MiaRec

User Guide

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1. Introduction

The user guide provides step-by-step instructions on how to get started with the MiaRec call recording and speech analytics platform.

2. Getting started

2.1 Logging in

MiaRec portal uses a web interface, which can be accessed on any standard browser over your network or over the internet.

Depending on how your admin set up your account, you will use one of the following ways to sign in:

- Sign in with credentials (login and password)
- ullet Sign in with credentials (login and password) and multi-factor authentication
- Single sign-on with a third-party identity provider (SAML 2.0)

2.1.1 Sign in with credentials

Open the MiaRec web portal URL in your web browser (see the Info block below, if you do not know the URL).

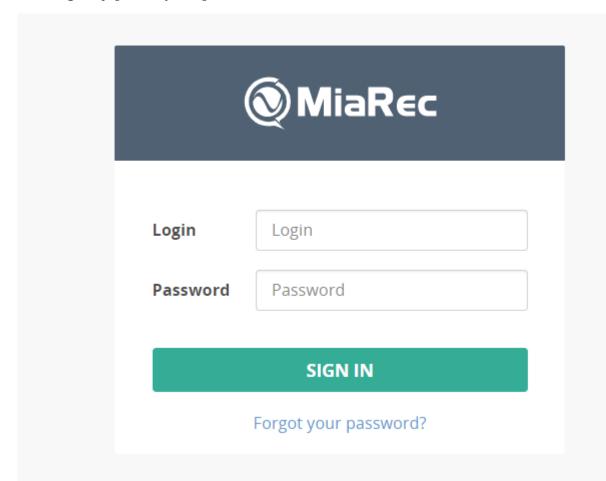


What is the URL of the MiaRec web portal?

The MiaRec platform is usually hosted by one of our partners or by your company in your local network.

Contact your system administrator if you do not know the URL.

On the Sign In page, enter your login credentials and click SIGN IN.



Depending on how your admin set up the MiaRec platform, you may have the ability to reset your password when you forgot it. If you do not see the **Forgot your password?** link, then a password reset is not available in your account.

2.1.2 Sign in with credentials and multi-factor authentication

When multi-factor authentication (MFA) is enabled in your account, you use a combination of your login credentials and a verification code to access the web portal.



i Info

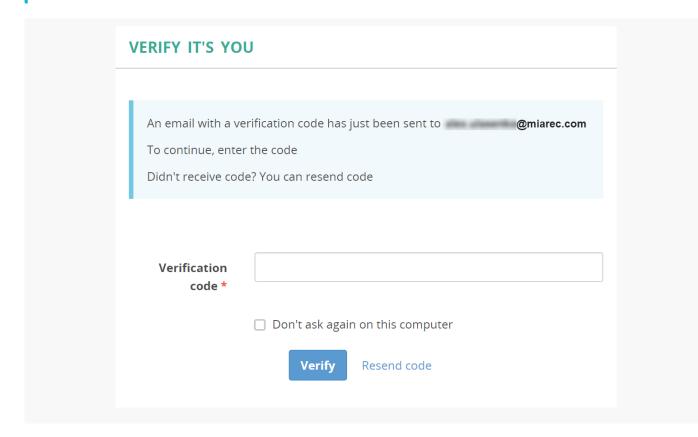
What is MFA?

MFA, sometimes referred to as two-factor authentication or 2FA, is a security enhancement that requires you to present two pieces of evidence:

- something you know (login and password)
- something you own (like a phone or access to an email account).

Each time you sign in to your account from a new device, you'll require to enter a one-time verification code that is sent to you via text message (SMS) or email.

Note, that multi-factor authentication is an optional feature and may not be available to you. To enable multi-factor authentication, contact your system administrator.



2.1.3 Single sign-on with a third-party identity provider (SAML 2.0)

If Single Sign-On (SSO) is activated on your account, you will be able to sign in to MiaRec using a third-party identity provider like Google, Azure AD, OneLogin, Okta, Auth0 and other providers who support SAML 2.0.



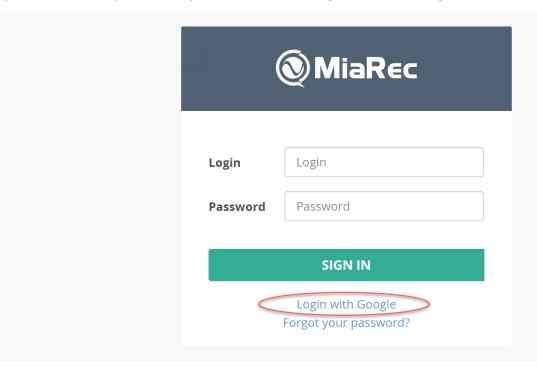
Info

What is Single Sign-On?

Single sign-on (SSO) is a session and user authentication service that permits a user to use one set of login credentials – for example, a name and password – to access multiple applications.

To enable SAML-based authentication, contact your system administrator. \\

Open the MiaRec web portal URL in your browser and click $\operatorname{\textbf{Login with}}$... link to sign in.

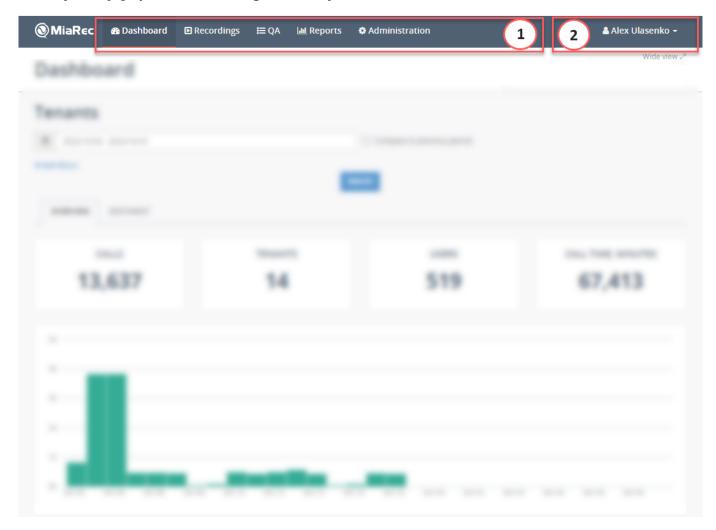


2.2 At a glance

This page provides a quick introduction to the MiaRec application.

2.2.1 Navigation options

At the top of the page, you will find the Navigation and My Profile menus.



Navigation menu

This toolbar displays navigation buttons you can use to access the following sections:

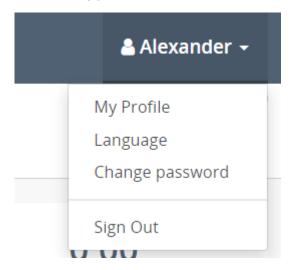
- Dashboard. Provides call metrics for your entire organization.
- Recordings. Allows you to access call recordings.
- \bullet ${\bf Q}{\bf A}.$ Provides quality assurance (QA) metrics for your entire contact center.
- \bullet $\ensuremath{\textbf{Reports}}.$ Allows you to build and run custom reports.
- Administration. Gives you access to administration settings and configurations.



Some sections may not be available to you due to the permissions and licensing set up by the administrator.

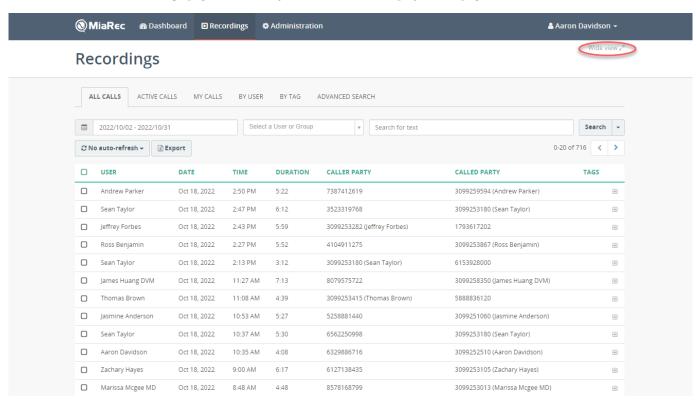
My Profile menu

The user profile menu provides quick access to your account settings, like language, time zone, email address and others. For details, see My profile.

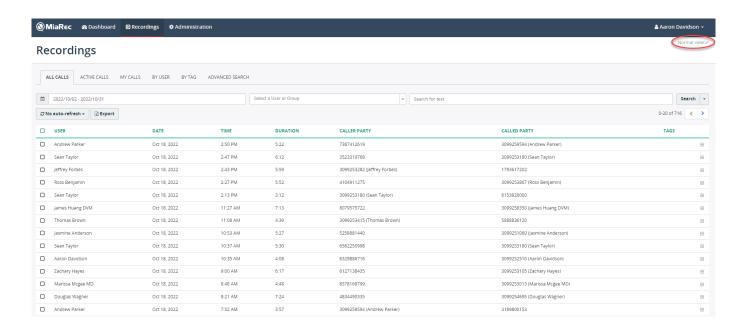


2.2.2 Wide view

The **Wide view** link in the top right corner allows you to change the width of the content on a page. This option is useful for tabular data like the **Recordings** page, where many columns could be displayed on a page.



To switch back to a normal view, click the ${\bf Normal\ view}$ link in the top right corner.



2.2.3 Call recording view tabs

The tabs All calls, Active calls, My calls and others on the Recordings page provide quick access to the call recordings that meet the respective criteria, like "active calls only", "my calls only", and so on. For details, see Recordings Overview.

Recordings

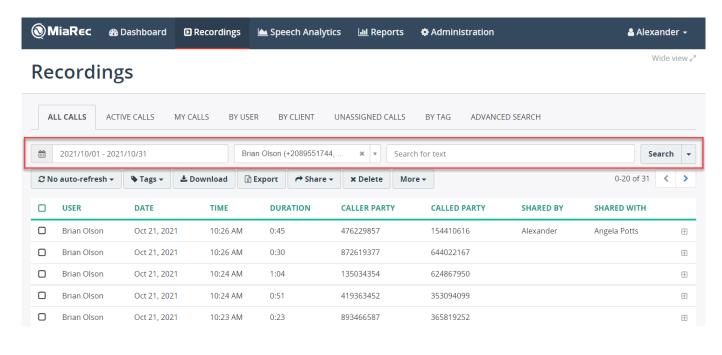
Wide view ⊮,³¹

AL	LL CALLS ACTI	VE CALLS MY CAL	LS BY USER	BY CLIENT UNASSIC	GNED CALLS BY TAG A	DVANCED SEARCH	
Select a Date Range			Select a l	Jser or Group	▼ Search for text		Search +
æ No	o auto-refresh 🕶	Tags ▼	nload 🔀 Export	⊕ Email × Delete	More ▼		0-20 of many
	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
	Brian Olson	Today	11:53 AM	0:49	593114340	212277933	⊞
	Brian Olson	Today	11:51 AM	1:50	560754402	385630388	±
	Brian Olson	Today	11:49 AM	1:51	205564237	985014613	±
	Brian Olson	Today	11:48 AM	0:55	215569134	196374262	\oplus
	Brian Olson	Today	11:48 AM	0:28	197840975	285636461	±

2.2.4 Search for specific calls

To search call recordings by parameters like date range, user and phone number, use the search panel. For details, see the Quick Search and Advanced Search sections.

