

MiaRec

Overview & Key Concepts

MiaRec, Inc.

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1. What is MiaRec?

MiaRec is an AI-powered conversation analytics platform. It captures the conversations between your organization and your customers, transcribes them, and uses AI to turn them into insights you can act on: summaries, sentiment scores, topics, customer-experience metrics, and automated quality scores.

Instead of manually listening to a small sample of calls, your team can understand every conversation – why customers call, how they feel, how agents perform, and where your business can improve.

Note

Call recording is one of several ways conversations enter MiaRec – the platform can also sync recordings from telephony platforms, import them in bulk, or accept manual uploads. The product focus is what the AI does with the conversation after it arrives. See [Conversations](#).

1.1 The MiaRec products

MiaRec capabilities are organized into three products. Your subscription determines which of them are available to your organization (see [Subscriptions & Licensing](#)).

Conversation Analytics

Conversation Analytics analyzes every conversation automatically:

- **Transcription** – accurate, speaker-separated transcripts of every conversation.
- **Summaries** – a short AI-written summary of each conversation, including the reason for the call and its outcome.
- **Sentiment analysis** – a sentiment score for each conversation, with a written explanation.
- **Topics** – automatic detection of the subjects discussed, so you can see trends across thousands of conversations.
- **AI insights and CX metrics** – custom data points extracted from each conversation, such as customer satisfaction (CSAT), missed sales opportunities, or any insight your organization defines.

Learn the concepts in [Conversation Analytics](#).

Quality Assurance

Quality Assurance replaces manual, sample-based call scoring with **Auto QA** — AI-powered evaluation of conversations against your scorecards. The AI answers each scorecard question with evidence from the transcript; supervisors review the results, override answers where needed, and coach agents from the findings. Manual evaluation remains available for cases where a human review is preferred.

Learn the concepts in [Quality Assurance](#).

Relationship Management

Relationship Management is the third MiaRec product, currently on the product roadmap. It focuses on what your conversations reveal about each customer relationship over time, building on the conversation data that Conversation Analytics already captures.

1.2 How the documentation is organized

The MiaRec documentation is split into four guides by audience:

Guide	Audience	What it covers
Overview & Key Concepts (this guide)	Everyone	What MiaRec is, the core concepts, and a glossary
User Guide	Supervisors, QA analysts, agents	Day-to-day work: dashboards, conversations, search, reports, QA
Administration Guide	Administrators of your organization	Users, roles, capture settings, AI configuration, data management
System Operator Guide	Technical staff operating the platform	Platform installation-level and infrastructure topics

This guide is intentionally slim: it explains *what things are* and links to the User Guide and Administration Guide for *how to use and configure them*.

1.3 Key concepts in this guide

- [Conversations](#) — the unit of capture and analysis, and how conversations enter the platform.

- [Conversation Analytics](#) — transcripts, summaries, sentiment, topics, insights, CX metrics, and redaction.
- [Quality Assurance](#) — scorecards, Auto QA, manual evaluation, and the review workflow.
- [People & Access](#) — users, roles, permissions, groups, and what each audience sees.
- [Subscriptions & Licensing](#) — how subscriptions and licenses shape what you see in the product.
- [Glossary](#) — definitions of the terms used throughout the documentation.

2. Conversations

2.1 What a conversation is

A **conversation** is the unit of capture and analysis in MiaRec. Today a conversation is a recorded phone call between an agent of your organization and another party — typically a customer. MiaRec defines the term broadly: it names the interaction itself, not the audio file that captured it.

Everything in MiaRec is built around conversations: they are listed, searched, played back, transcribed, analyzed by AI, and scored by Quality Assurance.

2.2 What a conversation contains

Each conversation combines several kinds of data:

- **Metadata** — date and time, duration, direction (inbound, outbound, or internal), the participating parties (caller and called numbers and names), and the user and group the conversation belongs to.
- **Audio recording** — the captured audio, playable in the browser and downloadable.
- **Transcript** — the speaker-separated text of the conversation (see [Conversation Analytics](#)).
- **AI results** — summary, sentiment score, topics, and insight values produced automatically.
- **Collaboration data** — [notes](#), [tags](#), and [custom field](#) values added by users or by AI.
- **Flags** — a conversation can be marked *confidential* (restricting who can access it) or *do not delete* (protecting it from automatic retention cleanup).

