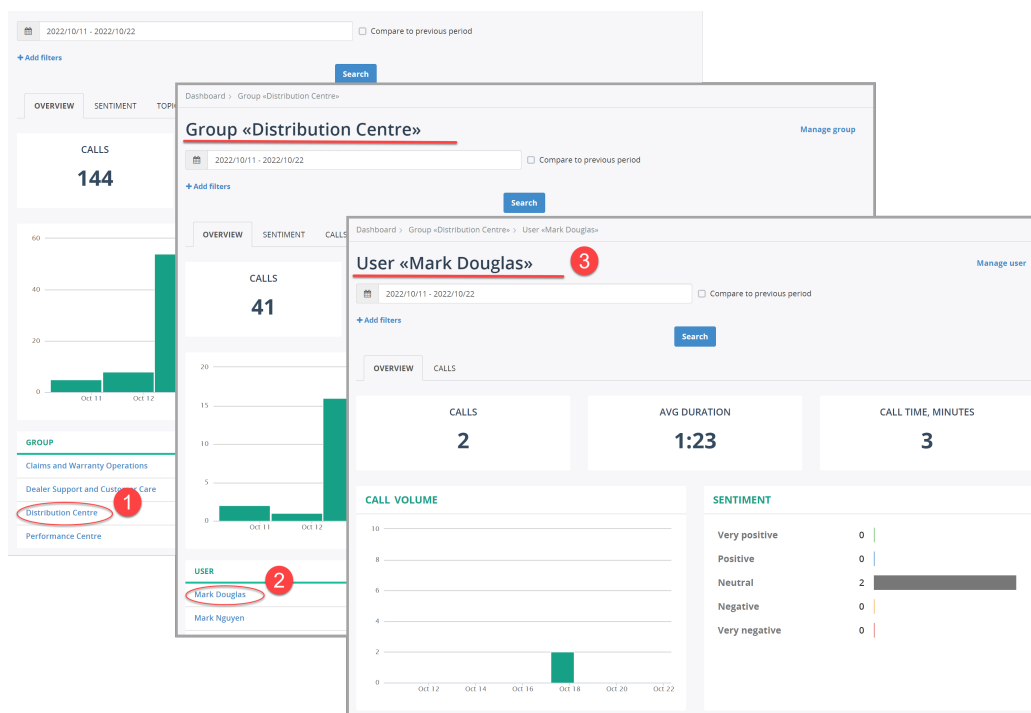
Comparing metrics over time is a great way to benchmark a progress and identify issues as they come up. If the **Compare to previous period** checkbox is selected, then all applicable metrics are calculated for both the current period and the previous one (for example the current month and the previous month). A magnitude of increase or decrease is shown in both absolute and relative (percentage) measures.



## Drill-Down

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 a name of a group, user or topic, or click the **View** button next to a name.



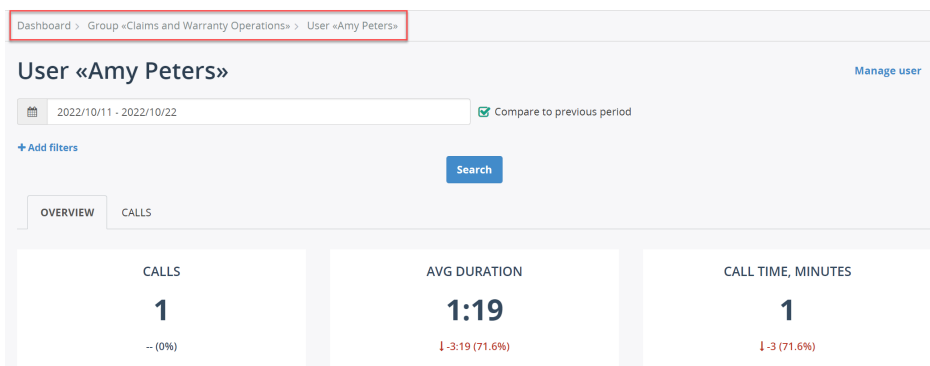
## Breadcrumbs

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

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

### Dashboard

Wide view <sup>a</sup>





## Recordings

The **Recordings** tab view provides access to review and potentially edit the call recordings the Supervisor manages. This list may include only their own call recordings, or the call recordings of other users they manage as a Supervisor, where those additional access levels have been licensed, granted, and enabled.

USER	DATE	TIME	DURATION	FROM	TO	TAGS
Bill	Today	12:00 PM	31:58	+184	+1205711	
Bill	Today	11:43 AM	0:09	+184	+1205711	
Bill	Today	11:42 AM	1:04	+184	+1205711	
Bill	Today	10:37 AM	7:22	+184	+1205711	
Bill	Today	8:15 AM	26:13	+184	+1205711	
Par	Sep 8, 2021	3:30 PM	0:14	+133	+1205711	j
Par	Sep 7, 2021	11:55 AM	0:09	+133	+1205711	j
Use	Sep 2, 2021	9:27 AM	6:50	+170	+1205711	
Use	Aug 31, 2021	1:26 PM	40:14	+167	+1205711	
Use	Aug 31, 2021	1:26 PM	0:10	+167	+1205711	
Use	Aug 30, 2021	11:18 AM	44:54	+167	+1205711	
Use	Aug 30, 2021	10:36 AM	2:36	+167	+1205711	
Use	Aug 30, 2021	9:55 AM	3:10	+167	+1205911	
Use	Aug 30, 2021	9:54 AM	0:44	+170	+1205911	
Use	Aug 30, 2021	8:27 AM	14:13	+167	+1205711	
Use	Aug 30, 2021	8:20 AM	6:35	+167	+1205711	
Use	Aug 30, 2021	8:15 AM	5:22	+167	+1205711	
Par	Aug 27, 2021	3:20 PM	0:09	+169	+1205711	j
Use	Aug 26, 2021	4:11 PM	5:42	+167	+1205711	
Nico	Aug 26, 2021	10:13 AM	2:13	+167	+1205671	n

Call Recording supports the following call recording views and tools displayed above the list when viewing the Recordings section.

- ❖ **All Calls** – Displays the full list of all call recording types the Supervisor has access to review.
- ❖ **Active Calls** – Displays the list of currently active calls the Supervisor has access to review live (monitor – only where available/authorized).
- ❖ **My Calls** – Displays the list of the Supervisor's call recordings for review (where allowed).
- ❖ **By User** – Displays the list of call recordings the Supervisor has access to review grouped by user and user group.
- ❖ **Not Assigned to Users** – (Admin access only) Displays any calls recorded on active TNs not yet assigned to a user in Call Recording.
- ❖ **By Category** – Displays call recordings grouped by category (where Call Recording Categories are in use)
- ❖ **Advanced Search** – Displays the advanced search form for looking up call recordings in the list below. Additional search criteria are offered here for more detailed ways to locate data.

**Note:** All Optional views are permission-based and must be enabled by the organization's Call Recording Admin, so the views displayed to you may differ from the example provided here where all options are presented. Contact your organization's Call Recording Administrator to learn more about the tools you have been authorized to use.

## Search Calls

Call Recording allows for an easy search of calls by utilizing different parameters, such as:

- ❖ Date range
- ❖ User or Group name
- ❖ Any text. Text results found within caller/called phone number, name, and call notes fields, and (where displayed) custom fields and the transcription verbiage.

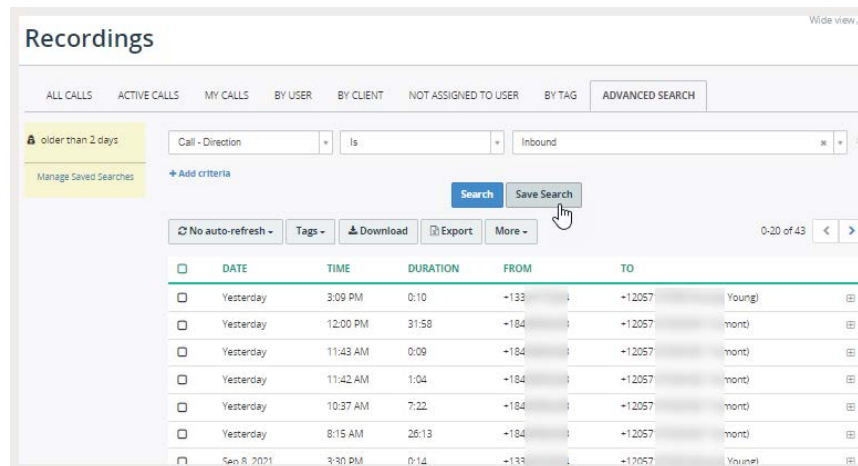
## Search Calls - Advanced

While in Recording – Click on the **Advanced Search** tab to view and make use of additional search criteria drop-down menu items or data-entry fields to find specific call recordings in your list.

Advanced search criteria include:

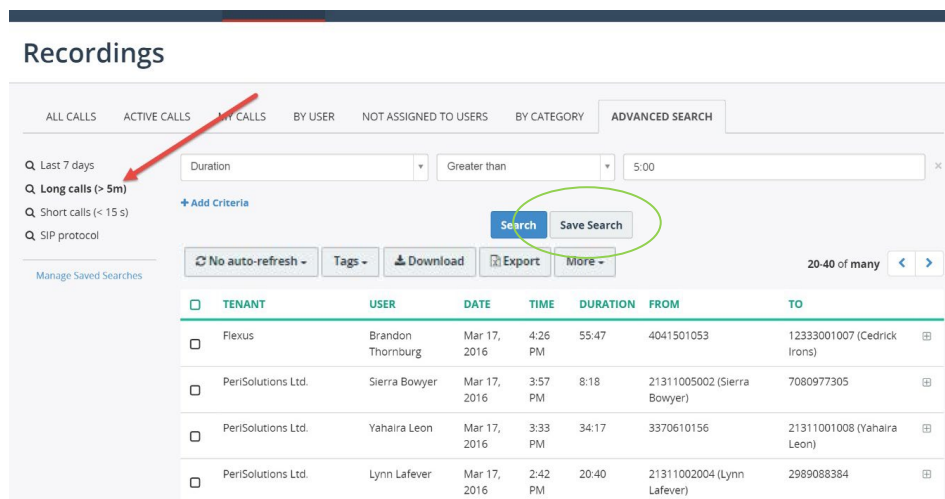
User or Group                      Call ID                      Phone numbers (FROM and/or TO)  
Date or Date range              Call duration...