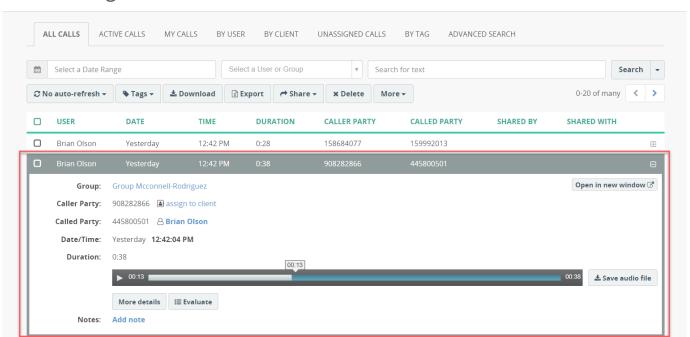
Wide view _≥³¹



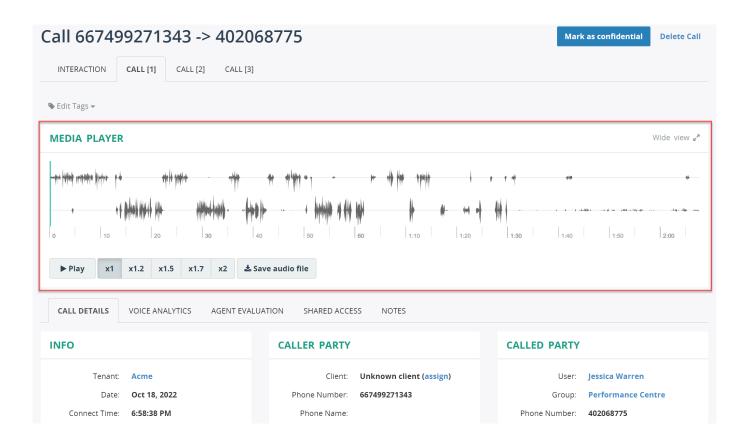
2.2.5 Playback recordings

To playback a call recording, click the respective call in a list and use a built-in media player to listen to the recording.

Recordings

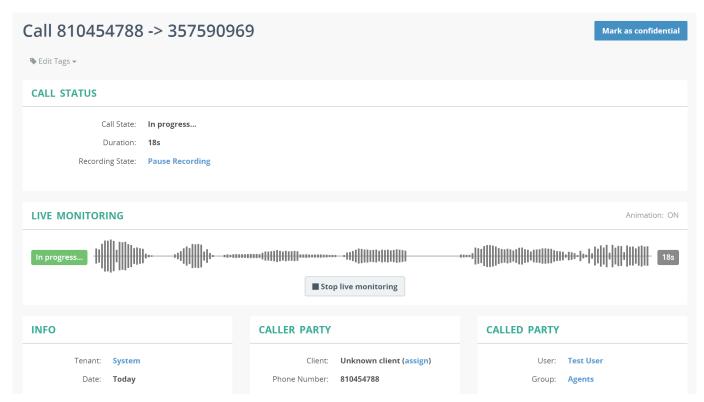


Click **More details** or **Open in new window** buttons to switch to a detailed view of call recording, and playback it in an advanced media player. Such an advanced media player displays an audio waveform, which allows you to see visually the moments of silence or overtalk in a conversation. For details, see <u>Playback recordings</u>.



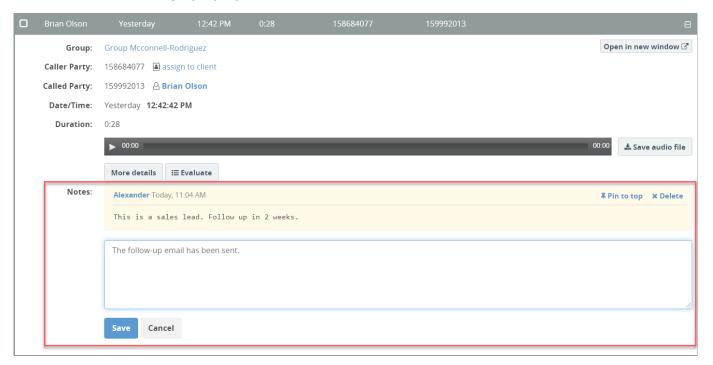
2.2.6 Monitor calls in real-time

As a supervisor, you can monitor employees' calls in real-time to guide and support agents to deliver optimum customer service. For details, see Monitor a recorded call in real-time.



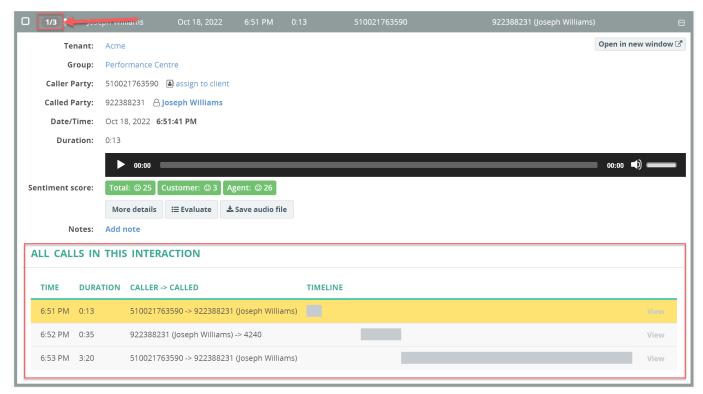
2.2.7 Create notes for call recordings

If you have the appropriate permissions, you can view and optionally add new notes for call recordings. This way, you can easily find the relevant call recordings by any keyword within the notes. For details, see Add notes to a recorded call.

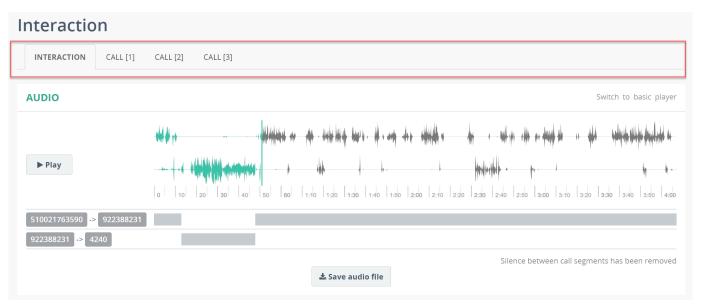


2.2.8 View multiple related call segments in one place

MiaRec groups all related calls into a single interaction to create a complete picture of customer communication with your agents. If the call segment is a part of a longer interaction, then a corresponding badge is shown to the right of the call details (for example, 1/3 means this call segment is the first in the interaction that consists of 3 segments). When you open call details, you can see the other segments in a timeline.

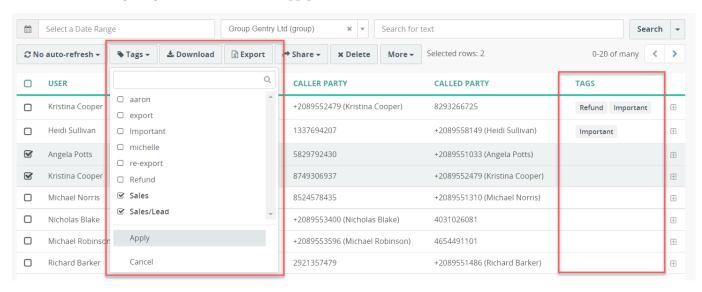


To playback all the call segments at once, open **More details** for the call and navigate to the **Interaction** tab. For details, see View multi-segment calls.



2.2.9 Tag call recordings

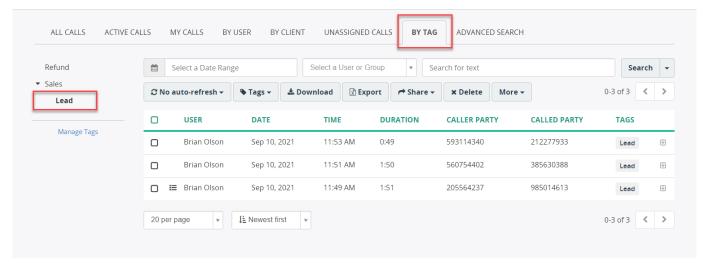
You can assign tags to call recordings to organize and categorize them. To do so, select one or more recordings, click the **Tags** button, select the target tag from the list and click **Apply**.



To quickly filter the recordings by tag, navigate to the **By Tag** view and select the target tag from the list on the left. For details, see Categorize call recordings.

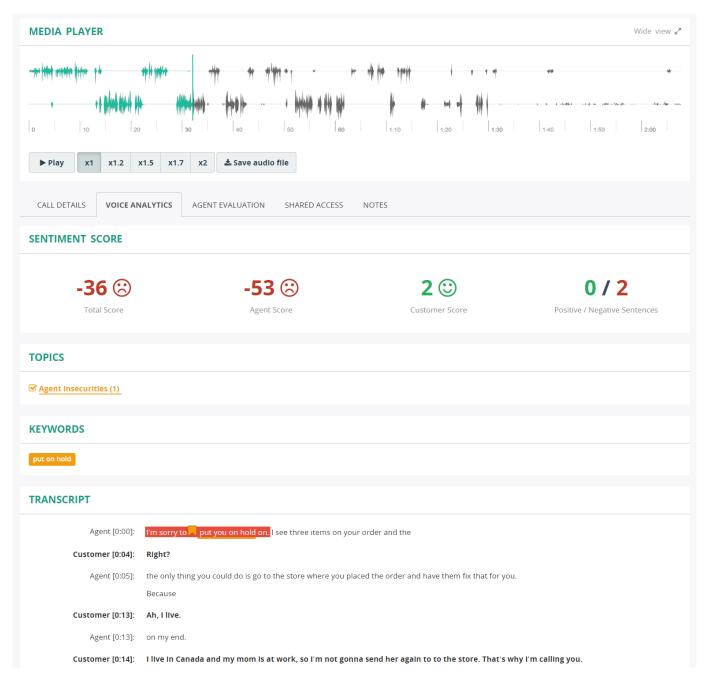
Wide view ✓

Recordings



2.2.10 Transcription and speech analytics

The MiaRec application can automatically transcribe call recordings, analyze them for sentiment, extract keywords and categorize calls into topics

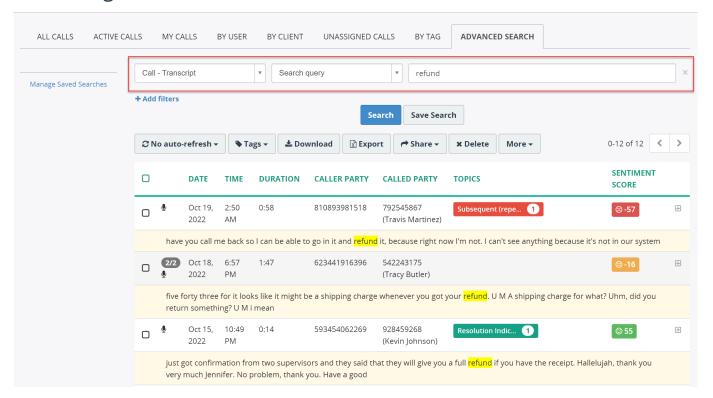


To search call recordings by transcript text:

- 1. On the **Recodings** page, click the **Advanced Search** tab.
- 2. In the **Select a parameter** field, choose **Call Transcript**.
- 3. Type the text you are interested to search for, and click **Search**.

