



# Cloud Contact Center

Supervisor and  
Management Portal  
Introduction Guide

Course: SGMWCCSM001  
December 2020

## Agenda



- Webex Contact Center (WxCC) Service Architecture (Brief)
- Supervisor Training
  - URL / Logging in
  - Navigating The Desktop
- Reporting – Analyzer
  - Historical / Real-Time Reports (Visualizations)
  - Dashboards
- Agent Console
- Call Monitoring
  - Selection / Filtering
  - Scheduling
- Call Recording
  - Management / Search
  - Organization and Tags
  - Security and Pruning
- Questions

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Here are the topics I will be showing you today:

- First I will provide a high level overview of the service architecture. Not the intent to make you experts on the service design however understand some basics will allow you to be better prepared for the experience. I will provide a description of Terms used. Service delivery and a brief review of how calls flow through the service.
- Second the login process is presented
- Next Navigating the client desktop or console
- Then we will review Reports (Visualizations) and Dashboards
- Launching the Agent Console
- Then Call Monitoring. We will cover the use of the tools for Selection, Filtering and Scheduling monitored calls.
- Finally we will review Call Recording. We will cover recording Management, Organization, Security and Storage
- Lastly I will address any additional questions

# WxCC Framework Terminology



**Entry Point.** The initial landing place for customer calls on the WxCC system. One or more toll-free or direct dial numbers can be associated with a given entry point. IVR call treatment is performed while a call is in the entry point. Calls are moved from the entry point into a queue and are subsequently distributed to agents.

**Queue.** A holding place for calls while they await handling by an agent. Calls are moved from the entry point into a queue and are subsequently distributed to agent team(s).

**Site.** A call center location under the control of the enterprise. For example, an enterprise named *Acme* might have sites in Chicago, Manila, and Bangalore.

**Team.** The logical grouping of agents. Teams handle calls for one or more queues. Agents can belong to more than one team, but agent can only log into one team at a time.

**Agent.** A person who answers customer calls; also referred to as a *customer service representative*.

**Agent Profile.** A group of permissions and Agent Desktop behaviors that can be assigned to specific agents. Each agent profile specifies permission levels relating to queue transfers, agent consults and transfers ("buddy teams"), wrap-up and idle codes, wrap-up time-out values, and agent auto-available.

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Lets first look at the Terminology used when discussing the service delivery and operation.

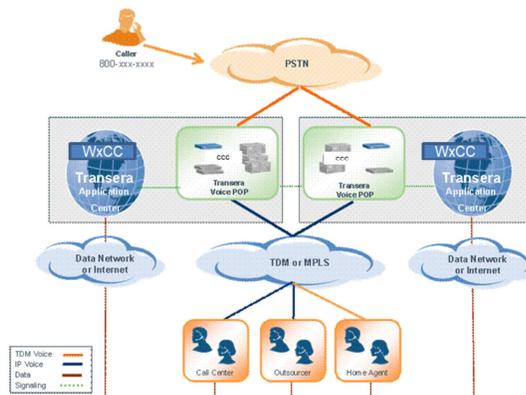
- An "Entry Point" is the landing place for the caller when contacting the Contact Center. This is where any IVR treatment is performed. Also, any messaging, announcements and/or menu choices for the caller are also provided once the call has been received at the Entry Point.
- The "Queue" is a holding place for callers until such time as an Agent becomes available.
- A "Site" in this context is a little different from what we might traditionally think of the term site. The "Site" in this context is where the Contact Center is located.
- A "Team" is a grouping of Agents. It is important to remember that Agents can be members of multiple Teams however, when logged into the service, Agents can only be active in one team during their session. Teams can be designed to handle multiple queues as well.
- An Agent is one who has the calls or communications routed to them through the contact center service.
- An Agent Profile is the permissions that define what Agent functions or capabilities, what Teams they belong to and their skill levels.

# What is Cisco Webex Cloud Contact Center?



Webex Contact Center (WxCC) is a virtual ACD located in the Cloud

- ❖ Contact Center provides “mid-point” call control
- ❖ Call Treatment is provided to Caller leg
- ❖ Join together two call legs
  - Caller leg
  - Agent leg



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The Webex Contact Center is a cloud-based service that operates a little different than your traditional premise or hosted-based call-center. There are two distinct parts to the contact experience, barely perceptible but very useful. The service operates in the mid-point between the Caller and the Agent. With this design there is a "Caller" leg and an "Agent" leg to the communications path.

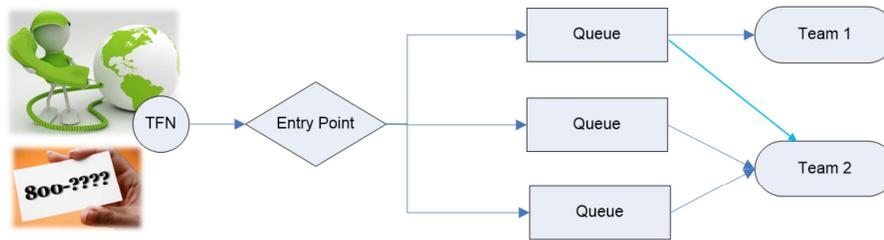
When the caller makes contact with the Contact Center they are first provided with IVR treatment, messaging/announcements and perhaps a menu of options to choose from. When it is necessary to connect with an Agent, the service will first call the agent to make sure that a connection can be established to the available agent and notify the agent that a caller will be presented. The agent's communication device will ring or alert them to the incoming call. The agent will answer the call using their communication device be it a desk phone or softphone, etc. in the same manner in which they would answer any call. Once answered / accepted, then the desktop will present the Contact Center call controls to be used to manage the interaction.

# Entry Points and Queues

## Typical Call Flow



1. Client Dialed Number is mapped to an Entry Point
2. Entry Point IVR treatment
3. Call is routed to a specific Queue
4. Call in Queue is distributed to one or more Teams of agents



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Here we see a very brief overview of the Call Flow through the Contact Center service.

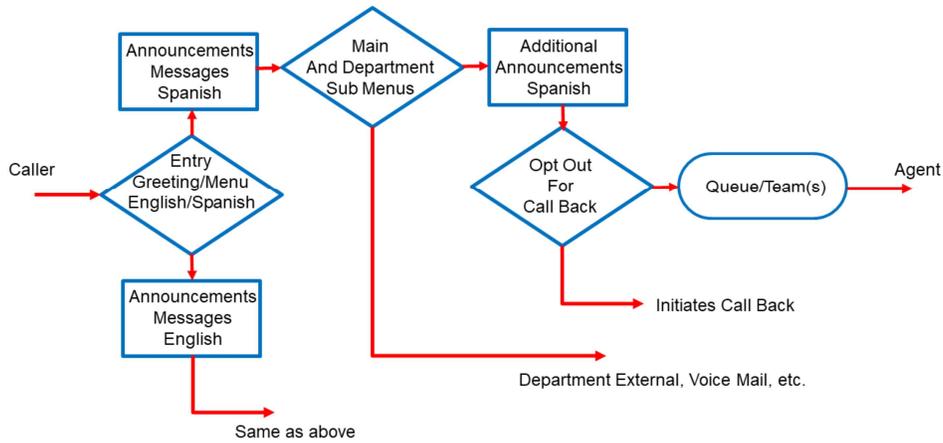
A call is received when the caller has dialed the phone number for the service. Typically the client has dialed an 800 number for example. The call is received at the Entry Point. At this point the caller will likely be given an announcement and offered menu choices to select from such as selecting Sales, Service or Support by entering digit at the prompt.