2.3 How conversations enter the platform

Conversations can reach MiaRec through several ingestion methods. Recording is one method among several — whichever way a conversation arrives, the same analysis applies afterward.

- **Real-time recording** — the MiaRec recorder captures calls directly from your phone system as they happen.
- **Telephony platform sync** — MiaRec connects to cloud telephony and contact-center platforms and retrieves recordings and call details from them automatically.
- **Bulk import** — existing recordings, including archives from third-party recorders, can be imported in bulk.
- **Manual upload** — users can upload individual audio files through the web portal for analysis (see [Uploading audio files](#)).

Note

Ingestion is configured by your administrator and, for some methods, by your service provider. As a user you simply see conversations appear in the portal. Administrators can read more in the Administration Guide under [How conversations arrive](#).

2.4 Screen recordings

In addition to audio, MiaRec can capture the agent's desktop screen during a conversation. Screen recordings are linked to the corresponding conversation, so a reviewer can watch what the agent did while listening to what was said. Screen recording is a separately licensed capability.

2.5 Grouped conversation segments

When a call is transferred or placed on hold and resumed, the phone system may produce several separate recordings. MiaRec links these related segments together so they appear as parts of one continuous conversation rather than as unrelated entries. This gives reviewers the full story of a customer's experience — for example, a call that traveled through two agents before being resolved.

See [Grouped conversation segments](#) in the User Guide.

2.6 Where you work with conversations

- **The Conversations list** — the central, searchable list of conversations you have access to, with tabs for views such as *All Conversations* and *My Conversations* (see [Browsing conversations](#)).
- **The conversation detail page** — one page per conversation with playback, summary, sentiment, transcript, analytics, evaluations, and notes (see [Anatomy of the detail page](#)).
- **Dashboards, search, and reports** — aggregate views across many conversations (see [Dashboards](#) and [Advanced search](#)).

2.7 Related concepts

- [Conversation Analytics](#) — what AI produces on every conversation.
- [Quality Assurance](#) — how conversations are evaluated.
- [People & Access](#) — who can see which conversations.

3. Conversation Analytics

Conversation Analytics is the MiaRec product that analyzes every conversation automatically. This page defines each analytics concept and tells you where its results appear. For hands-on usage, see the [User Guide](#); for configuration, see the [Administration Guide](#).

3.1 Transcript

The **transcript** is the text of a conversation, produced automatically by speech-to-text. Transcripts are speaker-separated — you can see who said what — and each phrase carries a timestamp, so clicking text jumps the audio player to that moment. Conversations can be transcribed in many languages.

The transcript is the foundation for all other analytics: summaries, sentiment, topics, insights, and Auto QA are all derived from it.

Where it appears: the *Transcript* tab of the conversation detail page. Transcript text is also searchable through [advanced search](#), and can be downloaded. See [Reading transcripts](#).

3.2 Summary

The **summary** is a short AI-written digest of the conversation — typically the reason for the call, what was discussed, actions taken, the outcome, and next steps. Authorized users can edit a summary if the AI missed something.

Where it appears: at the top of the conversation detail page; summaries are also searchable. See [Conversation summaries](#).

3.3 Sentiment score

The **sentiment score** expresses the emotional tone of a conversation as a number from **-100 (most negative) to +100 (most positive)**. Each conversation receives three scores — overall, agent, and customer — so you can distinguish an upset customer from an unprofessional agent. Scores map to five labels, from *Very Negative* to *Very Positive*.

Every score comes with a written **explanation** of why it was assigned, and phrases that contributed to a negative score are highlighted in the transcript as evidence.

Where it appears: on the conversation detail page, on the Sentiment dashboard tabs (including a heatmap for spotting negative-conversation patterns over time), in search filters, and as report columns. See [Sentiment](#).

3.4 Topics

A **topic** is a named subject your organization wants to detect in conversations — for example "Service cancellation", "Billing question", or "Competitor mentioned". Your organization defines its own topic list; the AI reads each transcript and identifies which topics were discussed, based on the topic's description. One conversation can match multiple topics.

