Version 1.0

OfficeSuite® Extension Call Recording Tenant Administration Reference Guide

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Introduction

OfficeSuite® Extension Call Recording allows your business to record inbound and outbound calls according to the rules that you define. You select which calls are eligible for recording. You designate which of your employees handling those calls will be recorded. To help you understand the details of each recorded call, OfficeSuite® Extension Call Recording immediately presents and preserves call records that tell you who called, when he or she called, who answered and whether, when and where those calls were transferred. And, finally, OfficeSuite® Extension Call Recording also gives you a powerful tool for evaluating how your employees handled each recorded call.

This guide provides the information required to set up and manage OfficeSuite® Extension Call Recording.

Who's Being Recorded and Who Can Listen?

You and your employees are naturally concerned about who is being recorded, which calls are being recorded and who can subsequently listen to those recordings.

WHO'S IN CONTROL?

Only specially designated individuals, Call Recording (CR) Admins, control which calls and which individuals are recorded. CR Admins are also the only ones who can listen to, evaluate and download the call recordings collected by OfficeSuite® Extension Call Recording. Consequently, it is very important to carefully limit who within the business is chosen to be a CR Admin.

WHO WILL BE RECORDED?

Only extensions marked Record This Extension's Calls are ever recorded. Sales and support staff might be marked for recording. Senior management might not be. Of course, calls can be transferred between extensions. OfficeSuite® Extension Call Recording transfers break the call into segments. If the call is transferred away from a recording-eligible extension, the new segment is not recorded. If the same call is later transferred back to an extension marked Record This Extension's Calls, the new segment is recorded.

WHICH CALLS CAN BE RECORDED?

Your business starts by identifying which inbound phone numbers are recording eligible. For example, calls to the main sales number might be considered eligible for recording while the CEO's personal direct number might not. Inbound calls to the designated numbers are "recording eligible." The full list of recording eligible phone numbers is collected at time of sale. Subsequent changes to this list can be made later by contacting the OfficeSuite® Support Center.

For outbound calls, the caller decides whether the call is recording eligible. If callers start their outside dialing with an 8, the outbound call is "recording eligible." If callers start their outside dialing with a 9, the call is not eligible for recording.

Note: Call segments are recorded and saved only if

- the call itself is recording eligible and
- the extension connected during that segment is marked for recording.

Examples of call segments that are not recorded:

- No recording is made if the inbound call is to a number not identified as being recording eligible. This means, for example, a call to the CEO's number might not be made recording eligible and thus would not be recorded, regardless who answers it or to whom it is subsequently transferred.
- The call segment is not recorded if the extension talking on that call is not marked for recording. This means, for example, an inbound Sales call that would otherwise be recording eligible is not recorded while the CEO is handling that call. (If the CEO's extension is not marked Record This Extension's Calls.)
- Extension-to-extension calls are never recorded.
- Three-way calls are not recorded.

Getting Started

To get started, follow these steps:

1. Identify which of the business's phone numbers will be eligible for recording. Your sales representative will help you get these numbers into the initial sales agreement.

2. Your business may span multiple time zones. To avoid confusion, all of the data collected and presented by OfficeSuite® Extension Call Recording is based on a single time zone that you choose before the service is first turned up. Time stamps shown in the call details are all relative to that time zone regardless of where the calls came from or where they were answered.

3. Read the Navigating the User Website section of this Guide.

4. Identify at least one CR Admin and have your service representative set up that first CR Admin extension. Log in as that CR Admin.

5. Identify which of your silhouette extensions will be marked for recording. Then go to the Agents and ACDs section of this Guide and follow the instructions there to set up the extensions.

6. Use the remaining sections in this document to learn about and start using the other components of OfficeSuite® Extension Call Recording.

Navigating the Website

The website is accessed through a web browser. Recommended browsers include:

- Internet Explorer 10 or later
- Mozilla Firefox 24 or later

The Windows Media Player plug-in is required to listen to audio content. When this document was published, the necessary plug-ins for Firefox could be obtained as follows:

Windows/Firefox:
http://port25.technet.com/pages/windows-media-player-firefox-plugin-download.aspx

Linux/Firefox:
http://mplayerplug-in.sourceforge.net/install.php

LOGGING IN

Point the browser to:
https://officesuiteacd.broadviewnet.com/?domain=<WEBUURL>

where <WEBURL> is replaced with the last part of the URL used to log in to the OfficeSuite® portal, without the slash (/). Non-working example: *https://officesuiteacd.broadviewnet.com/?domain=2125551212*

Use your OfficeSuite® extension and password (numeric PIN) to log in. This is the same extension and PIN used to log into the OfficeSuite® portal and the OfficeSuite® phone.

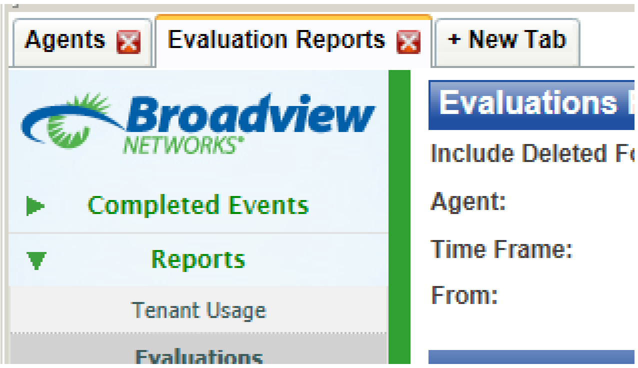
THE NAVIGATION BAR, MENUS AND SUB-MENUS

Once you are logged in, the Navigation bar appears on the left side. Menu items have right-facing arrows. Click them to display a sub-menu, which then displays the selected function to the right of the Navigation Bar.

GENERAL WEBSITE INFORMATION

Tabs

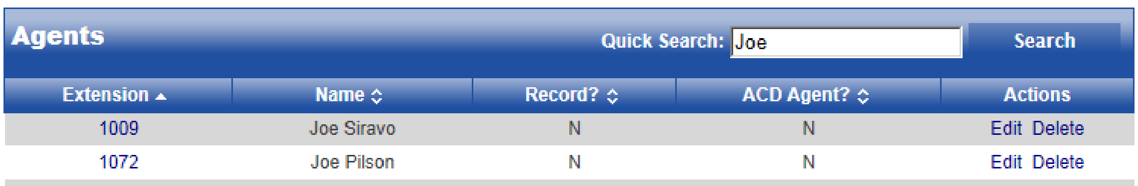
Tabs are provided at the top of the page to facilitate working with multiple views of the system. Some new tabs open automatically when you click a sub-menu, link or button. To open a new tab on your own, click + New Tab. To close a tab, click the red and white X.