Each of these criteria supports the use of different comparison operators for filtering, including: Equal To, Not equal to, Starts with, Ends with, Includes, Is empty, Not empty, Match simple pattern, Match regex pattern, Before, After, Between, Older than x days, Newer than x days.



## Saved Search

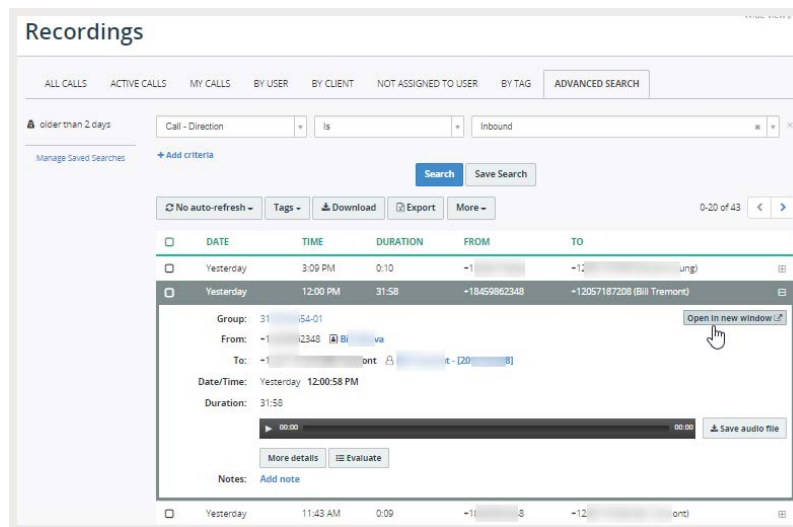
You can save the search criteria you just used, and use it in future sessions by clicking **Save Search**. Saved searches are displayed to you as search options on the left side of the screen.



## Playback Call Recordings

### Inline Basic Audio Player

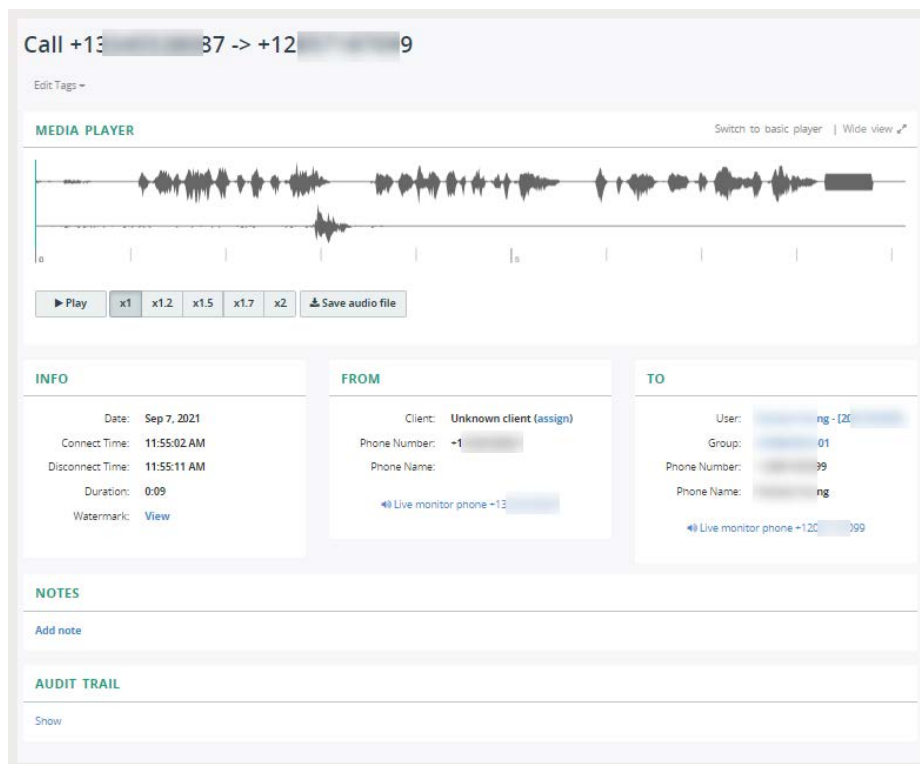
While in Recordings - Click on the item you wish to review in call recording list to see call details and a basic media player within the call list.



### Advanced Audio Player

While in Recordings - Click on **Open in new window** to open a new dialog where detailed call information along with the tools for working with a more advanced audio player are displayed.

This visual and audio presentation offers an easy way to detect periods of silence and talk-over within the conversation.



## Notes

When the Call Recording Supervisor has been given the appropriate authorizations, s/he will be able to view and add new notes to call recordings.

- ❖ These call notes can be displayed inline under the recording and when a recording is opened in a new window.
- ❖ Notes are displayed in a list from oldest to newest by default.
- ❖ Supervisors may also be granted access to Pin notes to the top of the list (out of order), Unpin a note (return it to normal order), or Delete a note, as well.

## Call Recording Notes Inline

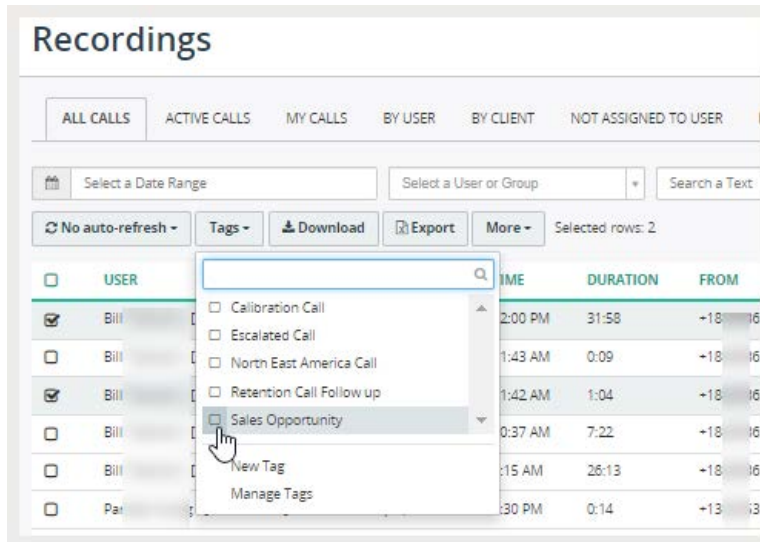
The screenshot shows the 'Call Recording Supervisor' interface. At the top, a header bar displays the user 'Antonie Parker' and the call ID '21311003000 (Antonie Parker)'. Below this, the call details are shown: 'From: 21311003000 (Antonie Parker)', 'To: 6219310492', 'Date/Time: Jun 10, 2015 9:17:21 PM', and 'Duration: 31:35'. A play button and a 'Save audio file' link are visible. The 'Notes' section contains two entries: 'admin Today, 9:06 PM: This is a sales lead. Follow up in 2 weeks' and 'admin Today, 9:07 PM: Scheduled a demo.'. Each note has 'Unpin' and 'Delete' buttons. A green circle highlights these buttons for the second note. Below the notes is a text input field and 'Save' and 'Cancel' buttons. At the bottom, a table lists other calls with columns for checkboxes, names, dates, times, durations, phone numbers, and IP addresses.

## Call Recording Notes in New Window

The screenshot shows the 'Call Recording Supervisor' interface in a new window. The title bar reads 'Call 21311003000 -> 6219310492'. The 'AUDIO' section shows a waveform and a 'Switch to basic player' link. Below the audio is a 'Play' button and a 'Save audio file' link. The 'DATE/TIME' section shows 'Date: Jun 10, 2015', 'Connect Time: 9:17:21 PM', 'Disconnect Time: 9:48:56 PM', 'Duration: 31:35', and 'Watermark: View'. The 'FROM' section shows 'User: Antonie Parker', 'Phone Number: 21311003000', 'Phone Name: Antonie Parker', and 'Ip-address:'. The 'TO' section shows 'User:', 'Phone Number: 6219310492', 'Phone Name:', and 'Ip-address:'. The 'Notes' section contains two entries: 'admin Today, 9:06 PM: This is a sales lead. Follow up in 2 weeks' and 'admin Today, 9:07 PM: Scheduled a demo.'. Each note has 'Unpin' and 'Delete' buttons. Below the notes is a text input field and 'Save' and 'Cancel' buttons.

## Tags

Call Recording supports applying tags (categories) to call recordings. When the Supervisor has appropriate permissions, he or she may create and assign Tags to completed Call Recordings. This tool is found in the Recordings views. Tags are very useful for reporting.



### To Create a Tag

*If authorized:*

1. Click on the **Tag** drop-down above the list.
2. Click on **New Tag**.
3. Provide or define the following:
  - Enter a unique **Name**.
  - Optional - Select a **Tag** to nest this new one under.
  - Define the **Visibility** options.
4. Click **Save** when finished.

### To Manage a Tag

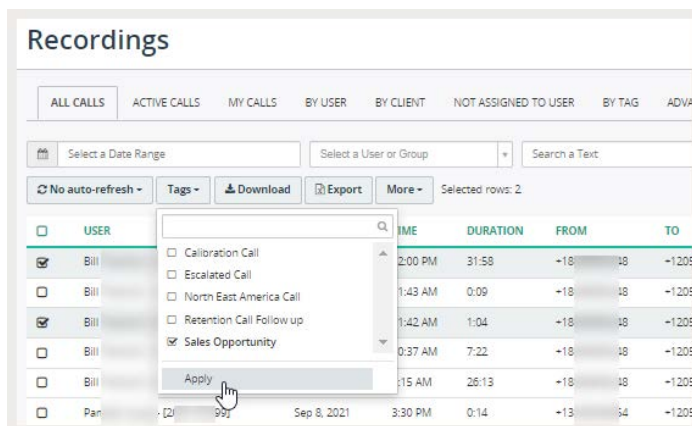
*If authorized:*

1. Click on the **Tag** drop-down above the list.
2. Click on **Manage Categories**.
3. Select the Tag you wish to modify.
  - Click on **Edit** to modify the name, where it is nested, or visibility options.
  - Click on **Add Sub-Tag** to create a child tag under the selection.
4. Click **Save** when finished.

## To Apply a Tag

If authorized:

1. Click to select (checkmark) one or more call recordings in the list.
2. Click the **Tags** button to view available options and a lookup tool.
3. Select one or more Tags from those listed to which you would like to assign the call.
4. Click **Apply**.



## Download

Authorized Supervisors may download and save selected recordings as .wav files while in the Recordings tab view.

