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

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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

Application-level menu
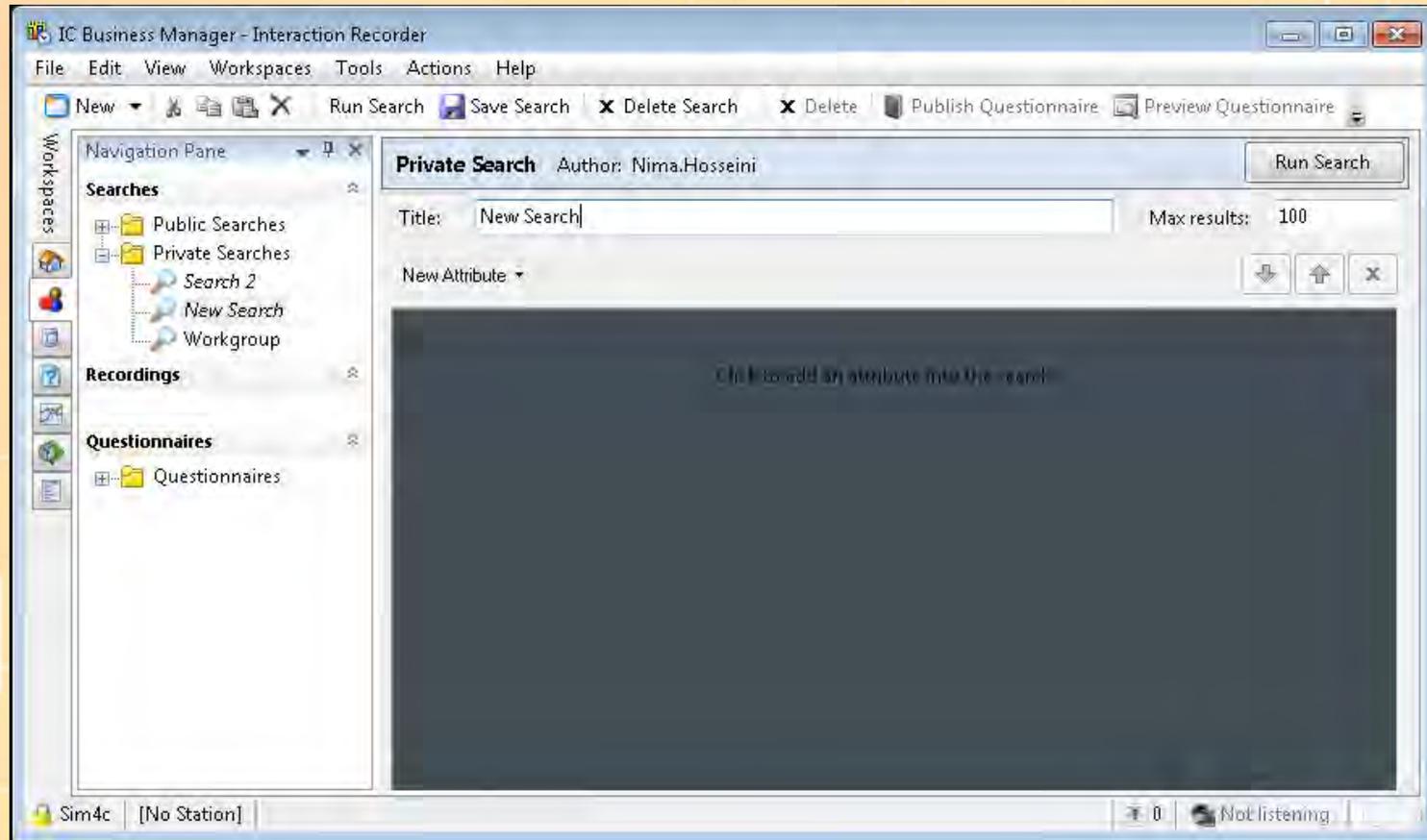
Interaction Recorder Icon
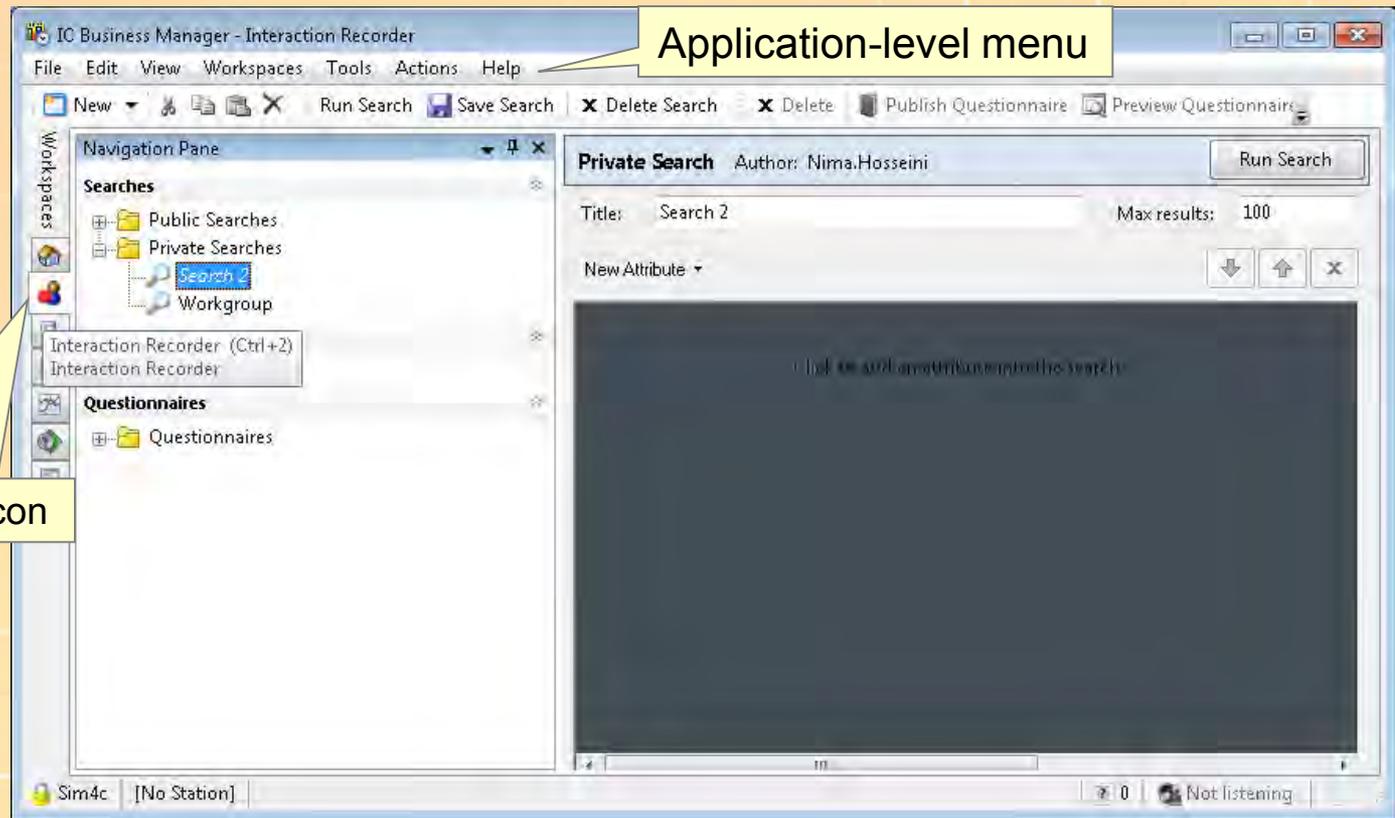
Querying for Recordings