Recordings

Wide view 🚜

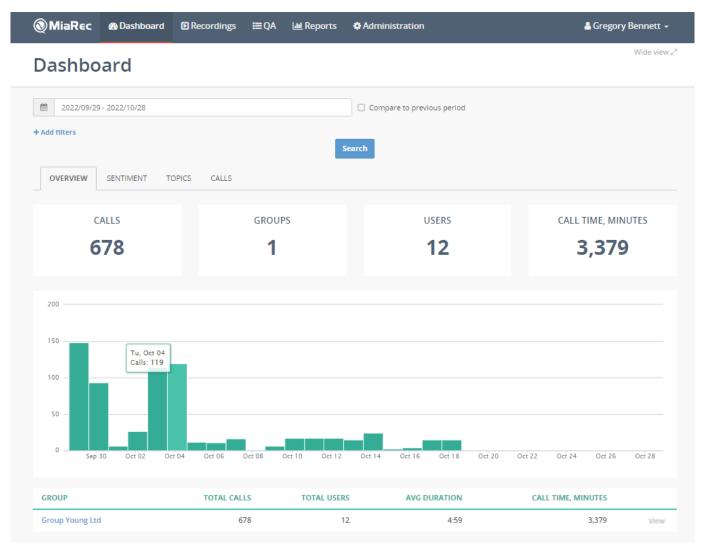


This concludes an introduction section to the MiaRec platform. In the next chapters, we will discuss each of these topics in detail.

3. Dashboard

3.1 Dashboard Overview

The Dashboard page allows supervisors and users to gain an accurate and evolving picture of their entire call center's performance. With all key metrics available on a single screen, you can derive actionable insights, streamline efficiency, and enhance the experience between the company, agents, and customers.



Key features of the Dashboard:

- A bird's eye view of various call metrics, like the total number of recorded calls, calls' duration, calls per day and others.
- A drill-down view that allows you to dive deep into your data and lets you explore your data at a more granular level.
- Trend analysis view with the ability to compare key metrics over time to instantly see trends
- Powerful filtering capabilities, which allow you to focus only on the data that is important to you.

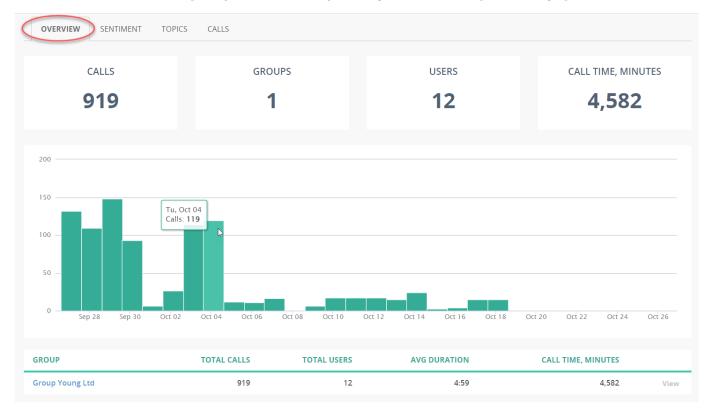
3.2 Dashboard metrics

3.2.1 Call Metrics

Overview tab

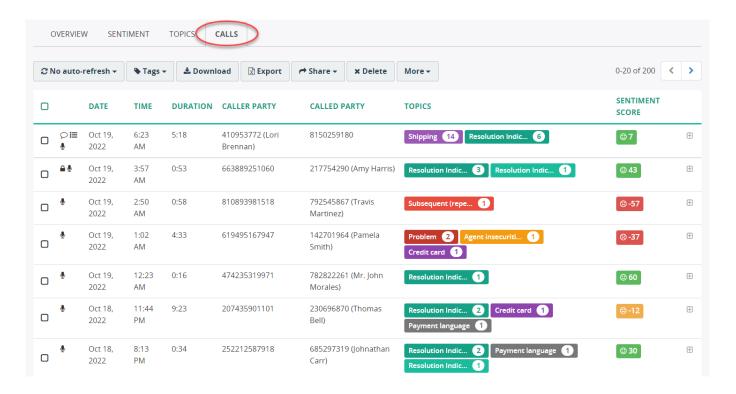
The **Overview** tab provides information about the key call metrics, like the total number of recorded calls per day, call time, and average duration time.

You can view the number of calls per day within the chart by hovering the cursor over a point on the graph.



Calls tab

The **Calls** tab shows the call recordings, which relate to the selected period in the Dashboard and the applied filters. Use this tab to review the individual call recordings, from which the aggregated call metrics were calculated.



1 Info

A list of the displayed columns in the **Calls** tab is configured by the administrator under **Administration > Customization > Field Visibility**.

3.2.2 Sentiment Metrics

The Sentiment tab provides easy yet granular visibility into the sentiment analysis and scoring of all customer interactions.

Sentiment analysis uses Artificial Intelligence (AI) and machine learning to analyze call transcripts for polarity. Polarity refers to the overall sentiment conveyed by a particular text, phrase or word. This polarity can be expressed as a numerical rating known as a "sentiment score".

The call distribution by sentiment is grouped into 5 categories and marked with distinctive labels:

- Very negative
- Negative
- Neutral
- Positive
- · Very positive



Sentiment score vs sentiment label

The sentiment labels are set based on a numeric sentiment score that is calculated for each call, where each label covers 20% of the values on a scale. The MiaRec platform uses a numeric scale from -100 to +100 for a sentiment score.

A relationship between labels and scores is presented in the following list:

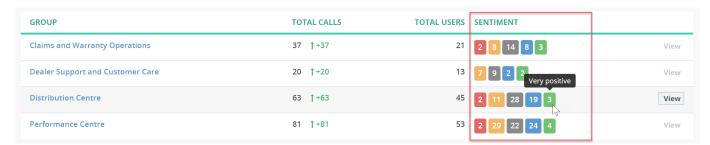
- Very negative (scores below -60)
- Negative (scores between -60 and -20)
- Neutral (scores between -20 and +20)
- **Positive** (scores between +20 to +60)
- Very positive (scores above +60)

The **Sentiment** page shows the overall distribution of calls by sentiment as well as the chart, which represents daily sentiment trends through the selected period.



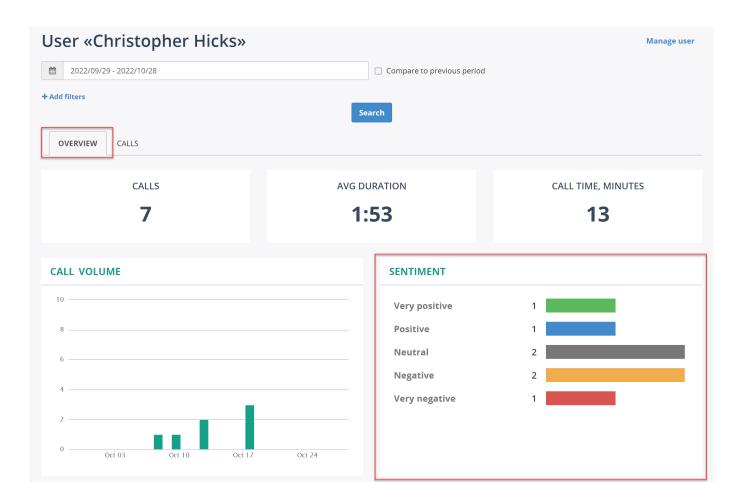
Depending on a drill-down level, the **Sentiment** page also shows a distribution of calls by sentiment for each group or user.

The inline labels show the total number of calls in each sentiment category. By hovering a mouse cursor over a label, you can see the sentiment category name.



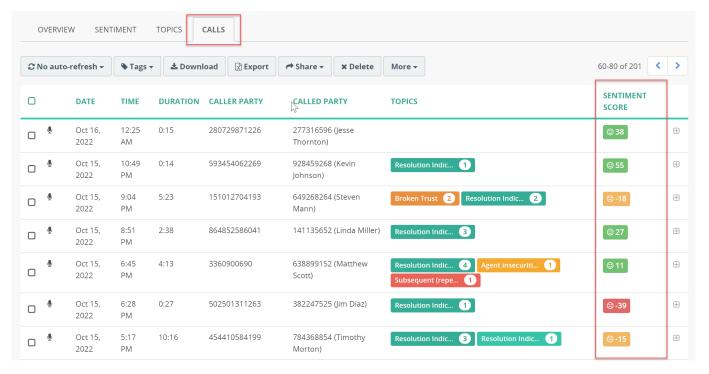
Sentiment metrics on a user level

When drilling down to a user level, the sentiment metrics are presented on the **Overview** page:



Sentiment score in Calls tab

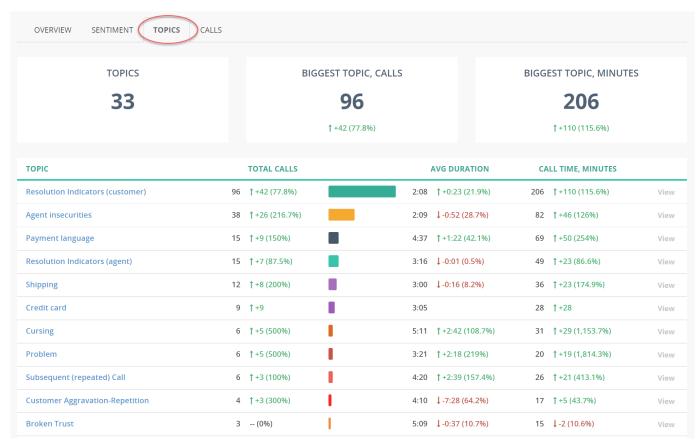
By navigating to the ${f Calls}$ tab, you can view the sentiment score in the corresponding column of the calls list.