Note: Best practice is to avoid the browser's Back button. Instead, to change views, click a new option, open a new tab or click X to close the current tab.

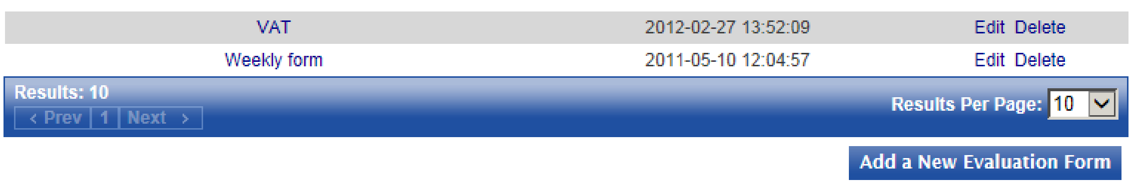
Links

Links appear in blue text. The cursor changes form when you hover over them.



Buttons

Buttons are used throughout the application. For example, to create a new item, the Add... button is often located at the lower right-hand corner of the page, as seen above.



Required Fields

Configuration pages often have fields that must be filled in for the new data to be accepted. Required fields have a red asterisk (*) in front of the field name.

Searches

Many web pages present opportunities to search for specific data. When you are trying to match a string of letters or digits, you can use asterisks to match any possible substring. For example, searching for *Jones* will match "Jones Real Estate" and "2125551234 Robert Jones, Jr."

Results per Page

Pages that list multiple results often allow the number of results displayed to be adjusted. Use Results per Page to temporarily increase this number.

Sorting Based on a Column

Individual page listings can be sorted based on the data in a particular column by clicking the column header. Clicking a second time reverses the sort order.

Main Menu: Completed Events

Completed Events provides the ability for Call Recording Administrators to search and review completed Call Recording activities, including:

- Locating, listening to and evaluating specific recorded Calls
- Downloading recorded calls offline
- Building and managing a Recording Library of important recordings
- Searching for previously completed Evaluations of call recordings

CALLS

To search calls, follow click Completed Events > Calls. The Calls Search page lets you search for completed calls based on your search criteria. Once a call is found, click View to see more details.

Note: By default, call details are available for 365 days, and call recordings are available for 30 days.

FIELD DEFINITIONS

- **Call ID:** Match one of the call identifiers called Call ID.
- **Call Number:** Match the other call identifier called Call Number.
- **Direction:** Match the direction of the call.
- **Extension:** Not relevant to SACR.
- **Agent:** Match calls answered by this Agent.
- **Display:** Match calls by the contents of the Display field (Calling Name and Calling Number).
- **Abandoned:** Not relevant to SACR.
- **Inbound Caller ID:** Match calls by the contents of the Display field (Calling Name and Calling Number).
- **Outbound Num Dialed:** Match the number dialed on an outbound recorded call.
- **Duration:** Match call duration in minutes. When the first field is blank, match only calls shorter than the To value. When the To field is blank, match only calls longer than the first field.
- **Recorded?:** When Yes, match only recorded calls (Yes). When No, match calls that came through the recording system that were not recorded (e.g., because they were answered by extensions that were not recording eligible).
- **From:** Match when the call began, beginning with this date and time. If blank, match all calls before the To value.
- **To:** Match when the call began, ending with this date and time. If blank, match all calls since the From value.

The search results are displayed on the same page:

Download

Call ID	Time	Dur.	Dir.	Display	Source	Destination	Agent	Rec?	Call Number	Actions
20432537	8/12/14 10:33:10 AM	00:00:25	Inbound	BROADVIEW NTWKS - 2675375000	trunk	6107554162		N	CAS-6QD8KZJQM2U7	View
20431893	8/12/14 10:24:02 AM	00:00:25	Inbound	Schwartz,Blair - 6102799694	trunk	6107554162		N	CAS-6QD67X0C8J8E	View
20430228	8/12/14 10:06:23 AM	00:01:02	Inbound	Reseller Mktg S - 3037226811	trunk	6107554425		N	CAS-6QD5JLLWDNVV	View
20426435	8/12/14 9:29:21 AM	00:01:26	Inbound	TOTAL TELECOM S - 6318151235	trunk	6466196191		Y	CAS-6QD43Q655E8Z	View
20422530	8/12/14 7:53:38 AM	00:00:30	Inbound	HACKENSACK NJ - 2018200770	trunk	6107554425		N	CAS-6QD0DAPMGAEG	View
20420963	8/11/14 6:30:35 PM	00:00:07	Inbound	MAXLIFE - 3056020781	trunk	9738488814		N	CAS-6QC36UCEHVX2	View
20420500	8/11/14 6:05:51 PM	00:00:18	Inbound	HOLLDORF BRIAN - 2533342424	trunk	6466196191		N	CAS-6QC285ZEE3S2	View
20415579	8/11/14 4:30:23 PM	00:00:15	Inbound	JTN - 7472012589	trunk	5600 - SIL Tech Support	Carlos Carrero (3231) 3231 - 3231	Y	CAS-6QBYJ3FNAY2P	View
20416039	8/11/14 4:20:00 PM	00:01:27	Inbound	NEW YORK NY - 2124045321	trunk	6107554238		N	CAS-6QBY4D5RBFAG	View

FIELD DEFINITIONS

- **Call ID:** A system-wide call identifier.
- **Time:** Time the call started.
- **Dur:** Duration. The duration of the call.
- **Dir:** Direction of the call.
- **Display:** Calling Number and Caller Name received by the answering party.
- **Source:** The call source (all calls are trunk).
- **Destination:** The called number.
- **Agent/Device:** Not relevant to SACR.
- **Rec?:** 'Y' if the any segment of the call was recorded, 'N' otherwise.
- **Call Number:** A system-wide call identifier.
- **Actions:** The "Call Details" page for this call can be accessed by clicking the ***View*** link.

To see the details for a particular call, click ***View***.

The system returns the ***Call Details*** page.

DOWNLOADING RECORDED CALLS OFFLINE

Recorded calls can also be downloaded offline by performing the following steps:

- Select which recordings you want to download offline by selecting the checkboxes.
- Click ***Download***.
- Choose the location to have them downloaded to.