The caller would then be presented to the appropriate Queue which may also play an announcement or messaging before being routed to a Team/Agent. Here a caller may be held if no agent is immediately available. May receive announcements or other messaging such as their wait time status, etc.

This would then route the call to the correct Team(s) which would then route to the first available Agent.

# Entry Points and Queues

## Detailed Example General Call Flow



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Here is a real example of a Call Flow in use with another client. In this call flow a caller enters an Entry Point and is given initial IVR treatment that includes making a selection for English/Spanish. The caller is then provided with additional messaging in the particular language and then is provided with menu to select from which will then determine how the call is routed.

Examples:

- Support Team
- Department
- Maybe routed to voicemail or External number

In the case of being routed to a specific Team the caller is given further announcements:

- Please hold for next available Agent
- Wait time, etc.

In this example if the wait time exceeds a predetermined amount the caller can be provided a choice for a Call-back option or continue to wait. The Call-back feature (if used) will then out-dial the original caller automatically once an agent becomes available. Calls are then routed to the Team and the available Agent will then be contacted to connect the call.

# Launching the Console



- HTML Supervisor Applet Portal URL

➤ <https://portal.cjp.cisco.com>

Bookmark this URL

**Cisco Webex**  
Enter your email address  
Email address  
Next

**Cisco Webex**  
Hello scotttest5@mytestaccounts.com,  
Password  
Sign In  
Forgot password?

Enter Login Id  
and Password  
Provided

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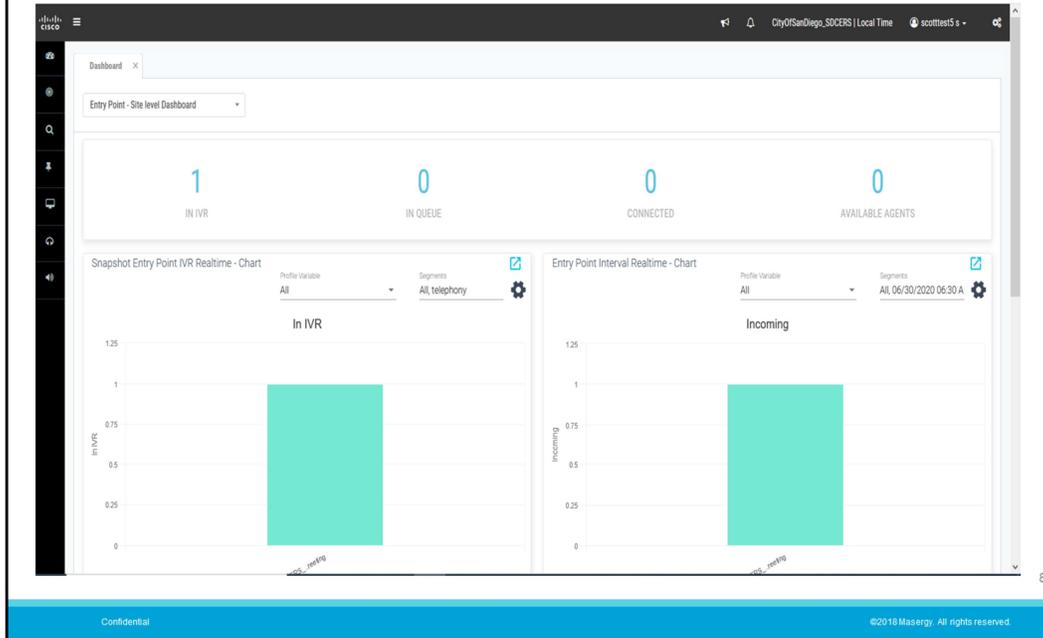
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The Supervisor/User will first receive an invitation message to “Join” the Contact Center service. Once you have clicked the imbedded link in the message you will receive a temporary access code. When used you will be prompted to enter a new Password and save it.

The Supervisor/Manager will login to the service using their internet browser to the web URL address provided to them by their system administrator. It should be noted that you must make sure that you bookmark the URL provided and not the site that you might be redirected to when logging into the service. The service will redirect you automatically to the active webserver which can change from time-to-time due to server availability, maintenance, location, etc. You will then enter your login email and password.

Note: Your email will typically be your work email address. The Password will be the result of your creating the Password from your initial service invitation and the Password you then created.

# WxCC Management Dashboard



Once logged into the Management portal you will be presented with the default Management console and dashboard. Along the left-hand side are your management controls to access functional areas. We will cover that next.

Displayed is a Default Dashboard showing Real-Time statistics for the Contact Center.

# Navigating The Dashboard



**Expand Menu**

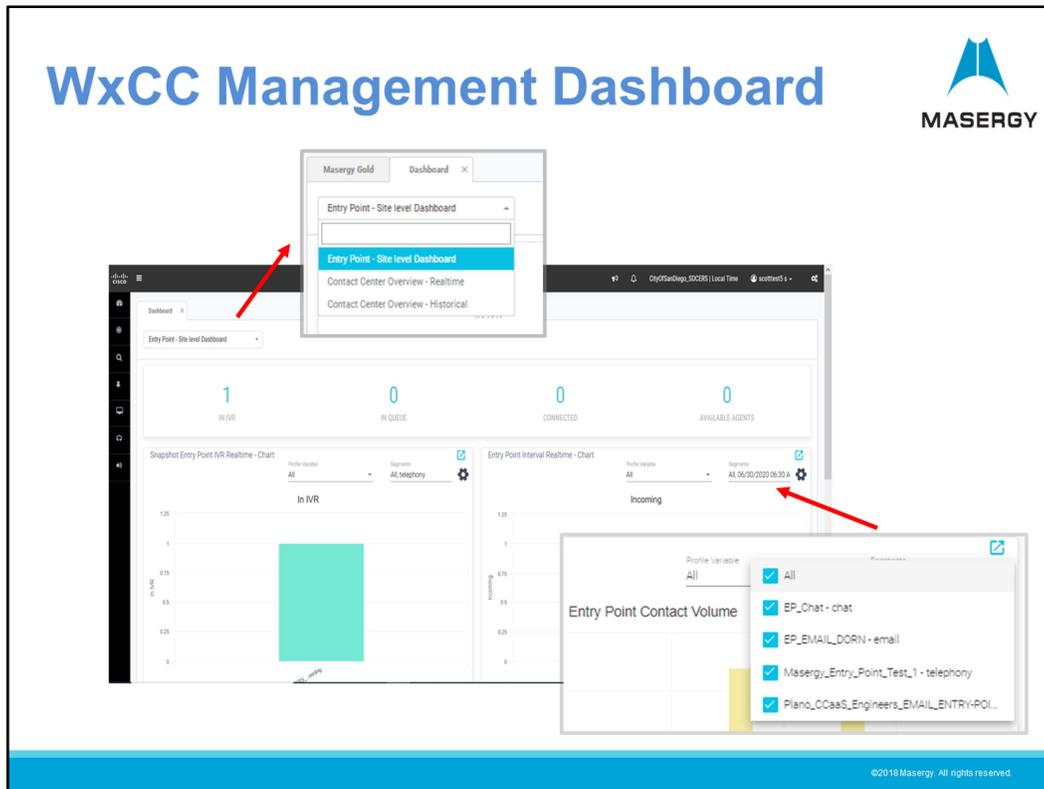
- ❖ May or may not have all choices. Rights can be determined by Admin
- ❖ Access to Reports and Dashboards
- ❖ Agent Desktop
- ❖ Call Monitoring
- ❖ Call Recording

The dashboard icon controls menu can be expanded by clicking on the three horizontal bars at the top left-hand side. This will expand the controls menu allowing you to see the available choices. The menu choices can be pre-determined in design and managed by the System Administrator.

