

Business Manager-Recorder

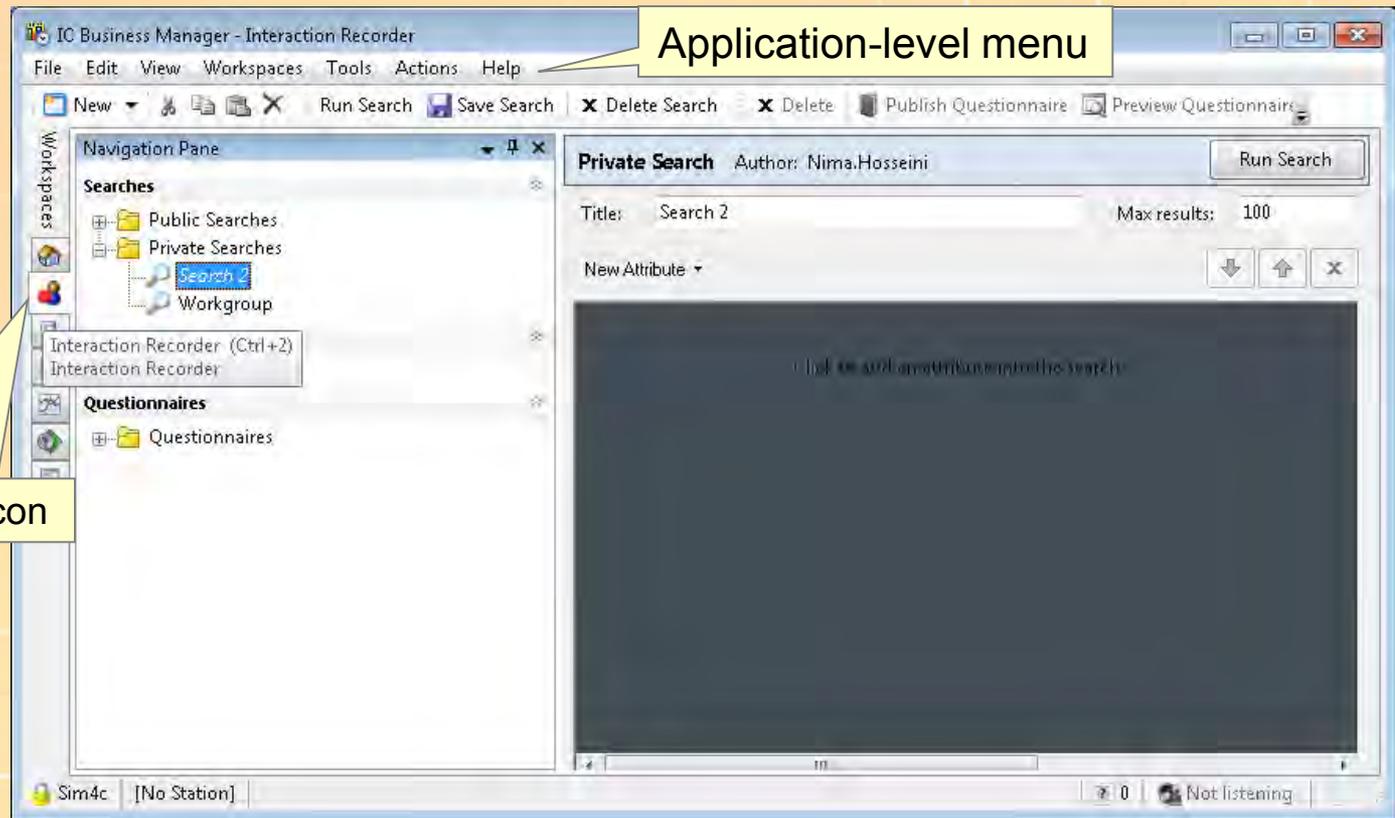
4.0 Training/Demo

Overview

1. Navigating the User Interface
2. Querying for Recordings
3. Viewing Recordings
4. Recording Playback
5. Adding Bookmark
6. Adding Tags
7. Scoring Recording

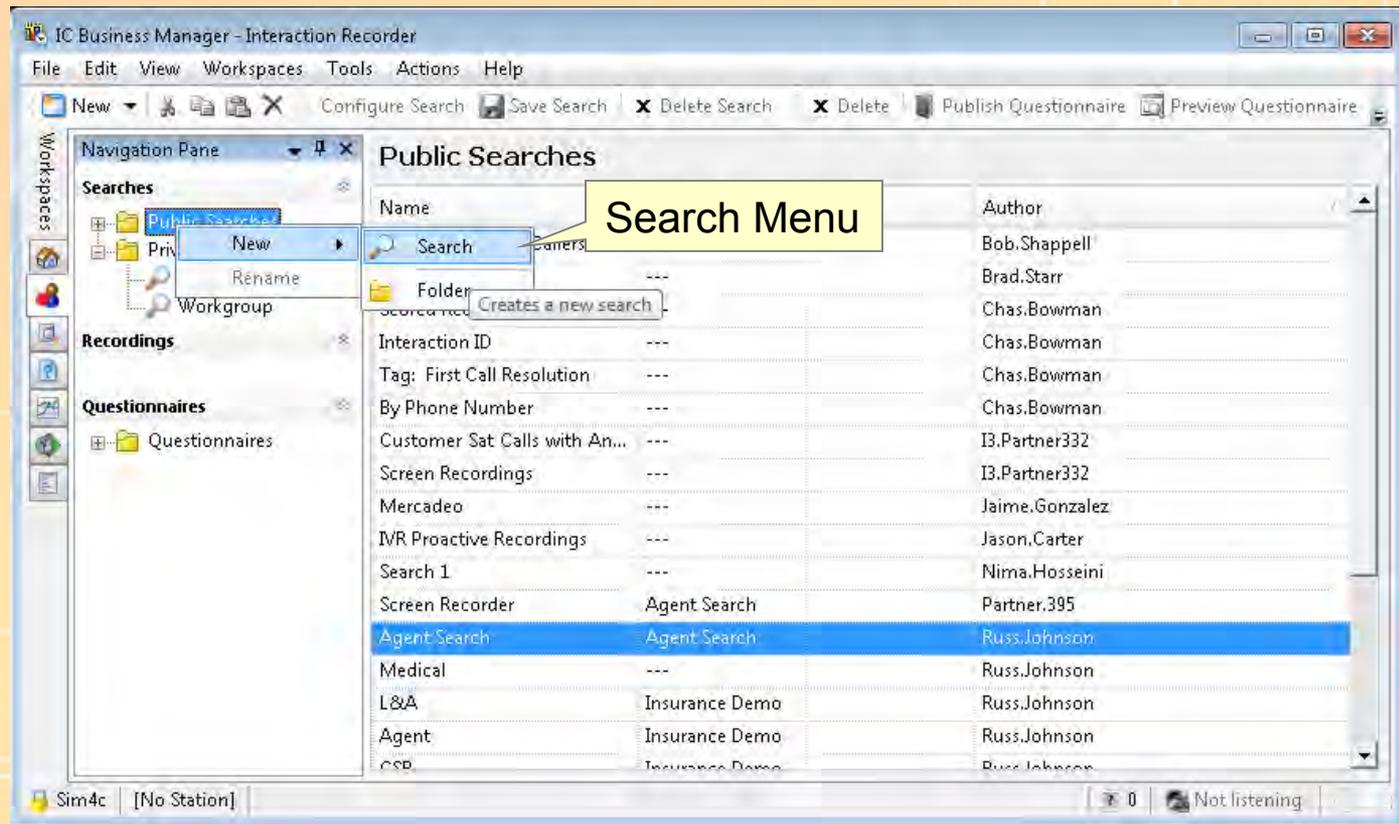
Navigating the User Interface

- Business Manager-Recorder is started from Start → Programs → Interactive Intelligence → Interaction Business Manager.
- To access recorder click on the Interaction Recorder Icon