Download

Call ID	Time	Dur.	Dir.	Display	Source	Destination	Agent	Rec?	Call Number	Actions
20433669	8/12/14 10:47:07 AM	00:00:00	Inbound	BROADVIEW NTWKS - 8887398390	trunk	6107554291		N	CAS-6QD74DHZRNFD	View
20433031	8/12/14 10:37:46 AM	00:00:15	Inbound	BROADVIEW NTWKS - 2675375000	trunk	6107554162		N	CAS-6QD6S25RU898	View
20432537	8/12/14 10:33:10 AM	00:00:25	Inbound	BROADVIEW NTWKS - 2675375000	trunk	6107554162		N	CAS-6QD6KZJQM2U7	View
20431893	8/12/14 10:24:02 AM	00:00:25	Inbound	Schwartz,Blair - 6102799694	trunk	6107554162		N	CAS-6QD67X0C8J8E	View
20430228	8/12/14 10:06:23 AM	00:01:02	Inbound	Reseller Mktg S - 3037226811	trunk	6107554425		N	CAS-6QD5JLLWDNVV	View
20426435	8/12/14 9:29:21 AM	00:01:26	Inbound	TOTAL TELECOM S - 6318151235	trunk	6466196191		Y	CAS-6QD43Q555E8Z	View
20422530	8/12/14 7:53:38 AM	00:00:30	Inbound	HACKENSACK NJ - 2018200770	trunk	6107554425		N	CAS-6QD0DAPMOAEG	View
20420963	8/11/14 6:30:35 PM	00:00:07	Inbound	MAXLIFE - 3056020781	trunk	0738488814		N	CAS-6QC36UCEHVX2	View
20420500	8/11/14 6:05:51 PM	00:00:18	Inbound	HOLLDORF,BRIAN - 2533342424	trunk	6466196191		N	CAS-6QC285ZEE3S2	View
20415579	8/11/14 4:30:23 PM	00:00:15	Inbound	JTN - 7472012589	trunk	5600 - SIL Tech Support	Carlos Carrero (3231) 3231 - 3231	Y	CAS-6QBYJ3FNAY2P	View

SFTP SERVER

For Call Center Services customers that want to permanently retain all of their call recordings and don't wish to use the bulk download functionality we offer an SFTP server solution. This can be purchased for an additional monthly fee. Please contact your Sales Representative for additional information.

How It Works

Every 24 hours Call Center Services will copy the requested recordings (along with csv files with explanatory rows per recording) to a local sftp server (the ***Daily Copy***). The subscribed customer will be provided restricted access to that sftp server so that they can retrieve their own recordings and csv files on their own schedule. Because it's now sftp, the subscribing customer can automate their entire process.

Specifics

Broadview will update the recordings available for download on a daily basis, which will run once, after midnight. If the customer needs a recording before it is posted to the sftp server, they can still get it from the ***Call Center Services*** portal.

Daily Copy

1. Each customer will have their own directory on the sftp server and their recordings and csv files will be found there. The customer's sftp credentials will only allow them to access and copy from that directory (and its subdirectories, if any).
2. The content of each customer's ***Daily Copy*** will be based on midnight-to-midnight relative to the time zone.
   a. A recording shall be included in the nightly copy if and only if the call ended between the customer's two midnights.
3. Each day's ***Daily Copy*** shall be accompanied by the same format of csv file as included with a bulk download from the portal.
4. The file name for the csv file will include the date of the calls described therein.
5. The csv file will include at least one row for every "***Completed Event/Call***", even if nothing about that call was recorded.

Daily Cleanup

Once a day, a ***Daily Cleanup*** will be run on all directories on the sftp server. The ***Daily Cleanup*** will delete all the files (Call Center Services recordings and associated csv files) moved to the sftp server more than 7 days ago. Note that it does not matter on what date the recording or csv file was created, it only matters how long the current copy has resided on the sftp server.

CALL DETAILS PAGE

The top section of the ***Call Details*** page repeats the information from the ***Calls Search*** page. The Recordings section lets you listen to, evaluate and add recordings to the ***Recording Library***. The ***Call Path*** section provides details about the call from start to finish. The Evaluations section lists the Evaluations that have already been performed on the recorded segments of this call, if any.

ACTIONS

The Recordings section of the Call Details page has links to Listen to or Evaluate the recording, or store it in the Recording Library.

Listen

Click ***Listen*** to launch the embedded media player, which lets you play, pause and rewind the recording. There is also a ***Download*** link on the media player that allows you to download the .wav file to a selected location on your PC.

Evaluate

Click ***Evaluate*** to display a list of available Evaluation Forms. If only one form is available, the following menu does not display. Instead, the evaluation begins using the one available form.

Click ***Use*** to select an evaluation form. The form opens. The Evaluation Information and Call Information sections are pre-populated, and the form is presented ready to be filled out. Click ***Listen*** to Recording at the top of the page to listen to the recorded call during the evaluation. Scroll down and complete the evaluation. Click ***Save*** at the bottom of the page to save the evaluation.

Add to Library

In addition to scoring Agents, it is often helpful to save noteworthy recorded calls. The Recordings Library is the repository of saved recordings. Click ***Add to Library*** to add this recording to the library. You are prompted to enter a title and a descriptive note. These fields are searchable, so include words that will be helpful in finding this recording later.

Click ***Save*** to move the recording to the Recording Library. The recording, its Call Details and its completed Evaluation Forms will all be retained.

Note: Recordings not moved to the Recording Library are deleted after the agreed time period has elapsed (by default, 30 days). Recordings moved to the library are retained indefinitely, limited only by total storage.

Recording Library

Click ***Calls*** > ***Recording Library*** to display the Recordings Library search page, which searches for all saved recordings matching the chosen criteria. Once a call is found, click ***View*** to reveal more details about the call.

FIELD DEFINITIONS

- **Agent:** Match the extension that participated in the call.
- **Title:** Match the title of the entry in the library.
- **Note:** Match the contents of the note in the library.
- **From:** Match a recording based on when the call began, beginning with this date at midnight. If blank, match all calls before the To value.
- **To:** Match a recording based on when the call began, ending with this date at midnight. If blank, match all calls since the From value.

Matching recordings are listed on the same page:

Start Time	Stop Time	Title	Note	Ext	Agent	Actions
3/13/11 10:22:29 PM	3/13/11 10:22:42 PM	Recording #1	This is a recording	500 - Sales Main	Thomas Edison (103)	View Call Edit Delete
3/10/11 3:45:19 PM	3/10/11 3:46:36 PM	Recording #2	Check this out	500 - Sales Main	Thomas Edison (103)	View Call Edit Delete

FIELD DEFINITIONS

- **Start Time:** Start time of the recording.
- **Stop Time:** Stop time of the recording.
- **Title:** Title assigned to the recording.
- **Note:** Note associated with the recording.
- **Ext:** Dialed number for which the call was recorded.
- **Agent:** Agent who answered the call.
- **Actions:**
  View Call: Shows the Call Details page for this call.
  Edit: Change the title and/or note associated with the recording.
  Delete: Delete this entry from the library.