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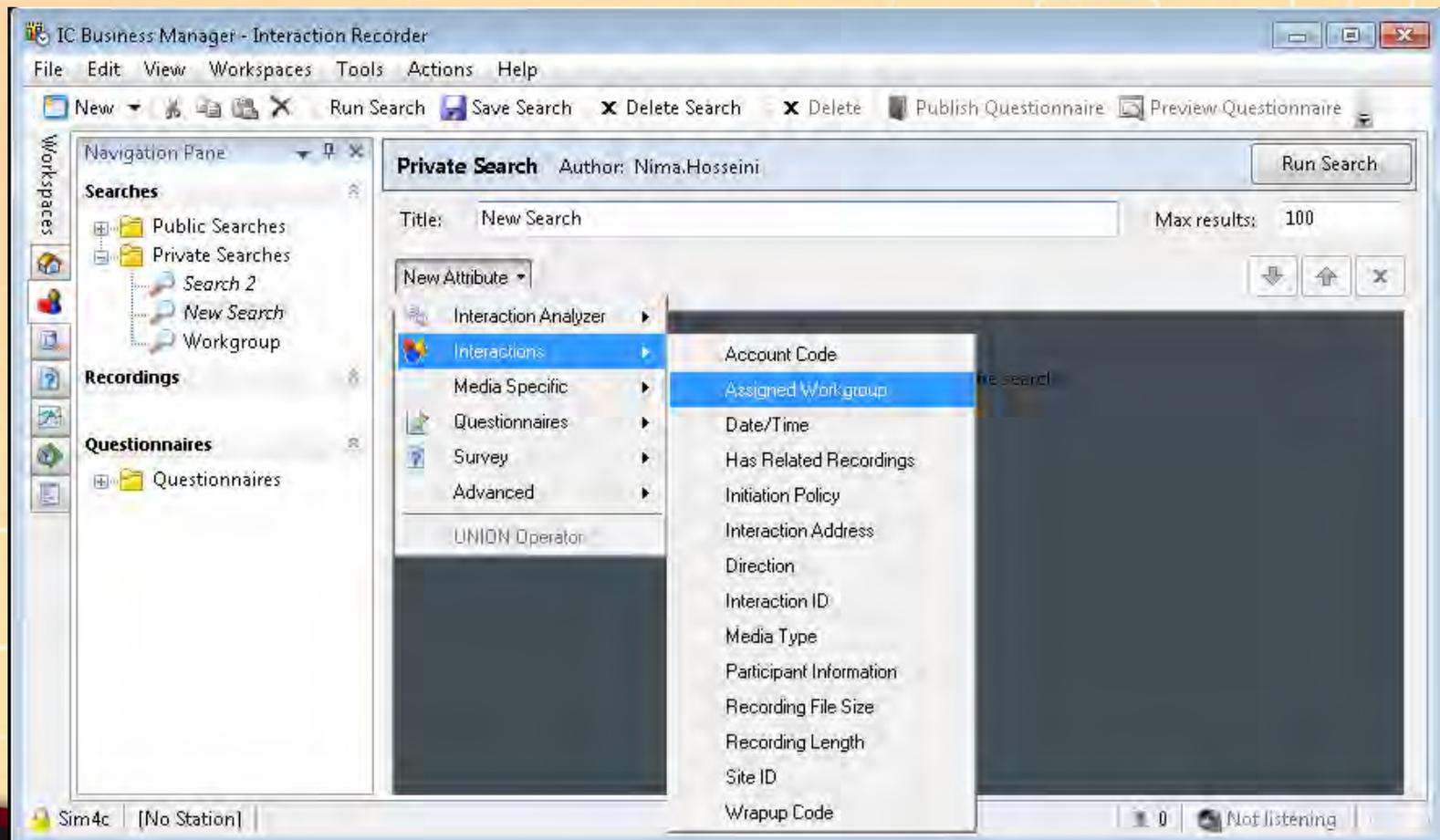- To build a Private Search, right click on 'Private Searches'
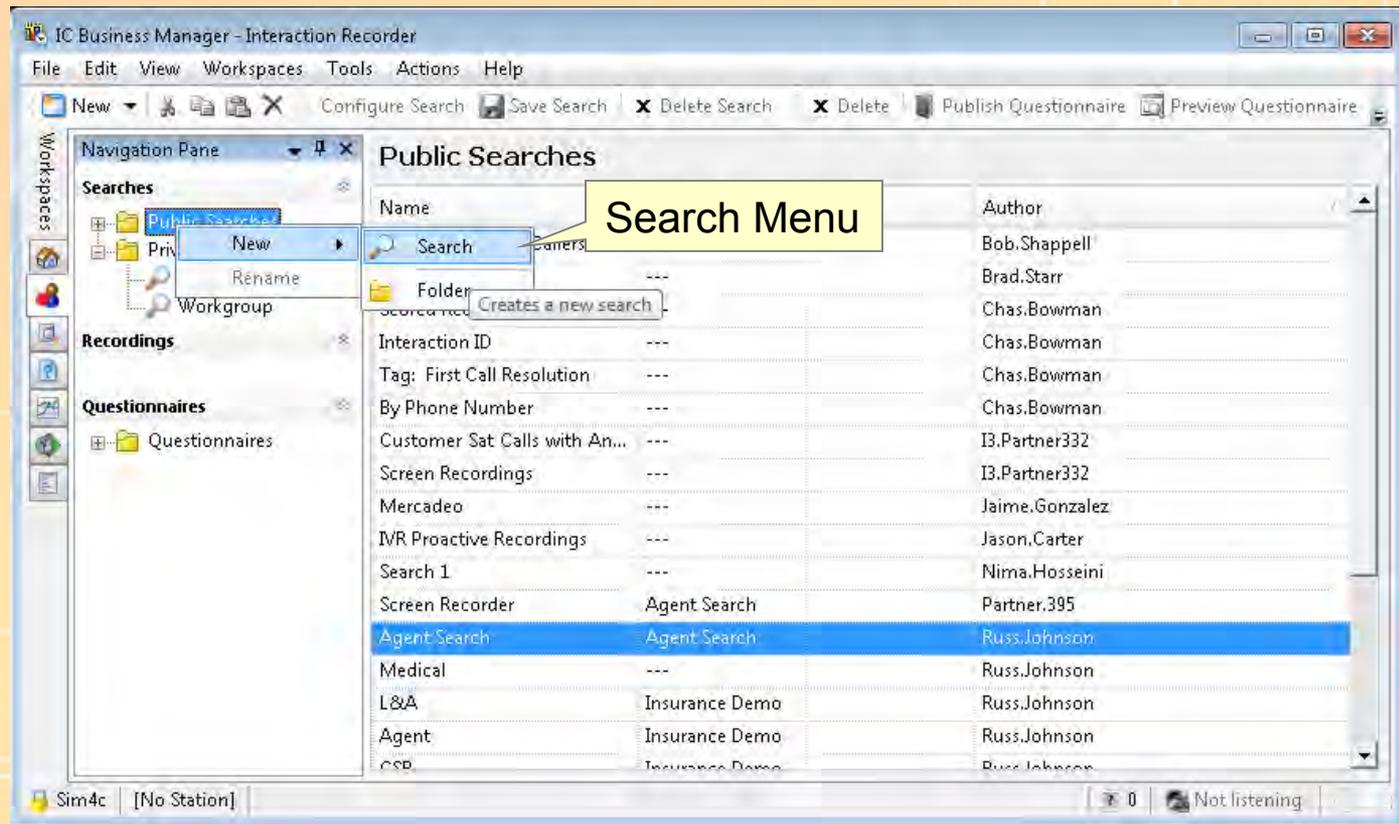
Querying for Recordings