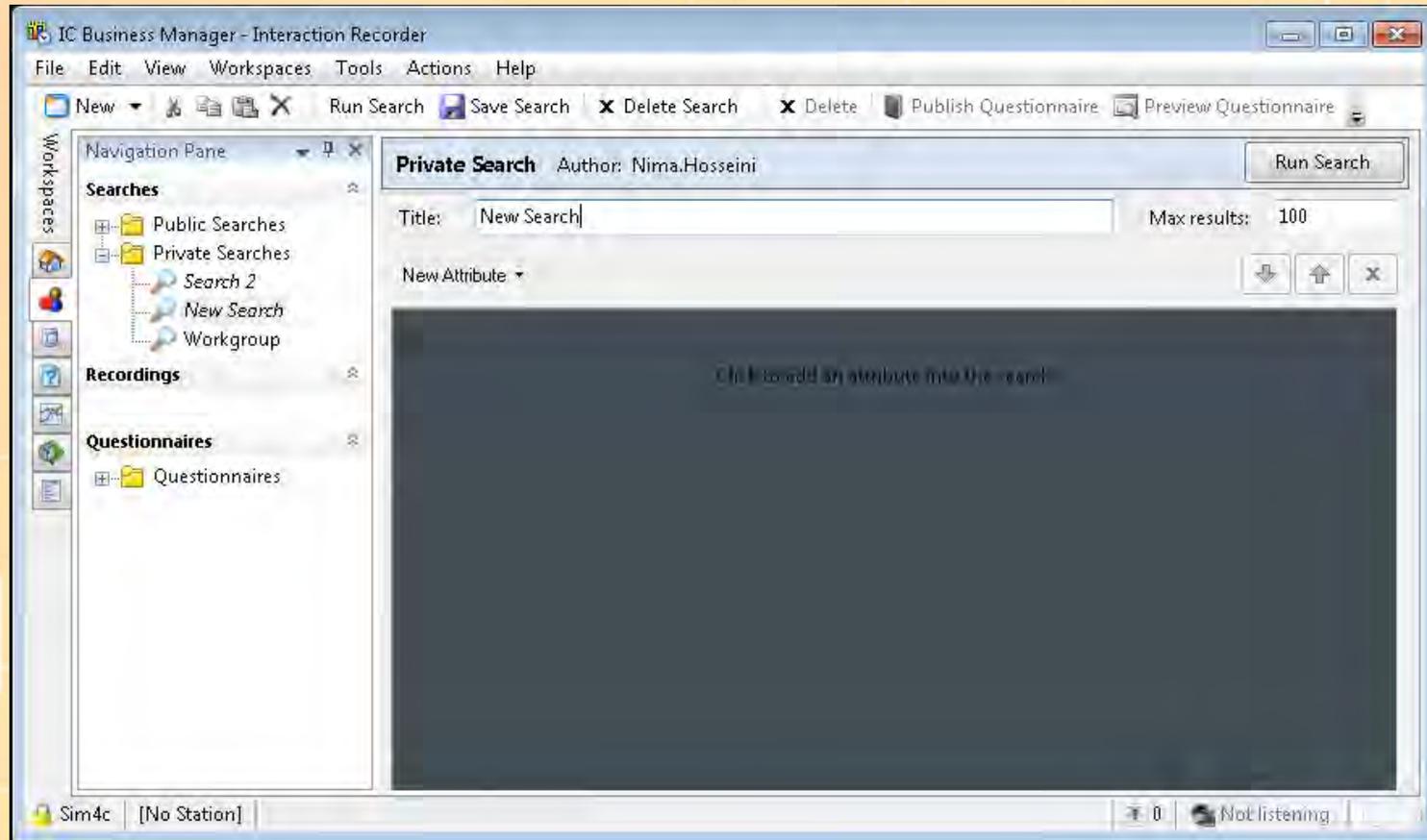
Querying for Recordings

- To build a Public Search (that others can see/run), right click on 'Public Searches' and choose New > Search.
- To build a Private Search, right click on 'Private Searches'