When ready:

1. Select one or more recordings in the list using the adjacent check box(es) ☒.
2. Click on the **Download** link to instruct the app to prepare the files for download to .wav.
3. Click on the link that displays once the files are ready for download.
4. Click **Close** in the pop-up dialog once the zip file has completed the download.
5. Click on the [call.zip](#) file that downloads to your pc (check the bottom of the browser window, or in the toolbar for Macs) to open and/or save to a file location using the browsing tools.

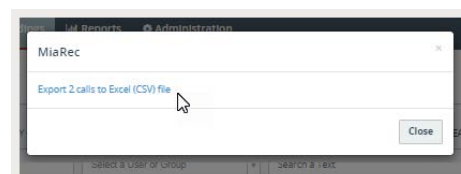


## Export

Authorized Supervisors or Admins may have permission to Export the information about one or more call recordings in their list as .csv (Excel) files. This action can be performed manually:

**Note:** Storage limitations are license based and the file type used to export the files is pre-defined.

1. Select one or more recordings to be saved to an excel spreadsheet using the adjacent check box(es) ☒ in the table list.
2. Click on the **Export** link above the list to instruct the system to prepare the file.
3. Click on the link that displays once the file is ready for export to download.
4. Click on the downloaded file to open and/or save to a file location.
5. Click **Close** in the pop-up dialog once the task has been completed.



## Assign to Client

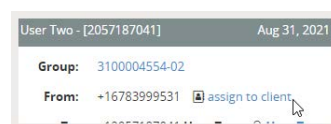
Call Recording supports the ability to assign a Client to calls. When the Supervisor has appropriate permissions, s/he may create and assign a Client tag to completed Call Recordings.

This tool is found in the Recordings views. The system will automatically include the Client assignment to the number in future interactions. This tool is very useful in reporting or when searching. Authorized Supervisors will be able to manage client assignments for a recording *Inline* while viewing the Recordings list or while working in the call details view (open in new window).

### To Assign to Client

If authorized:

1. Click on the [assign to client](#) link while viewing a recording (inline or details view).
2. Select a client from the drop-down option list.
3. Optional: ☒ to add this phone number to the client
4. Optional: ☒ to apply this rule to all similar calls in the future.
5. Click **Save** when finished.



### Assign call to client

 A screenshot of the 'Assign call to client' dialog box. It shows a 'Phone number' field with '+16783999531'. Below it is a dropdown menu labeled 'Assign to Client' with the text 'Select from list'. To the right of the dropdown is a 'Create client' link. There are two checkboxes: 'Add this phone number to the client' (checked) and 'Apply this rule to all similar calls' (unchecked). At the bottom right is a 'Save' button.

### To Create a Client

If authorized:

1. Click on the [assign to client](#) link to view the *Assign call to client* dialog.
2. Click on the [Create client](#) link (far right).
3. Enter a unique **Name\*** (displays for selection)
4. **Contacts / Phone Numbers\*** - Ensure there is at least one phone number populated or edit as needed. format = +ten-digits no spaces. Example: +12345678
5. Optional Name - Enter a contact or location here, as desired.
6. Optional: Click on the **+ add contact / phone number** to include more phone numbers for this Client, repeat as needed.
7. Click **Save**. This client is now assigned to the number(s) defined and will be available for future assignment selections.

 A screenshot of the 'Add Client' dialog box. It has a 'Name\*' field with the text 'New Acme Wonder Biz'. Below it is a section for 'Contacts / phone numbers\*'. There are two rows, each with a 'Phone' field (containing '+16783999531' and '+16783999532' respectively) and a 'Name (optional)' field (containing 'Bob' and 'Jane' respectively). At the bottom left is a link '+ Add contact / phone number'. At the bottom right is a 'Save' button.



## To View Calls Assigned to Client

If authorized:

1. While reviewing a call recording that has a Client assignment:
2. Click on the client name.  
The application opens a new view providing a list of calls that have this client assignment.

**Client «Widgets Company»** [Edit Client](#) [Delete Client](#)

Name: **Widgets Company**  
 Contacts: **+16783378769 (John Thompson)**  
**+16783999531**

**Calls**

Select a Date Range Select a User or Group Search a Text [Search](#)

[No auto-refresh](#) [Export](#) [Delete](#) [More](#) 0-9 of 9

	USER	DATE	TIME	DURATION	FROM	TO	TAGS
<input type="checkbox"/>	User Three - [2059187339]	Aug 30, 2021	9:55 AM	3:10	+16783999531	+12059187339 (User Three)	
<input type="checkbox"/>	User One - [2057191946]	Aug 30, 2021	8:20 AM	6:35	+16783378769	+12057191946 (User One)	
<input type="checkbox"/>	User One - [2057191946]	Aug 30, 2021	8:15 AM	5:22	+16783378769	+12057191946 (User One)	
<input type="checkbox"/>	User One - [2057191946]	Aug 26, 2021	4:11 PM	5:42	+16783378769	+12057191946 (User One)	
<input type="checkbox"/>	Nicole Luengen - [2055786839]	Aug 26, 2021	10:13 AM	2:13	+16783378769	+12055786839 (Nicole Luengen)	
<input type="checkbox"/>	Nicole Luengen - [2055786839]	Aug 23, 2021	9:54 AM	15:34	+16783378769	+12055786839 (Nicole Luengen)	
<input type="checkbox"/>	Nicole Luengen - [2055786839]	Aug 23, 2021	8:44 AM	0:54	+16783378769	+12055786839 (Nicole Luengen)	
<input type="checkbox"/>	Nicole Luengen - [2055786839]	Aug 23, 2021	8:43 AM	0:08	+16783378769	+12055786839 (Nicole Luengen)	
<input type="checkbox"/>	Nicole Luengen - [2055786839]	Aug 23, 2021	8:26 AM	1:08	+16783378769	+12055786839 (Nicole Luengen)	Escalated Call

20 per page 0-9 of 9

This dialog also offers tools to Edit Client details or to Delete Client.


## To Delete a Client

Use Caution - this action is immediate.

1. Click on the [Delete Client](#) link. The list is updated and displays to show that the client has been removed.  
 Note: The Delete Client action is immediate and removes the client assignment from all calls, deletes the custom field, and deletes the item from the selection list; however Call Recording offers a chance to **Undo** the action if performed erroneously.

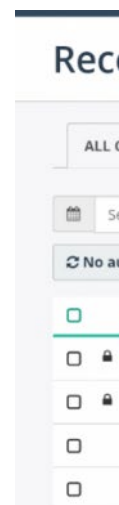


## Confidential

 Call Recordings marked with a Lock icon are Confidential and are not available for review by other Supervisors (unless otherwise authorized to do so by an Admin). A call recording may be marked as "Confidential" either manually by a Supervisor or Administrator who has been granted access to do so - or automatically by the system for certain call types, specific users, or specific groups as defined by an authorized Administrator. Many organizations set internal employee to employee calls to Confidential automatically – or may do so for specific groups of users within the enterprise (e.g., the CEO or the HR department).

In some organizations, specific supervisors may be granted access to manage call recording Confidential flags, and may or may not be allowed to review call recordings marked as Confidential. If so, the Confidential button is shown to the Supervisor in the Recordings view (see More...) and in the Call Details view as a button option. The settings that allow call recordings to be marked as Confidential are defined by a Call Recording Administrator. This feature is often utilized to ensure that calls between HR and employees remain secured, or calls made by an executive or upper management are not available for review by unauthorized personnel.

Typically, all recorded agent/user conversations would be available for review by their Supervisor. If a call recording is marked as Confidential, then the call recording would not be available for review by the Supervisor unless that Supervisor was specifically authorized to view the Confidential Calls of others – this would be defined by an authorized Administrator.



### Automatically Mark as Confidential

An Administrator may enable the **Confidential Calls** *Mark all calls of this user as confidential* setting in the Recording Settings section of the user's profile. When enabled, all call recordings are marked confidential as a default, and only a Supervisor or Admin with enough authorization to override and view Confidential calls can see or work with the call recordings that are marked confidential.

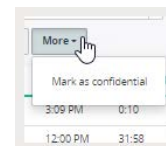
### Manually Mark as Confidential

In this case, authorized Supervisors or Admins may be authorized to mark calls as **confidential** manually if the Administrator enabled the permissions to do so for their own calls or for the calls of those assigned to them. **Note:** For most users, this is not typically enabled and it is not recommended that it be enabled.

For those who should be allowed to set or clear the Confidential flag on other's call recordings (e.g., specifically authorized Supervisors or Administrators), the **Set Confidential Flag** and **Clear Confidential Flag** settings should be set to Enabled in the **Access Other Calls** area. And if the Supervisor (or Admin) should also be able to Override and View the calls others have set to Confidential, the **Access Confidential Calls View** setting should be set to Enabled.

Note: Call Recordings cannot be shared if they are set to Confidential.

While looking at the Recordings list, the More drop-down offers access to flag one or more selected recordings below as *Confidential* for authorized users.



While viewing a recording details and Open in new window, authorized users may see the Mark as confidential button (top right).



## Access Confidential Calls

An Administrator may grant permission to some Supervisors or Admins to review others' confidential call recordings. As an example, company HR executives may be assigned to a group that is granted such access. The permissions for this are also configured by an Administrator in the Manage Users > Roles page. (this is a Service Provider level task.) For supervisors who may see others' confidential recordings, the options to allow set or clear confidential flag in access other calls would be needed to flag calls appropriately.

Configure Roles	Not allowed for this access scope			
<b>Configure Groups</b>	<input type="checkbox"/> View	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	all   none
<b>Configure Users</b>	<input checked="" type="checkbox"/> View	<input checked="" type="checkbox"/> Edit	<input checked="" type="checkbox"/> Delete	all   none
<b>Access Own Calls</b>	<input type="checkbox"/> View	<input type="checkbox"/> Playback	<input type="checkbox"/> Trigger on-demand	<input type="checkbox"/> Categorize
	<input type="checkbox"/> Add notes	<input checked="" type="checkbox"/> Set confidential flag	<input checked="" type="checkbox"/> Clear confidential flag	all   none
	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete		
<b>Access Other Calls</b>	<input type="checkbox"/> View	<input type="checkbox"/> Playback	<input type="checkbox"/> Trigger on-demand	<input type="checkbox"/> Live monitor
	<input type="checkbox"/> Categorize	<input type="checkbox"/> Add notes	<input checked="" type="checkbox"/> Set confidential flag	all   none
	<input checked="" type="checkbox"/> Clear confidential flag	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	
<b>Access Confidential Calls</b>	<input checked="" type="checkbox"/> View			all   none
<b>Access Public Categories</b>	<input type="checkbox"/> View	<input type="checkbox"/> Edit	<input type="checkbox"/> Delete	all   none

When the **Access Confidential Calls – View** setting is enabled for an Admin or Supervisor, they will be able to see or listen to the call recordings they may review that have been marked Confidential. If the *View* setting is **not** enabled, all Call Recordings marked *Confidential* will be unavailable to the Supervisor for review.