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

Querying for Recordings

- Add <u>Attributes</u> 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 <u>Delete</u> to remove it.
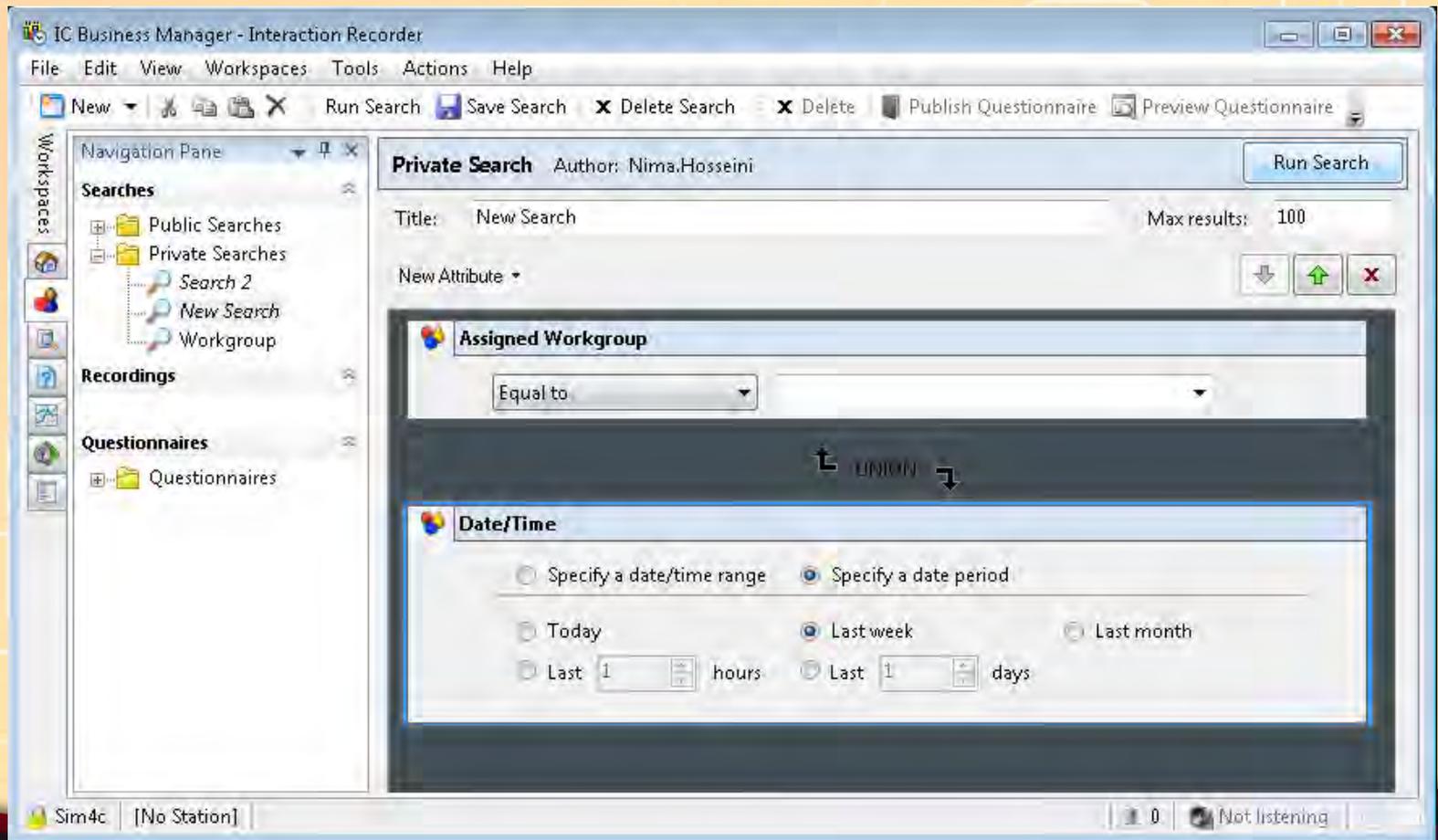
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