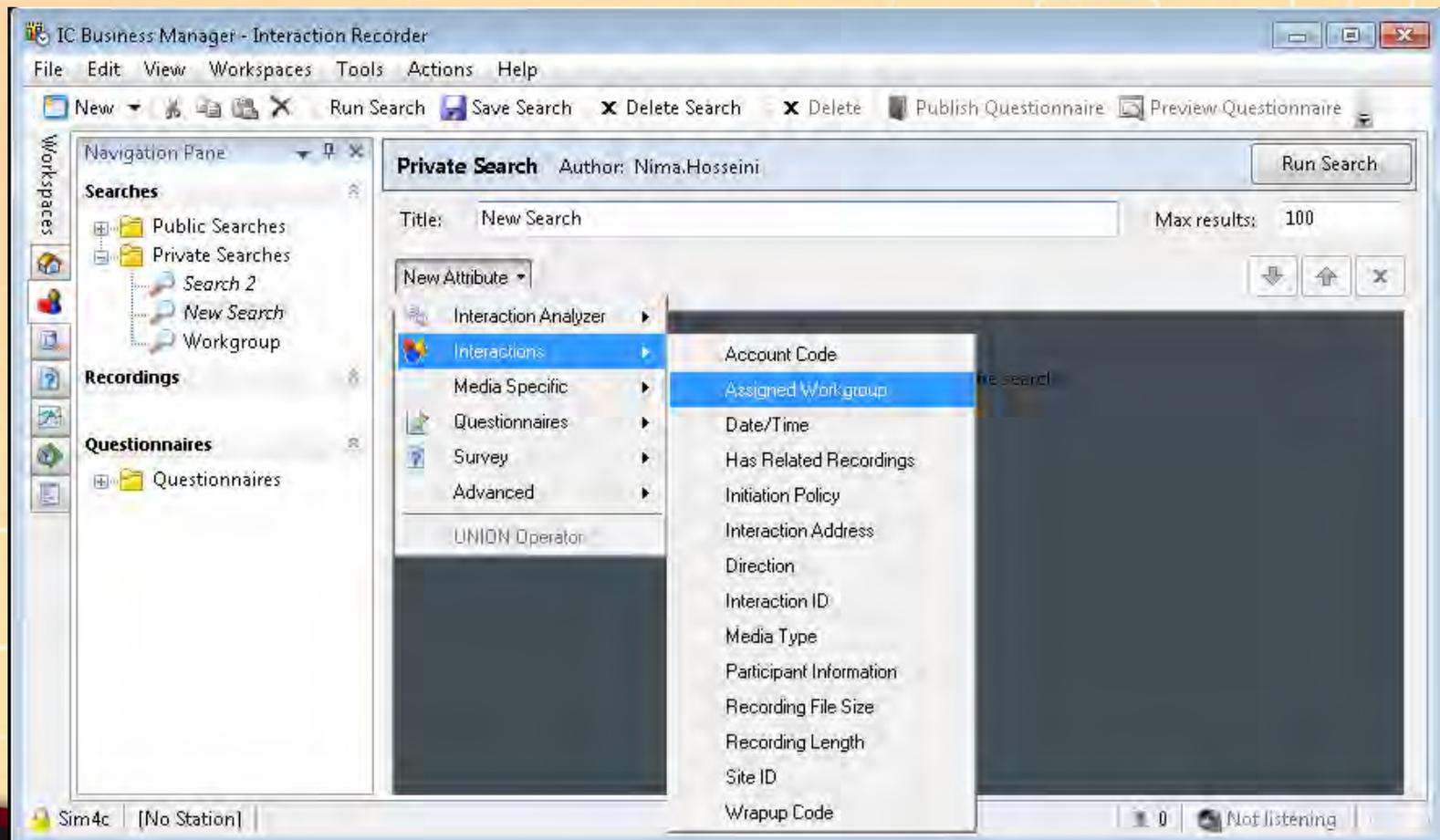
Querying for Recordings

- Once you have created a query you can name it.



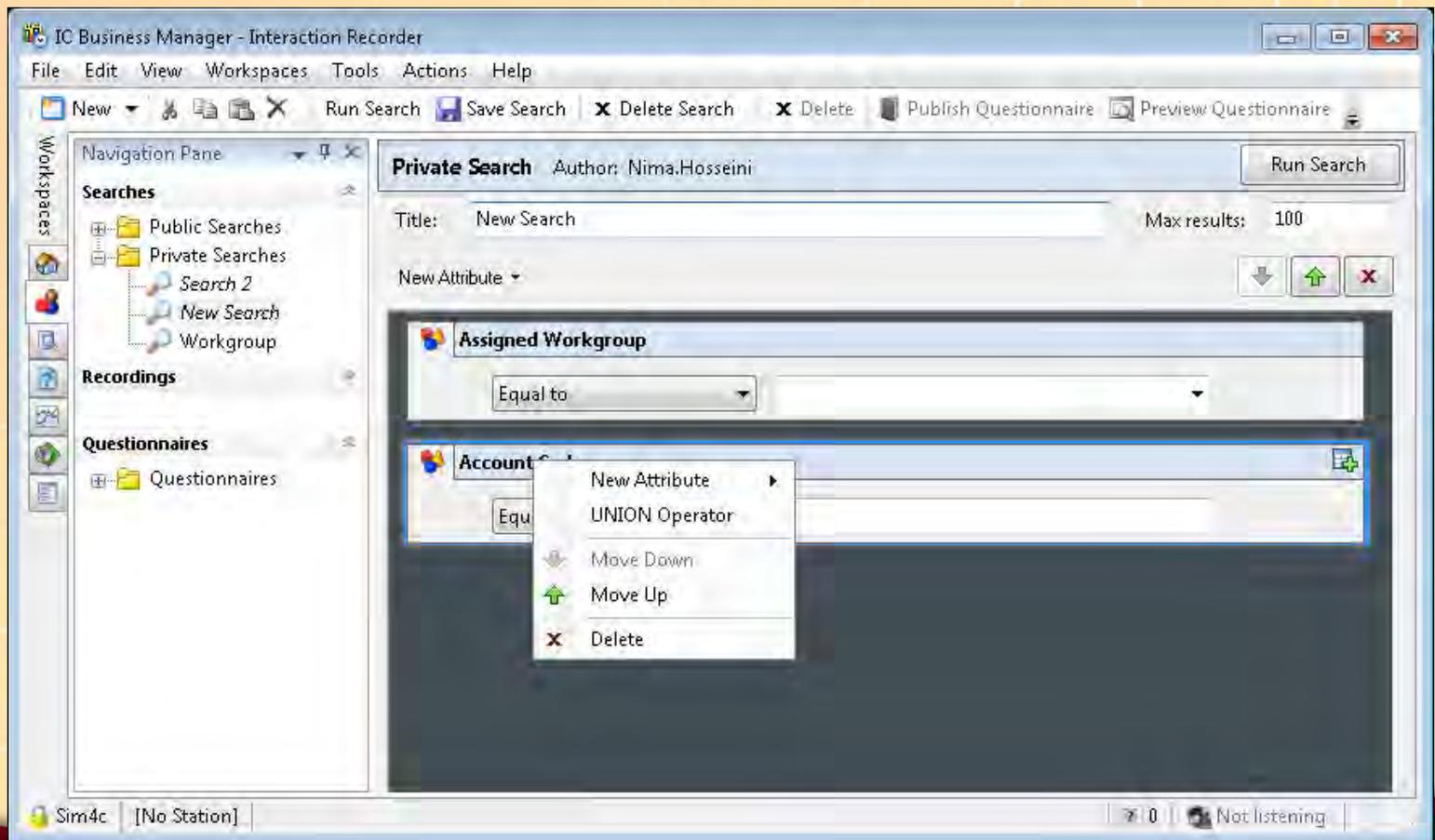
Querying for Recordings

- Add Attributes to create queries for the right recordings.
- Select attribute from New Attribute drop down or click anywhere in the grey area