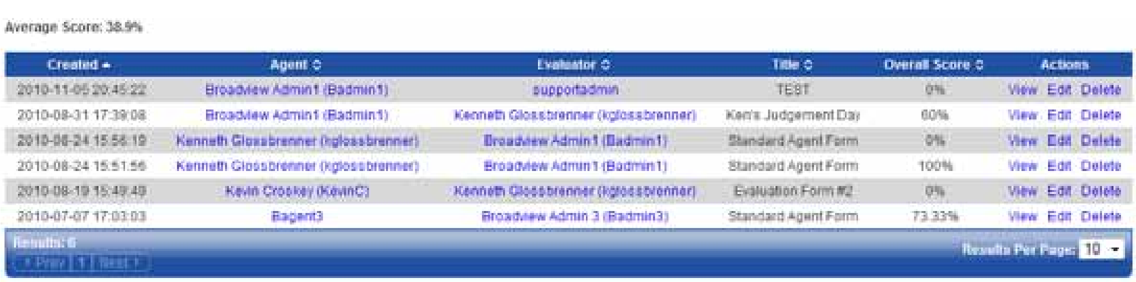
EVALUATIONS

The Evaluations sub-menu allows Administrators to search for and view individual evaluated recordings.

FIELD DEFINITIONS

- **Agent:** Match the Agent who was evaluated.
- **Evaluation Form:** Match the form used for the Evaluation.
- **From:** Match Evaluations based on when the Evaluation was done, beginning with this date immediately after midnight. If blank, match all Evaluations before the To value.
- **To:** Match an Evaluation based on when that Evaluation was done, ending with this date just before midnight.

Click ***Search*** to display the results.



Created	Agent	Evaluator	Title	Overall Score	Actions
2010-11-05 20:45:22	Broadview Admin1 (Badmin1)	supportadmin	TEST	0%	View Edit Delete
2010-08-31 17:39:08	Broadview Admin1 (Badmin1)	Kenneth Glossbrenner (kglossbrenner)	Ken's Judgement Day	60%	View Edit Delete
2010-08-24 15:56:19	Kenneth Glossbrenner (kglossbrenner)	Broadview Admin1 (Badmin1)	Standard Agent Form	0%	View Edit Delete
2010-08-24 15:51:56	Kenneth Glossbrenner (kglossbrenner)	Broadview Admin1 (Badmin1)	Standard Agent Form	100%	View Edit Delete
2010-08-19 15:49:49	Kevin Croskey (KevinC)	Kenneth Glossbrenner (kglossbrenner)	Evaluation Form #2	0%	View Edit Delete
2010-07-07 17:03:03	Bagent3	Broadview Admin 3 (Badmin3)	Standard Agent Form	73.33%	View Edit Delete

- **Created:** The date the Evaluation was performed.
- **Agent:** The Agent who was evaluated.
- **Evaluator:** The person who performed the Evaluation.
- **Title:** The title of the Evaluation form used.
- **Overall Score:** The percentage of basis points received.
- **Actions:**
  View: View the completed form.
  Edit: Edit the completed form.
  Delete: Remove the evaluation record from the database.

Main Menu: Reports

TENANT USAGE

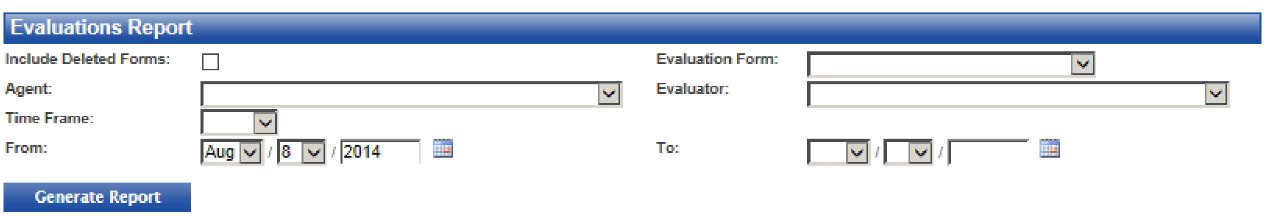
Tenant usage lets you determine space and time utilization.
Click ***Reports*** > ***Tenant Usage*** and select the Tenant from the drop-down list. The system returns the Summary Report page.

FIELD DEFINITIONS

- **Recording Space:** The total amount of space allocated for recordings.
- **Count:** The current number of recordings.
- **Minutes Purchased:** The total number of minutes purchased.
- **Minutes Used:** The number of minutes used.
- **% of Minutes Used:** The percentage of purchased minutes in use.

EVALUATIONS

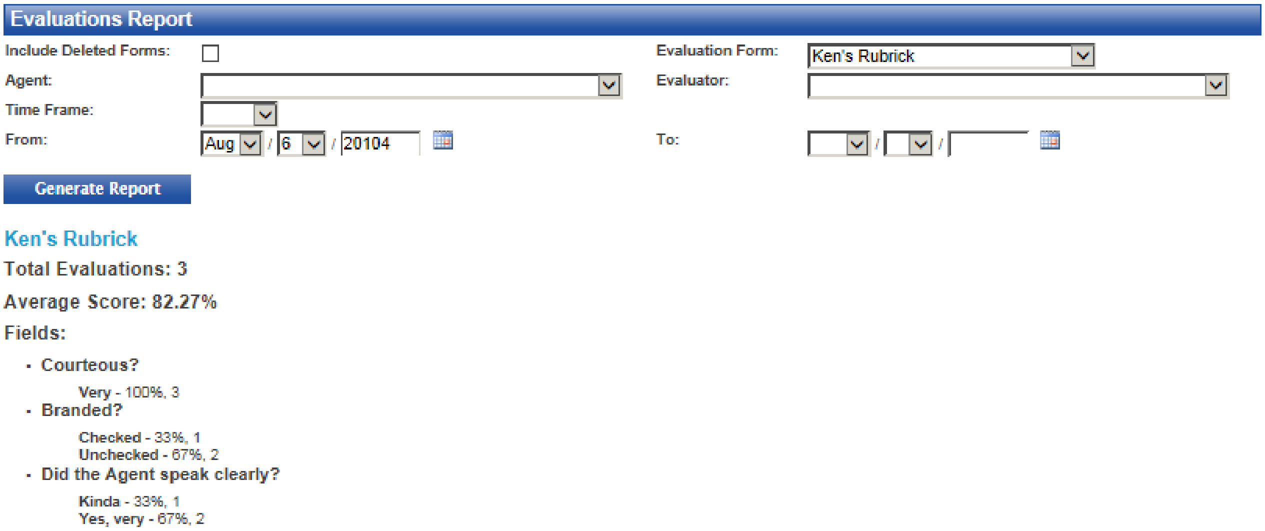
The Evaluations report summarizes all of the evaluations that have been conducted that match the parameters selected at the top of the page. The processes for creating the Evaluation Forms and for performing the evaluations are described elsewhere.