You may have access to all or part of the following:

- Reporting and Analytics (Analyzer). This provides access to the Historical and Real-Time Reports.
- The Agent Desktop. This allows a Supervisor/Manager to be able to Launch the Agent Desktop to take or make calls and communications through the Contact Center.
- Call Monitoring allows you to Monitor calls by demand, selective criteria and schedule.
- The Call Recording controls allow one to search and manage recordings based on a variety of criteria.
- Other functional choices are related to provisioning and service management. These functions are typically reserved for system Administrators and are not covered in this training module.

If you are a System Administrator I highly recommend attending the WxCC System Administration Training.



The default Dashboard displayed is the stock “Entry Point Dashboard”. The drop-down menu in the upper left allows you to display other stock dashboards available. These Dashboards are comprised of a set of available stock reports known as “Visualizations”.

This stock dashboard provides:

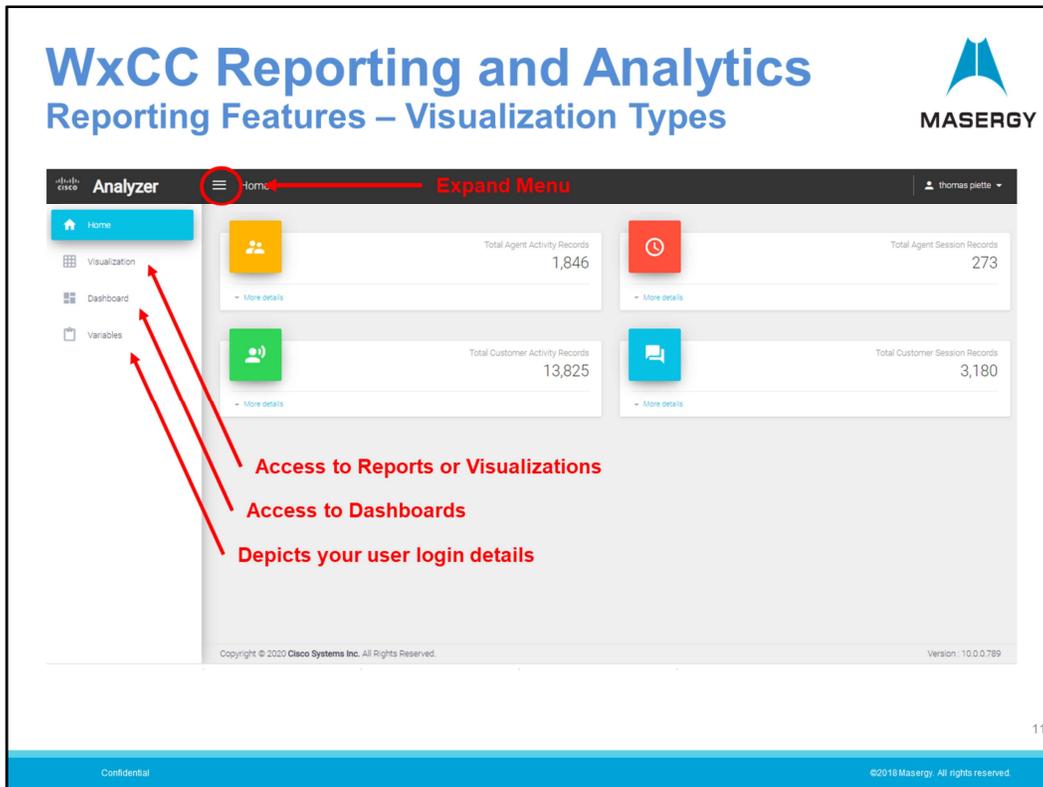
- Calls in the IVR (Entry Point calls)
- Calls in Queue
- Calls Connected to Agents
- The number of Available Agents

Also displayed are Bar Charts providing Real Time data for selected or all forms of available channels of communication. A Bar Chart for Historical contact volume is also displayed.

Note: Some of the stock visualizations shown even allow you to alter what information within them is displayed. In drop-down menu depicted on the lower right you are able to choose a specific Entry Point (Remember Entry Points? Where calls or other forms of communication enter the service like email and chat) or select all.

Customizable Reports and Dashboards for displaying Call Center Statistics can be created.

We will review Reports and Analytics also known as Analyzer next.

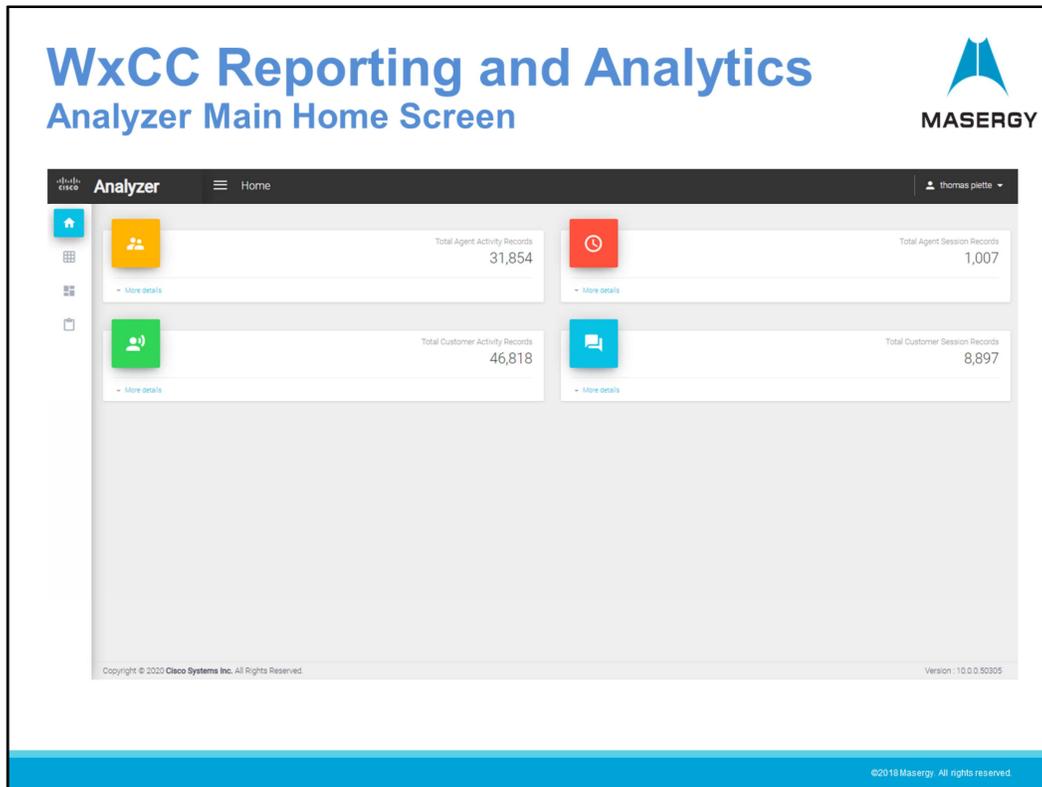


This is the “Home” screen for Analyzer.  
On the left-hand side are your menu options.

Through Analyzer you will have access to Reports known as “Visualizations” and “Dashboards” which are a collection of the visualizations.