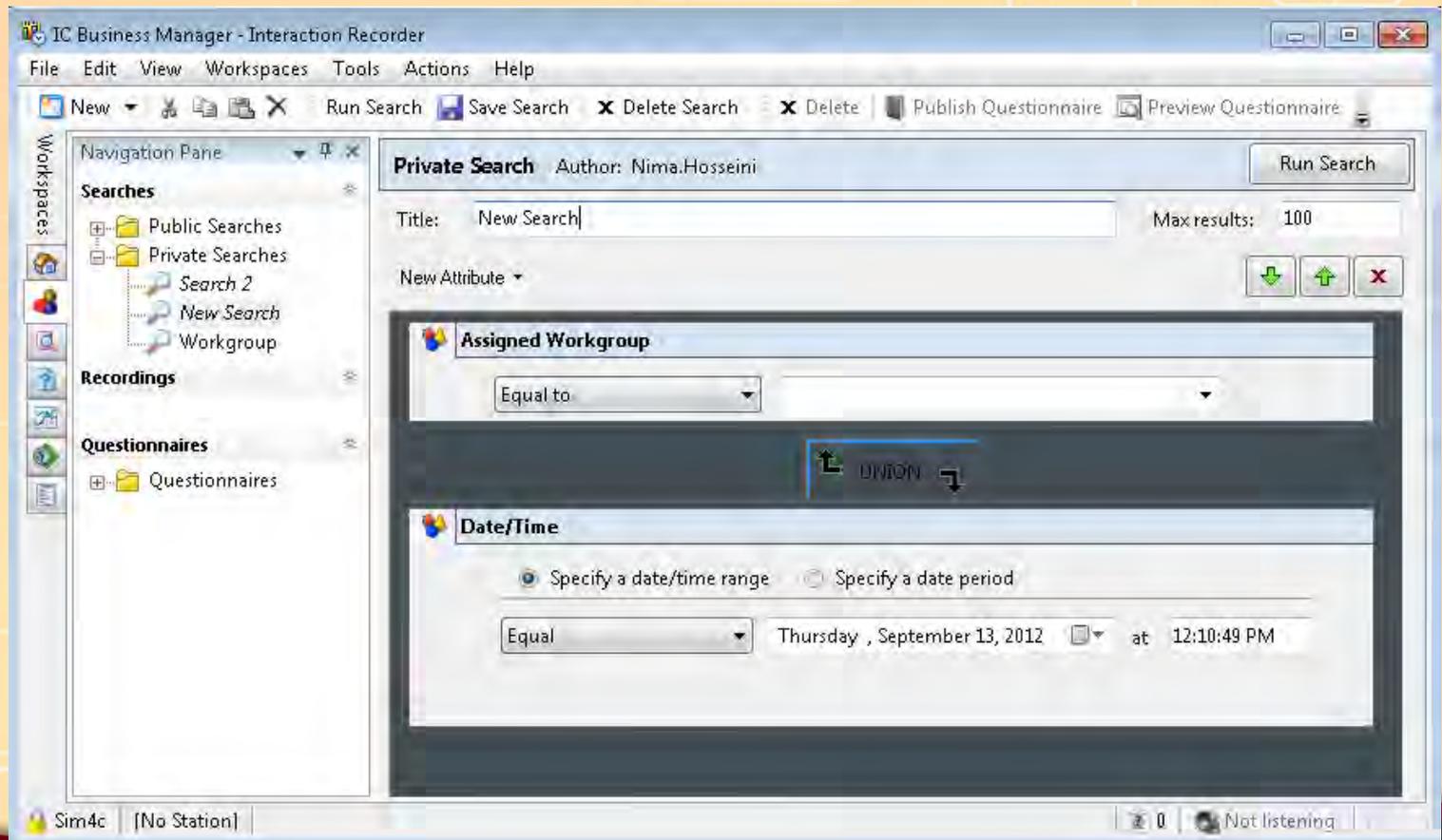
Querying for Recordings

- Select the attributes relevant to your particular query. Right click on an Attribute and click Delete to remove it.



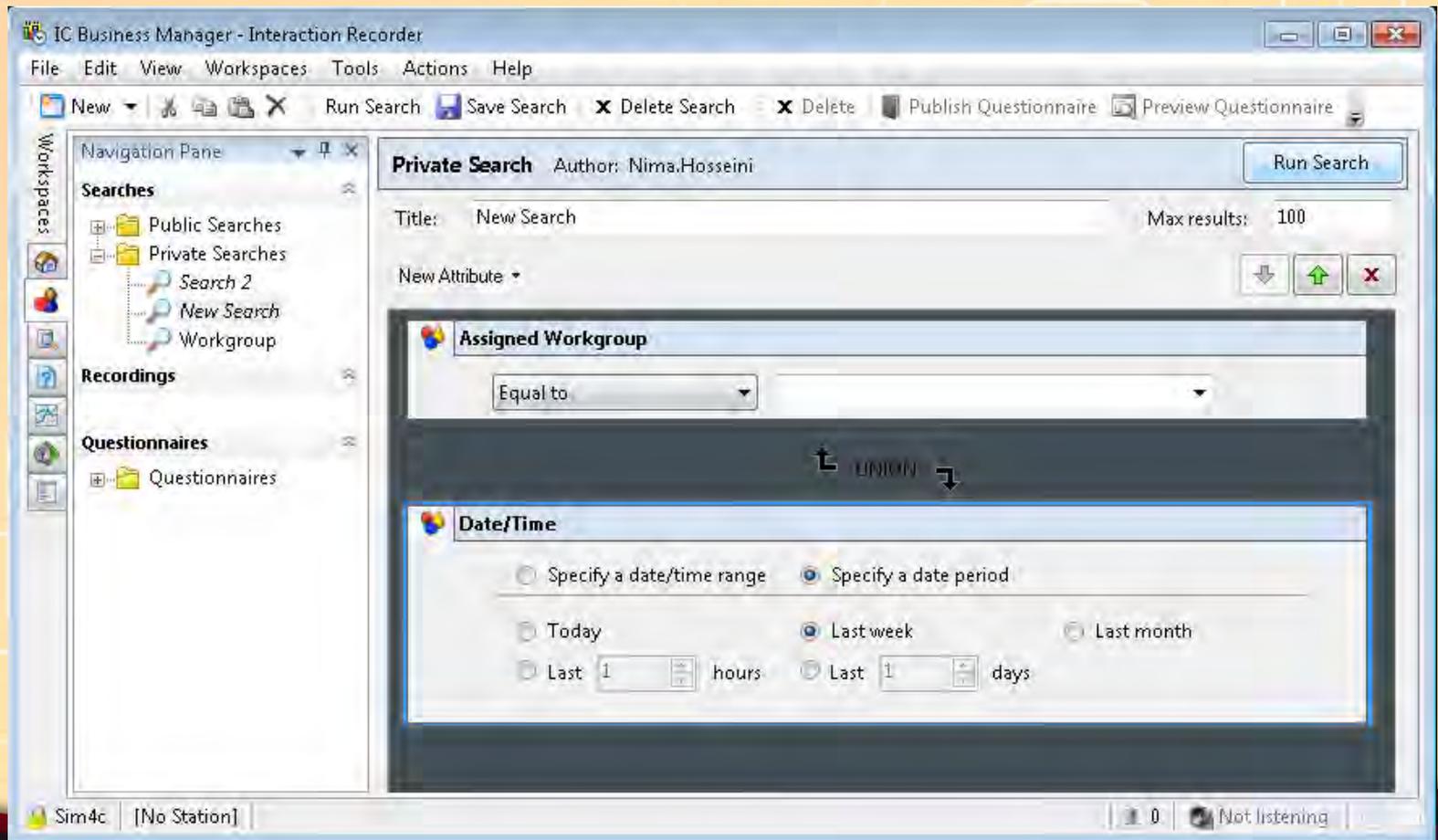
Querying for Recordings

- Use the union operator to turn your query into an AND statement. Do not use the union operator to keep your query as an OR statement



Querying for Recordings

- Set Max results and click Run Search.



Viewing Recordings

- Results will display in the top right window pane.
- Select any record to see recording details in Media Details pane.

The screenshot displays the IC Business Manager - Interaction Recorder application. The interface is divided into several panes:

- Navigation Pane:** Located on the left, it shows a tree view with folders for 'Public Searches', 'Private Searches', 'Search 2', 'New Search', and 'Workgroup'.
- Media Typ:** A tab at the top of the main content area.
- New Search results:** A table displaying 100 recordings. The table has columns for Recording ID, Date/Time, Recording Length, Interaction Address, Local Party Name, and Scoring L. One record is highlighted in blue.
- Media Details:** A pane below the search results showing details for the selected recording, including Recording Date, Interaction ID Key, Recording Length, Call Line, Recording ID, Initiation Policy, Direction, and Call Tone.
- Details:** A pane at the bottom showing participant data and attributes. It includes a tree view for 'Segment 01' with sub-items 'Guy Risk' and 'David Morgan'. A table lists attributes like Duration, Interaction Address, Display Name, Related Recordings, and Role.