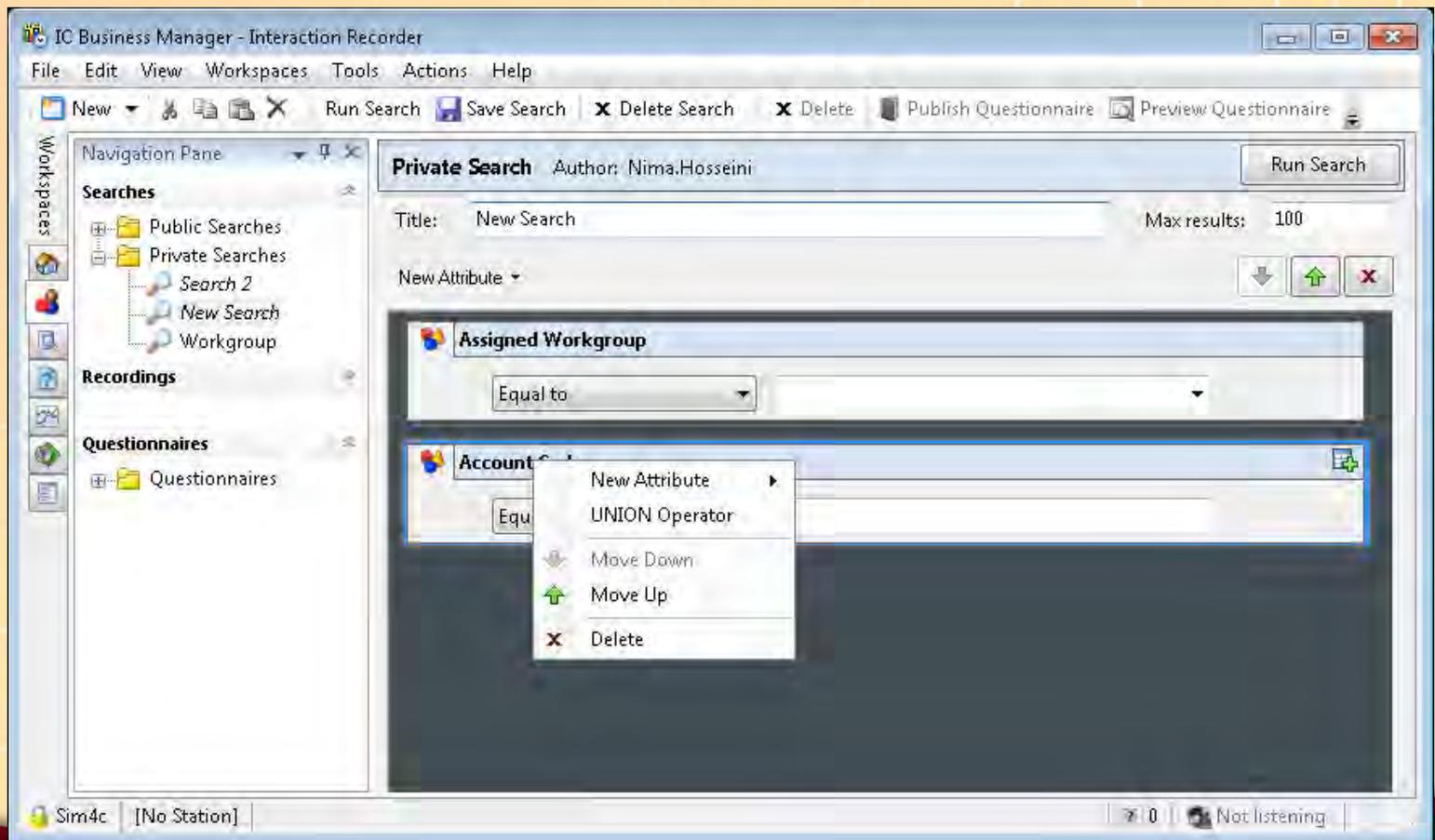
Querying for Recordings

- Use the <u>union</u> operator to turn your query into an AND statement. Do not use the union operator to keep your query as an OR statement
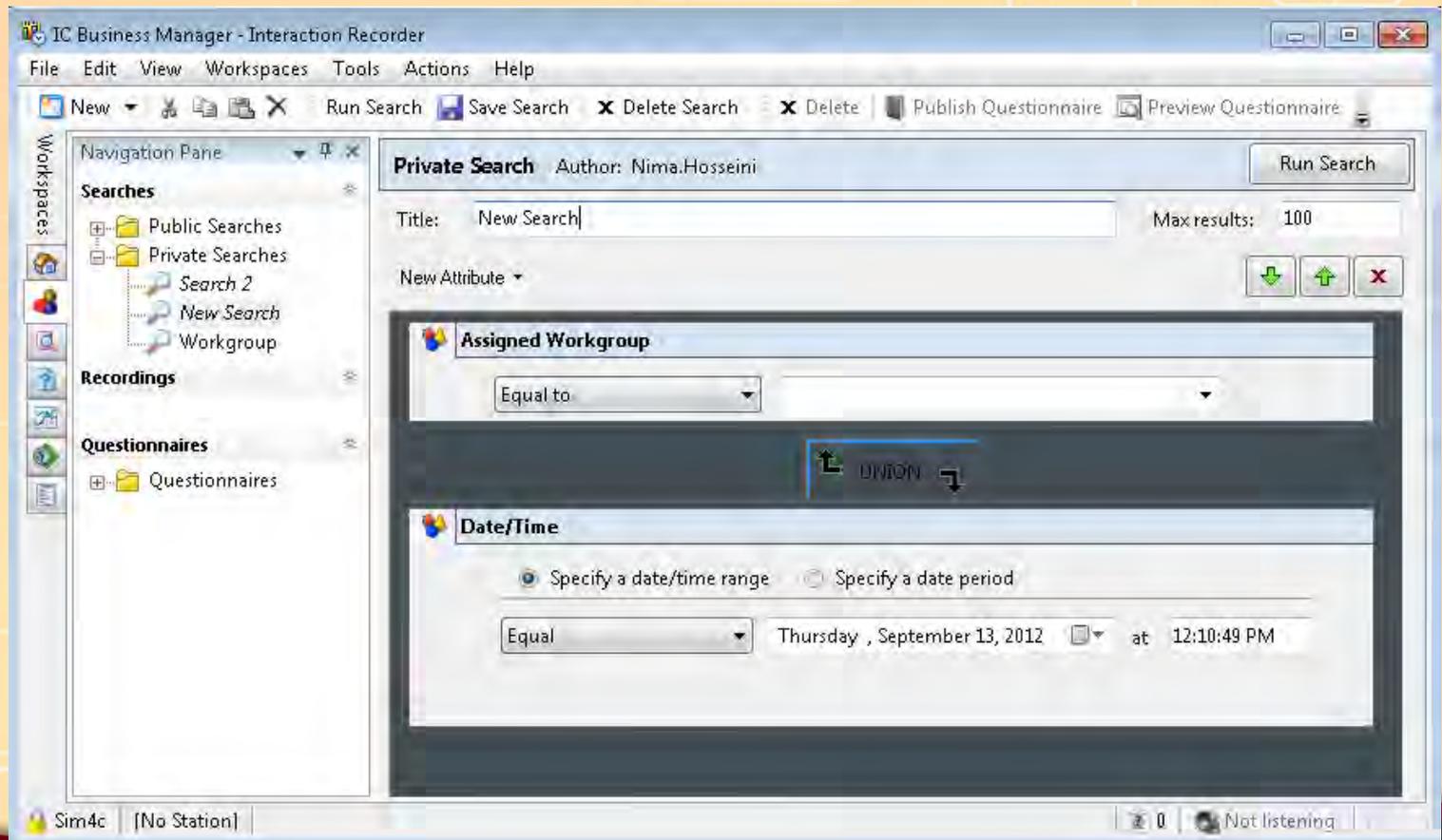
Querying for Recordings