Topics turn thousands of individual conversations into trends: which subjects drive call volume, which are growing, and which correlate with negative sentiment.

Where it appears: the Topics dashboard tab shows topic distribution and trends; topics are also available as search filters. See [Topics](#) in the User Guide, and [Configuring topics](#) in the Administration Guide.

3.5 Insights and AI tasks

An **insight** is any specific piece of information the AI extracts from a conversation — the reason for the call, the product discussed, a satisfaction score, a missed sales opportunity. Insights are produced by **AI tasks**: configured instructions (prompts) that tell the AI what to look for and where to store the result. Summaries, sentiment scores, topics, and Auto QA results are all produced by AI tasks; your organization can also define fully custom insights.

Insight values can include the AI's explanation of how it reached the answer, often with supporting quotes from the transcript, so reviewers can trust — and verify — the result.

Where it appears: the *Analytics* tab of the conversation detail page groups the insight values for that conversation. See [AI insights](#) in the User Guide and [Creating custom insights](#) in the Administration Guide.

3.6 Custom fields

A **custom field** is a data field your organization adds to conversations — for example "Call Reason", "Product", or "CSAT". Custom fields can be filled in manually by users, populated automatically by your telephony integration, or written by AI tasks. They are searchable, can appear as columns in conversation lists and reports, and numeric fields can be shown as dashboard metrics.

Where it appears: on the conversation detail page and as search, report, and dashboard dimensions. See [Custom fields](#) in the Administration Guide.

3.7 CX metrics (CSAT, NPS, NES)

CX metrics are customer-experience scores — such as customer satisfaction (CSAT), Net Promoter Score (NPS), or NES — estimated by AI for each conversation. In MiaRec, a CX metric is a configured insight: an AI task scores the conversation and writes the value into a custom field, together with the AI's reasoning. Your organization chooses which metrics to measure and how they are defined.

Where it appears: on the conversation's *Analytics* tab and as dedicated dashboard tabs showing the metric across your organization. See [CX metric dashboards](#).

3.8 Entity recognition and redaction

Entity recognition detects specific kinds of information inside transcripts — names, organizations, dates, amounts, card numbers, and similar entities.

Redaction removes sensitive information from conversations: matched content is masked in the transcript and replaced with silence in the audio. Organizations use redaction to keep payment card data, personal identifiers, and other sensitive details out of stored conversations. Redaction rules are defined by your administrator and can use recognized entities as detection patterns.

Where it appears: redacted words show as masked text in transcripts, with the matching audio silenced. See [Data redaction](#) in the Administration Guide.

3.9 Related concepts

- [Conversations](#) — the unit all of this analysis applies to.

- [Quality Assurance](#) — AI evaluation of conversations against scorecards.
- [Subscriptions & Licensing](#) — why some analytics may not be visible to you.

4. Quality Assurance

Quality Assurance (QA) in MiaRec is the systematic evaluation of conversations against your organization's quality standards. The primary method is **Auto QA** — AI-powered scoring of conversations — with **manual evaluation** available as a secondary method. This page defines the QA concepts; the [User Guide QA chapter](#) covers the day-to-day workflow.

4.1 Scorecard

A **scorecard** is the template that defines what "good" looks like for a conversation. It is organized into **sections** (for example *Greeting, Problem Solving, Closing*), each containing **questions** such as "Did the agent introduce themselves properly?". Questions can be answered with choices (for example Yes / No / N/A), or with a numeric score.

Questions and sections carry **weights**, so the items that matter most count the most, and the scorecard has a **passing threshold** — the minimum score a conversation must reach to pass.

For Auto QA, each question is written in plain language, optionally with extra guidance that clarifies for the AI what counts as a correct answer — for example, explaining that a "proper" introduction includes thanking the caller and offering help.

Where you see it: scorecards are managed under the QA menu. See [Scorecard designer](#).

4.2 Auto QA

Auto QA uses AI to score conversations against a scorecard automatically. The AI reads the transcript, answers every question, and provides a justification for each answer with evidence from the conversation — including where in the call the evidence occurs — so reviewers can verify the result rather than take it on faith.

Because scoring is automatic, Auto QA is not limited to a small sample: it can evaluate every conversation that matches the criteria your organization sets, giving complete coverage of agent performance and customer experience.