FIELD DEFINITIONS

- **Include Deleted Forms:** Toggle whether to include the deleted form.
- **Evaluation Form:** Match only evaluations performed using this form.
- **Agent:** Match only evaluations done on this Agent.
- **Evaluator:** Match only evaluations performed by this Evaluator.
- **Time Frame:** Use to quickly pick the beginning of the day, week or month, respectively, as the beginning date of the report.
- **From:** Report only on evaluations performed since the beginning of this date at midnight. If blank, match all evaluations before the ***To*** value.
- **To:** Report only on evaluations performed before midnight on this date. If blank, match all evaluations following the ***From*** value.

To generate the report, click ***Generate Report***.



The Report shows a summary of evaluation results for the requested Agent(s), Evaluation Form(s), Evaluator(s) and date range.

- Each section of the report is headed by the form name.
- **Total Evaluations:** Total number of evaluations reported in this section.
- **Average Score:** Average percentage of basis points received across all evaluations reported in this section.
- Individual fields summarize how each question was answered across all evaluations reported in this section.

Main Menu: Agents and ACDs

This is the section of the website where extensions are identified and marked as recording eligible. On the Agents sub-menu, Administrators select which OfficeSuite® extensions are eligible for recording.

AGENTS

The Agents page displays all extensions, including which ones are currently available to be recorded.

Agents Quick Search: Search

Extension ▲	Name ⇕	Record? ⇕	ACD Agent? ⇕	Actions
1000	Greg Test Admin	Y	N	Edit Delete
1001	Test User 1001	N	N	Edit Delete
1002	Agent 1002 Mitel Phone	Y	N	Edit Delete
1003	Test Agent 1003	Y	N	Edit Delete
1004	User 1004	N	N	Edit Delete
1005	User 1005 User 1005	N	N	Edit Delete
1006	User 1006 User 1006	N	N	Edit Delete
1007	Extension 1007	N	N	Edit Delete
1008	User 1008 User 1008	N	N	Edit Delete
1009	Bhargavi Rajaraman	N	N	Edit Delete

Results: 1-10 of 28 ‹ Prev 1 2 3 Next › Results Per Page: 10

Refresh Extensions Add an Agent

FIELD DEFINITIONS

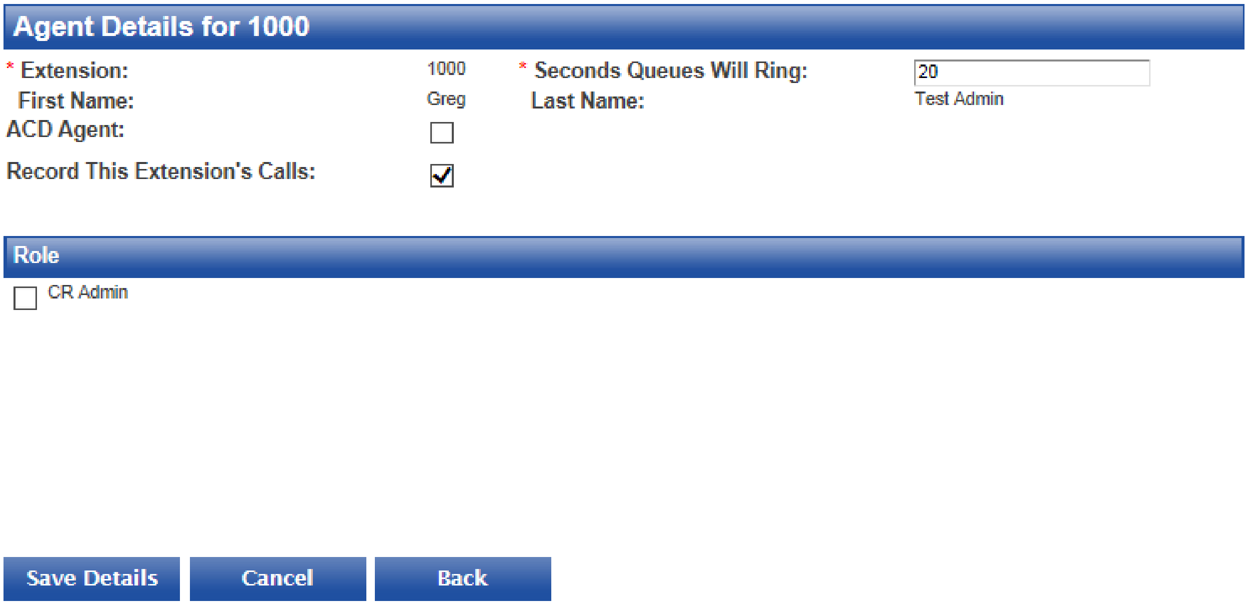
- **Extension:** The OfficeSuite® extension. This can be either an OfficeSuite® User or Location.
- **Name:** First and last name of the User or Location.
- **Record?:** Yes or No will this Agent's calls be recording eligible.
- **ACD Agent?:** Not relevant to OfficeSuite® Extension Call Recording Service.
- **Actions:**
  - **Edit:** Click to modify the Agent details.
  - **Delete:** Click to delete the Agent.

REFRESH EXTENSIONS

Click ***Refresh Extensions*** to copy all the current extensions and users from OfficeSuite®. Then edit each extension and user involved with the OfficeSuite® Extension Call Recording service. Click it again when new extensions or users are added or deleted on the OfficeSuite® side.

EDITING AN AGENT

(To Create a New Agent in silhouette SACR, the intended Agent must first have an extension in silhouette.) On the "Agents" page, click ***Add an Agent*** or click ***Edit*** for an existing Agent.



- **Extension:** The OfficeSuite® extension. This can be either an OfficeSuite® User or Location.
- **Extension:** Extension of the Agent in silhouette.
- **Seconds to Ring:** Not relevant to SACR.
- **First Name:** Agent's first name from silhouette.
- **Last Name:** Agent's last name from silhouette.
- Assign the "CR Admin" Role to every Agent who is entrusted to manage and view this system. Note that a Location cannot be made into a CR Admin because Locations do not have PINs with which to log in to this portal.

Click ***Save***.

This must be an existing User or Location extension in silhouette. That User/Location must have an ACD Sign-in key configured for its phone. The extension entered on this New Agent page is not validated. When/if a Queue attempts to ring an Agent at an invalid extension, silhouette immediately rejects the call, and the Queue immediately moves to the next member Agent.

Main Menu: Resources

Resources for OfficeSuite® Extension Call Recording are developed and managed here. These include Evaluation Forms.