The “Variables” tab is simply your login details. At this time there is no functional need for you to access. One notable item a user of reports will be assigned an ID code. If you have the ability to create custom reports then the ID references the author.

Note: This presentation provides an overview of the Reporting capabilities. We do offer a separate training course on Analyzer alone. In that course we go more deeply in the ability to edit and create your own reports. As Supervisors you likely need to access and run reports. If your responsibility is also to produce customized reports we encourage you to take the Analyzer Training.



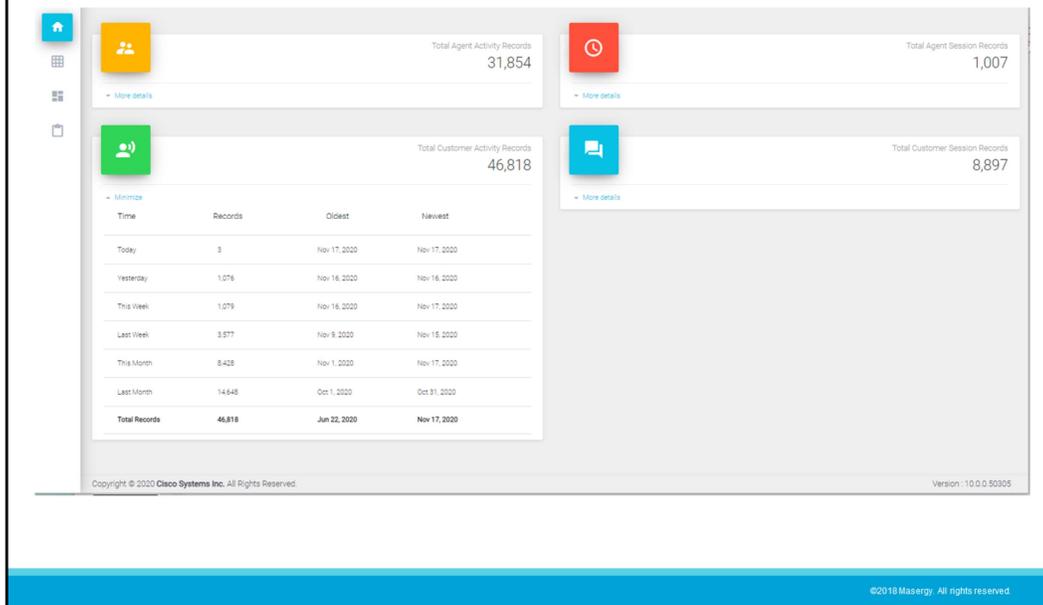
The Analyzer Home Screen also contains a default Dashboard. This Dashboard is made up of four quadrants summarizing the total system statistics in the form of Agent and Customer (client), Activity and Session records to-date.

This represents the four types of reporting that can be done. These are:

- Agent Activity – Represents details of the elements (state changes) in the agent workflow.
- Agent Session - Represents the agent workflow, consisting of a sequence of agent activities.
- Customer Activity – Represents details of the elements in the customer’s interaction with the service.
- Customer Session - Represents the customer’s overall flow (summary) consisting of a sequence of activities.

# WxCC Reporting and Analytics

## Analyzer Main Home Screen



Each quadrant can be expanded to show the records count for the last month.

To restate its importance, remember that each of these four records types represent the type of reports/visualizations available. Many reports can be edited or customized to your needs. New reports can be created. When editing or creating a report or visualization that falls into one category it cannot be made to be a different one.

# Visualizations(Reports)

## Stock Reports

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Visualization

Home > Visualization > Stock Reports

Search Folders & Visualizations Show: Everything

Business Metrics Historical Reports Real-Time Reports

- **File / Folder Structure**
- **Default Folders Include**
  - Metrics
  - Historical
  - Real Time
- **Can Create Custom**
  - Folders
  - Reports
  - Dashboards

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Clicking on the Visualization Icon opens the window to show the folders available. The folders and files within follow a windows-like structure.

Three Stock Reports folders store:

- Metrics
- Historical Reports
- Real-Time Reports

You can also search using keywords for individual reports and/or folders.

# Visualizations(Reports)

## Historical Reports

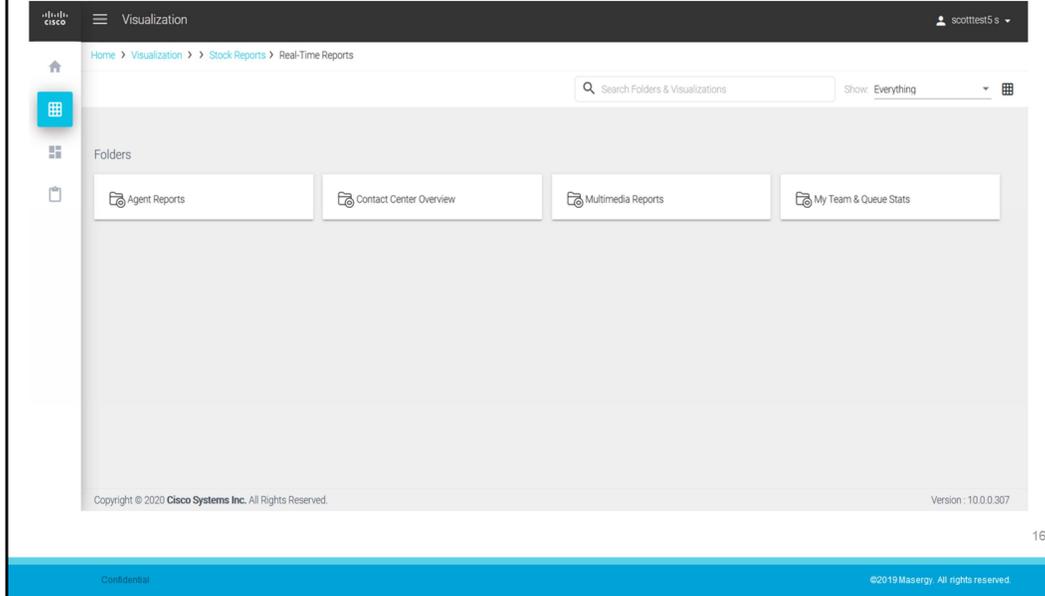


The screenshot shows the Cisco Visualization interface. At the top, there is a navigation bar with the Cisco logo, a menu icon, and the text "Visualization". On the right side of the navigation bar, there is a user profile icon and the name "scotttest5 s". Below the navigation bar, there is a breadcrumb trail: "Home > Visualization > Stock Reports > Historical Reports". A red circle highlights the "Stock Reports" and "Historical Reports" links in the breadcrumb trail. A red arrow points from the text "Can click to move back to the preceding location" to the "Stock Reports" link. Below the breadcrumb trail, there is a search bar labeled "Search Folders & Visualizations" and a "Show: Everything" dropdown menu. The main content area is titled "Folders" and contains a grid of folder cards: "Agent Reports", "Agent Trace Reports", "Auxiliary Reports", "Contact Center Overview", "Multimedia Reports", and "My Team & Queue Stats". At the bottom of the page, there is a footer with the text "Copyright © 2020 Cisco Systems Inc. All Rights Reserved." and "Version: 10.0.0.307". The page number "15" is visible in the bottom right corner. A blue bar at the very bottom contains the word "Confidential" on the left and "©2019 Masergy. All rights reserved." on the right.