Where you see it: auto-scored evaluations appear in the Evaluations list and on the conversation's QA tab, like any other evaluation. See [Understanding Auto QA](#) in the User Guide and [Enabling Auto QA](#) in the Administration Guide.

4.3 Manual evaluation

A **manual evaluation** is a human review: a supervisor picks a conversation and a scorecard, listens to the call, and answers the questions. Manual evaluation is included with the Quality Assurance product and is useful for calibration, sensitive cases, or scorecards you prefer to keep human-scored. An evaluation can also be assigned to another evaluator with a due date.

See [Manually evaluating a conversation](#).

4.4 Scoring at a glance

Whether an evaluation is automatic or manual, the score is calculated the same way:

- Each answered question earns points; question and section weights determine how much each contributes.
- Questions answered **N/A** are excluded from the calculation entirely — they neither help nor hurt.
- The result is a percentage score for each section and for the whole evaluation.
- The evaluation **passes** if the overall score meets the scorecard's passing threshold. Individual answer choices can be configured as failing: selecting one forfeits the points for that question and the questions that follow it in the section or form.

The exact calculation, with worked examples, is in [Score calculation](#).

4.5 Review and override

Auto QA is designed for human oversight. A supervisor reviewing an auto-scored evaluation can:

- Read the AI's answer and justification for each question.
- **Override** any answer they disagree with – the score recalculates, and the original AI answer is preserved alongside the override for transparency.
- Leave feedback on the AI's answer; scorecard owners use this feedback to refine question wording and guidance so future scoring improves.
- Add section-level feedback and overall comments: what went well, what could be improved, and any additional feedback.

See [Reviewing evaluations](#).

4.6 Coaching

Evaluations turn into agent improvement through feedback:

- The written feedback on an evaluation (strengths, improvement areas, per-section comments) gives the agent concrete, evidence-backed guidance.
- [Notes](#) can be attached to a conversation – including anchored to specific moments of the transcript – so coaching comments point at exactly what was said.
- Agents can view their own evaluations, so feedback reaches them directly in the product.

4.7 Related concepts

- [Conversation Analytics](#) – the transcripts and insights Auto QA builds on.
- [People & Access](#) – who can evaluate, review, and see evaluations.
- [Subscriptions & Licensing](#) – Auto QA availability depends on your subscription.

5. People & Access

This page explains who uses MiaRec, and the concepts that control what each person can see and do. Administration procedures are in the [Administration Guide](#).

5.1 Your organization

Throughout the documentation, **your organization** means your company's own environment in MiaRec – its users, conversations, settings, and data. Everything described in this guide, the User Guide, and the Administration Guide happens within your organization.

If MiaRec is delivered to you as a service, some platform-level settings are managed by your service provider. The Administration Guide marks those settings explicitly.

5.2 Users

A **user** is any person with a MiaRec login. All users are managed by your organization's administrators, who create accounts, assign roles, and control access (see [User accounts](#)).

Three audiences use MiaRec day to day:

- **Agents** – users whose conversations are captured and analyzed. Agents typically see their own conversations, their personal dashboard, and their own evaluations.
- **Supervisors** – users who manage a team. Supervisors see their team's conversations and dashboards, review and evaluate conversations, and manage scorecards.
- **Administrators** – users who configure your organization: user accounts, roles, groups, AI settings, custom fields, and data management.

These are typical patterns, not fixed categories – what a user can actually do is determined by their role.

 Note

The people your organization talks to — the other party in a conversation — are referred to as **customers** in this documentation. Customers are not MiaRec users.

5.3 Roles and permissions

A **role** is a named set of permissions assigned to each user. Permissions control individual capabilities: viewing conversations, playing audio, downloading, evaluating, sharing, administering users, and so on. MiaRec ships with typical roles such as Agent, Supervisor, and Admin, and your administrators can adjust them or create new ones.

Each role also has an **access scope** that sets how much data the role can see:

- **Organization** — all data in your organization (typical for administrators).
- **Selected Groups** — data of specific groups (typical for supervisors, scoped to their teams).
- **User** — the user's own data only (typical for agents).

Together, permissions answer "what can this user do?" and access scope answers "on whose data?".