- Set <u>Max results</u> and click <u>Run Search</u>.

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Viewing Recordings

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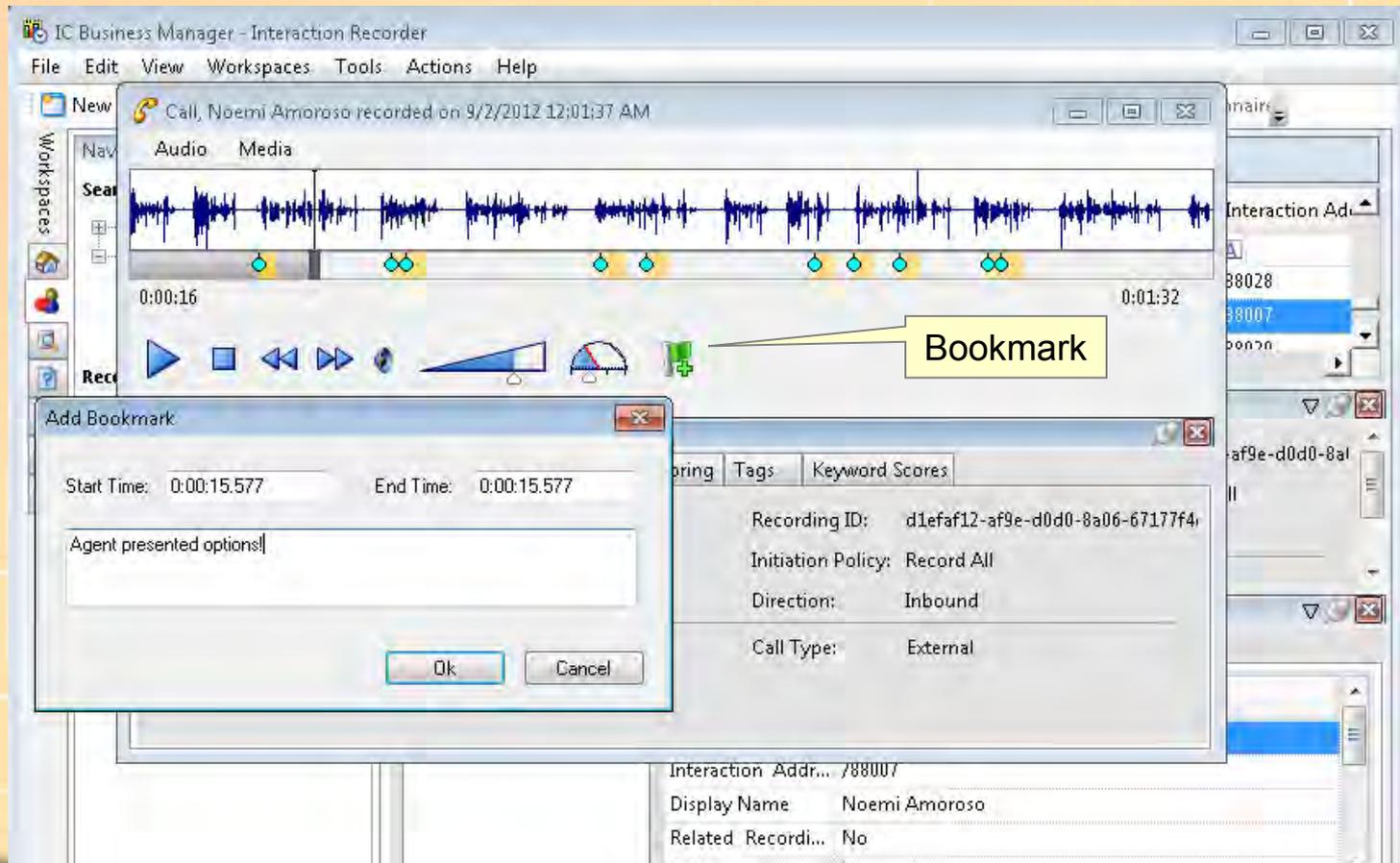- Select any record to see recording details in Media Details pane.