EVALUATION FORMS

Evaluation forms enable the systematic evaluation of recorded phone calls. Evaluated calls and Evaluation Reports can be used in mentoring and reviews.

Six elements are combined in various ways to create a complete Evaluation Form.

- **Checkbox:** Used for questions with Yes/No answers: True/False, Did/Didn't achieve a particular goal.
- **Radio Group:** Used for multiple choice questions; the Evaluator can put a "check mark" next to the correct answer.
- **Combo Box:** Used for multiple-choice questions; the Evaluator selects the correct answer from a drop-down list. Unlike Radio Groups, Combo Boxes can be configured so that the Evaluator can skip the question. If the question is skipped, the points for that question do not factor into the calculation of the overall percentage score.

- **TextArea:** Used for open-ended (discussion) questions; the Evaluator has 350 free characters to answer. TextArea questions are not scored.

- **Heading:** Headings are not questions. Headings are displayed in the Evaluation Form in a larger font to delineate different portions of the questionnaire.

- **Text:** The Text element is not a question. Text elements are displayed in the form to provide annotations and reminders to the Evaluator.

When a form is filled out about a call recording, an overall percentage is automatically calculated. Checkbox, Radio Group and Combo Box questions are all Pts Calculated (basis points) that factor into that calculation. Different answers are awarded different points (Weights). If the question has 200 basis points and the answer selected receives 150 points, that's 75% of the points for this question. The total Evaluation score sums all of the points awarded by the answers and divides them by all of the basis points. This creates the overall percentage.

FIELD DEFINITIONS

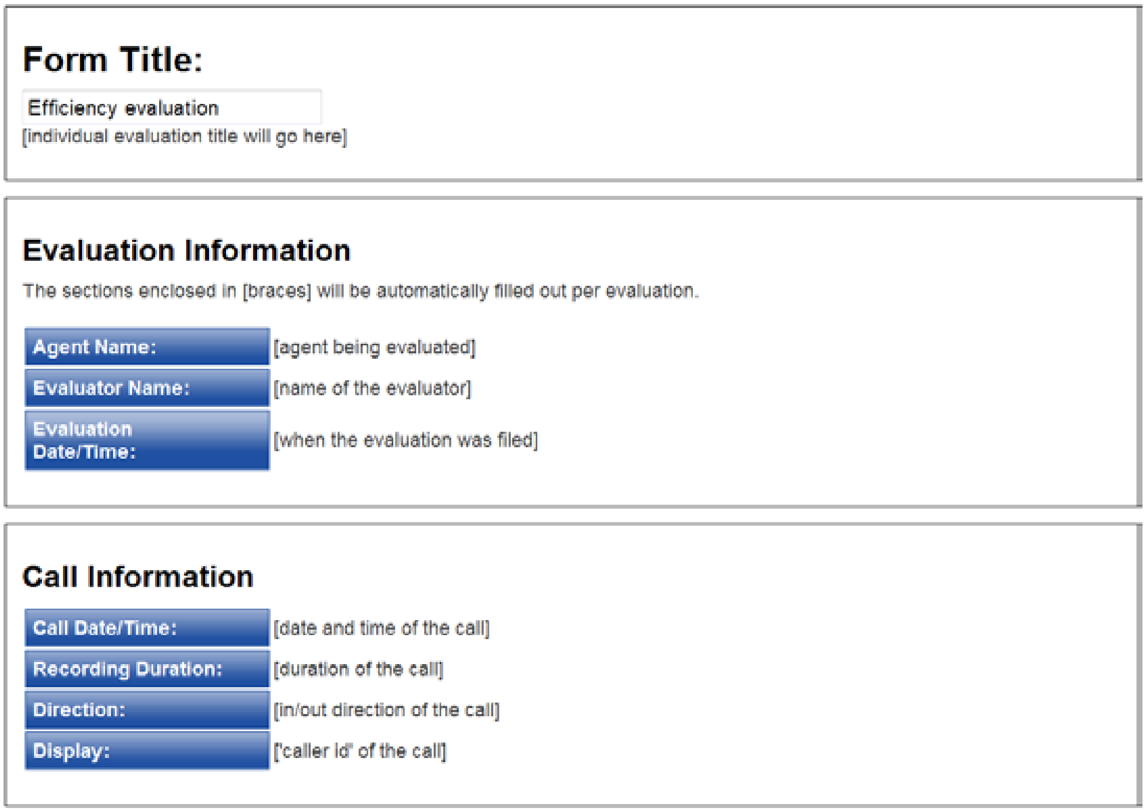
- **Form Title:** The title of the form.

- **Date Created:** The date the form was created.

- **Actions:**
  Edit: Click to edit the form.
  Delete: Click to delete the form.

CREATE OR EDIT AN EVALUATION FORM

On the "List Evaluation Forms" page, click ***Add a New Evaluation Form*** or click ***Edit*** for an existing Form.



Form Title:

Efficiency evaluation

[individual evaluation title will go here]

Evaluation Information

The sections enclosed in [braces] will be automatically filled out per evaluation.

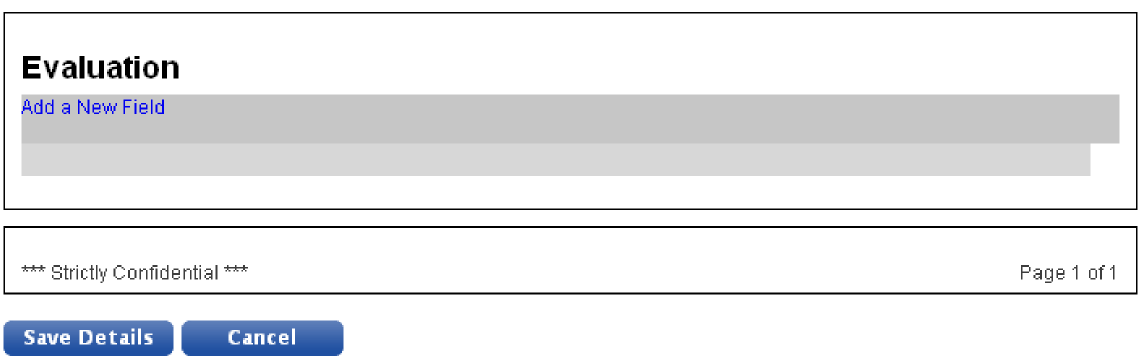
Agent Name:	[agent being evaluated]
Evaluator Name:	[name of the evaluator]
Evaluation Date/Time:	[when the evaluation was filed]

Call Information

Call Date/Time:	[date and time of the call]
Recording Duration:	[duration of the call]
Direction:	[in/out direction of the call]
Display:	['caller id' of the call]

FIELD DEFINITIONS

- **Form Title:** The title of the form.
- **Evaluation Information and Call Information:** These fields will be populated automatically whenever the form is used to evaluate a call recording. Note that the Agent Name can be overwritten if someone other than the intended Agent answered that Agent's call.