Yellow callout boxes with arrows point to the 'Results' table, the 'Media Details' pane, and the 'Additional Details' table.

Media Typ	Recording ID	Date/Time	Recording Length	Interaction Address	Local Party Name	Scoring L
	=	9/2/2012 12:13:...	=	88003	Lance Hursey	
	7ef0af12-0f49-d0eb-8a06-67...	9/2/2012 12:13:...	00:01:31	88029	Guy Risk	
	7cf0af12-37e1-d08f-8a06-67...	9/2/2012 12:13:...	00:01:31	88010	Clinton Hunsucker	

Attribute name	Value
Duration	00:01:32
Interaction Addr...	/88029
Display Name	Guy Risk
Related Recordi...	No
Role	Respondent

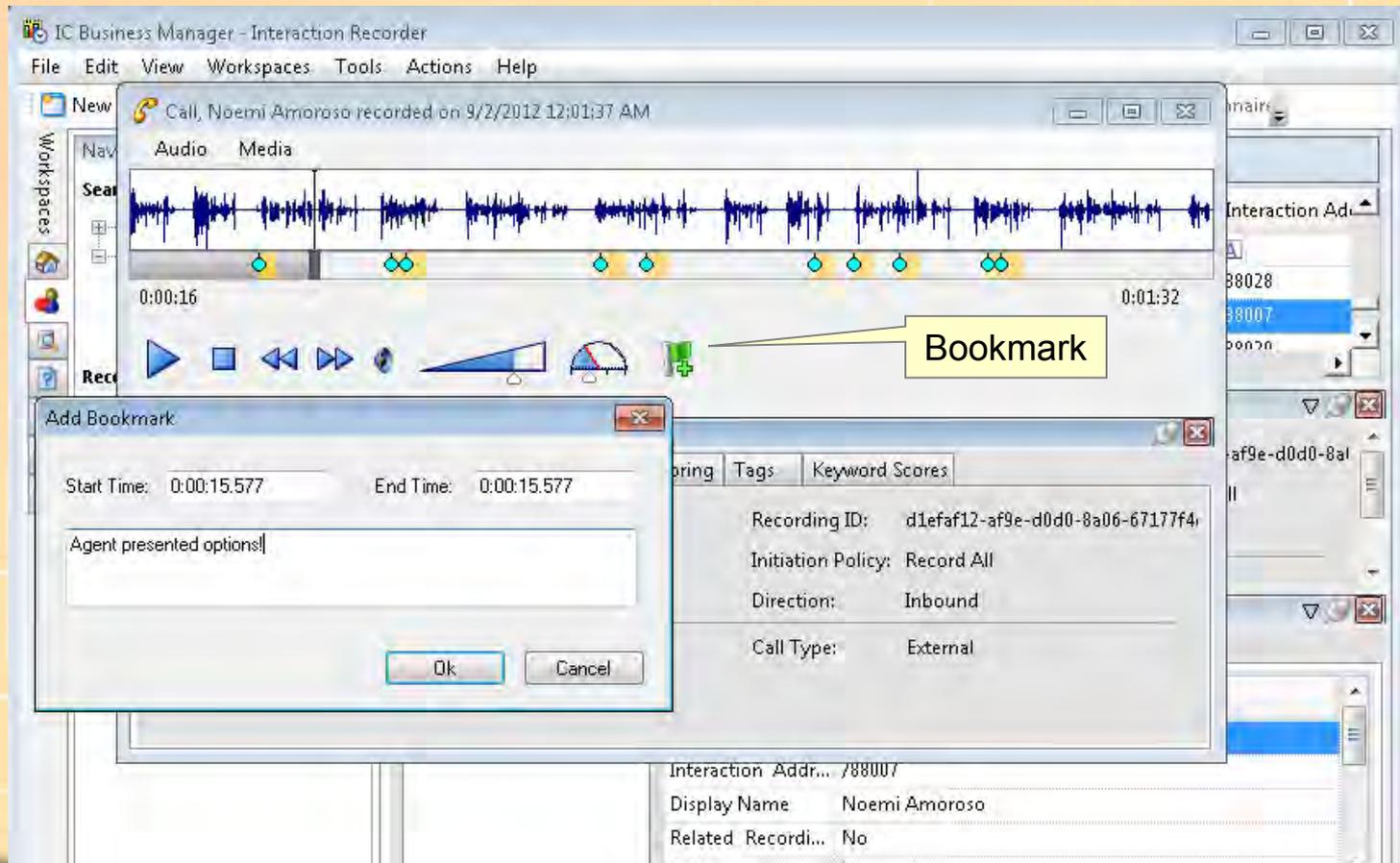
Recording Playback

- To listen to a recording double click on the record.
- See additional details in Details pane.

The screenshot displays the 'IC Business Manager - Interaction Recorder' interface. The main window shows an audio waveform for a call recorded on 9/2/2012 at 12:01:37 AM. The waveform is labeled 'Call, Noemi Amoroso recorded on 9/2/2012 12:01:37 AM'. Below the waveform is a playback bar with various controls including play, stop, and volume. A red arrow points from the playback bar to a call log entry in the 'Details' pane. The call log entry is titled 'Call, Noemi Amoroso recorded on 9/2/2012 12:01:37 AM' and has a 'Media' tab selected. A context menu is open over the call log entry, showing options: 'Primary Sound Driver', 'Remote Audio', 'Telephone Handset', and 'Make Selected Audio Device the Default'. A yellow callout box labeled 'Analyzer keyword spotted' points to a specific point on the waveform where the text 'I understand' is visible. Another yellow callout box labeled 'Playback volume and speed control' points to the volume and speed controls in the playback bar. A third yellow callout box labeled 'Playback Device' points to the context menu. The 'Details' pane shows various fields: Recording Date: 9/2/2012 12:01:37 AM, Recording ID: d1efaf12-af9e-d0d0-8a06-67177f4, Interaction ID Key: 1001142506H0120902, Initiation Policy: Record All, Recording Length: 00:01:31, Direction: Inbound, Call Line: BulkCaller, and Call Type: External.

Adding Bookmark

- To add bookmark to recording select a time on playback bar and click add or click on bookmark icon to open Add Bookmark window.



Tags

- Tags replace the 3.0 “categories” concept
- Applying tags to recordings allows highly granular use of recorder policy to completely customize how a recording with a particular tag is treated.
- Tags can be used to query for recordings.
- Will show how to add/remove/modify tags.