Recording Playback

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

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.
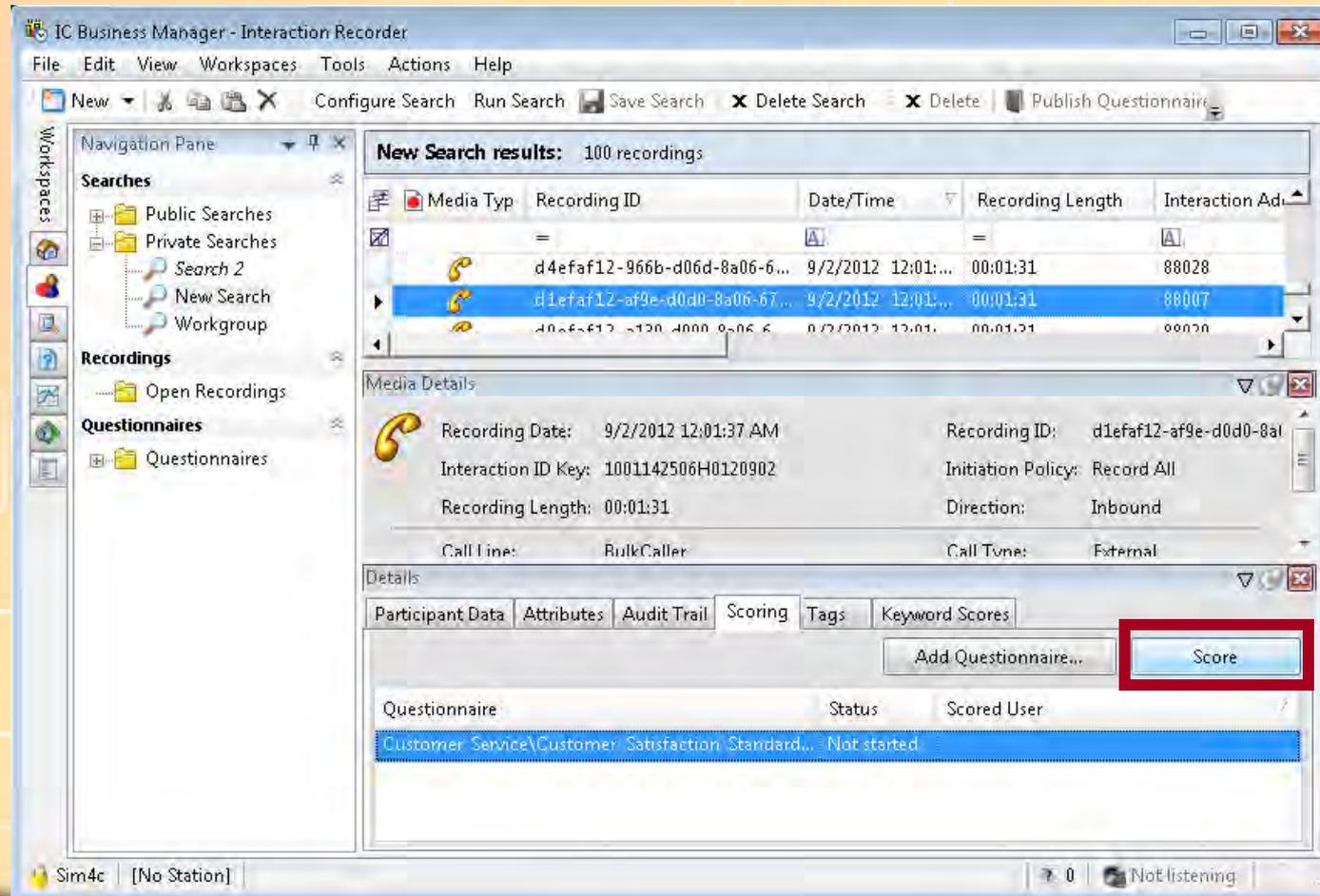
Scoring Recordings

- 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.

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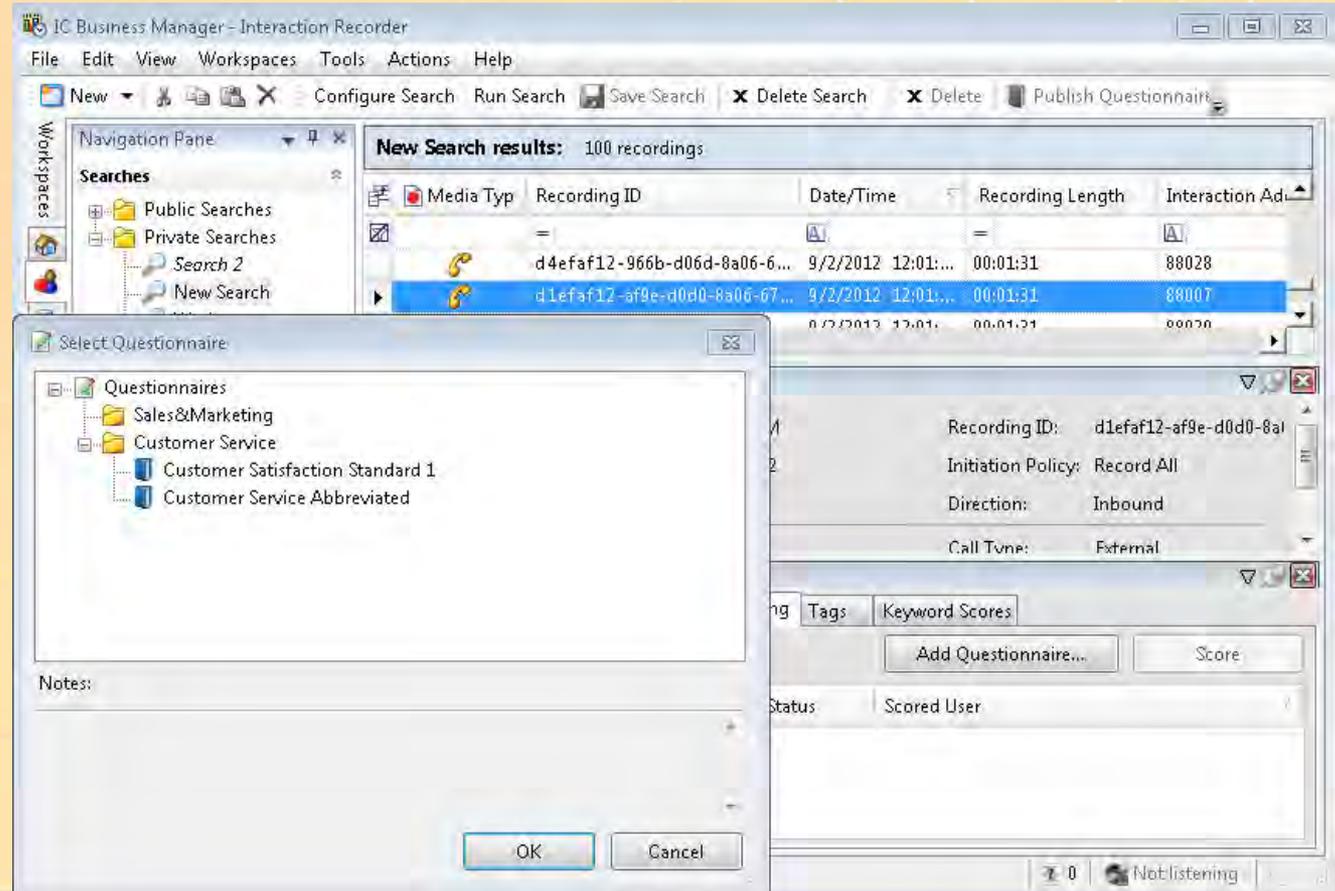
Scoring Recordings