Call 264460096 > 313287900

Confidential Back Office

AUDIO

Switch to basic player

DATE/TIME

Date: Jul 19, 2015

Connect Time: 8:17:27 PM

Disconnect Time: 8:17:29 PM

Duration: 0:02

Watermark: View

FROM

User: Unknown User (assign)

Phone Number: 264460096

Phone Name:

Ip-address: 192.168.2.84 (3000)

TO

User: Unknown User (assign)

Phone Number: 313287900

Phone Name:

Ip-address: 192.168.2.5 (5070)

## Multi-Part Calls - Interactions

Call Recording automatically recognizes multiple call parts within a longer interaction with a caller. For example, when a call comes in and has been transferred from one agent to another, when a call has been put on hold and resumed, or when an agent made a consultative call to his/her supervisor and then resumed the initial call.

When a call is a part of longer interaction, a special icon is displayed next to it within the calls list(s), and a message is displayed indicating that 'This call is part of longer interaction', which also provides a quick link to the *interaction* view for the call recording.

**Recordings**

ALL CALLS ACTIVE CALLS MY CALLS BY USER NOT ASSIGNED TO USERS BY CATEGORY

Select a Date Range:  Antonio Parker  Search a Text  Search

☐ Delete Categories  No auto-refresh 0-20 of many < >

		TIME	DURATION	FROM	TO	CATEGORIES
<input type="checkbox"/>	Yesterday	2:15 PM	0:23	200 (Test User)	205	<input type="checkbox"/>
<input type="checkbox"/>	Antonio Parker Yesterday	2:15 PM	0:23	200 (Test User)	205	<input type="checkbox"/>

Icon shows that a call is a part of interaction

Message tells that a call is a part of interaction

This call is a part of longer interaction

Open in new window

From: 200 Test User (Antonio Parker)  
To: 205  
Date/Time: Yesterday 14:15:16  
Duration: 0:23

00:00 00:23

Save audio file

<input type="checkbox"/>	Antonio Parker Yesterday	2:14 PM	0:14	200 (Test User)	205	<input type="checkbox"/>
<input type="checkbox"/>	Antonio Parker Yesterday	2:14 PM	0:20	200 (Test User)	205	<input type="checkbox"/>
<input type="checkbox"/>	Antonio Parker Yesterday	2:13 PM	0:11	200 (Test User)	205	<input type="checkbox"/>
<input type="checkbox"/>	Antonio Parker Yesterday	2:13 PM	0:16	200 (Test User)	205	<input type="checkbox"/>

### Supported Multi-Part Call Scenarios

Call Recording merges multiple call parts into a single interaction in the following call scenarios:

- ❖ An inbound call is transferred from one agent to another; both parts of the call are added to the interaction.
- ❖ An agent puts their first call on hold, makes an outbound consultative call, and then returns to their original call. In this case, all 3 calls will be added to the interaction.
- ❖ An agent has an active call occurring, and he/she receives a second incoming call. The agent places the first call on hold and proceeds to answer the new call. The agent then returns to their original call. In this scenario, the incoming call that occurs between the hold/resume event is treated as an outside interaction. Only the 1st and the 3rd call parts will be added to the interaction.

Multi-part calls are stored internally in the database as multiple calls that are linked. When played in the Call Recording portal, they are displayed to the Supervisor as a single audio file for the entire communication string. This makes it easy to play back the whole set of interactions with the caller by simply clicking the **Play** button.

## Interaction

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

**AUDIO** Switch to basic player

▶ Play

Call 200 -> 205  
Begin Time: 10:21:11 PM  
End Time: 10:21:46 PM  
Duration: 35 seconds  
[Call details](#)

200 -> 205  
200 -> 210

Save audio file

Silence between call segments has been removed

**DATA/TIME**

Begin Time: Yesterday, 10:20:25 PM  
End Time: Yesterday, 10:21:46 PM  
Total Duration: 1:21

Call Recording automatically recognizes multiple call parts of longer interaction, for example, when a call has been transferred from one agent to another, or when a call has been put on hold, the agent made a consultative call to his/her supervisor and then resumed the initial call.

On the recordings page, users can see if the call segment is a part of a longer interaction.

<input type="checkbox"/>	USER	DATE	TIME	DURATION	FROM	TO
<input type="checkbox"/> 3/3	Carrol Robards	Nov 20, 2017	6:59 PM	1:41	+1310 [redacted]	808 [redacted] (CSR 808 [redacted])
<input type="checkbox"/> 2/3	Carrol Robards	Nov 20, 2017	6:56 PM	2:52	808 [redacted] (CSR 808 [redacted])	2056
<input type="checkbox"/> 1/3	Carrol Robards	Nov 20, 2017	6:50 PM	5:40	+1310 [redacted]	808 [redacted] (CSR 808 [redacted])

## Viewing Multi-Part Calls

Each call segment is shown on a timeline. Users can navigate easily to the next segment for playback using the tools provided or by clicking within the appropriate interaction segment.

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

**MEDIA PLAYER** Switch to basic player Wide view

▶ Play Save audio file

**ALL CALLS IN THIS INTERACTION**

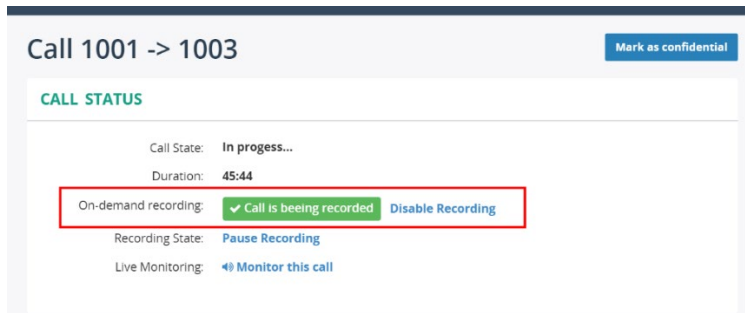
TIME	DURATION	FROM -> TO	TIMELINE
6:50 PM 5:40	+1310 [redacted] -> 808 [redacted] (CSR 808 [redacted])		<a href="#">View</a>
6:56 PM 2:52	808 [redacted] (CSR 808 [redacted]) -> 2056		<a href="#">View</a>
6:59 PM 1:41	+1310 [redacted] -> 808 [redacted] (CSR 808 [redacted])		<a href="#">View</a>

## On-Demand Recording

When a Supervisor is configured to use on-demand recording tools via their desktop phone, they may be authorized to activate/deactivate a call recording in near real-time while the call is active. Group supervisors may also be authorized to activate/deactivate call recording while a call is active for the users assigned to the groups they manage.

Where available for a supervisor:

Click on an in progress call in the Active Calls list to view the **Call Status** display. This view shows the current call state, call duration, the **On-Demand recording tools** (Start/Disable, Pause), the Recording state, and for authorized Supervisors with the appropriate setup downloaded and enabled, the Live Monitoring tools are shown here too.



Click on an available button or link in this view to Enable/Disable Recording, Pause/Resume Recording, etc.

If the Supervisor decides during a call that he/she would like to keep a recording, then a call recording will be stored in Call Recording from the very beginning of a call. (AKA “lookback” – see below).

## Look-Back Recording

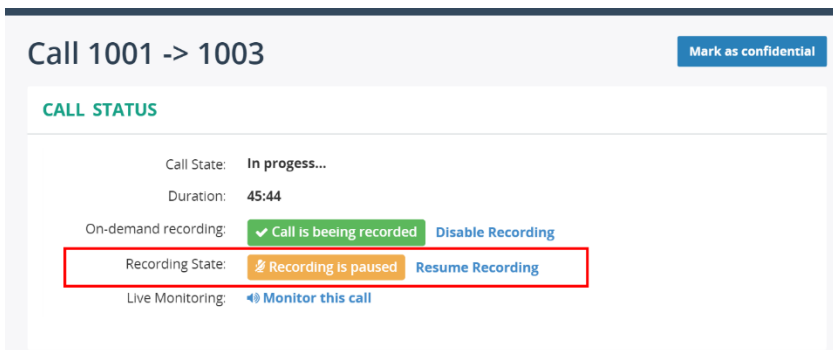
When On Demand is in use, Call Recording supports **look-back** recording. This simply means that Call Recording can be setup to provide an entire call’s contents on demand as a recording if the Supervisor decides at any time - even during the last moment of a call - to manually start saving the recording. The whole conversation will then be stored in the Call Recording database and available for review. Where enabled for use, this works at any time before termination of the call.

During a call, an agent or his/her supervisor should select Active Call in Call Recording web interface and click the Open in new window button. Inside the opened web-page he/she will be able to see their on-demand controls.

## Pause/Resume Recordings

The Call Recording portal also allows authorized users to see active (in progress) call recordings and offers the ability to manually pause/resume an ‘in progress’ call recording in accordance with PCI requirements.

While logged into the Call Recording web portal, authorized users may access the call recording management tools in the Call Details view during a live (active) call to pause/resume call recording, as needed.



## Reports

Call Recording provides extensive and useful reporting to authorized Supervisors and Admins.

The screenshot displays the 'Reports' section of the Call Recording Supervisor interface. The top navigation bar includes 'Dashboard', 'Recordings', 'Reports' (active), and 'Administration'. The user is logged in as 'Smith - [20... 7]'. The 'Reports' sidebar shows options for 'Recent reports', 'My reports', and 'All reports'. The main content area, titled 'All reports', features a search bar and buttons for 'Create', 'Import', and 'Delete'. A table lists the following reports:

REPORT NAME	VISIBILITY	STATUS	SCHEDULE	LATEST RUN
Call details	Private ([205578...])	Finished	Every day	Today, 12:00 AM
Call summary	Private ([205718...])	Finished	Not scheduled	Aug 24, 2021, 4:11 PM
Call summary	Private ([205718...])	Finished	Not scheduled	Aug 26, 2021, 10:11 AM
Call summary 1	Private ([205718...])	Finished	Not scheduled	Aug 18, 2021, 7:40 AM
Group call summary with drill-down	Public	Finished	Not scheduled	Yesterday, 8:39 AM

At the bottom, there is a '20 per page' dropdown and a '0-5 of 5' pagination indicator.