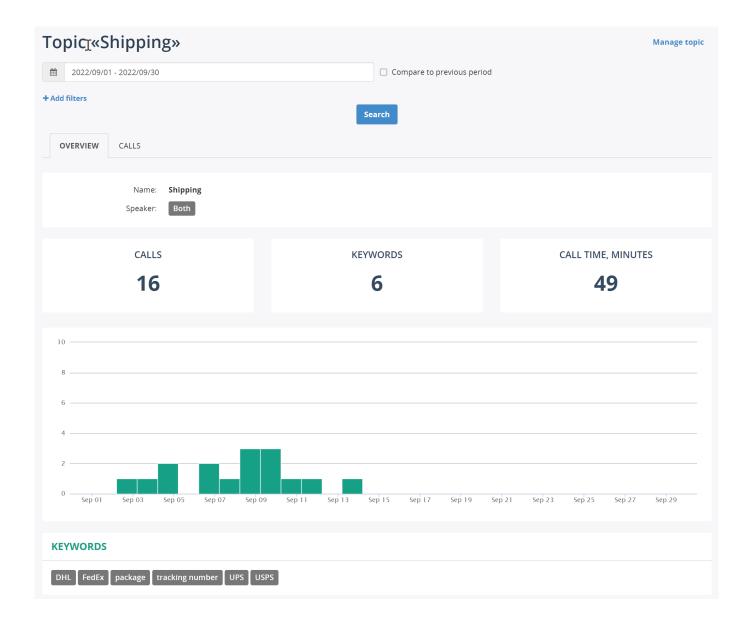
3.2.3 Topic Metrics

The **Topics** page shows the call distribution by topic. For example, as a supervisor, you can easily and quickly analyze call volume trends per topic over time, e.g., changes in the number of calls related to shipping issues from last month to this month.

The topics are shown in sorted order, starting with the topic with the highest number of calls shown at the top.



By drilling down to the individual topic, you can view trends of such a topic in a chart. This page also shows a list of keywords that are used to categorize calls with this topic.



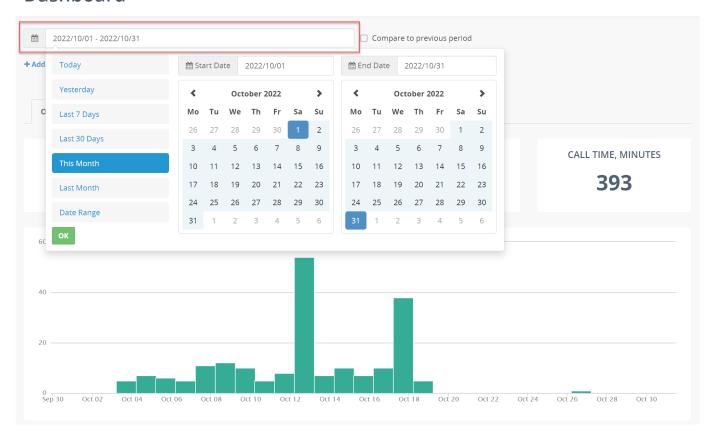
3.3 Filter Data in Dashboard

3.3.1 Select a date range

To review metrics for a specific period of time, select the date range in the Date Range input control. You can choose from one of the options like "Last 30 days", "This month", "Last month" as well as a custom date range:

Wide view ⊮™

Dashboard

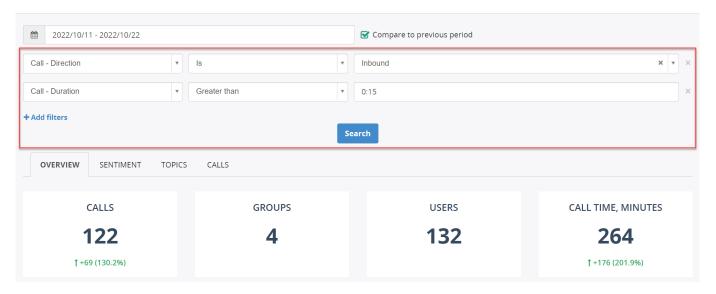


3.3.2 Add Filters

Optionally, you can filter data that is presented in a dashboard. For example, you may filter calls by direction (inbound only) and duration (longer than 0:15).

Wide view ⊮"

Dashboard



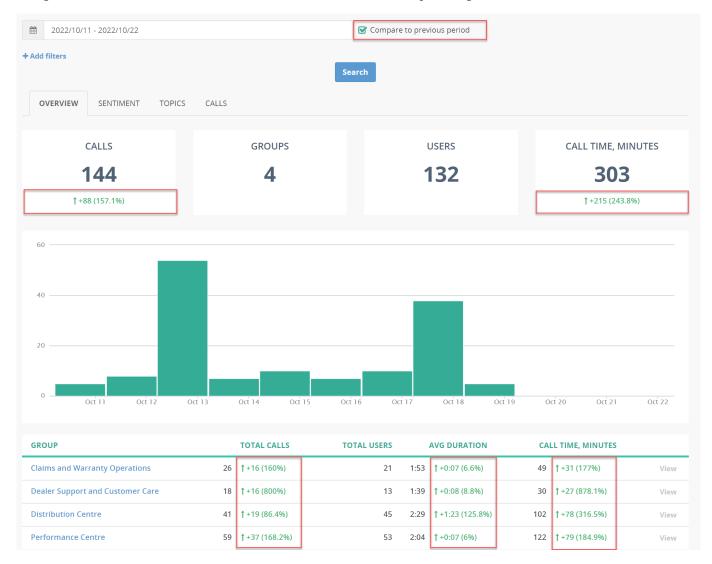
Click \boldsymbol{Add} $\boldsymbol{filters}$ to add filtering criteria to the input data.

3.4 Compare to Previous Period

Comparing metrics over time is a great way to benchmark progress and identify issues as they come up.

If the **Compare to previous period** checkbox is selected, then all applicable metrics are calculated for both the current period and the previous one (for example the current month and the previous month).

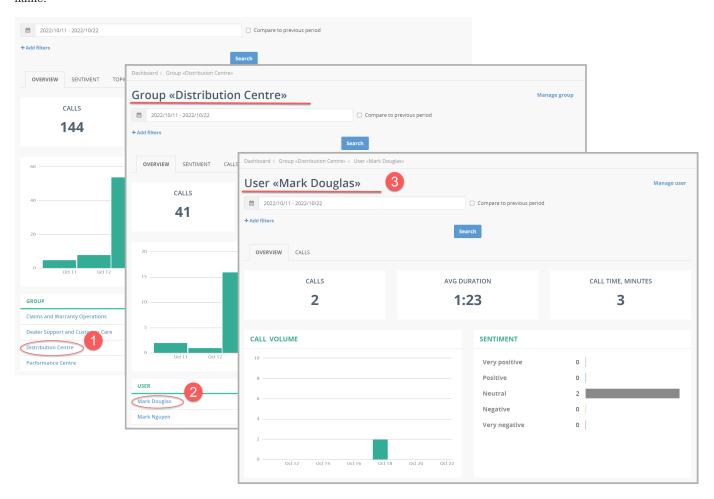
A magnitude of increase or decrease is shown in both absolute and relative (percentage) measures.



3.5 Drill-Down Capabilities

With a drill-down capability, you can dive deep from a bird's eye view of the data to a more granular view, like group or user-level metrics.

To dive deep into the data, click the name of the corresponding group, user or topic, or click the **View** button next to such a name.



3.5.1 Breadcrumbs

The breadcrumbs at the top of the screen allow users to be aware of the current location within the hierarchical structure of a dashboard.

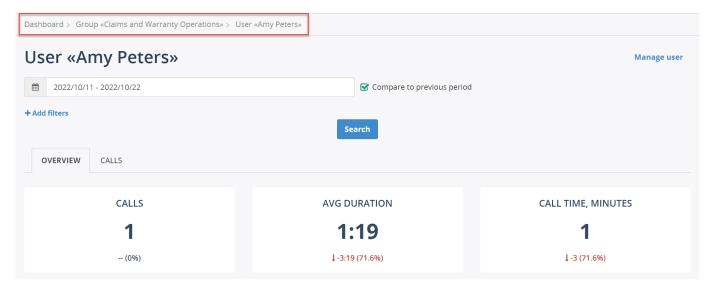


Breadcrumbs are a list of links representing the current page and its "ancestors" (parent page, grandparent page, and so on), going all the way back to the Dashboard homepage.

To navigate to the upper level in the Dashboard hierarchy, click the corresponding link in the Breadcrumbs.

Wide view ⊮"

Dashboard



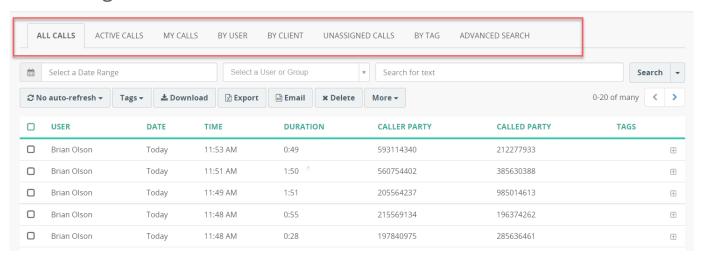
Wide view ∠ⁿ

4. Recordings

4.1 Recordings overview

The **Recordings** page has tabs **All Calls**, **Active Calls**, **My Calls** and others, that provide quick access to the recordings that meet the respective criteria like "active calls only", "my calls only", and so on.

Recordings



MiaRec supports the following views:

- All calls Displays all the call recordings (including active ones). Note, depending on your role permissions and the access scope, not all call recordings might be accessible to you.
- Active calls Displays the in-progress call recordings.
- My calls Displays call recordings associated with the currently logged-in user.
- By user Displays call recordings by a group or user.
- By client Displays call recordings by a client. For details, see Filter calls by a client.
- Unassigned calls Displays call recordings that are not assigned to any user; this view is visible to administrators only.
- By tag Displays call recordings by a tag. For details, see Categorize call recordings.
- Advanced search Provides access to an advanced search form. For details, see Advanced search.



Each view may have a different set of visible columns, which are configured by an administrator.

Wide view *

4.2 Playback recordings

4.2.1 Overview

You can playback call recordings either on the Recordings page or on the Call Details page.

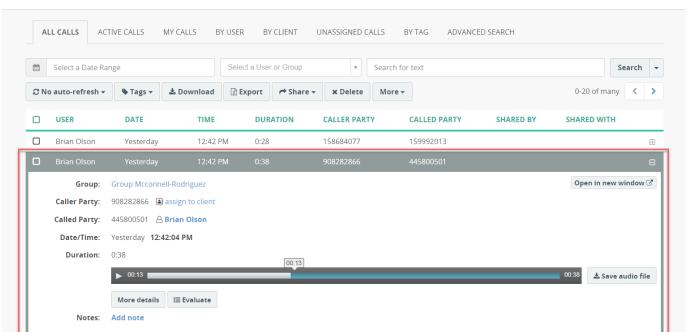
4.2.2 Inline basic media player on the Recordings page

On the **Recordings** page, click in the list of recordings to display an inline basic audio player. From this screen, you can also download an audio file by clicking **Save audio file** button.



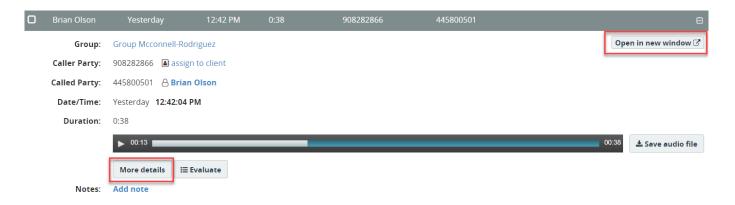
To download files, your user account must have the Download permission.