See [Roles and permissions](#).

5.4 Groups

A **group** is a set of users within your organization — usually a team, such as *Support* or *Sales*. Groups are used throughout the product:

- Dashboards and QA statistics can be viewed per group.
- Supervisors' access is typically scoped to the groups they manage.
- Licenses can be tracked per group.

See [Groups](#).

5.5 What each audience typically sees

Area	Agent	Supervisor	Administrator
Dashboard	Personal dashboard	Organization and team dashboards	Organization dashboards
Conversations	Own conversations	Team conversations	Organization-wide, per role
QA	Own evaluations (view)	Team evaluations, review and override, scorecards	QA configuration and permissions
Reports	Own reports	Team-scoped reports	Organization-scoped reports
Administration menu	Not visible	Limited (per role)	Visible

Actual visibility follows the user's role and access scope, so your organization may differ from this typical layout. Every user also has a **My Profile** area for personal settings — password, timezone, language, and security (see [My profile](#)).

5.6 Related concepts

- [Subscriptions & Licensing](#) — the other factor that shapes what users see.
- [Conversations](#) — the data that access scopes apply to.

6. Subscriptions & Licensing

What you see in MiaRec depends on what your organization has subscribed to, how licenses are assigned, and what your role permits. This page explains those layers from your organization's point of view, and the phrasing convention this documentation uses for subscription-dependent features.

6.1 Subscriptions

Your organization subscribes to MiaRec products — [Conversation Analytics](#) and [Quality Assurance](#) — and the capabilities described in this documentation are available accordingly. For example, if your subscription does not include Quality Assurance, the QA areas of the portal will not be available to your users.

Subscriptions are arranged with MiaRec or with your service provider — there is no in-product page for changing your subscription.

6.2 The "if your subscription includes..." convention

Because feature availability varies between organizations, this documentation uses conditional phrasing for subscription-dependent capabilities:

If your subscription includes Auto QA, conversations are scored automatically against your scorecards.

When you read a sentence like this, it means the feature is part of a specific product or add-on and may not be present in your portal. If a documented feature is missing for you, it is more likely a subscription, licensing, or permission difference than a problem.

6.3 Licenses

Within your organization, some capabilities are licensed **per user** — your administrator assigns them to the specific users who need them. Per-user licensed capabilities include:

- **Recording** — the user's conversations are captured.
- **Conversation analytics** — the user's conversations are transcribed and analyzed by AI.
- **Quality assurance** — the user's conversations can be evaluated.
- **Live monitoring** — the user's active conversations can be listened to in real time.
- **Screen recording** — the user's desktop screen is captured during conversations.

The number of licenses of each type available to your organization is set by your subscription. Administrators can view usage and assign licenses on each user's account (see [User accounts](#) in the Administration Guide).

6.4 When a feature is not visible

If you expect a feature and cannot see it, the cause is usually one of these layers:

1. **Subscription** — the feature is not part of your organization's subscription.
2. **License** — the feature is licensed per user, and the relevant user does not hold a license.
3. **Role and permissions** — your role does not grant the feature, or your access scope does not cover the data (see [People & Access](#)).
4. **Provider-managed settings** — for service-delivered deployments, some platform settings are managed by your service provider and are not visible to your organization's administrators.

6.5 Who to contact

- **Users:** contact your organization's MiaRec administrator. They can check your role, permissions, and licenses.
- **Administrators:** if the feature is not available at the organization level, contact your service provider or MiaRec support to review your subscription.

6.6 Related concepts

- [People & Access](#) – roles, permissions, and access scope.
- [What is MiaRec?](#) – the products a subscription is built from.

7. Glossary

Definitions of the terms used throughout the MiaRec documentation.