Access to the Reports section (where enabled) is provided as a tab in the toolbar for authorized Supervisors. Call Recording offers multiple built-in reports, including customizable styles like:

- ❖ Audit trail reports (details or summary)
- ❖ Calls reports (details, summary, or group with direction)
- ❖ Group reports (summary or summary with drill-down)
- ❖ Interval call summary report
- ❖ User reports (call summary or details)

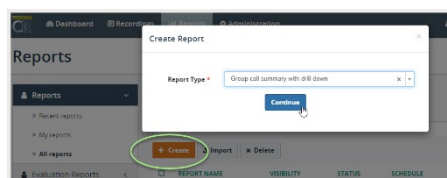
Reports offer extensive filtering options to allow users to customize as needed to gather helpful statistics. Typical usage might include:

Per Day reports  
 Per Group reports  
 Per User reports  
 Agent Evaluation reports  
 Call detail reports, and more...



## To Create a Report

While working in Reports:



1. Click the **+ Create** button to open the *Create Report* dialog and begin.
2. Select a **Report Type** (required) from the drop-down selection tool and click **Continue**.

*A new view displays all options for creating the type of report selected.*

For our example the **Group Summary with drill-down** report was selected.

The example image here → shows the fields and display options available to define during creation or editing for this report.

3. Enter or select appropriate information in all required fields and any options.
  - **Report Title:** Required. Enter a short unique name for viewing in selection lists followed by a concise description and any basic visibility, printing, caching, and access options for others.
  - **Summary Attributes:** Define Summary table data and column attributes
  - **Chart:** Choose and define chart style attributes
  - **Sorting:** Choose and define Sorting attributes
  - **Columns:** Define table column specific attributes
  - **Filtering Criteria:** Add specific criteria to use for filtering this report (optional)
  - **Send Report by Email:** Define whether the report will be automatically run and sent via email.
  - **Schedule:** Choose and define how often the report is run.
4. Click **Save** when finished to update the system with the new report  
Or click **Save and Run** to save and immediately run the report manually, as well.

**Note:** All report styles will have specific pre-defined setup requirements and options.

## To Edit a Report

*While viewing Reports:*

1. Locate and open a report.
2. Click on Edit.
3. Make changes as needed to required and optional fields or settings.
4. Click Save when finished.

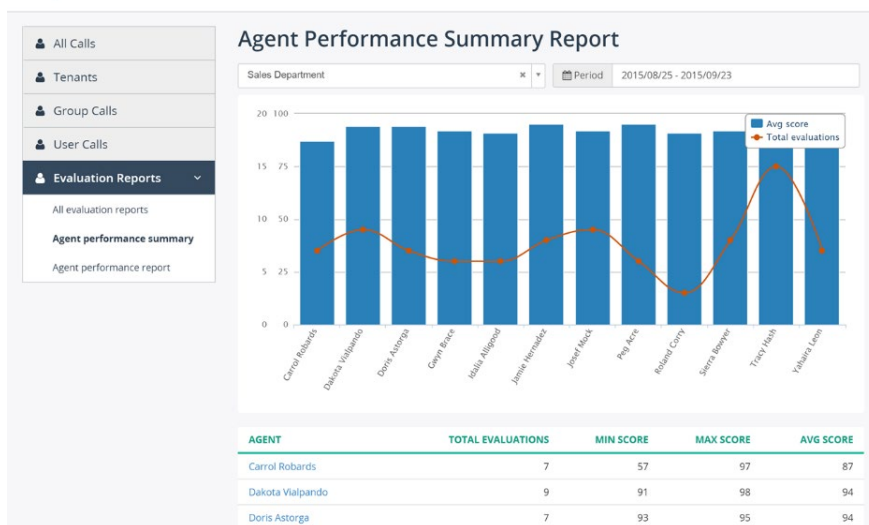
## To View/Run a Report

*While viewing Reports:*

1. Select a Report from all Calls, Group Calls, User Calls or Evaluation Reports
2. Click on it to display the default data defined during setup of the report.
3. Modify filters like the period or click on a single user/agent etc. as needed to drill down.

The Reports section titled Evaluation Reports (where available to the Supervisor) offers options for creating (if authorized) or viewing and running new evaluation forms to gather the results of evaluations and performance statistics. Similar steps are taken to create or manage Evaluate forms. Ref: [Evaluate](#).

### Reports



## Audit Trail

All call recordings are logged and all actions taken on a call recording (Notes, Delete, Create, Playback, Confidential, Pause, etc.) are saved to the Administrator's audit log. Access to review the audit trail data is provided to specifically authorized Administrators only.

## Custom Fields

Call Recording supports the creation of custom fields by authorized Administrators. These may be used for storing or displaying any data, like an order number, support ticket number, product name, call campaign, etc.

The custom fields are often used to display information in the Recordings call list.

In the following example the Order # and Campaign fields were added to the display as Custom Fields:

## Recordings

The screenshot shows the 'Recordings' table view. At the top, there are tabs: ALL CALLS, ACTIVE CALLS, MY CALLS, BY USER, NOT ASSIGNED TO USER, BY CATEGORY, and ADVANCED SEARCH. Below the tabs is a search bar with 'Technical Support' entered. A red callout points to the search bar with the text 'New fields may be displayed in columns'. Below the search bar is a table with columns: USER, DATE, TIME, DURATION, FROM, TO, ORDER #, and CAMPAIGN. The table contains four rows of call data. A red box highlights the 'ORDER #' and 'CAMPAIGN' columns.

USER	DATE	TIME	DURATION	FROM	TO	ORDER #	CAMPAIGN
Jamie Hernandez	Oct 24, 2015	4:21 PM	0:27	21311005003 (Jamie Hernandez)	2228865533	10001	Campaign A
Jamie Hernandez	Oct 23, 2015	9:11 PM	0:49	6597162111	21311005003 (Jamie Hernandez)	10002	Campaign B
Tracy Hash	Oct 23, 2015	8:22 AM	0:24	21311005004 (Tracy Hash)	5370521272		
Gwyn Brace	Oct 22, 2015	12:39 PM	2:36	5690871923	21311005100 (Gwyn Brace)		

Additionally, Custom Field values can be setup by an authorized Admin to display information within the Call Details view:

The screenshot shows the 'Call Details' view for call 21311005003 -> 2228865533. At the top, there are buttons: 'Mark as confidential' and 'Delete Call'. Below the buttons is an 'AUDIO' section with a waveform and a 'Switch to basic player' link. Below the audio is an 'INFO' section with a red callout pointing to it with the text 'View custom fields in call details'. The 'INFO' section contains fields: Date (Oct 24, 2015), Watermark (View), Order # (10001), and Campaign (Campaign A). Below the 'INFO' section are two columns: 'FROM' and 'TO'. The 'FROM' column contains fields: User (Jamie Hernandez), Group (Technical Support), Phone Number (21311005003), Phone Name (Jamie Hernandez), Phone Id, and Ip address. The 'TO' column contains fields: User, Phone Number (2228865533), Phone Name, Phone Id, and Ip address.

If a Custom Field displays in a table view with Search or Advanced Search tools available, the data shown can also be used as a Search term.

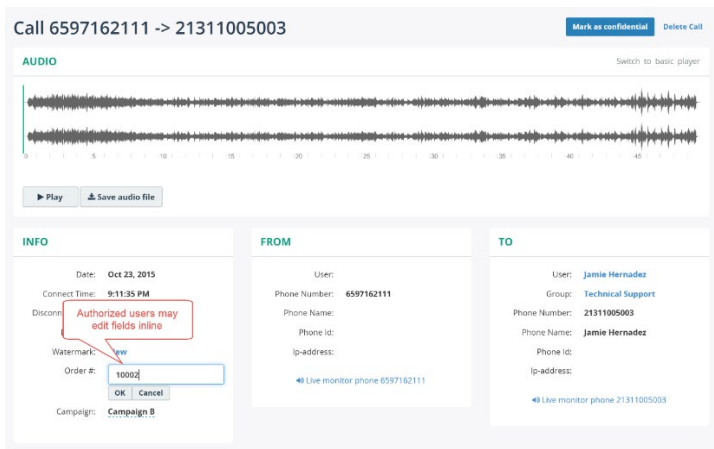
## Recordings

The screenshot shows the 'Recordings' table view. At the top, there are tabs: ALL CALLS, ACTIVE CALLS, MY CALLS, BY USER, NOT ASSIGNED, and ADVANCED SEARCH. Below the tabs is a search bar with 'Technical Support' entered. A red callout points to the search bar with the text 'Quick search within custom fields'. Below the search bar is a table with columns: USER, DATE, TIME, DURATION, FROM, TO, ORDER #, and CAMPAIGN. The table contains three rows of call data. A red box highlights the 'ORDER #' and 'CAMPAIGN' columns. Below the table is an 'ADVANCED SEARCH' section with a red callout pointing to it with the text 'Advanced search within custom fields'. The 'ADVANCED SEARCH' section contains fields: Order # (dropdown), Equal To (dropdown), and 10002 (text input). Below the fields are buttons: 'Run Search' and 'Save Search'. Below the buttons is a table with columns: DATE, TIME, DURATION, FROM, TO, ORDER #, and CAMPAIGN. The table contains one row of call data.

USER	DATE	TIME	DURATION	FROM	TO	ORDER #	CAMPAIGN
Jamie Hernandez	Oct 23, 2015	9:11 PM	0:49	6597162111	21311005003 (Jamie Hernandez)	10002	Campaign B
Sierra Bowyer	Jun 5, 2015	11:37 AM	20:40	21311005002 (Sierra Bowyer)	2021002588		
Sierra Bowyer	Jul 25, 2014	7:10 AM	3:43	21311005002 (Sierra Bowyer)	1610002548		

DATE	TIME	DURATION	FROM	TO	ORDER #	CAMPAIGN
Oct 23, 2015	9:11 PM	0:49	6597162111	21311005003 (Jamie Hernandez)	10002	Campaign B

**Note:** Custom Fields are generally read-only. Access to edit the data types shown in custom fields on the Call Details page is only available where a Supervisor has been authorized to do so by the organization's Call Recording Admin. Access to edit the data displayed in a Custom Field also requires authorization.