Recordings

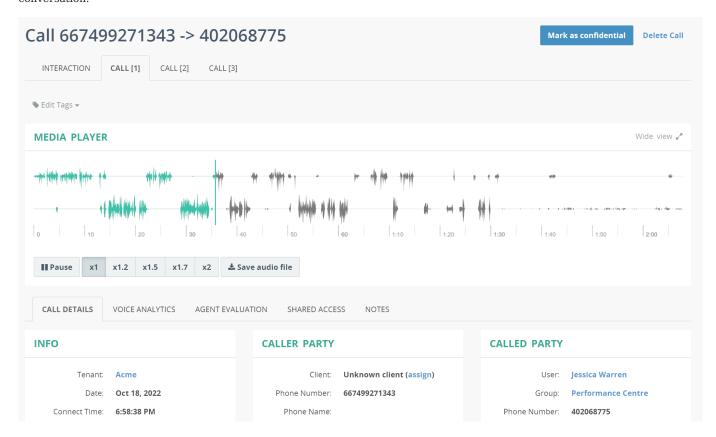


4.2.3 Advanced media player on the Call Details page

The Advanced Media Player is shown on the Call Details page. To open such a page, click **More details** or **Open in new window** buttons for the respective call on the **Recordings** page



An audio waveform in the Advanced Media Player, which allows you to visually see the moments of silence or overtalk in a conversation.



With the Advanced Media Player, you can control a playback speed from x1 to x2. Speeding up will allow you to listen to the recording faster, which saves time.

To download the audio file click Save audio file button.



To download files, your user account must have the Download permission.

4.3 Add notes to call recordings

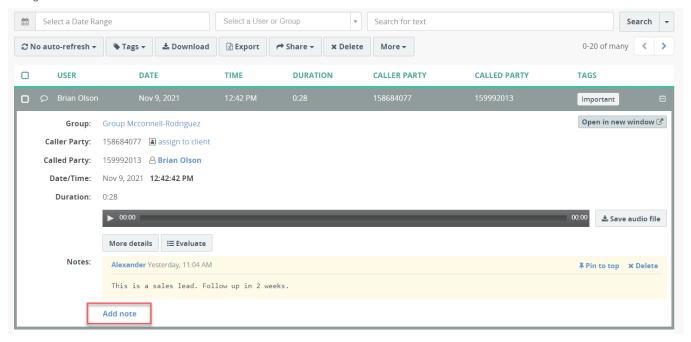
4.3.1 Overview

You can use notes to save important information related to call recordings. Such notes are searchable, so you can easily pull the recordings that have certain text in their notes.

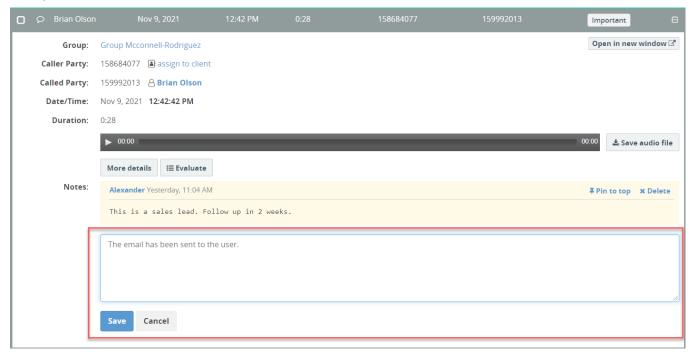
The notes can be added to either the ${\bf Recordings}$ page or the ${\bf Call} \ {\bf Details}$ page.

4.3.2 Add notes from the Recordings page

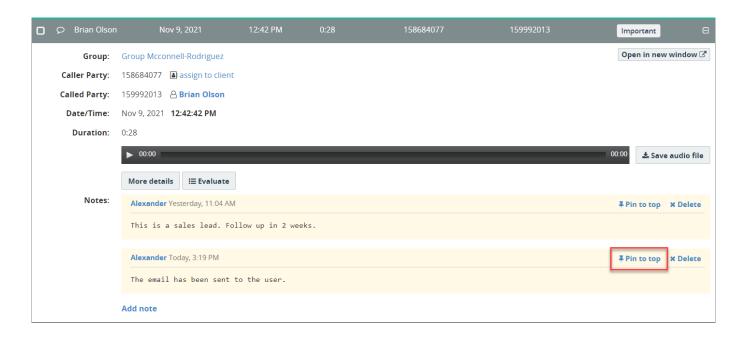
1. Navigate to the inline call details view and click Add note.



2. Enter your note and click Save.

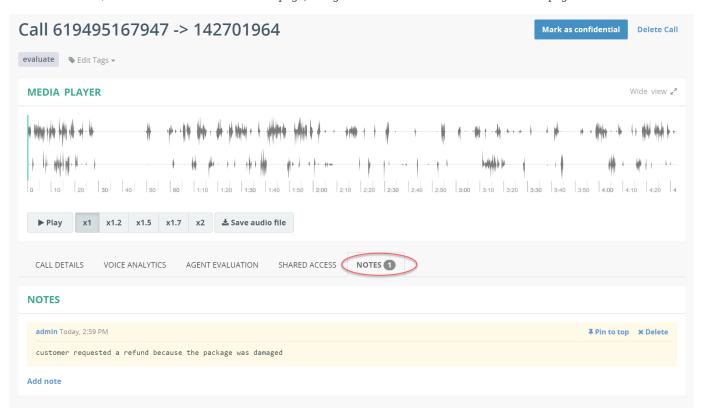


The notes are displayed in a sorting order from the oldest to the newest. However, it is possible to pin any note to the top (out of order) by clicking **Pin to top**.



4.3.3 Add notes from the Call Details page

You can also view/add notes from the Call Details page, using the Notes section at the bottom of the page.



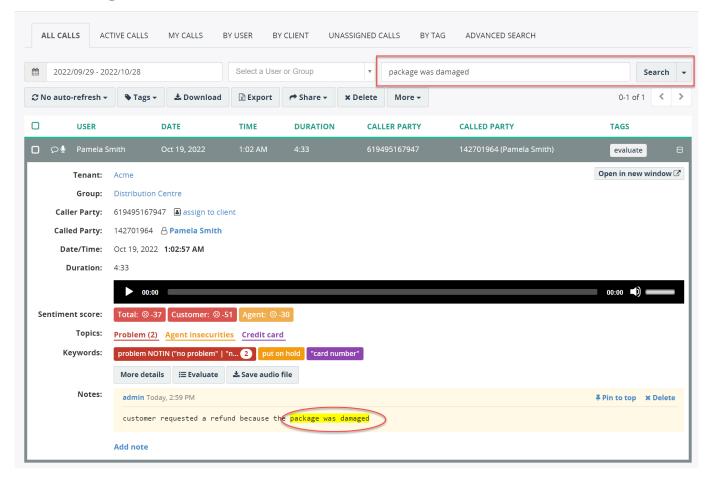
4.3.4 Search in notes

You can use a Quick Search as well as Advanced Search to find call recordings with certain text in notes.

To use Quick Search, type the search text input control and hit the **Search** button. The results will be highlighted in the Notes section of the call info.

Recordings

Wide view **

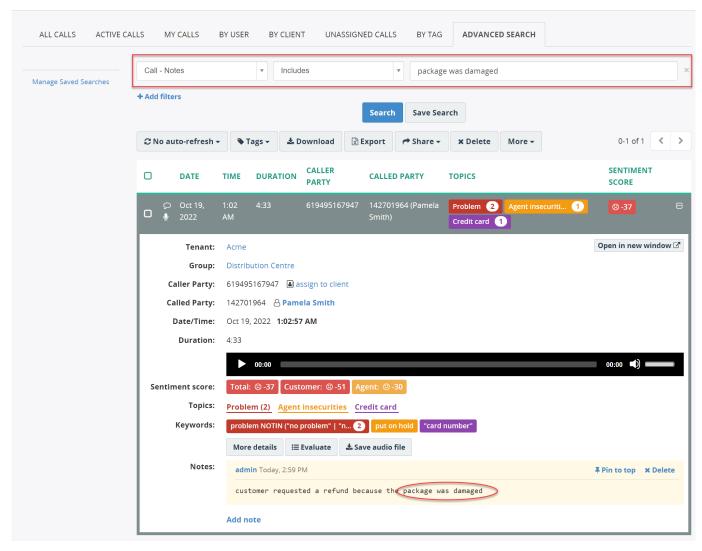


To use Advanced Search, select the **Call - Notes** in the Parameter list, choose the appropriate operator, enter the text to search and hit the **Search** button.

In the Advanced Search form, you can mix and match multiple criteria for searching, like Date/time range, user/group, call direction, duration etc.

Recordings

Wide view ⊮" License expires in 322 days



Info

The found text is not highlighted in the Advanced Search results by design.

4.3.5 Alternatives for Call Notes

Adding notes is a powerful tool for users who needs to add notes to call recordings in a free-text format.

If a free-text format capability is not required, then there are better alternatives to call notes:

- Tags
- Custom fields

4.4 Export call details to CSV file

On the Recordings page, you can export call details for one or multiple recordings to Excel (*.csv) file for further data analysis.

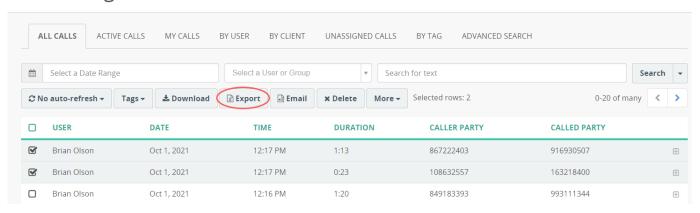


The CSV file contains metadata only. If you need to export audio files as well, then use the Download recordings option.

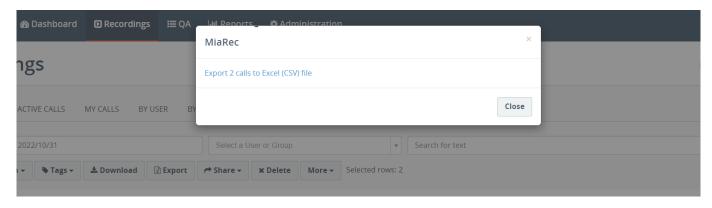
To export call details to a CSV file, select the call recordings on the **Recordings** page, and click the **Export** button.

Recordings

Wide view ⊮*



In the pop-up dialog, click the link to download the CSV file.



4.5 Download audio files

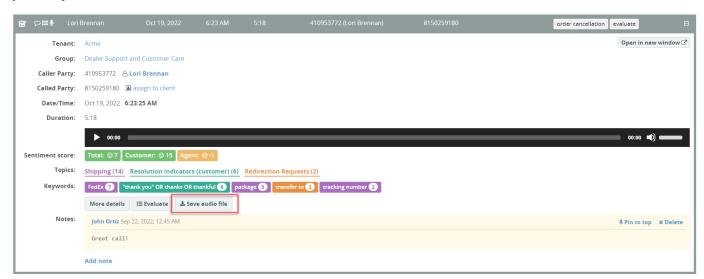
You can download an individual audio file or multiple audio files in bulk.



A download option may be unavailable to you if the Download permission is not granted by your administrator to your user account.