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

Scoring Recordings

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

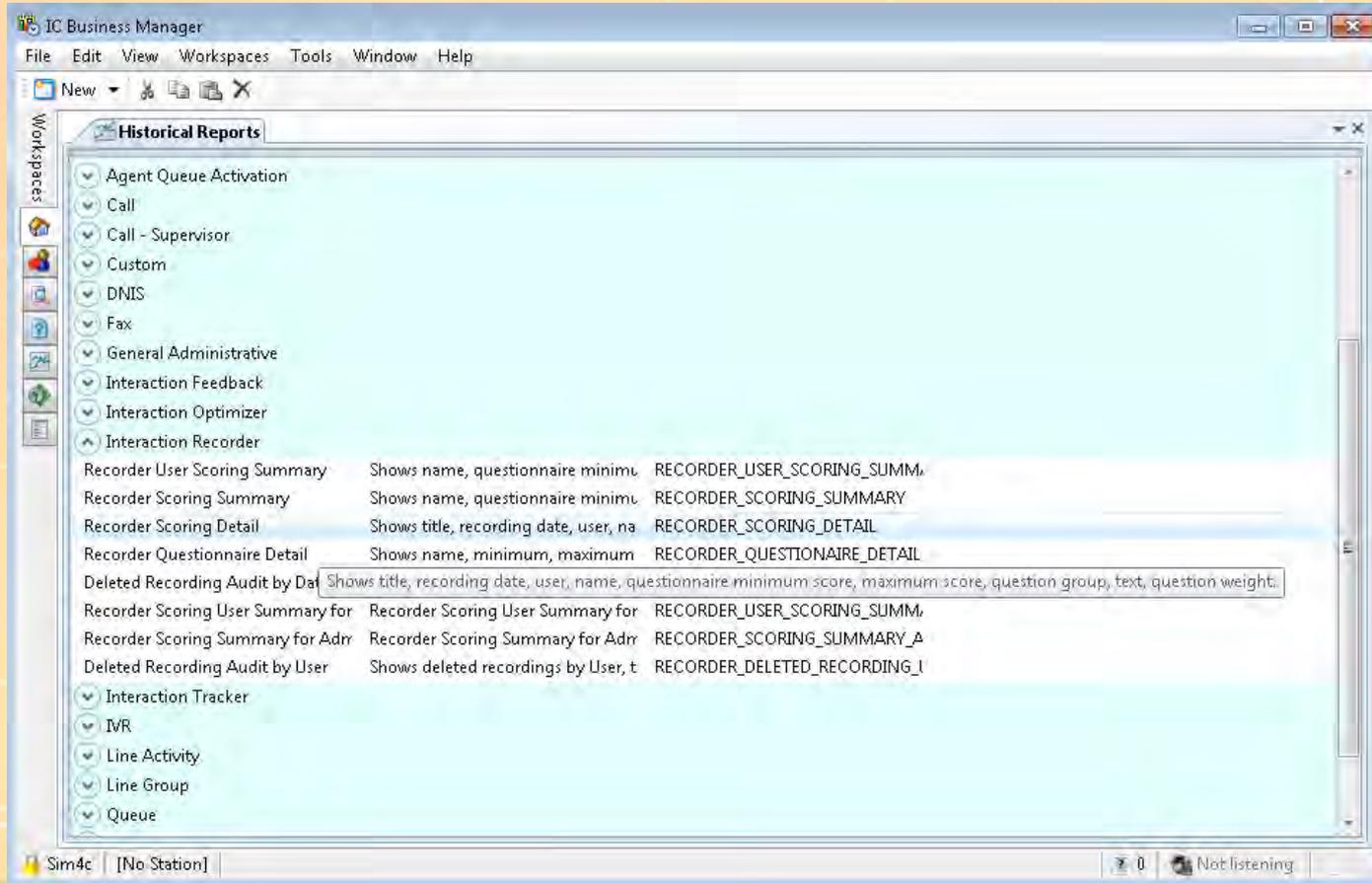- Questionnaire status is set to Finished for scored recordings.