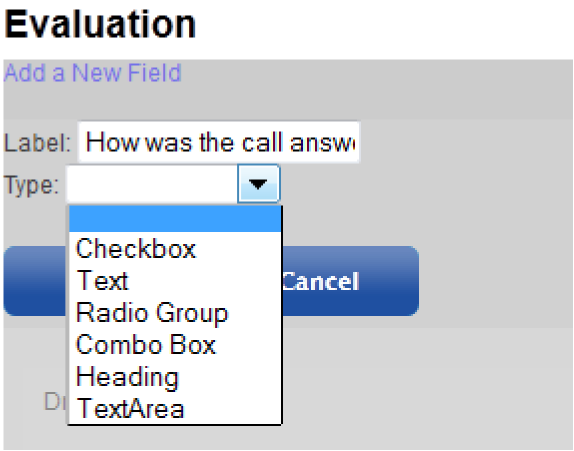
Evaluation

Add a New Field

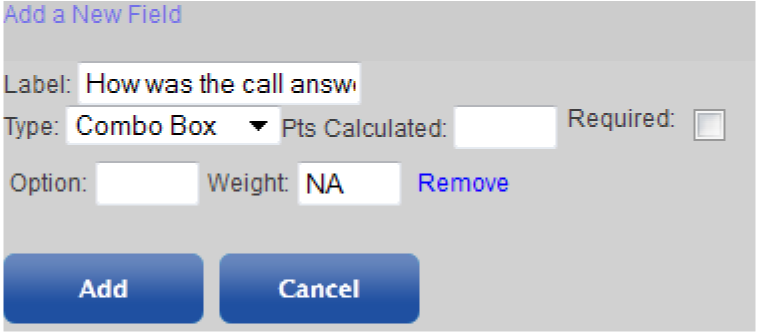
*** Strictly Confidential *** Page 1 of 1

Save Details Cancel

To add a new question to the form, in the Evaluation section, click ***Add a New Field***.



- **Label:** The full text for the question.
- **Type:** The question type, selected from the drop-down menu.

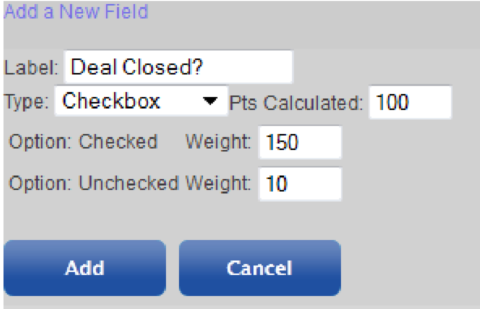


- **Pts Calculated:** For Checkbox, Radio Group and Combo Box questions, this is the total point basis for this question and is used in the denominator when the final percentage is calculated. If Pts Calculated is not populated, its value for this question is taken as the largest of the Weight assigned to any of its answers.

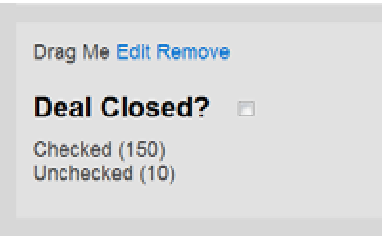
Note: The larger the Pts Calculated for an individual question, the more the answer affects the overall percentage score.

- **Required:** For Combo Box questions only, checking this field will force the Evaluator to choose an answer. If the box is not checked, the Evaluator can choose "N/A" in which case this question and its Pts Calculated are excluded from the calculation of the overall percentage score for this recording.
- **Option:** For Radio Group and Combo Box questions, this is the full text of an answer choice. Click Remove to remove a previously defined answer choice.
- **Weight:** For Radio Group and Combo Box questions, this is the points (Weight) awarded when this answer is chosen. For Checkbox questions, assign Weights to the pre-defined answers "Checked" and "Unchecked."

Note: The Weight assigned to a particular answer can be larger than the Pts Calculated. This allows for results such as, "In this area, the Agent achieved 110% of the objective!"



Click ***Add***. The question will be added to the form.



Note: When the form is presented to the Evaluator, it does not show the points for the question or the points associated with the answer choices.

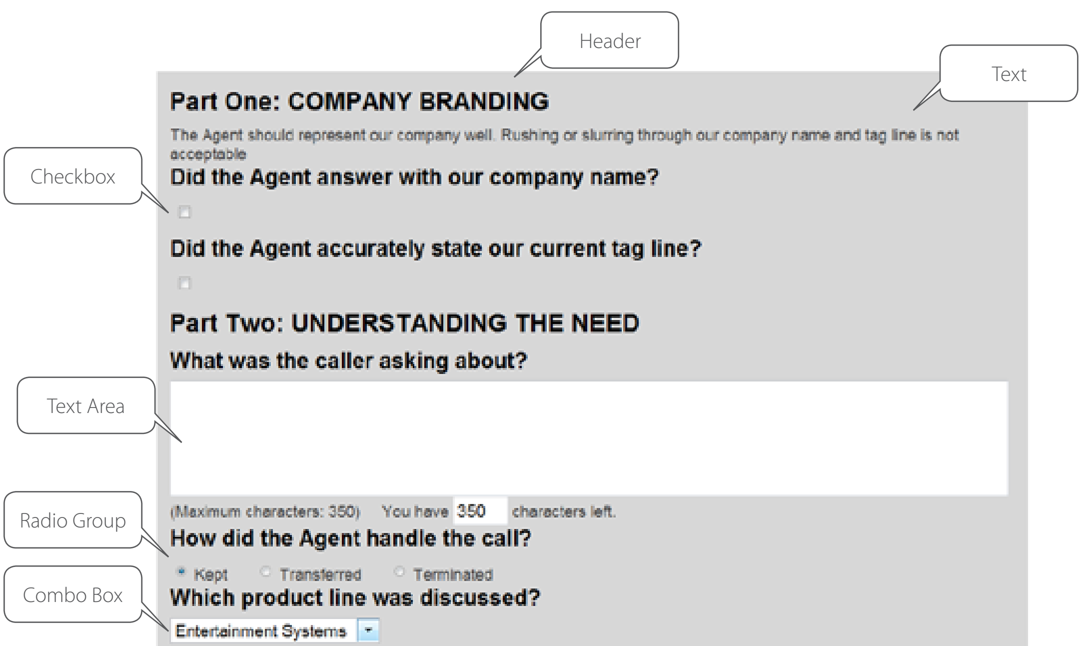
- Repeat the steps above until all of the questions have been added.
- Edit or Remove a question by clicking on the appropriate link.
- Re-arrange the order of the questions by clicking, holding and dragging the Drag Me link.