4.5.1 Download the audio file from the Recordings page

On the **Recordings** page, select the call recording in the list and click the **Save audio file** button to download the audio file to your computer.



4.5.2 Download the audio file from the Call Details page

On the extended Call Details page, click the Save audio file button to download the audio file to your computer.



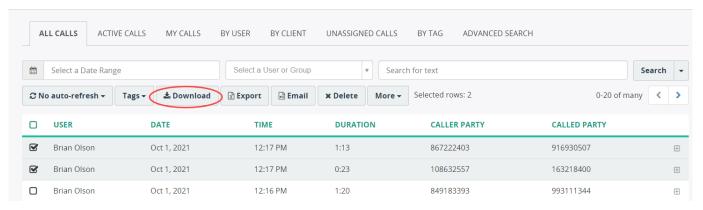
4.5.3 Download multiple audio files in bulk

On the **Recordings** page, you can download up to 20 recordings at once in a ZIP archive file.

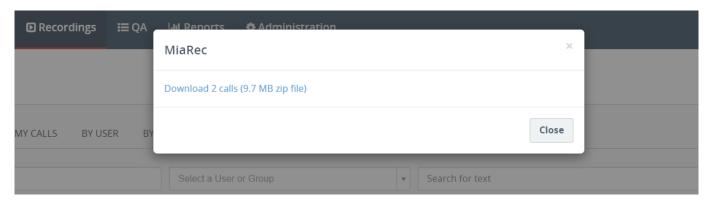
To do that, select the respective recordings from the list and click the $\boldsymbol{Download}$ button.

Wide view ⊮™

Recordings



The dialog box will pop up with the link to download a ZIP file.



Wide view 2

4.6 Delete call recordings

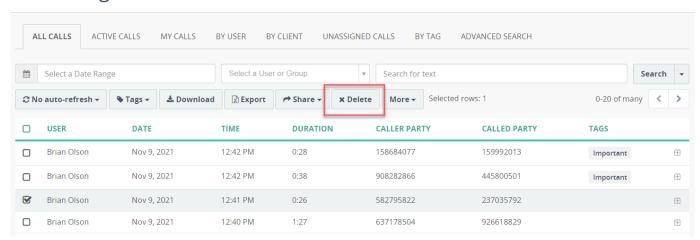
The page describes how you can remove call recordings from the MiaRec platform.

4.6.1 Delete recordings in bulk

To delete a recorded call:

- 1. Click the **Recordings** tab.
- 2. Select the call(s) that you want to delete.
- 3. Click the **Delete** button.

Recordings



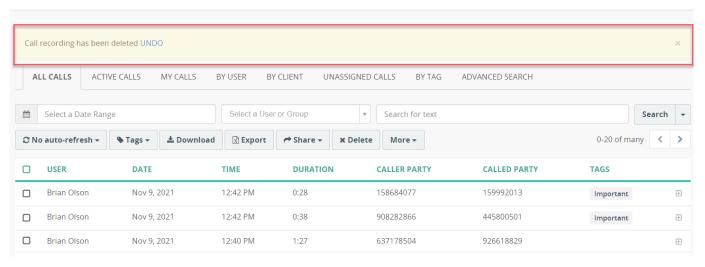
The popup message will appear informing you that the recording has been deleted. Clicking the **Undo** link will restore the call recording.

1 Info

The popup message disappears automatically in 45 seconds, so you have a limited time to undo the delete action.

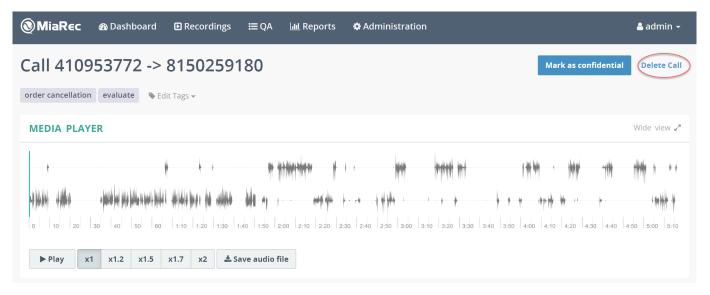
Recordings

Wide view ⊮



4.6.2 Delete individual recording

You can delete an individual call recording on the extended \pmb{Call} $\pmb{Details}$ page by clicking the \pmb{Delete} \pmb{Call} button:



4.7 Categorize call recordings

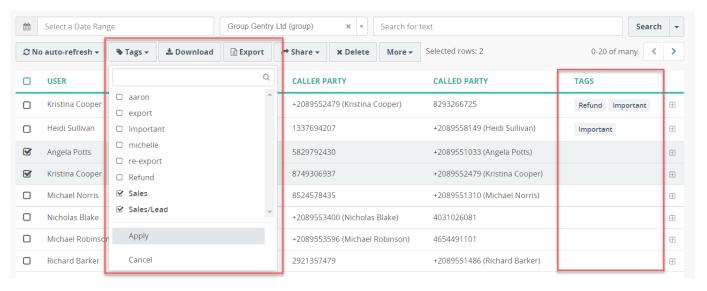
4.7.1 Overview

The tags allow you to easily identify and group associated call recordings in MiaRec. You can create your tags, and then assign these tags to call recordings.



Tagging recordings and creating/managing tags requires setting up appropriate permissions by an administrator.

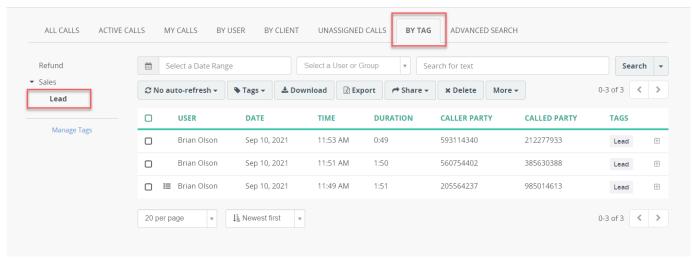
To assign a tag to call recordings, select one or more recordings, click the **Tags** button, select the target tag from the list and click **Apply**. You can assign multiple tags to the same call recording.



To quickly filter the recordings by tag, navigate to the By Tag tab and select the target tag from a list on the left.

Recordings

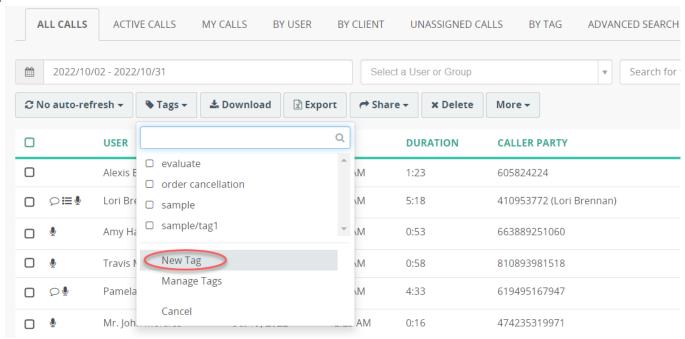
Wide view ⊮"



4.7.2 Create a new tag

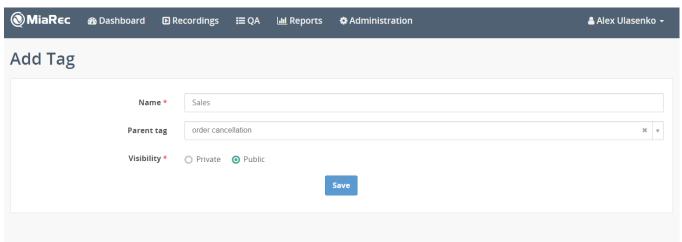
1. On the toolbar, click the Tags button.

2. Select **New Tag**.



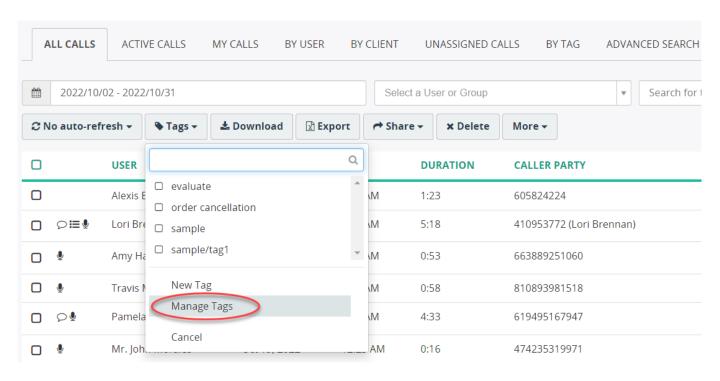
- 3. In the \boldsymbol{Add} \boldsymbol{Tag} screen, provide the following:
 - \bullet \mathbf{Name} give the unique name to a newly created tag. Required field.
 - Parent tag optionally, you can specify if this tag will be a child element to an existing tag.
 - Visibility choose a visibility setting. Private tags are visible to you only. Public tags are visible to all users.

Then click Save.

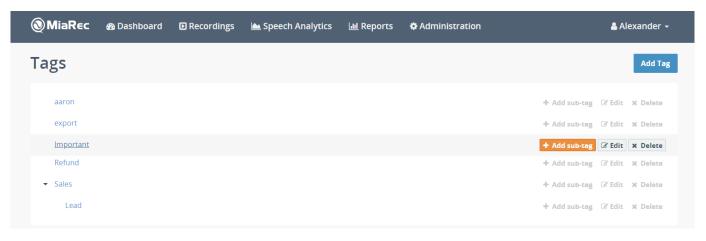


4.7.3 Manage existing tags

- 1. On the toolbar, click the **Tags** button.
- 2. Select **Manage Tags**.



In the ${f Tags}$ screen, you can create a new tag or modify/delete an existing tag.



4.8 Mark recordings as confidential

4.8.1 Overview

Call recordings may be marked as confidential to restrict access to them under certain conditions.

To understand how confidentiality works, consider the following scenario:

- The supervisor is a manager of a group of agents. He/she has access to all call recordings of these agents.
- Now, suppose the company's executive makes a call to one of these agents. Typically, such a conversation between an agent and the executive would be visible to the supervisor because the supervisor can access all calls of this agent.
- However, when a call is marked as confidential, then such a call recording would be hidden from the supervisor unless he/ she is granted permission to access the confidential calls.

A call recording may be marked as "confidential" either manually or automatically.

4.8.2 Manually mark calls as confidential



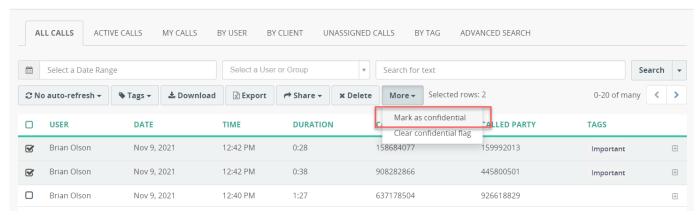
The administrator must grant you the **Set confidential flag** permission to use this feature.