Adding Tags

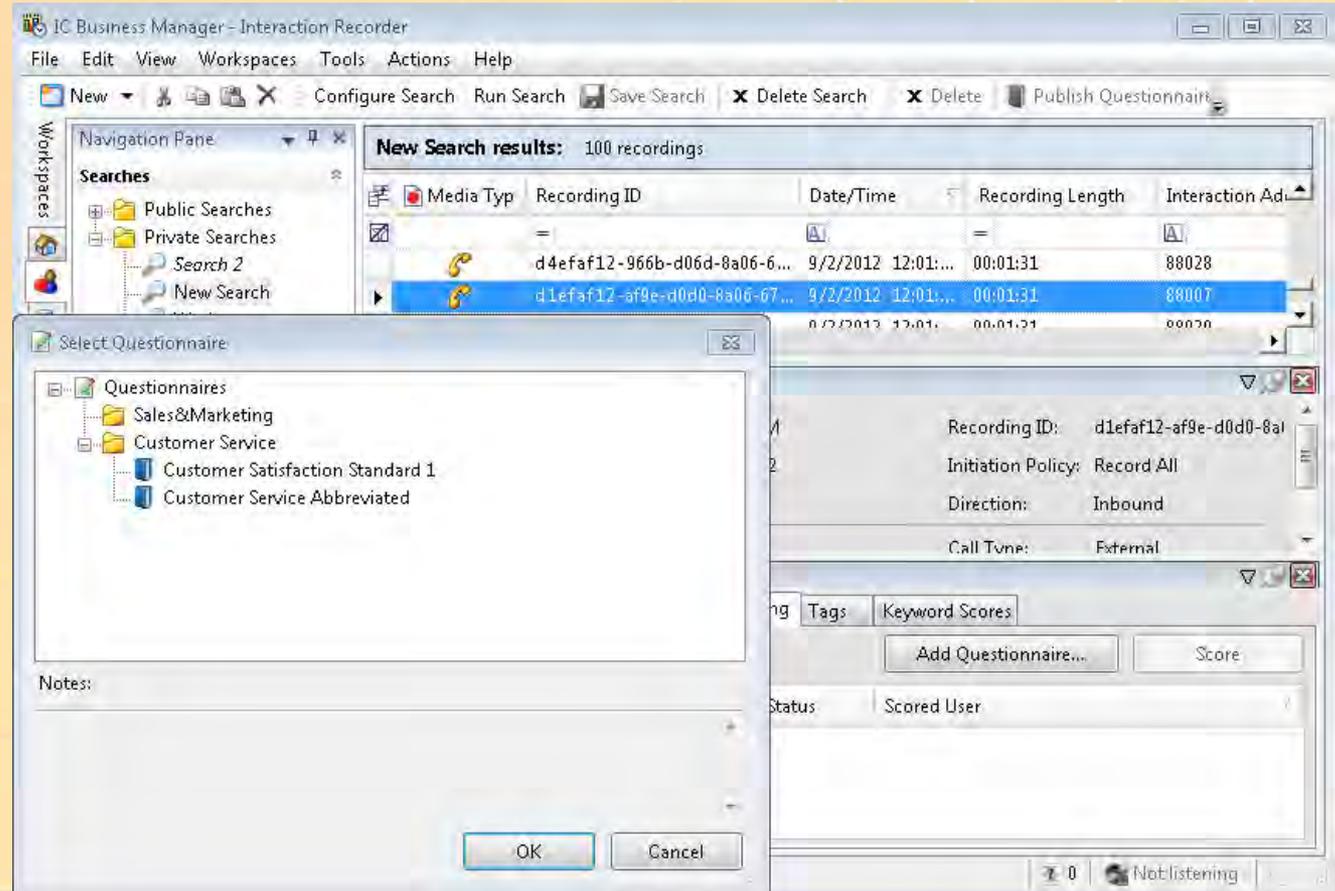
- To add a Tag, go to Tags tab from Details pane.
- Specify a new tag or select an existing tag from dropdown.
- To remove a tag, right click on the tag and click Remove.

The image displays two screenshots of a call recording software interface. Both windows show an audio waveform and playback controls. The left window shows the 'Details' pane with the 'Tags' tab selected, displaying a list of tags: Unhappy, Churn, Positive Sales, Negative Caller, and Positive. A text input field below the list is labeled 'Specify a new tag or select an existing tag:' and contains the text 'New tag1'. The right window shows the same interface but with a context menu open over the 'Churn' tag, displaying a 'Remove' button. The 'Tags' tab is also selected in the 'Details' pane.

Scoring Recordings

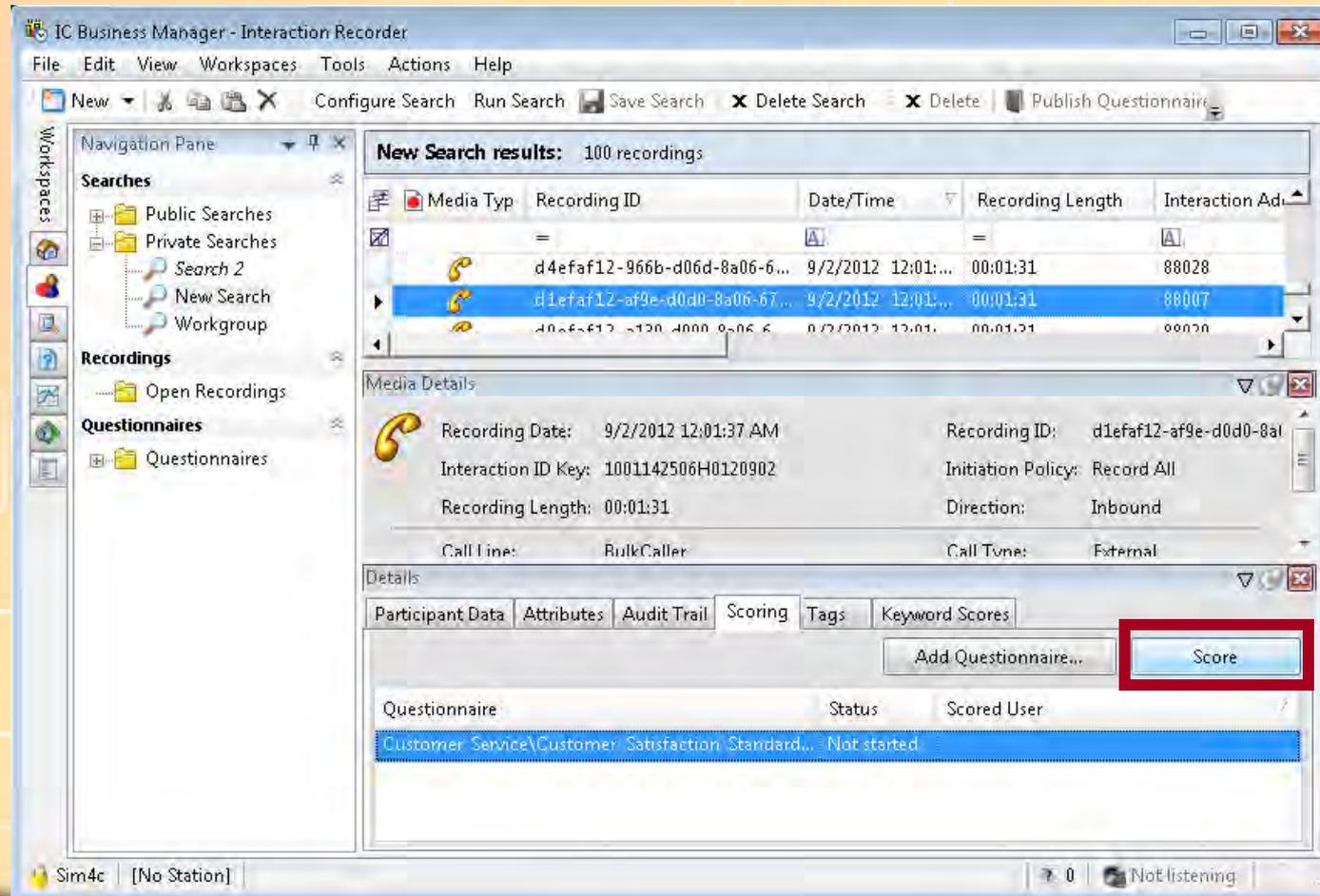
- To score an interaction click on Add Questionnaire from Scoring tab, choose a questionnaire from the list, click OK from the selection window.