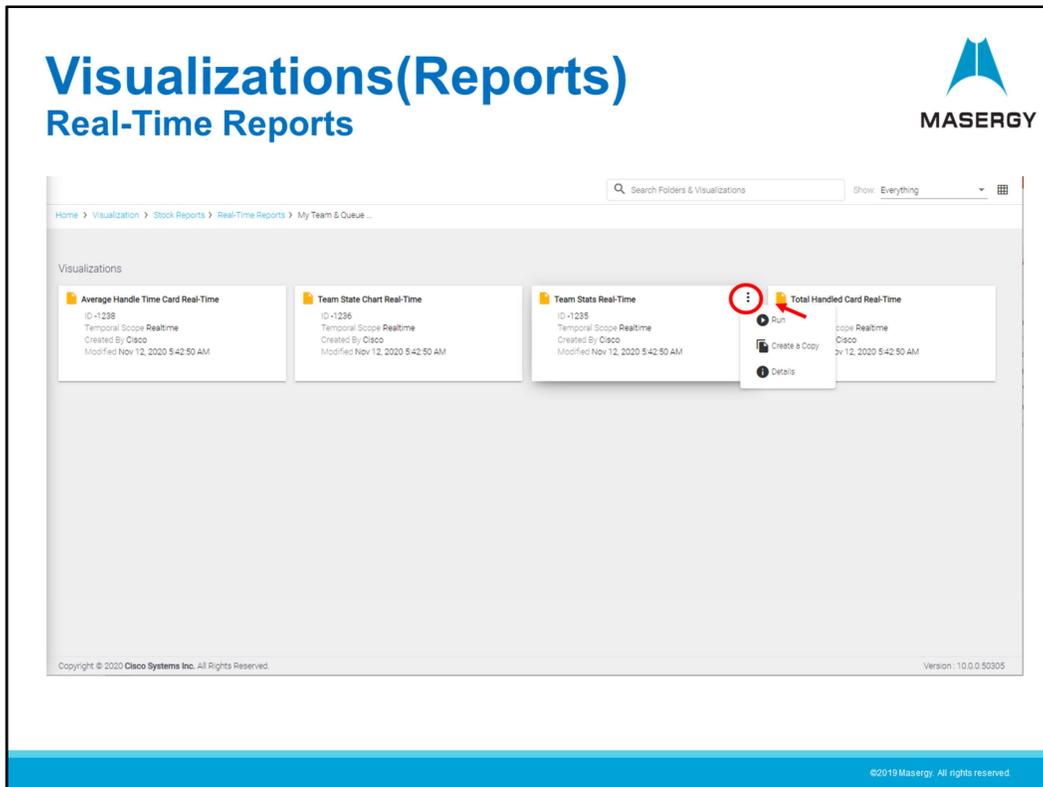
In this example clicking on the Historical Reports folder opens additional sub-category folders that contain the individual reports.

# Visualizations(Reports)

## Real-Time Reports



This is the sub-category folders for Real-Time reports. Lets take a look at the folder for “My Team & Queue Stats.”



These are the four stock reports (Visualizations) that are in the My Team & Queue Stats folder.

By clicking on the three vertical dots along the top right side you will open additional functions available. In the example above you can:

- Run the report/visualization
- Create a Copy
- Obtain details with regards to the report. Details include when created, author, etc.

Creating a copy will allow you to edit the report/visualization. This will provide you with the ability to customize a report to your needs or make a report your “own”. If interested we offer training on Analyzer to provide a deeper overview and further knowledge on using and customizing Visualizations and Dashboards.

# Analyzer – Dashboards

## Stock Dashboard Example – Contact Center Overview



cisco **Analyzer**

Contact Center Overview - Historical Queue Name: All | Channel Type: All | Interval: Daily | Duration: Last 7 days

**Average Service Level**

50

50 0 0

**Total Contacts Handled**

0

0 0 0

**Total Contacts Abandoned**

3

3 0 0

**Average Handled Time**

The data available is insufficient to render the visualization.

**Longest Contact In Queue**

00:00:07

SDCERS\_MemberServices\_Q

**Contact Details in Queue**

Interval	Channel Type	Queue Name	# Contacts	Avg Queue Wait Time	Longest Contact in Queue	# Abandoned Cont
06/22/2020 (1)	telephony (1)	SDCERS_MemberS...	1	00:00:03	00:00:03	1
06/24/2020 (2)	telephony (2)	Outdial_Q (1)	2	00:00:00	00:00:00	0

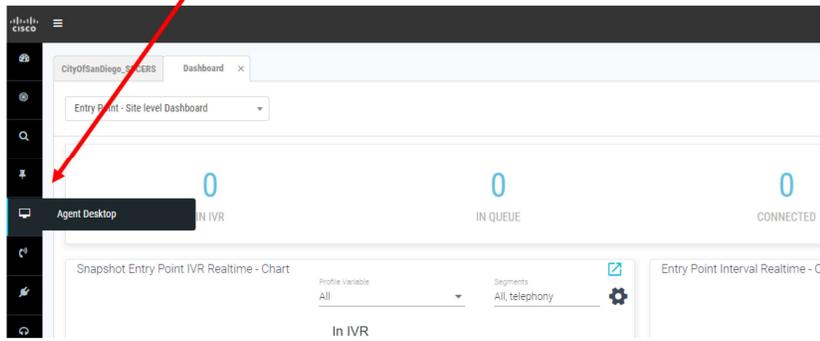
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In addition to Visualizations or Reports, Analyzer offers stock and customized Dashboards. Dashboards are a collection of Visualizations. With the use of Dashboards you can provide a means of displaying many different reports at once. This is very usefully for real-time status and used like a wall board in reporting visually.

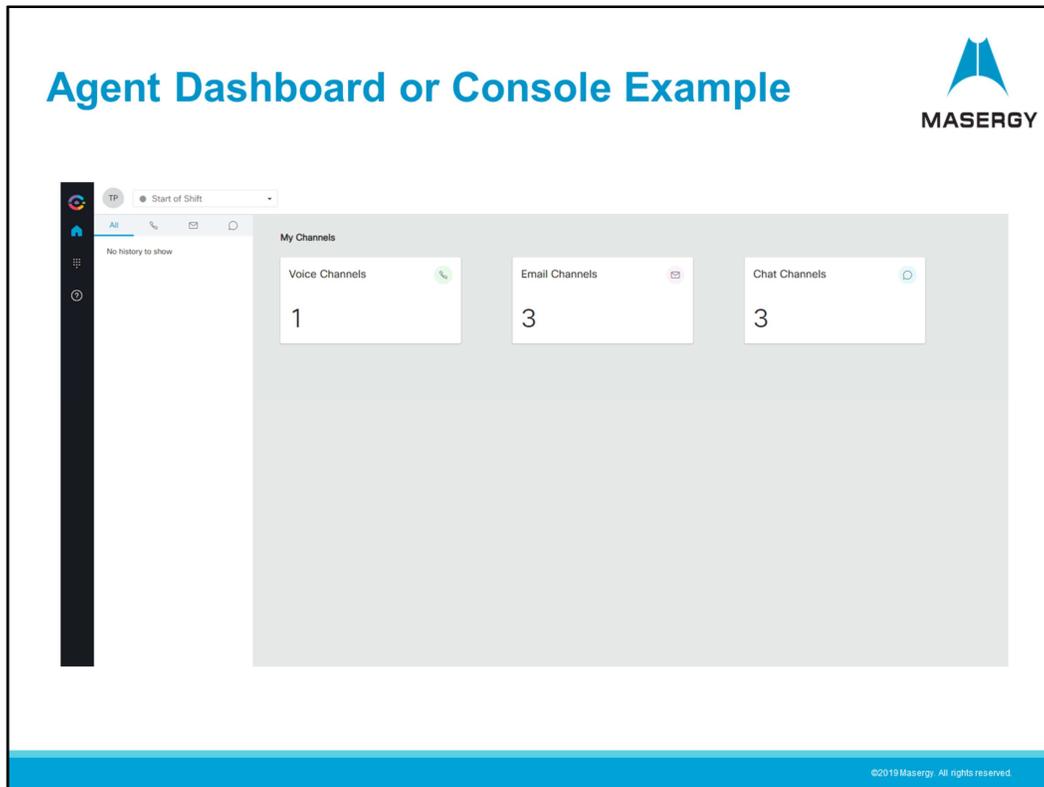
# Launching The Agent Desktop



If Admin or Supervisor Click on Agent Desktop Icon



For Supervisors and System Administrators who may need to Login as Agents you will have a Desktop Icon to select when you need to take or make calls through the Contact Center.