7.1 Conversations and their data

Term	Definition
Conversation	The unit of capture and analysis in MiaRec: a recorded interaction between your organization and another party – today, a recorded phone call.
Recording	The captured audio (or screen) file of a conversation. Used when the media file itself is meant; the interaction as a whole is a <i>conversation</i> .
Screen recording	A capture of the agent's desktop screen during a conversation, linked to that conversation.
Grouped conversation segments	Related recordings (from transfers, holds, and resumes) linked together and presented as parts of one conversation.
Transcript	The speaker-separated, timestamped text of a conversation, produced automatically by speech-to-text.
Summary	A short AI-written digest of a conversation: reason, key points, outcome, next steps.
Tag	A label users apply to conversations to categorize and filter them. Tags can be organized hierarchically.
Note	A free-text comment attached to a conversation. Notes support replies and can be anchored to a specific moment in the transcript.
Custom field	A data field your organization adds to conversations, filled manually, by an integration, or by an AI task.
Client	A directory record for a customer or account your organization talks to – a name plus phone numbers. Conversations are matched to clients by phone number.
Confidential	A flag restricting a conversation's visibility to users with confidential-conversation access.
Do not delete	A flag protecting a conversation from automatic retention cleanup.

7.2 AI analytics

Term	Definition
Conversation Analytics	The MiaRec product that automatically analyzes conversations: transcription, summaries, sentiment, topics, insights, and CX metrics.
Insight	A piece of information the AI extracts from a conversation, such as the call reason or a satisfaction score.
AI task	A configured instruction (prompt) that produces an insight and stores the result — as a summary, sentiment score, topic match, custom field value, or Auto QA evaluation.
Sentiment score	An AI-assessed score of a conversation's emotional tone, from -100 (most negative) to +100 (most positive), assessed separately for the conversation overall, the agent, and the customer.
Topic	A named subject your organization wants to detect in conversations. The AI identifies which topics each conversation discusses.
CX metrics	Customer-experience scores — such as CSAT, NPS, or NES — estimated per conversation by AI tasks your organization configures.
Entity recognition	Detection of specific information types in transcripts (names, dates, amounts, card numbers, and similar). Abbreviated NER.
Redaction	Removal of sensitive content from conversations: masked in the transcript and silenced in the audio, according to rules your administrator defines.

7.3 Quality Assurance

Term	Definition
Quality Assurance (QA)	The MiaRec product for evaluating conversations against your quality standards — Auto QA first, manual evaluation second.
Scorecard	The evaluation template: weighted sections and questions with a passing threshold. (Shown as <i>evaluation form</i> in some older parts of the product.)
Auto QA	AI-powered scoring of conversations against a scorecard, with a justification and evidence for every answer.
Manual evaluation	An evaluation completed by a person, question by question.
Evaluation	A scored assessment of a conversation, produced by Auto QA or by an evaluator.
Override	A reviewer's correction of an AI answer on an auto-scored evaluation. The original AI answer is preserved alongside the override.
Passing threshold	The minimum score, set on the scorecard, that an evaluation must reach to pass.

7.4 People and access

Term	Definition
Your organization	Your company's own environment in MiaRec — its users, conversations, and settings.
User	Any person with a MiaRec login.
Customer	An end customer of your organization — the other party in a conversation. Customers are not MiaRec users.
Agent	A user whose conversations are captured and analyzed.
Supervisor	A user who manages a team: reviews conversations, evaluations, and dashboards for their groups.
Administrator	A user who configures your organization: accounts, roles, AI settings, and data management.
Group	A set of users within your organization, usually a team; used for dashboards, access scoping, and license tracking.
Role	A named set of permissions assigned to a user.
Permission	An individual capability a role grants, such as playing audio or evaluating conversations.
Access scope	The data-visibility level of a role: Organization, Selected Groups, or User.

7.5 Platform and capture

Term	Definition
Ingestion (or capture)	How conversations enter MiaRec: real-time recording, telephony platform sync, bulk import, or manual upload.
Live monitoring	Listening to a user's active conversation in real time; requires a monitoring license.
Extension	A telephony endpoint identifier (extension or phone number) assigned to a user so their conversations are matched to them.
Retention	Automatic deletion policies applied to aged conversations. The <i>do not delete</i> flag exempts a conversation from retention.
License (or seat)	A per-user entitlement to a capability such as recording, conversation analytics, quality assurance, live monitoring, or screen recording.
Subscription	The set of MiaRec products and capacity your organization has purchased. See Subscriptions & Licensing .
Service provider	The party operating the MiaRec platform for your organization, when MiaRec is delivered as a service. Some platform settings are provider-managed.
MCP (Model Context Protocol)	A standard interface through which external AI tools can query your MiaRec data.