- You can also add questionnaire from playback window.
- Questionnaires can also be assigned automatically using recorder Initiation Policy.



Scoring Recordings

- To begin scoring click Score after you have manually added a questionnaire.



Scoring Recordings

- Answer questions using Questionnaire window.
- You can save a partially answered questionnaire to return to it later.
- Recoding play back window opens with Questionnaire.

- Questionnaire status is set to Finished for scored recordings.

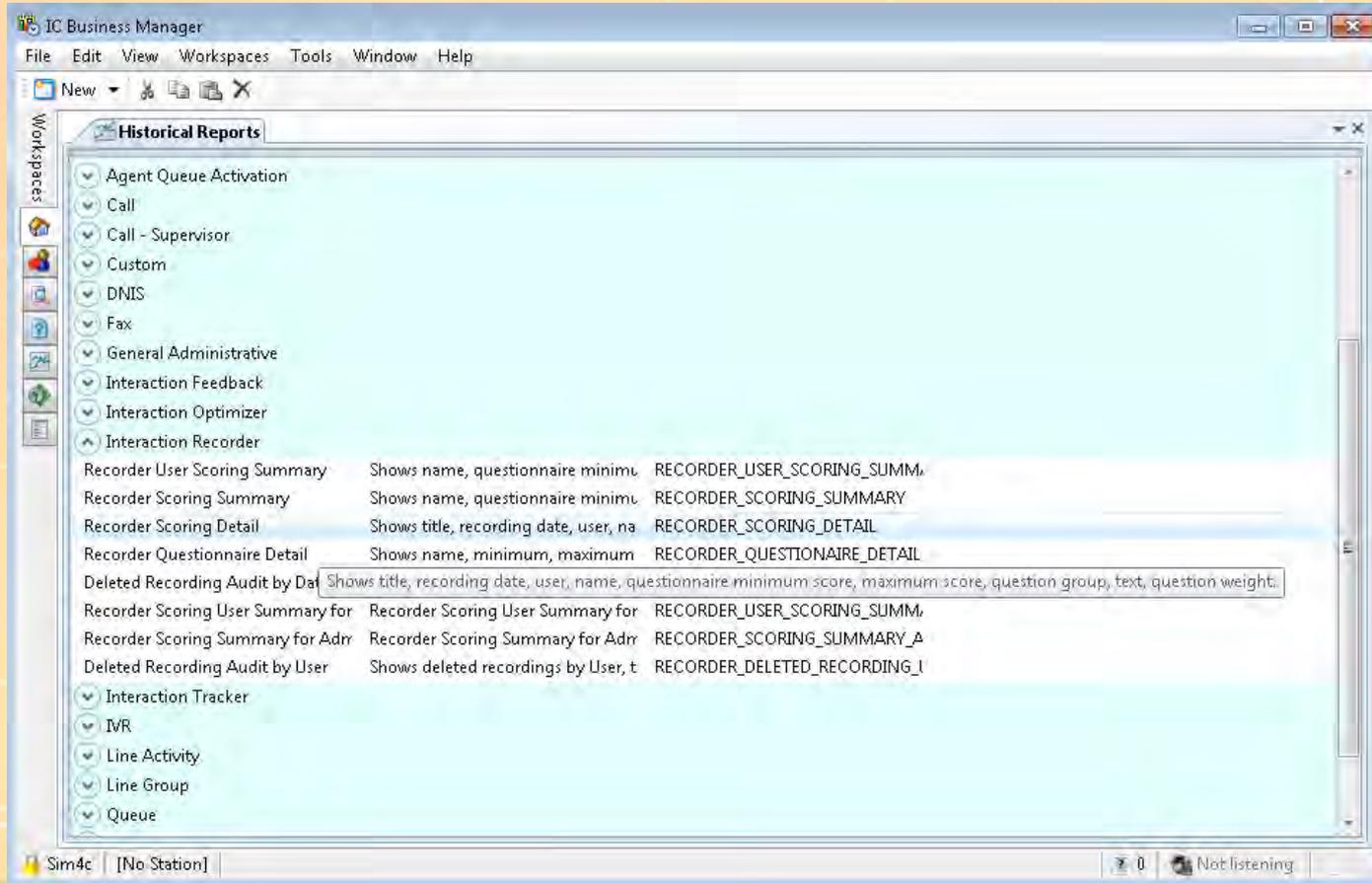
The screenshot displays the IC Business Manager interface. The main window shows a recording playback window for a call recorded on 9/2/2012 at 12:01:37 AM. The recording is titled "Customer Satisfaction Standard 1 - Call, Noemi Amoroso recorded on 9/2/2012 12:01:37 AM". The playback window shows a waveform and a progress bar. The questionnaire window is open, showing a list of questions and their scores. The "Greeting" section has a score of 0.00% and includes questions like "1. Use 'Hello' or similar salutation", "2. Did the agent identify themselves?", "3. Did they use corporate greeting?", "4. Did the agent act happy to get the call?", and "5. Comments regarding agent greeting skills". The "Customer Service Skills" section also has a score of 0.00% and includes questions like "1. Did the agent possess good understanding of product line?". The "Total Score" is 0.00%, "Non-critical Score" is 0.00%, and "Critical Accuracy" is 0.00%. The questionnaire status is set to "Finished".

Details

Participant Data	Attributes	Audit Trail	Scoring	Tags	Keyword Scores
Add Questionnaire...		Score			
Questionnaire	Status	Scored Use			
Customer Service\Customer Satisfaction Standard...	Finished	Noemi Amo...			