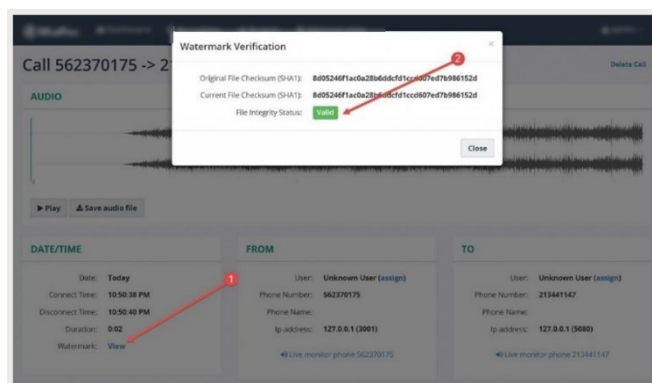


## Watermark

Call Recording supports tamper-proof watermarking or also known as the File Integrity Status of audio files.

To review the Watermark status while in the Call Details view:

1. Click on the **View** link next to **Watermark** in the **Date/Time** section.  
*The File Integrity Status line shows the current verification indicator.*
2. Click **Close** when finished to exit the dialog.



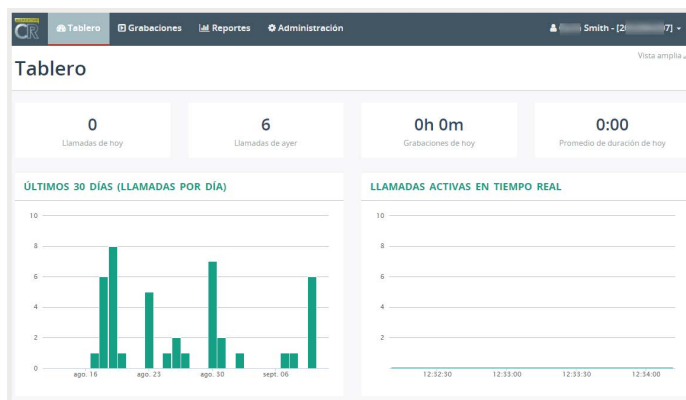
## Multi-Language Interface

Call Recording supports the use of a multi-language user interface. This makes it possible for different users to select different languages (where it is enabled for use). Check with your Administrator or the Service Provider for a list of supported languages in your system.

**Note:** Administrators may have access to set the language availability on multiple levels:

- Default language for all users (menu Administration > System > Language).
- Default language for tenant when multi-tenancy is enabled.
- Default language for group.
- Language for individual users.

In this example, the Call Recording web portal is displayed in Spanish:

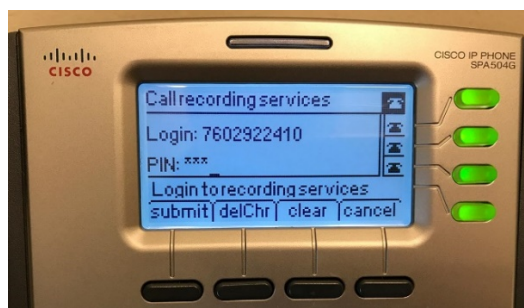


## Phone Device Integrations

Call Recording also supports call control configurations for managing recording activity from devices or applications integrated with the Call Recording portal. This includes multiple phone/device types. Options for such configurations include On-Demand recording and Pause/Resume recording.

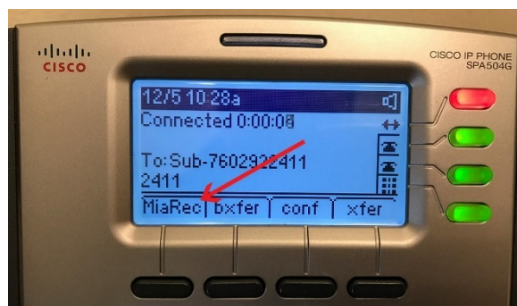
### Sign Into Call Recording

The first time a user accesses the Call Recording phone services on the device, a login page is displayed. The user must enter their PIN to access the phone services. This is the same PIN that was configured on the user profile in the Call Recording web portal. Contact your organization's Call Recording Administrator for assistance or to receive your PIN.



### Activate Call Controls

Tap the Call Recording access Soft Key to view call recording control options. In this example Call Recording (MiaRec) is integrated on a Cisco IP Phone:



Pause / Resume:



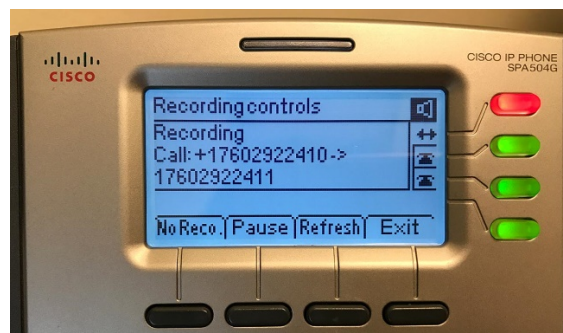
## On-Demand on Phone Devices

### Cisco and Cisco SPA Phones

Cisco IP phones may be configured with softkey access to enable or disable recordings and/or pause or resume the recording during a call to comply with PCI requirements.

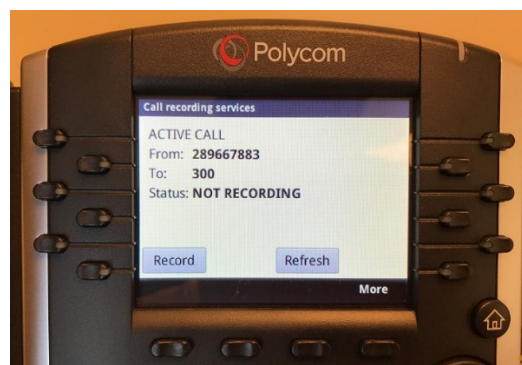


Call Recording also integrates with Cisco SPA service phones to provide on-demand recording control using a **Record|No Record** and/or **Pause|Resume** softkeys on the device. This example shows a Cisco SPA 504G with the Call Recording XML application recording controls configuration in use:



### Poly VVX Phones

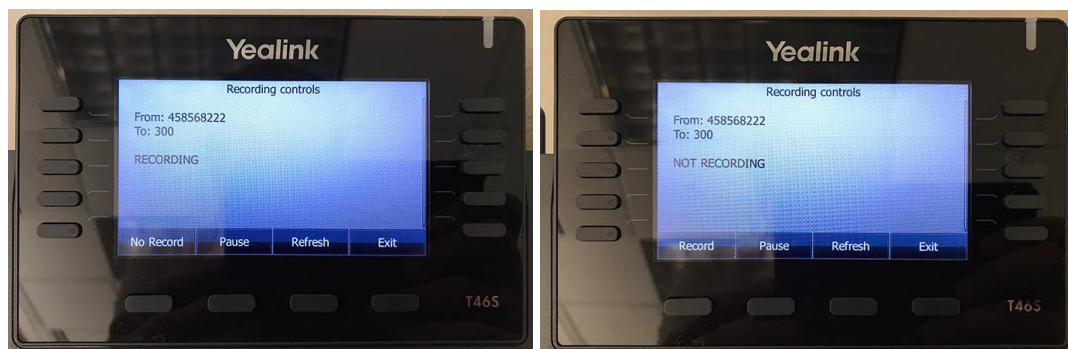
Call Recording integrates with Polycom VVX series phones to provide on-demand recording controls using softkeys. This example shows a Poly VVX 400 series phone with Call Recording XML application recording controls configuration in use:



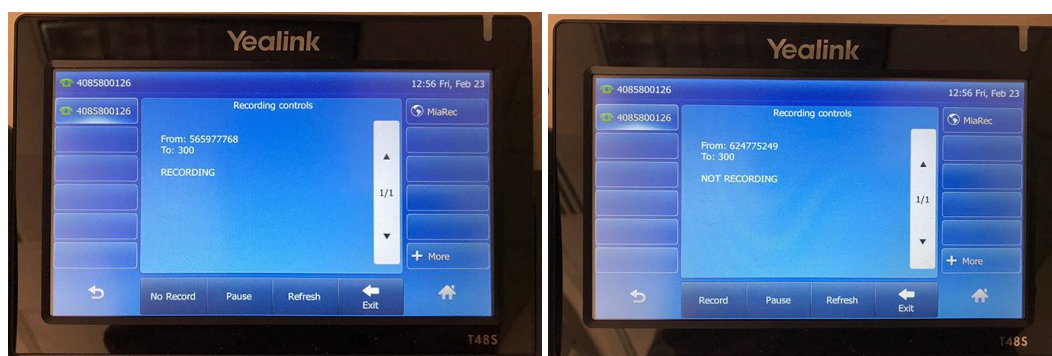


## Yealink Phones

Call Recording can integrate with Yealink phones to provide on-demand recording control using softkeys. The examples below show Yealink T46S and T48S devices with the recording controls in use for Yealink T46S / Call Recording softkey integration. Users can press **Record** | **No Record** and/or **Pause** | **Resume** softkey buttons during a call to selectively record some calls (on-demand recording) or portions of calls (for Privacy compliance). For Example:



Yealink T48S / Call Recording softkey integrations offer similar softkey functionality on a touch screen interface.



## Pause / Resume on Phone Devices

Some examples of call recording controls and use for Cisco, Poly and Yealink phones are shown below.

### Cisco and Cisco SPA Phones

Users/Agents may be enabled to use their Cisco IP phones to pause/resume recording to comply with PCI requirements.

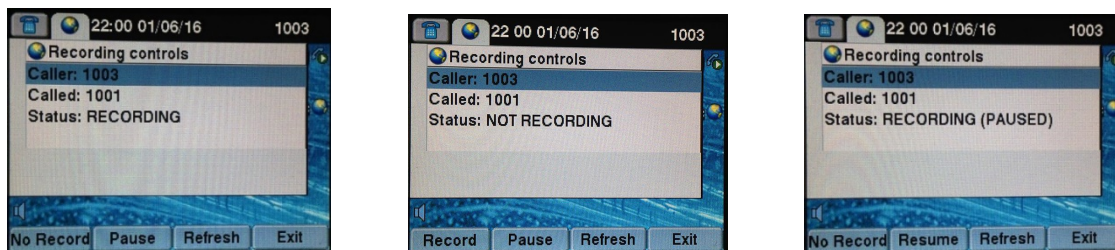
1. Click the **Call Recording** line key to access Call Recording control soft keys.
2. Click the **Record** button at the bottom to enable recording.
3. Click the **Pause** button at the bottom to pause (mute) recording.