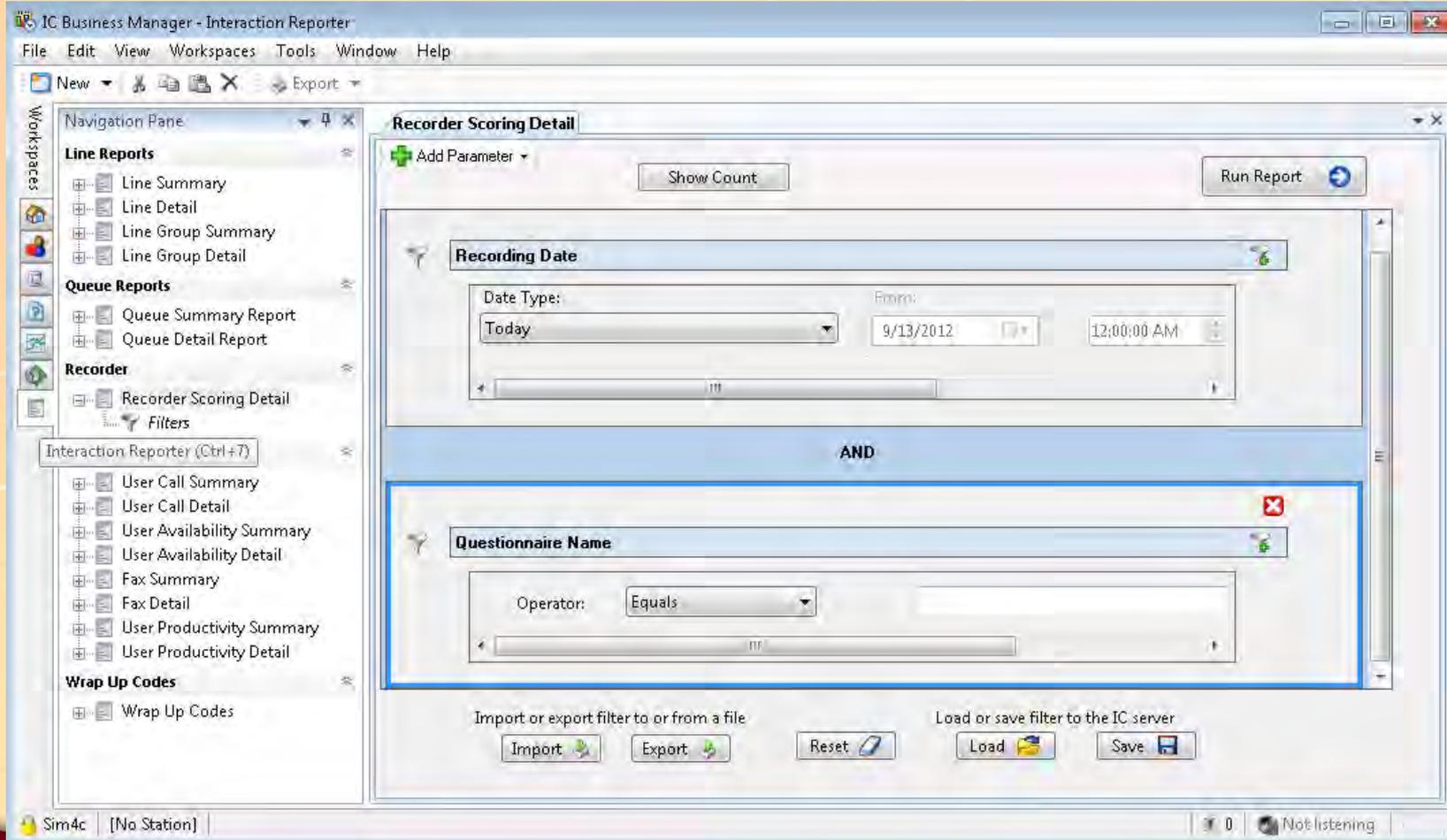
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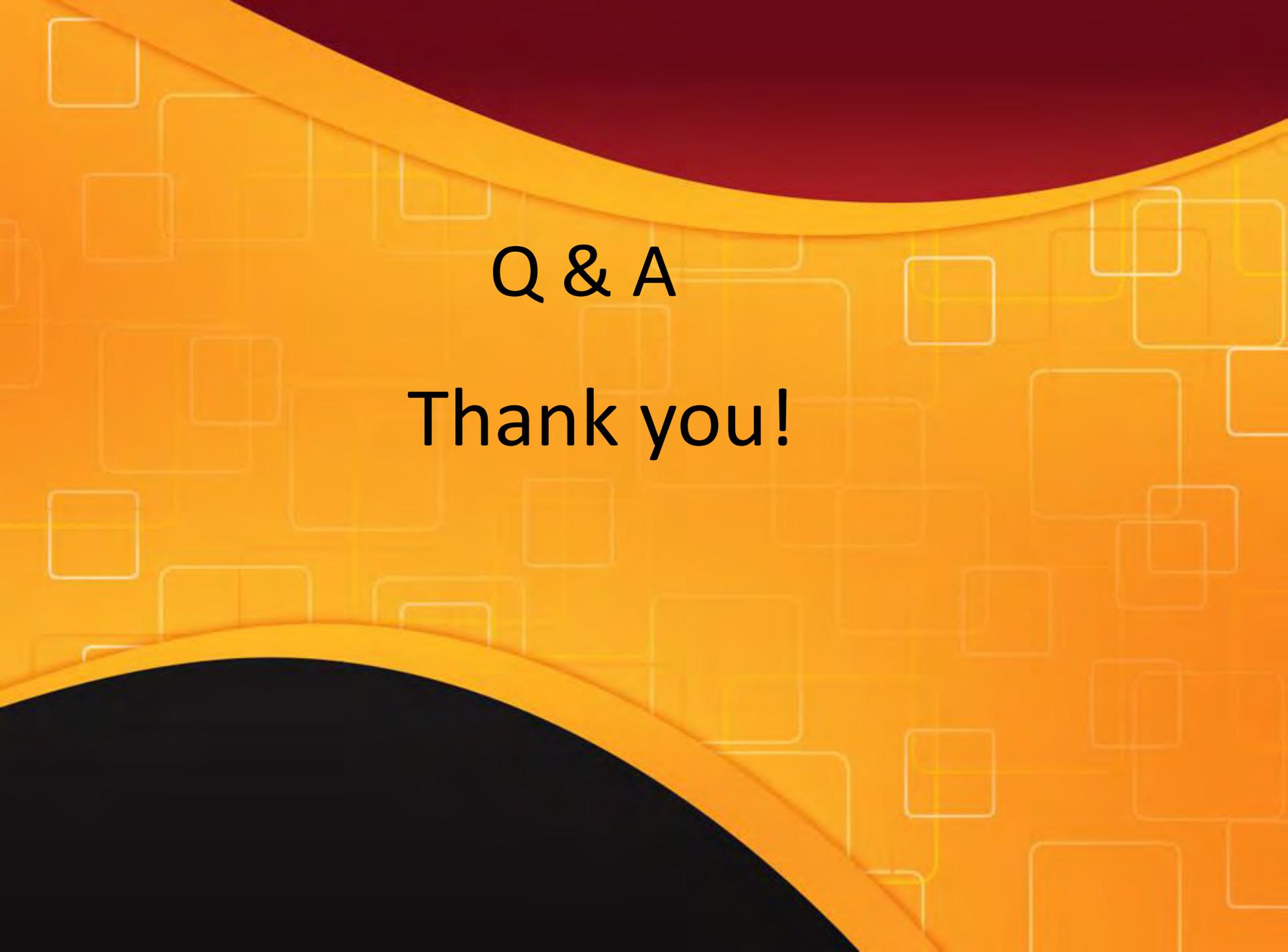
Questionnaire Scoring Reports

- 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!