When the form is complete, click ***Save Details*** at the bottom of the page.

Important: Even though changes to the Evaluation Form appear to be saved as they are entered, they are not preserved until the Save Details button is pressed.

EXAMPLE EVALUATION FORM

As seen by the Evaluator.



DELETE AN EVALUATION FORM

An existing Evaluation Form can be deleted by clicking on the Delete link on the "List Evaluation Forms" page. The Delete dialog box will be displayed. Click the ***Confirm Delete*** button.

Important: If an Evaluation Form is deleted, evaluation results based on that form will also be deleted.

Call Marking

In order to identify the start point of the ***Call Marking*** during a Call Center Services Call Recording call, the user will press ***#*** followed quickly by *******. A ***Call Marking*** audible confirmation start tone will be heard by both parties.

Once the ***Call Marking*** has begun, in order for the user to end the ***Call Marking***, they will press ***#*** followed quickly by a second ***#***. A ***Call Marking*** audible confirmation end tone will be heard by both parties, followed by a confirmation tag which is a two (2) digit number between 01 and 99. If the user does not hear the end tone or remember the confirmation tag, the Agent can re-dial the ***#*** and ***#*** buttons and again listen for the end tone and/or the confirmation tag.

The portion of the recorded audio between the ***Call Marking Start Tone*** and ***End Tone*** is the ***Call Marking***.

*Note: If the call is terminated intentionally or unintentionally, or if the call is transferred after the **Call Marking** has begun but before it has ended, the **Call Marking** will immediately and automatically end.*

Call Marking can be located on the ***Completed Events | Call page***.

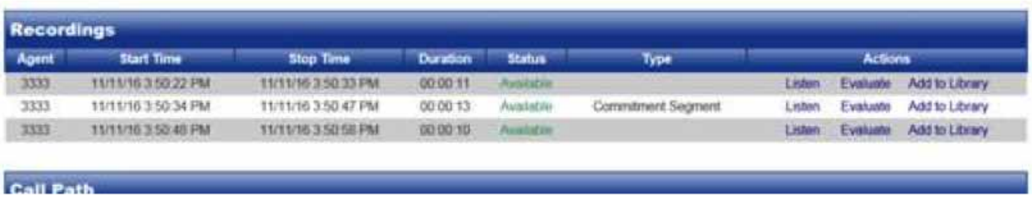
There is an ***Account Code*** column in this listing of calls. This column is populated with the ***Call Marking*** Confirmation Number. The ***Call Marking*** Confirmation Number consists of:

- the extension that initiated the ***Call Marking***
- the date the ***Call Marking*** was recorded - in ***yymmdd*** format.
- and the ***Call Marking*** Confirmation Tag. This tag is a two digit number between 01 and 99. The tag indicates which number ***Call Marking*** this was for this agent on this day (first second, third, etc.). During the actual call, the system audibly announced this two digit tag as soon as the agent terminated the ***Call Marking***.

In the search parameters on this page the ***Tenant Admin*** can search for a particular ***Call Marking***. For example for a tenant with 4-digit extensions:

- by searching Account Codes for ***1011****, all ***Call Markings*** initiated by ***x1011*** will be found.
- by searching for ****161110*****, all ***Call Markings*** recorded on ***November 10, 2016*** will be found.
- by searching for ***2140*03***, the search will locate the third ***Call Marking*** recorded by ***x2140*** on whatever dates are being considered.

On the ***Call Details*** page there is a new column ***Type***.



Recordings

Agent	Start Time	Stop Time	Duration	Status	Type	Actions
3333	11/11/16 3:50:22 PM	11/11/16 3:50:33 PM	00:00:11	Available		Listen Evaluate Add to Library
3333	11/11/16 3:50:34 PM	11/11/16 3:50:47 PM	00:00:13	Available	Commitment Segment	Listen Evaluate Add to Library
3333	11/11/16 3:50:48 PM	11/11/16 3:50:58 PM	00:00:10	Available		Listen Evaluate Add to Library

Call Path

The screenshot above represents a call during which a ***Call Marking*** was recorded. The actual ***Call Marking*** recording is marked ***Commitment Segment*** in this column. The user can listen to or download this recorded segment specifically.

In the CCS System, .csv files automatically accompany the bulk transmission of recordings, for example bulk downloads from the call search page and bulk transfers using sftp. In those .csv files there will be two new columns: ***Account Code*** and ***Type***. For calls with ***Call Markings***, the ***Account Code*** field will have the full ***Call Marking*** Confirmation Number as described above. The ***Type*** column will have the words ***Commitment Segment*** in any .csv row that points to an actual ***Call Marking*** recording.

Recording Suppression

To enable ***Recording Suppression*** the ***Tenant Admin*** will need to go to the ***Agent Details*** page. In addition to the option to set ***Record This Extension's Calls*** as either ***No*** or ***Mandatory***, Tenants permitted to use the ***Recording Suppression*** can select ***Option to Suppress*** instead of simply ***Mandatory*** or ***No***.

When assigned ***Option to Suppress***, the extension will record, but they can also use ****8*** to temporarily suppress and then again use ****8*** to resume recording. In the resulting recording file, repeated beeps completely replace the phone conversation for the duration of the suppression.

Operational Notes

CODEC INTEROPERABILITY

Recordings are made at the full bit rate of the telephone network. When the recordings are downloaded to a PC, they have been transcoded to become GSM inside a .wav wrapper. Most PC media players can play GSM files from a .wav wrapper.

See the section on Audio Library for a discussion of the codecs that are supported when a PC audio file is uploaded to the Audio Library.

Frequently Asked Questions (FAQ)

Q: HOW LONG ARE CALL DETAIL RECORDS, "CDRS," PRESERVED FOR VIEWING IN COMPLETED EVENTS/CALLS?

A: The default duration for call detail records is 365 days.

Q: HOW LONG ARE CALL RECORDINGS PRESERVED FOR ACCESS IN COMPLETED EVENTS/CALLS?

A: They are kept for 30 days by default.

Q: HOW LONG ARE CALL RECORDINGS AND CDRS PRESERVED IN THE RECORDING LIBRARY?

A: They are preserved indefinitely, but there is a service agreement limit (in minutes) on the total call recordings that can be saved perpetually in the Recording Library.

Q: WHAT IS THE MAXIMUM NUMBER OF SIMULTANEOUS CALLS THAT CAN BE PROCESSED IN MY CR SYSTEM?

A: The total number of simultaneous CR calls is not limited by the CR system itself. The number is limited only by the number of simultaneous calls permitted in and out of each of your silhouette tenants and its sites.