Contact your Administrator if you receive an error message or need assistance with permission changes to your user role profile.



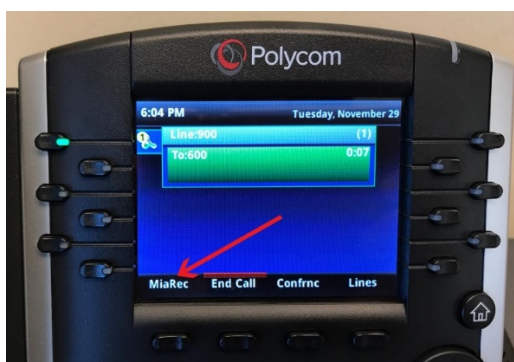


The screen updates automatically to offer useful task options and information about your current state as you select a recording control. A SoftKey is displayed on Cisco SPA series phones when phone services are configured properly.



## Polycom VVX Phones

Users may have access to use their Polycom VVX phones to pause/resume recording to comply with PCI requirements. A Soft Key for Call Recording is displayed on a Polycom VVX phone when phone services are configured properly. For example:



Click the **recording control soft key** button to access the **Recording controls** in the display. These may include No Record, Pause, Refresh, and Resume

- ❖ Press the **Pause** soft key button to pause (mute) recording temporarily.
- ❖ Press the **Resume** soft key button to (unmute) recording for the call.

## Yealink Phones

Call Recording can be integrated with Yealink phones to provide pause/resume recording control using softkey for PCI compliance. The photos below show examples of Yealink T46S and T48S with the Call Recording integration configured to use Pause / Resume in action.



## Password Changes



**Important Note:** If your organization is using Single Sign On, this feature may not be available. The password should be changed in the My Cloud Services Portal to ensure continuity and continued access using a Single Sign-On (SSO) protocol. A change to the password made in the Call Recording Portal has the potential to negatively affect your single sign-on access credentials and disallow normal SSO access to the Call Recording Portal. Contact your organization's Call Recording Admin for guidance or the Service Provider for assistance.

### To Change Your Single Sign On (SSO) Password

This action will update the password credential used to sign into Call Recording and any other applications from the Service Provider that are integrated using a Single Sign-On (one password) protocol.

1. Log into the **My Cloud Services Portal** as usual.
2. Click on the **Change Password** button in your Dashboard's **Profile** card.
3. Follow the instructions to create and save a new password credential.  
Admins in the My Cloud Service Portal may also go to **Locations > Groups > Edit > Manage Users** or the User's Dashboard Profile card and update the password for a user.

### To Change Your Password in Non-SSO Environments

Where the organization is not set up to make use of Single Sign On protocols, and direct login to the portal online via website URL is in effect, use the following instructions to modify the Password:

**Caution:** Use the instructions above if your organization uses SSO (or Active Directory) protocols. Contact your organization's Call Recording Admin for more information.

1. Click on your login name in the right top corner of the toolbar.
2. Select **Change my password** from drop-down menu.
3. Supply the requested information in the fields provided.  
*Please note and implement any password formatting requirements in use by your organization.*
4. Click **Save** when finished to update the credential and begin using the new password to sign into the Call Recording portal.



**For HIPAA, PCI, PII, etc. data security compliance, the following minimum password passphrase policy requirements should be in place or Call Recording portal access**

- ✓ Passwords/passphrases must have a minimum length of eight characters.  
(PCI/PII requires a minimum of 7 characters while HIPAA requires a minimum of 8 characters)
- ✓ Passwords/passphrases must contain numbers, alphabetic, and special characters.
- ✓ Users should be required to change passwords/passphrases at least every 90 days.
- ✓ Password/passphrase parameters must be set to require the new password/passphrase to be different from the previous four (4) passwords/passphrases.
- ✓ First-time passwords/passphrases for new users and reset passwords/passphrases for existing should be set to require a change during the first use.
- ✓ Limit repeated access attempts by locking out the user ID after not more than six (6) attempts. Once a user is locked out of his account, the account remains locked for a minimum of 30 minutes or until a system administrator resets the account and allows access again. The default setting for this allows up to 3 failed attempts to log in, upon the 4th failed attempt, the system gives a 15 second time out and then adds 15 more seconds to the time out period with each failure thereafter. Contact your admin for assistance.
- ✓ Passwords/passphrases must be encrypted during transmission and storage.

## Add-Ons (\$)

### Evaluate

(\$) The optional add-on Evaluate module provides Supervisors with an evaluation form development and management tool that makes it easy to create evaluation reports and use them to report on individual user/agent recorded calls and group call performance.

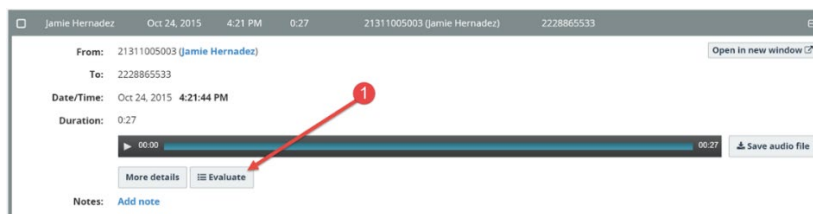
When this add-on license is purchased for one or more license holders and enabled by the organization, and a Supervisor or Admin is authorized to access the recordings of those with this license to add evaluation score cards to recorded calls, a button to access and work with the **Evaluate** forms is displayed in the Call Recording's Details view.

#### Prerequisites:

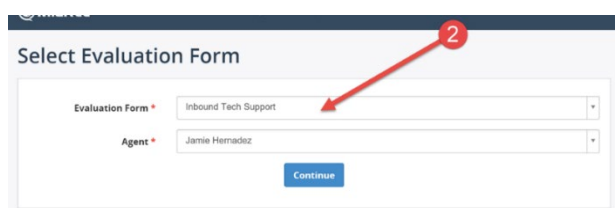
- ❖ The Supervisor should have appropriate permissions to evaluate recorded calls of license holders in their Managed Groups. (Ref. Roles – see your Admin for assistance with this level of access)
- ❖ The agent/user under review in the Recordings details view must have an Evaluate license (add-on) assigned and enabled on their profile in order for the Supervisor to perform evaluations on their call recordings..

### To Evaluate a Recording

1. Select a call recording to view details
2. Click on the "Evaluate" button in the call details window.

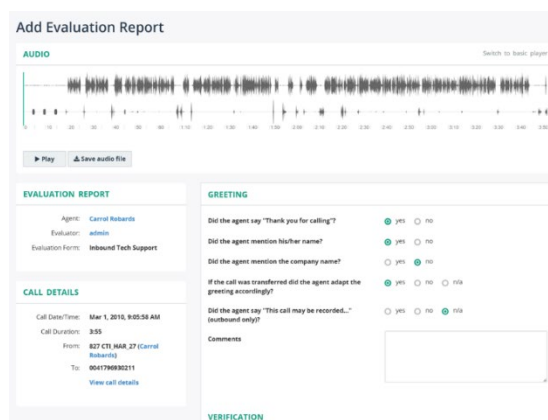


3. Choose an evaluation form to use for this call recording and the user/agent to be evaluated.



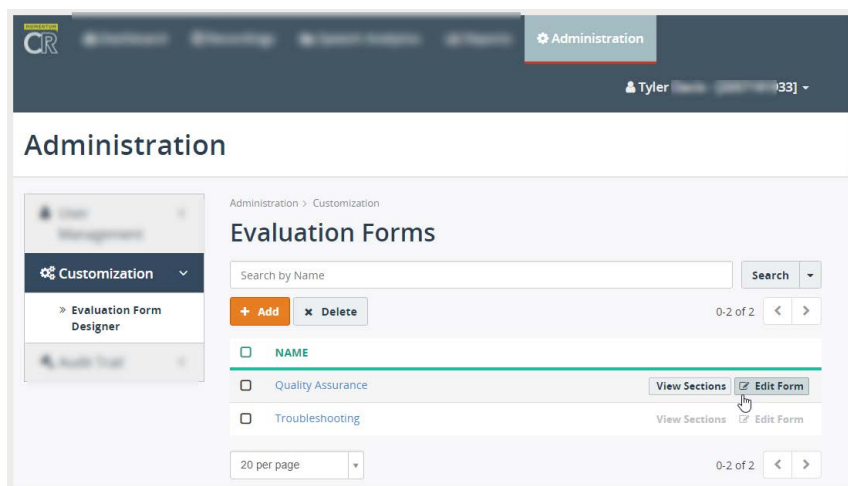
4. Listen to the call recording and answer the questions that have been created for use in this evaluation form.
5. Click **Save** when finished.

Once completed and saved, the call will be scored from 0 to 100 points, or as defined by the creator of the form.



## To Manage Evaluate Forms

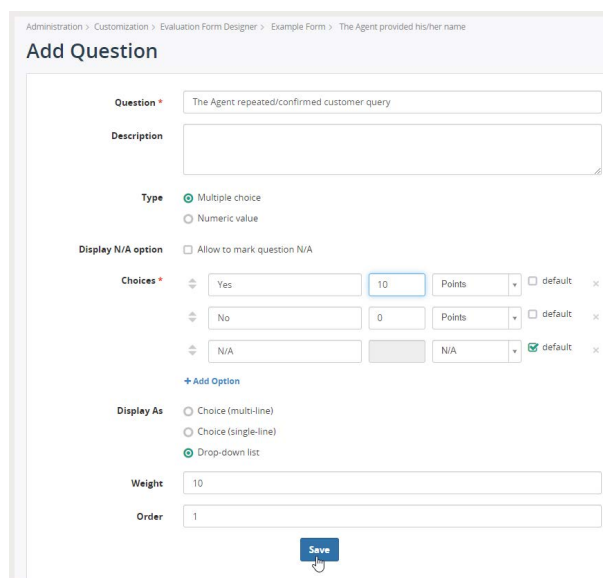
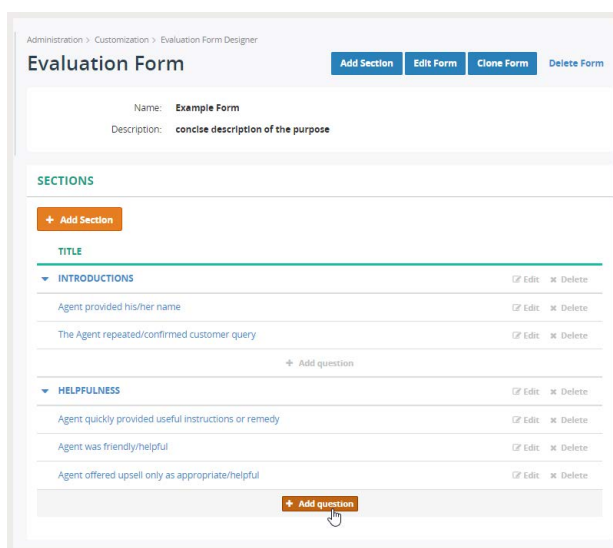
Supervisors (or Admins) provided with access permissions to Create and manage Evaluate forms can do so by going to: Administration > Customization > Evaluate Form Designer.