To manually mark call recordings as confidential:

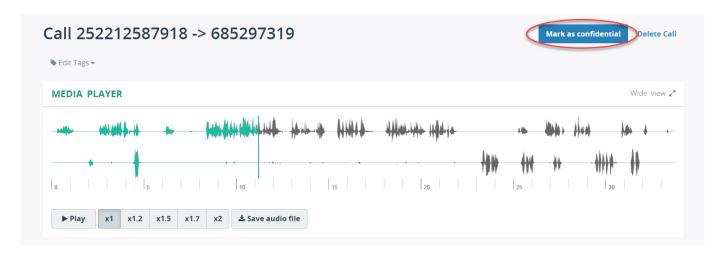
- 1. On the **Recordings** page, select the recordings you want to mark as confidential.
- 2. Click More > Mark as confidential.

Recordings

Wide view ⊭



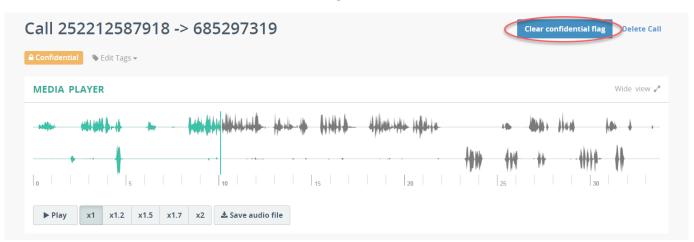
Alternatively, you can click the ${\bf Mark}$ as ${\bf confidential}$ button from an extended call details view.



The Confidential label is shown in the call details for the calls that are marked as confidential.



To reset a call to non-confidential, click Clear confidential flag.



4.8.3 Automatically mark calls as confidential

To automatically mark all call recordings of a specific user as confidential:

- 1. Edit the user profile in the Admin portal (menu **Administration > User Management > Users**),
- 2. In the **Recording settings** section, select the checkbox **Automatically mark all calls of this user as confidential**. Then, **Save** the changes.

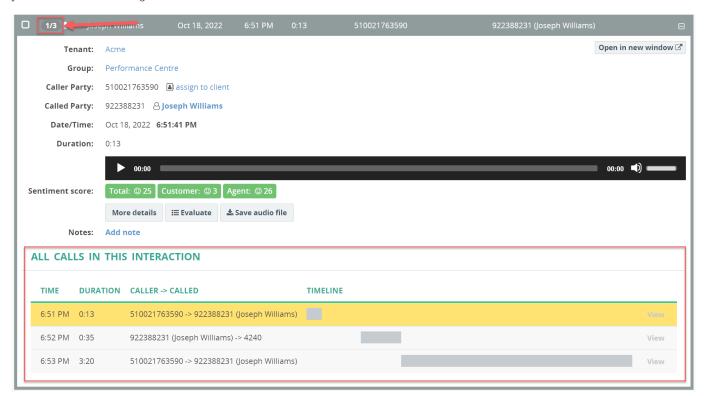
RECORDING SETTINGS

Record	Always On-demand Never Default	
Recording direction	☑ Inbound ☑ Outbound	
Extension	÷2089558517	×
	⇒ User2	×
	+ Add Extension	
Confidential calls	☑ Automatically mark all calls of this user as confidential	
Screen Recording Username	Supported formats: NETBIOS\login, DOMAIN\login, login	

4.9 View multi-segment calls

4.9.1 Overview

MiaRec groups all related calls into a single interaction to create a complete picture of customer communication with your agents. If the call segment is a part of a longer interaction, then a corresponding badge is shown to the right of the call details (for example, **1/3** means this call segment is the first in the interaction that consists of 3 segments). When you open call details, you can see the other segments in a timeline.



What are related calls?

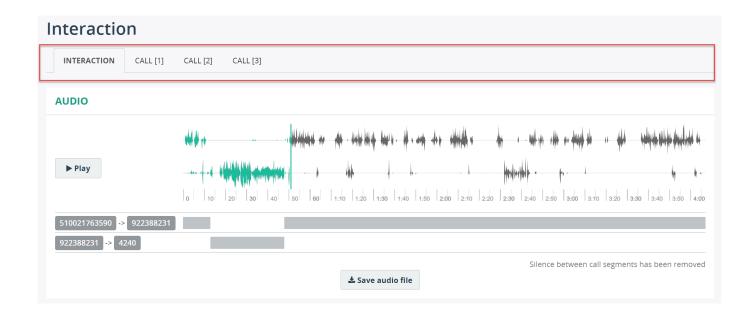
MiaRec treats the following calls as related:

- 1. Call is transferred from one agent to another. With many phone systems, in such a scenario, two call recordings are created.

 These two call segments are treated as related and the MiaRec application automatically groups them into a single interaction.
- 2. Call is put on hold and then resumed. With many phone systems, a new call recording is created when the call is resumed. MiaRec automatically groups such call recordings into a single interaction.
- 3. Agent places a call on hold and makes a consultative call to a supervisor, then the agent resumes the original call. In this case, three call recordings are created, and the consultative call is "sandwiched" between the other two. MiaRec automatically groups all three call segments into a single interaction.

Note, in a scenario when an agent places a call on hold and answers another inbound call, the answered inbound call is not treated as related to the call on hold.

In the extended call details view, you can see more details about each call segment by clicking the corresponding tab at the top of the screen. Also, you can play all call segments at once by navigating to the **Interaction** tab.



4.10 Live monitor calls

4.10.1 Overview

The live monitoring feature allows authorized users (supervisors) to listen to active calls in real time. This feature helps improve customer service, train new employees, and escalate problems as soon as possible.

Live monitoring is built into the MiaRec recording core. It doesn't require the support of live monitoring from the phone system, thus, it works with all the phone platforms that MiaRec supports.

The live monitoring supports two use cases:

- · Monitoring of a single call
- Monitoring of consecutive calls of a particular user

In the first case, a monitoring session automatically ends when the monitored call ends.

In the second case, a monitoring session automatically resumes when the monitored user makes or receives a new call. A supervisor simply initiates a live monitoring session once and keeps listening to the consecutive calls of a certain user without having to return to the active call screen.

4.10.2 Prerequisites

- The monitored calls should be assigned to a user.
- The "Live monitoring" license should be allocated to the monitored user (menu **Administration > User Management > Users**).
- A supervisor's role should have permission to live monitor other users' calls (menu Administration > User Management > Roles).
- The latest web browser (Chrome, Firefox, Edge, Safari) with support of WebRTC.



Note

The live monitoring license must be allocated to the user who is being monitored, not the user who is monitoring!

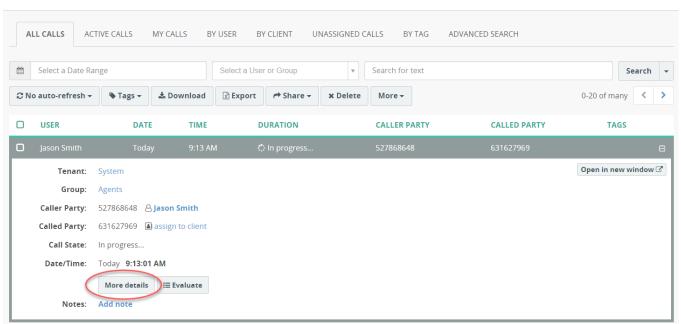
4.10.3 Monitor a single call

To monitor an active call:

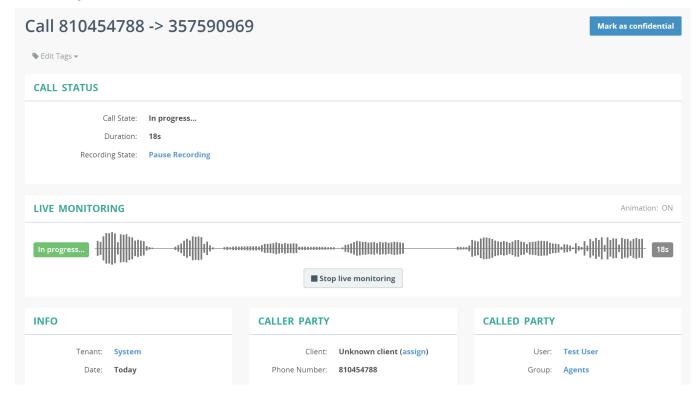
- 1. On the **Recordings** page, locate the call that is currently in progress.
- 2. Click the More details button to open the extended call details page.

Recordings

Wide view ⊮[™]



3. Click the **Start Live Monitoring** button. You should hear the audio of the monitored call and see the animation representing the audio signal.



4. To stop monitoring the call, click Stop Live Monitoring.

Optionally, you can disable animation by clicking $\bf Animation~ON/OFF~{\rm link}.$



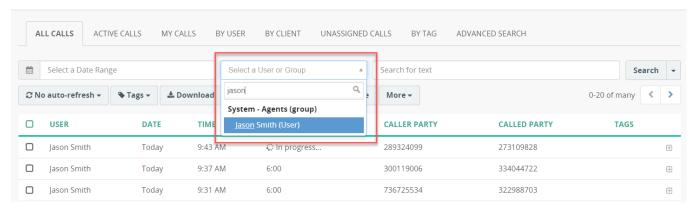
4.10.4 Monitor consecutive calls

To monitor consecutive calls of a user:

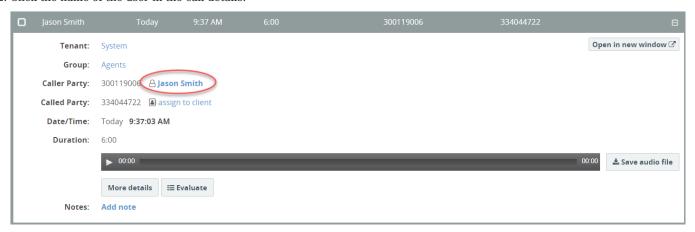
1. Locate one of the previous recordings of the user by using the Quick Search on the **Recordings** page.

Recordings

Wide view 2



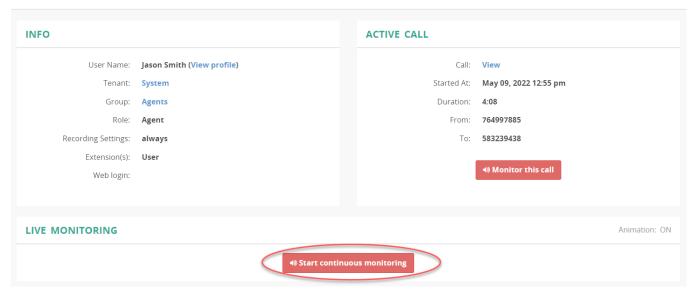
2. Click the name of the user in the call details.



3. On the **User** page, click **Start continuous monitoring** to monitor all calls of this user consequently. Note, clicking **Monitor this call** will monitor only the currently active call.

User «Jason Smith»

cense expires in 360 days





Note

If a user has multiple active calls at the same time, live monitoring will always use the most recent one.

4.11 Evaluate call recordings

4.11.1 Overview

The Agent Evaluation module provides the contact center managers with a tool to evaluate and monitor agent performance. The tool can help you identify and address potential customer interaction issues, improve the contact center's productivity and performance, and increase customer satisfaction. The existing evaluation forms can be quickly customized via MiaRec's evaluation form designer.