When the Agent Desktop is launched and after completing the Agent Login process you will be presented with the Agent Dashboard.

The screen shown above provides a view to the three available channels of interaction with customers contacting agents through the contact center.

- Voice Channels are telephone dialed clients
- Email and Chat are other forms of communication that the contact center can support if designed and provisioned

Call controls for telephone communications will facilitate call handing.

Change of state codes will facilitate call information, the use of identified idle codes will stop communications and the use of wrap-up or reason codes provide tractability to the resolution of the communication.

If you are a Supervisor that has the capability to take or make calls as an Agent, please attend the Agent Training session as that training session will provide a comprehensive instruction on the login procedure, the use and meaning of state changes, the use of call controls to manage the call process and interaction as well as the other forms of communications; email and chat and the use of Idle, Reason codes and Wrap-up.

# Call Monitoring



- Monitor next call
- Mid call monitor
- Continuous and scheduled monitoring

Queue	Site	Team	Agent	Monitoring Status	Supervisor Name	Supervisor Number	Duration	Action
Phonak_Outbound	Sonova	Phonak IS - IAM	David Spencer	monitoring started	Jennifer Cavallero	1000000000	00:03:47	[Stop] [Close]

Request Type	Queue	Site	Team	Agent	Monitoring Status	Supervisor Name	Supervisor Number	Action
Continuous ...	Any Queue	Any Site	Any Team	Ema Ulicevic	Request Pending	Lindsey Taylor	1000000000	[Play] [Close]

When accessing the Call Monitoring tab on the main navigation screen you are brought to this screen: Call Monitoring allows you to:

- Monitor the next call
- Monitor a call that is currently in process
- Continuously monitor
- Schedule monitoring

The main screen also shows a dashboard for the Current Calls Status, Monitored calls in process and/or Monitored calls requested.

We will take a deeper dive into each of these sections next and show you how to setup a monitored call.

# Call Monitoring – Navigation

## Monitoring Filter



The screenshot displays the Cisco Call Monitoring interface. On the left is the 'Monitoring Filter' sidebar with fields for Queue, Site, Team, Agent, and Callback Number. Three red arrows point from these fields to their respective dropdown menus. The 'Queue' dropdown shows 'All', 'Outdial\_Q', 'Q\_Test\_Only', 'Queue-1', and 'SDCERS\_MemberServices\_Q'. The 'Team' dropdown shows 'MemberServices', 'All', 'T2', 'Team-1', and 'Test\_Team\_Only'. The 'Agent' dropdown shows 'All', 'Claudia George', 'Cynthia Queen', 'Farnaz Farahani', 'Ravin Pacheco', and 'Sarema Valenzuela'. At the bottom of the sidebar are buttons for 'Monitor Next Call', 'Mid-Call Monitor', and 'Continuous Monitor'. The page number '22' is in the bottom right corner, and 'Confidential' and '©2018 Masergy. All rights reserved.' are in the footer.

We will now focus on the Monitoring filter.

The Monitoring Filter allows you to specify your monitoring for:

- Queue(s)
- Site(s) This will most likely be one site.
- Team(s)
- Agent(s)

The drop-down menus will allow you to specify one or more entries in each category.

# Call Monitoring – Navigation

## Callback and Monitoring Selection



Callback Number

Use Invisible Mode

Other  U.S. Format

Monitor Next Call

Mid-Call Monitor

Continuous Monitor

Phone Number To Receive Monitored Calls On

Prevents Monitoring Session From Being Displayed On Other Users Portals

Always Choose US Format – 1+ Dialing, 10-Digit Number

### Call Monitoring Features:

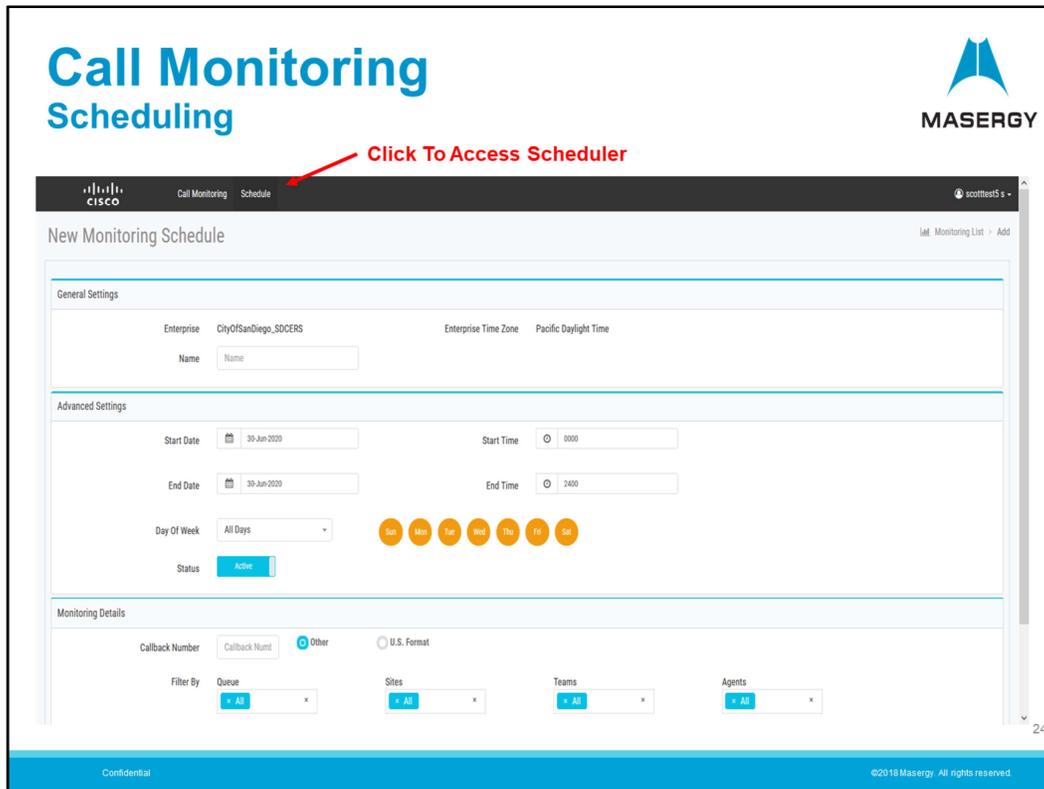
- Monitoring Based On Filtering Criteria
- Option To Monitor Next Call
- Option To Monitor A Call In Process
- Option To Monitor Continuously
- Allows Controls For Duration, Halt Monitoring (Pause Calls) and Resume Monitoring (Resume Calls)
- User Profile Permissions Can Also Include:
  - Wisper Coaching
  - Barge In

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When using Call Monitoring it will be necessary to identify a Callback number. The Callback number is where you can be reached. This would typically be your DID number. When monitoring is active the Contact Center service will call you at this number. Once answered you will then be connected to the call being monitored. For the North American dialing plan always choose the US Format.