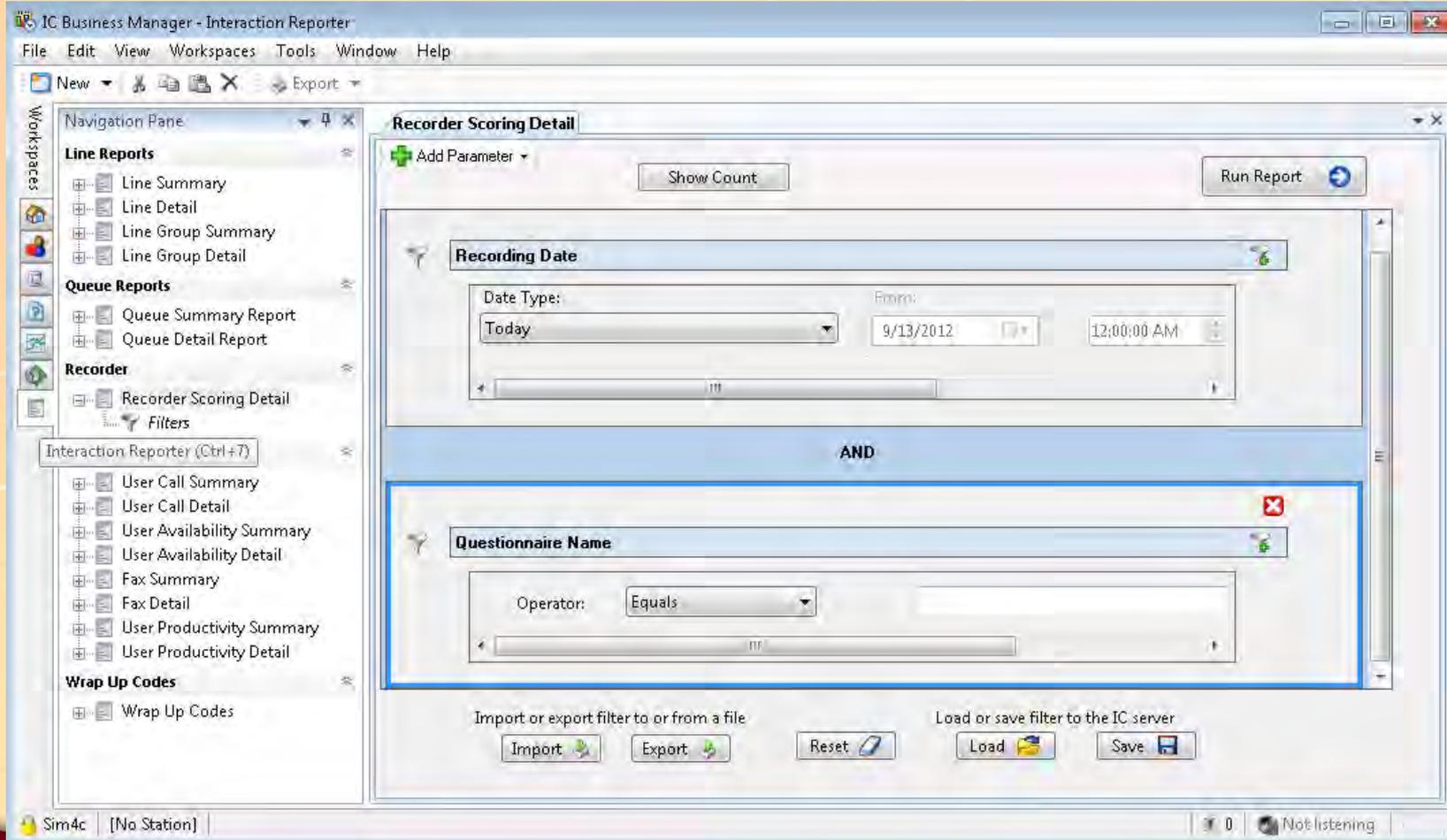
Questionnaire Scoring Reports

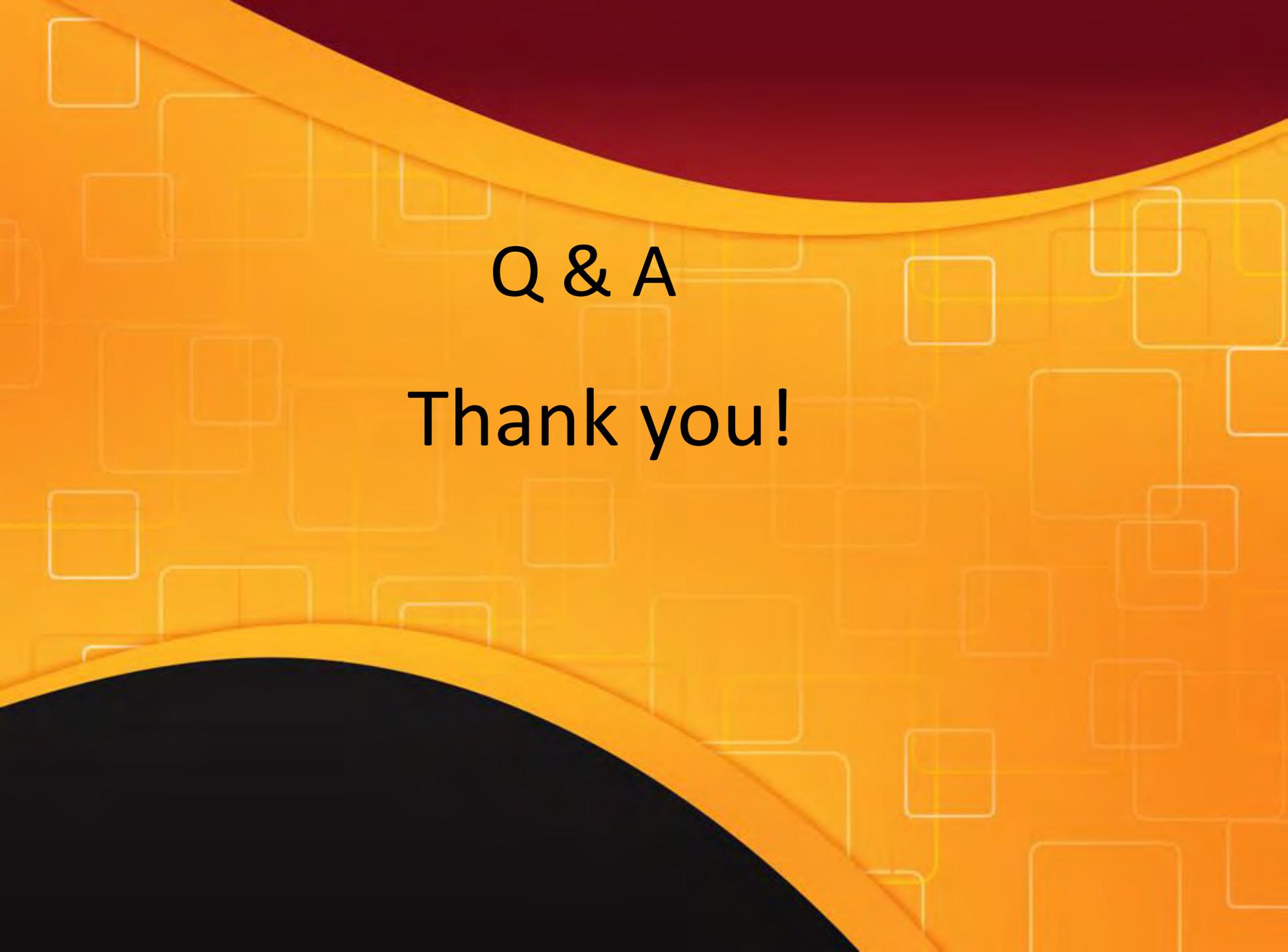
- Historical Reports section of Supervisor workspace includes multiple Scoring Results reports.



Questionnaire Scoring Reports

- You can also use Interaction Reporter to query for questionnaire results.





Q & A

Thank you!