- To **Search** through a list of Evaluate forms, type useful term (name) in the Search field and click **Search**.
- To **View** sections already created within a form, click the **View Sections** button adjacent to a listing
- To **Edit** a form, click the **Edit Form** button adjacent to the desired listing
- To **Create** a new Evaluate Form, click on the **Add** button above the list.

Provide a unique name and any other optional information requested in the Add dialog, and click **Save**.

Once created, the new form is added to the list and may be **edited** to include Sections and the Questions or evaluation notes needed for those sections. Click **Edit** next to the desired form and then Add sections and Add questions to those sections as needed and **Save**.



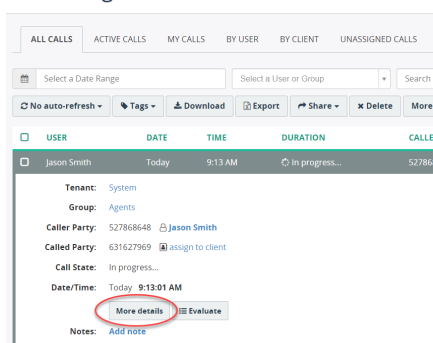
- To **Clone** a form, click the **Edit** button > **Clone Form** and then make changes to the form name, sections or questions, as needed.
- To **Delete** a form, click the **Edit** button > **Delete Form**. Note: authorization required - use with caution.

## Live Monitoring

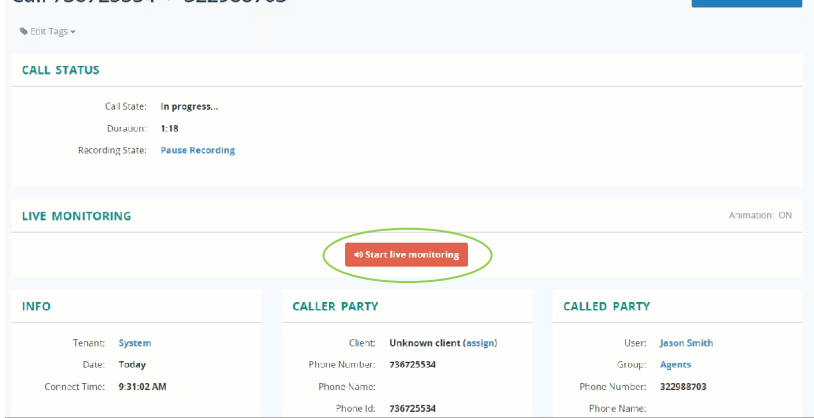
**Add-On. \$\$** The Live Monitoring feature allows authorized Supervisors or Admins to listen to the active calls of the agents or users assigned to them in real-time if a Live Monitoring license has been assigned to those users/agents. This feature helps Supervisors monitor customer service in real-time, train new employees, and quickly alleviate problems.

A special Add-On (\$) license must be purchased per assigned Agent/User (who will be monitored during calls). This feature is designed to provide a superior audio latency (less than 200ms). Live monitoring feature is built into the Call Recording recording core and ready for integration once the add-on Live Player module has been deployed, however it does not need to be enabled. Live monitoring does not depend on a phone system and works with any recording method once the Supervisor is granted permission to 'Live Monitor' users (check with your Admin) and the Live Player is downloaded and installed, whether it is passive or active. Live Monitoring supports Single Call or Consecutive Call monitoring.

### Recordings



### Call 736725534 -> 322988703



## Monitor a Single Call

Supervisors can use this mode to listen in on a single call and automatically terminate the call monitoring session when the call ends. If the Supervisor has the appropriate permissions, and the user/agent has a live monitoring license, s/he will be able to listen to the active calls of the users assigned to them. Once this button is clicked, the Live Player loads and begins to play automatically.

While viewing call details for a live call in the Recordings tab:

1. Click on the **More details** button.
2. Click on the **Start Live Monitoring** button to instantly load and playback a call in real-time.  
*When the call ends, the Live Monitoring session automatically stops.*
3. Click on the **Stop Live Monitoring** button to stop monitoring the call at any time before the call is terminated.
4. Click on the **Exit** button to close the dialog when finished.

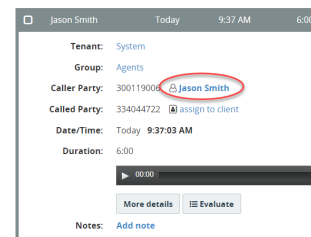
## Monitor Consecutive Calls

In this mode, a monitoring session can continue through multiple live calls for a monitored agent. The Supervisor can then initiate a live monitoring session and continue listening to each consecutive call the particular agent is making or taking until the supervisor decides to stop.

While in the Recording Tab list view:

1. Select one of the agent's previous calls to view call details.
2. Click on their Name as shown adjacent to the Caller Party: to view the options to monitor.
3. Click on the **Start continuous monitoring** button.

**Note:** Click on the **Animation On/Off** to turn the waveform visual on/off as desired during the session.



- Click on the **Stop continuous monitoring** button when you wish to end the session.

#### 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](#)

If you have questions or need assistance, contact your Call Recording Administrator who can work with the Service Provider's Customer Support team, as needed.

## Speech Analytics - QA

Call Recording offers an **Add-On (\$)** license option that (once assigned, setup, and enabled) makes use of the 3<sup>rd</sup> party Google Cloud Speech application (via API) for transcription services and allows the features and tools in the **QA** section to be displayed in Call Recording. Once audio to text transcription of an uploaded call recording is completed, the results are displayed to authorized users in the call details view. The transcription process can be run either manually by authorized supervisors or admins, or on a scheduled basis (every hour/day/week or more often). Scheduled upload for transcription of call recordings occurs as defined, so check with your Call Recording Admin to find out how often you should expect the transcripts to be sent out and returned. The screenshot below shows how a transcribed conversation is displayed with a text representation in the Transcript section of the call recording details view.

#### MEDIA PLAYER

Switch to basic player | Wide view

0 | 10 | 20 | 30 | 40 | 50 | 1:00 | 1:10 | 1:20 | 1:30 | 1:40 | 1:50 | 2:00 | 2:10 | 2:20 | 2:30 | 2:40 | 2:50 | 3:00 | 3:10 | 3:20 | 3:30 | 3:40 | 3:50 | 4:00 | 4:10

[Pause](#) [Save audio file](#)

#### TRANSCRIPT

Side 1 [0:00]: Lesley

Side 2 [0:00]: Looks good .

Side 1 [0:01]: thank you for holding . I do apologize for the wait . We have this new tool that I'm trying to do a search and to find more information about the lamp itself , and I'm not quite sure how to use it yet , so I'm kind of experimenting with it here that I can find the information that we're looking for but supposedly it has the information we're looking for so bear .

Side 2 [0:25]: Well , okay cool now . I'm fine . **I'm calling at lunch . You're fine .**

Side 1 [0:29]: Bear with me here , and hopefully we'll be able to find out the information .

Side 2 [0:34]: Okay , terrific .

Side 1 [0:35]: Maybe I need to do a test okay . There's a lamp for came up .

Alright .

When the recording is played, the transcript section automatically highlights the current position in the call as well (reference the yellow highlight in the screenshot above). This data can be



searched and used to find specific terms. Click on any word in the transcription text and the audio player will jump to that location and play the audio from that point in the recording.

The Advanced Search tab also allows authorized users to quickly locate call recordings that have a particular keyword or phrase in the transcription text.

CALLS MY CALLS BY USER NOT ASSIGNED TO USER BY CATEGORY **ADVANCED SEARCH**

Transcript Includes This call may be monitored

+ Add criteria

Run Search Save Search

No auto-refresh Tags Download Export More

0-3 of 3

<input type="checkbox"/>	DATE	TIME	DURATION	FROM	TO
<input type="checkbox"/>	Apr 20, 2017	12:58 PM	0:21	1210HIDDEN	+14086081250
<input type="checkbox"/>	Apr 11, 2017	4:20 PM	0:21	5281HIDDEN	+14086081250

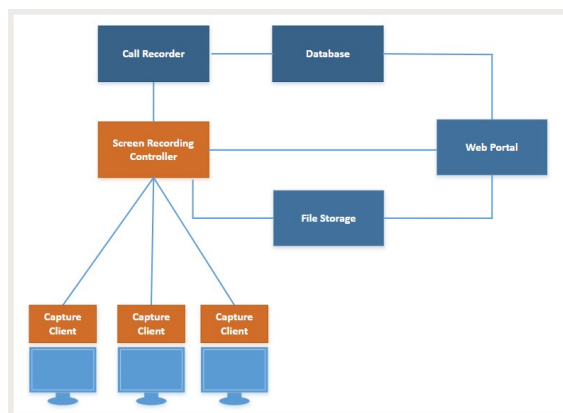
## Screen Recording

The Call Recording solution offers an **Add-On (\$)** license service for Screen Recording during calls. This service relies on a Screen Recording Client running on agent desktops in order to perform screen captures during a call. The controller application is responsible for authentication of client workstations and initiating capture process when an agent handles a new call from that workstation.

Once installed and setup on a workstation by an Administrator or the service provider, users being recorded simply perform their normal daily tasks.

Note: This application won't work with Call Recording without the Add-On license.

The following diagram illustrates a high-level architecture of a screen recording solution.



Components:

- The **Screen Recording Client** runs on the Agent's workstations as a Windows Service.
- The **Screen Recording Controller** authenticates all clients and controls a recording process; i.e., starts/stops screen capturing when agents receive/make calls.
- When the call ends, the **Client** automatically uploads the video file to the server for storage and playback by authorized Supervisors or Admins within the Call Recording portal.