Call Monitoring can be scheduled. On the navigation bar at the top click on “Schedule” and it will open the Monitoring Schedule window.

Here you can choose your settings for the call to be monitored.

- Name
- Start/End Date
- Start/End Time
- Day or Days of the week
- Set Status Active/De-active
- Your Callback Number
- Set Monitoring Filter

# Call Recording Management



The screenshot displays the Cisco Call Recording Management interface. On the left, there are filters for Queues, Sites, Teams, Agents, Wrap Up Codes, and Tags. The main area shows a table of search results with columns for Session ID, Queue, Site, Team, Agent, ANI, DNIS, Duration, and Wrap Up Codes. The table contains 10 rows of data, including session IDs like f234d305a4144520b871b1239e0ba1c and agents like Sarema Valenzuela and Claudia George. A 'Showing 1 to 10 of 350 entries' message is visible at the bottom of the table. The interface also includes a search bar, an 'Export' button, and a date range selector.

Session ID	Queue	Site	Team	Agent	ANI	DNIS	Duration	Wrap Up Codes
f234d305a4144520b871b1239e0ba1c	SDCERS_MemberServices_Q	SDCERS	MemberServices	Sarema Valenzuela			00:01:13	N/A
e619194fb76148f2b0d089ec7d67b3	SDCERS_MemberServices_Q	SDCERS	MemberServices	Claudia George			00:00:00	N/A
0e6fa763120b4c68707e277403298e0	SDCERS_MemberServices_Q	SDCERS	MemberServices	Ravin Pacheco			00:02:28	MA Information on DROP
f66aa29048674cc182e2b4bb7620550	SDCERS_MemberServices_Q	SDCERS	MemberServices	Ravin Pacheco			00:00:57	MP Clear Registration Attempt
4c0bc6657541473eb6993e18aa05d640	SDCERS_MemberServices_Q	SDCERS	MemberServices	Ravin Pacheco			00:01:26	MP Unlock Account
FFCF4EFAFD4E2F8A79AD9AC4C911C	Outdial_Q	SDCERS	MemberServices	Claudia George			00:08:28	Appt DROP Entry Retirement
f8ac01b8de24a1881ead1ac3d0f52e	SDCERS_MemberServices_Q	SDCERS	MemberServices	Sarema Valenzuela			00:01:18	SPSP 401K
5c493a13e68a47c5adb5d43b956f6f1	SDCERS_MemberServices_Q	SDCERS	MemberServices	Ravin Pacheco			00:03:14	MA Information on Retirement
c8ab548adccc49b0cce411d6384647	SDCERS_MemberServices_Q	SDCERS	MemberServices	Claudia George			00:10:47	MP Delete Account
ae0996ae286452482e6f9d17c1647	SDCERS_MemberServices_Q	SDCERS	MemberServices	Sarema Valenzuela			00:03:22	Death report

The last section to be reviewed is the Call Recordings Management. Shown is the default screen for the Recording Management Dashboard accessed via the Home page navigation screen. Immediately presented is a summary of call recordings available. Recordings are searchable and filters can be used to help limit results and quickly find the recording(s) of interest. In the next set of slides we will review the search and filter tools available.

# Call Recording Recordings Search Tool



Search Recordings

Queues  
x All x

Sites  
x All x

Teams  
x All x

Agents  
x All x

Wrap Up Codes  
x All x

Tags  
x All x

Exclude Deleted Agents  
 Search Deleted Files  
 Advanced Search

Date Range  
September 30, 2020 16:22 -  
October 6, 2020 16:22 +

- **Search Recordings Based On:**
- Queue(s)
  - Team(s)
  - Agent(s)
  - Wrap Up Code(s) Used
  - Tags or Text String That Can Be Assigned Recordings (If Used)

- **Options To Filter Recordings Search:**
- Excluding Deleted Agents
  - Search Deleted Recordings Less Than 30 Days  
Note: Deleted Recordings Older Than 30-Days Are Permanently Deleted.
  - Advanced Search Based On:
    - Call Attributes: DNIS, ANI, Other CAD Values, etc.
  - Date Range

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To left of the Call Recording window are the Search/Filter tools available. The tools allow you to search via drop-down menus based on:

- Queues
- Teams
- Agents
- Wrap-up Codes used
- Custom Tags or Text Strings that can be optionally used to categorize recordings

Additional options allow you to Filter results by:

- Excluding deleted agents
- Search deleted recordings
- Search based on Call Attributes such as the DNIS number, ANI or other CAD variable
- In addition you can filter by date range

# Call Recording Recordings Search Results



Search Search Attributes Others SDCERS Admin

### Search Results

Export

Further search list using keyword

Show 10 entries

Session ID	Queue	Site	Team	Agent	ANI	DNIS	Duration	Wrap Up Codes	Date
88e603c741bf46a1b6d74909c5d71a46	SDCERS_MemberServices_Q	SDCERS	MemberServices	Sarema Valenzuela	unavailable		00:00:00	N/A	2020-10-07 13:26:34
6ad019d158a04c40a0466f9bd07a46f	SDCERS_MemberServices_Q	SDCERS	MemberServices	Sarema Valenzuela			00:02:49	MP Unlock Account	2020-10-07 13:26:25
b3a8c9c2a584f8eadb681c479a1e620	SDCERS_MemberServices_Q	SDCERS	MemberServices	Sarema Valenzuela			00:01:09	MP Registration Questions	2020-10-07 13:25:45
029dfd4a9ba840d29c4017ec16566b47	SDCERS_MemberServices_Q	SDCERS	MemberServices	Sarema Valenzuela			00:02:26	MA Information on Retirement	2020-10-07 13:19:27
16270babface468f8c34d2a950db9eb	SDCERS_MemberServices_Q	SDCERS	MemberServices	Sarema Valenzuela			00:03:17	N/A	2020-10-07 13:16:48
24afc13897e341c28c10131a489348a8	SDCERS_MemberServices_Q	SDCERS	MemberServices	Claudia George			00:00:00	N/A	2020-10-07 13:11:10
6962d68603b547e2ae71df9fcd3a622c	SDCERS_MemberServices_Q	SDCERS	MemberServices	Claudia George			00:00:01	Miscellaneous	2020-10-07 13:08:50
727565a647d1438589afc3bce9a96926	SDCERS_MemberServices_Q	SDCERS	MemberServices	Sarema Valenzuela			00:14:43	MA Information on Retirement	2020-10-07 13:03:40
9ECCDF68A1CA49838A11705E43FF8F5C	Outdial_Q	SDCERS	MemberServices	Ravin Pacheco			00:04:18	MA Information on Payments	2020-10-07 13:02:27
3c3405e8230941cc84bee660250726ab	SDCERS_MemberServices_Q	SDCERS	MemberServices	Claudia George			00:01:12	MP Clear Registration Attempt	2020-10-07 13:01:07

Showing 1 to 10 of 343 entries

Previous 1 2 3 4 5 ... 35 Next

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Search results are displayed in the dashboard. The results window can be expanded to fill the space.

Note: There is a search field available in the upper right of the results window to allow further refinement of the list once produced.

# Call Recording

## Search Results Organization & Controls

**Export Search Results To Spreadsheet**

Export

Show 10 entries

Session ID	Queue	Site	Team	Agent	Call Status	DNIS	Duration	Wrap Up Codes	Date
cs071a46	SDCERS_MemberServices_Q	SDCERS	MemberServices	Sarema Valenzuela	unavailable		00:00:00	N/A	2020-10-07 13:26:34
6ad019d158a04c40a0466f9b5607a46f	SDCERS_MemberServices_Q	SDCERS	MemberServices	Sarema Valenzuela			00:02:49	MP Unlock Account	2020-10-07 13:26:25

**Recording Controls**

- Add / Remove Tags
- Delete
- Caller
- Agent
- Stereo

**Sort Results By**

- Column Data
- Alphabetical
- Date
- Ascending/Descending

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Once we have the recordings search completed we will now review the organization options and recording controls.

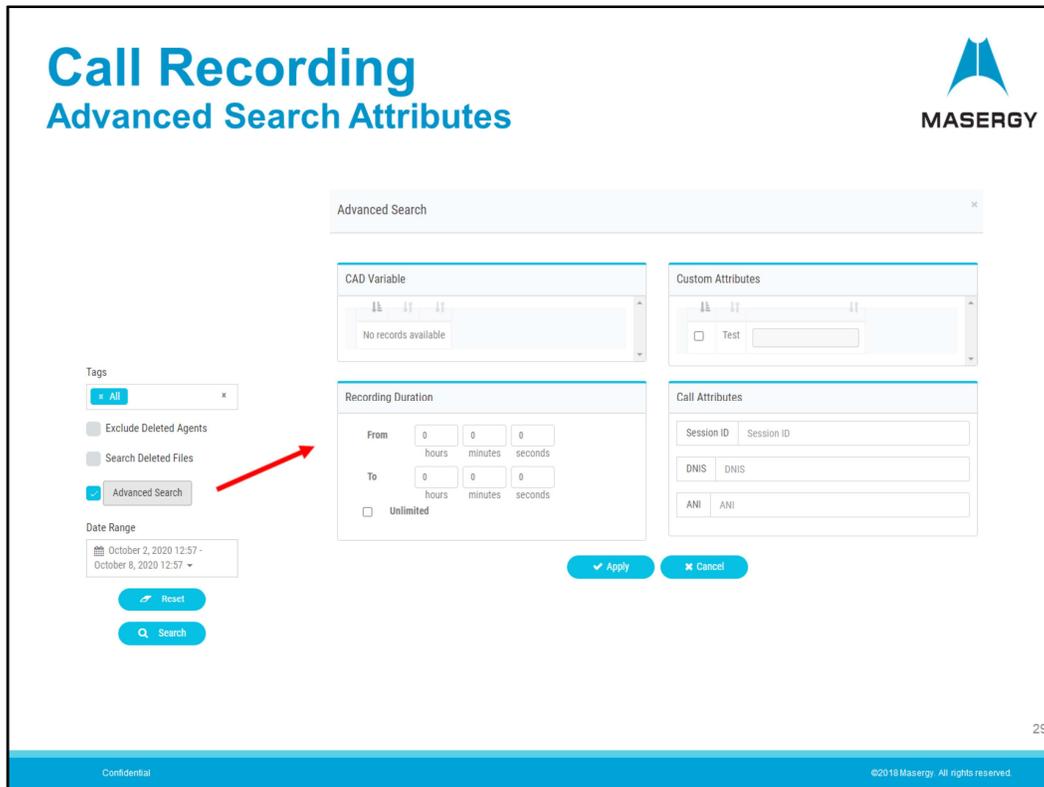
The search results can be further organized by using sorting options based on the column data results. Each column has an Ascending/Descending icon. When clicked it will sort the list based on that column's data. This will be based on:

- Alphabetical
  - Date
- And/or
- Numerical

On the right-hand side are three dashes. When clicked this opens the Recording controls that allow you to:

- Play the recording back in Stereo or playback the recording hearing only the Agent or Caller.
- Delete the recording
- Add or Remove Tags (if used)

Note: Controls for playback of either agent or caller can be quite useful especially if any talk-over occurs during the conversation making it difficult to hear.



Advanced search options are available. You have the option to create custom attributes to help define the search for specific recordings.

CAD variables can be used to capture account numbers, loyalty numbers or other such variables that the caller may have needed to enter in the process of their interaction with the service. If this option is used in the Contact Center design then searches performed can use the CAD variable to refine and sort recordings.

As mentioned previously Tags can be designed and used which can also help define a call and search results. Custom attributes can define foul language, anger, or praise for well handled call. All can be used to help refine and sort the recording list.

Searches can be performed by using duration. One can easily locate calls inordinately short or long.

Other Searches can also be done using the Session ID which defines a unique code for each specific communication interaction with the service. In addition searches can be done using DNIS and ANI number data.

# Call Recording

## Search Customization – Adding Attributes



**Clicking on “Search Attributes”**

- Allows the Creation and Management of Custom Attributes and Tags
- Use to Refine Searches

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If you are a Manager or Supervisor equipped with the Search Attributes capability you will be able to manage the creation and modification of custom “Text Attributes” and “Tags”. One or both can be used. Use of these custom attributes can help refine searches by assigning custom codes, categories, classifications, groupings, etc. Assigning these will help manage recording types, differentiate calls and aid when searching. In the example above the code “Test” was used. A code such as this can help when first turning up the service and this example can help keep “Test” calls separate from real calls. Other everyday use examples could be:

- Product/service type
- Client type
- Foul language usage

Use is optional and provides even greater refinement of defining the communication interaction over and above the use of Wrap-up or “Reason” codes.

# Call Recording

## Other – Security Key And Pruning

**Clicking on “Others” Opens Options (If Used)**

- Define Security Key Rotation For Recordings
- Manage Pruning (If Installation Has Enabled)
  - Length of Recording Storage
  - Time Based (Months/Days)
  - Agent Based (Minutes Length)
  - Storage Sized Base (Megabytes)

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Another option for Managers and Supervisors is the ability to define “Security Keys” and manage storage through “Pruning” options. Open the Recording Management module and click the “Others” button shown on the menu bar.

### Viewing and Changing the Security Key:

If your installation includes the encryption option, each recording file for your enterprise is encrypted using a public key that is randomly generated. When requesting a recording file, the Recordings Server software decrypts the file using a randomly generated private key. A new set of public and private keys can be generated periodically based on settings specified in the Security Keys tab. If your user profile authorizes you to access the Security Keys page, you can view and change the schedule for generating security key pairs.

### Viewing the Pruning Details

If your user profile authorizes you to access the Pruning Details settings, you can view the pruning settings specified for your enterprise. The lower part of the page displays the Pruning Detail settings described. You can manage pruning in the following ways:

- None
- Time Based in Months (A Month is defined as 31 days)
- Agent Based (Minutes length)
- Storage Based (Size in megabytes)

### Additional Masergy Contact Center Support and Training resources:

- Contact UC Support Help Desk: Email us at [UCSupport@masergy.com](mailto:UCSupport@masergy.com) or call + (800) 942-4700
- Contact UC Training to schedule a live Training session: Email us at [UCTraining@masergy.com](mailto:UCTraining@masergy.com)