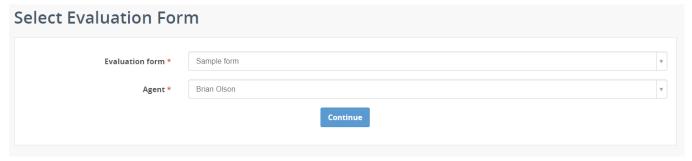
4.11.2 Evaluate an agent

To evaluate an agent:

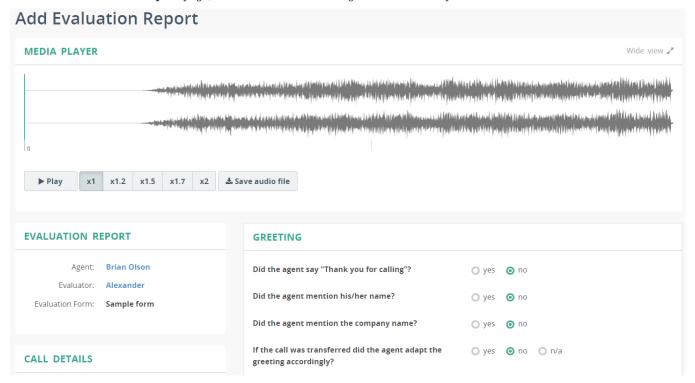
1. Select a call recording and click the **Evaluate** button in the call details view.



- 2. On the $\bf Select\ Evaluation\ Form\ page$, fill in the following fields and click $\bf Continue$.
 - In the **Evaluation form** field, select the appropriate evaluation form.
 - In the **Agent** field, select the user this evaluation will be performed for (this option is required when a call is assigned to multiple agents).



3. On the Add Evaluation Report page, listen to the call recording and answer the questions in the evaluation form.

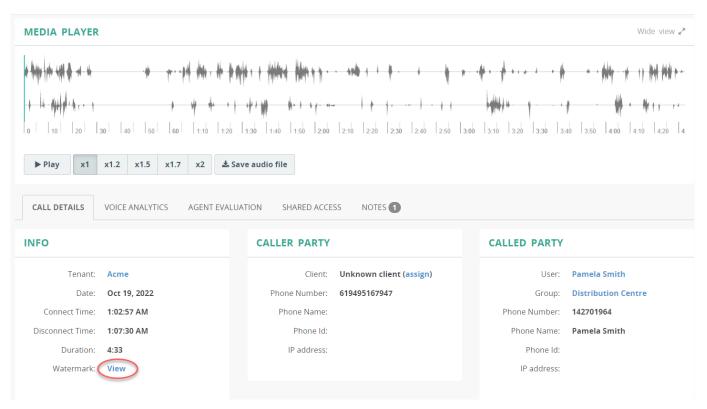


4. When finished, click the Save button.

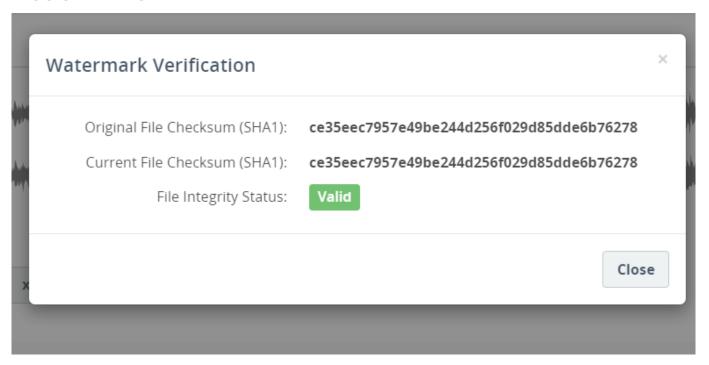
4.12 Check the integrity of an audio file

The application watermarks every file to ensure data integrity.

To verify the data integrity of an audio file, open the call recording in the extended call details page and click **View** under the **Info** section.



The pop-up window will provide the watermark verification status.



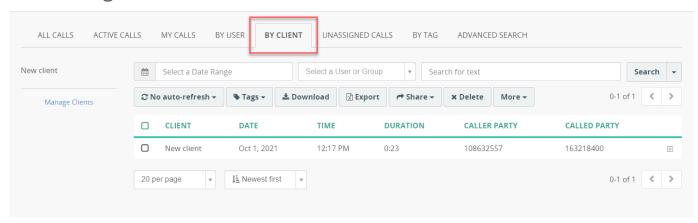
Wide view -

4.13 Filter by client

4.13.1 Overview

By navigating to the **By Client** tab, you can quickly filter call recordings associated with specific clients. You can register new clients in MiaRec, and then assign call recordings to these clients.

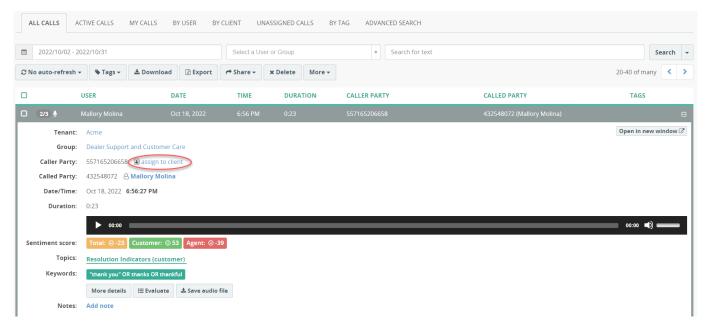
Recordings



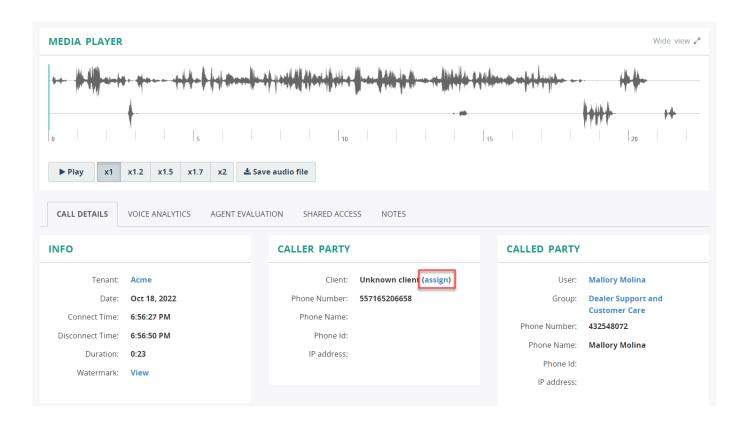
Calls can be assigned to clients either manually or automatically based on the known phone number of each client.

4.13.2 Manually assign a call to the client

To associate a recorded call with a client, navigate to the inline or extended call details view and click the **assign to client** link.



In the extended call details page, click the **assign** link next to the **Unknown client** info.



4.13.3 Automatically assign calls to the client

To automatically, assign calls to the client, you need to register the client's contact phone number in the application. When a call is received or made to the registered phone number, such a call will be automatically assigned to the client.

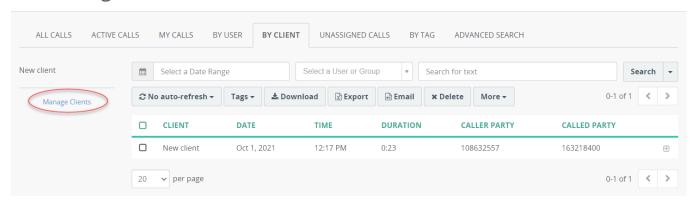
Multiple phone numbers can be registered to a client.

4.13.4 Create a new client

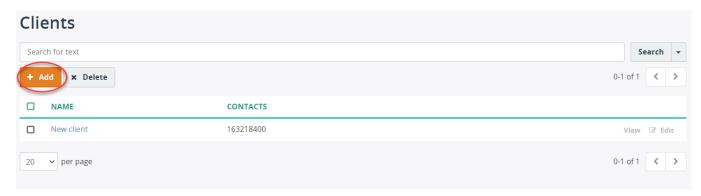
1. Navigate to the By Client call recording view, and click Manage Clients.

Recordings

Wide view ⊮[™]

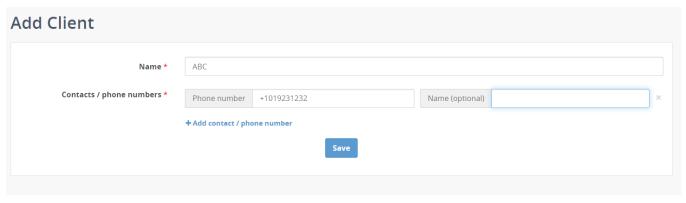


2. Click Add.



- 3. On the Add Client screen, fill out the following fields:

 - **Contacts/phone number** provide the contact's phone number associated with this client. This phone number will be used to automatically associate calls to the client.
 - \bullet ${\bf Name}$ provide the contact's name. Optional field.



4. Click Save.

4.14 Save custom fields

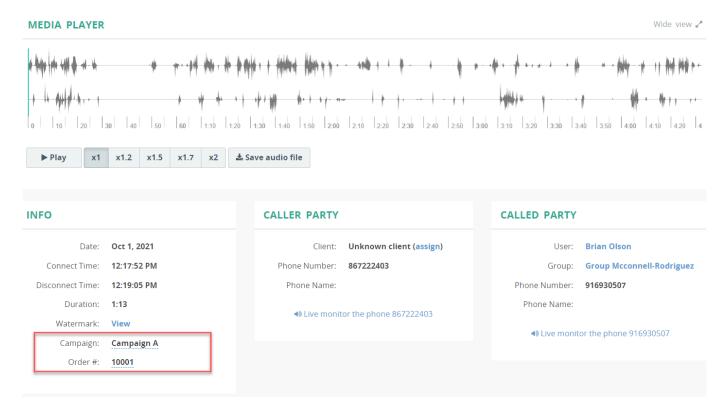
4.14.1 Overview

With custom fields, users can store additional attributes with each call recording, like an order number, support ticket number, product name, shipping due date, etc.

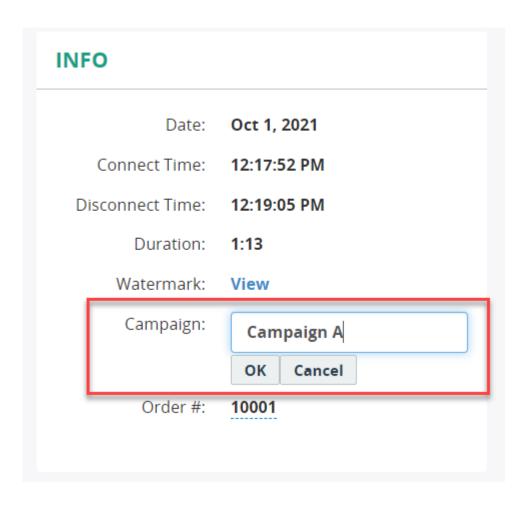


The custom fields must be pre-configured by an administrator in the Admin portal.

The custom fields are shown on the ${\bf Call\ Details}$ page under the ${\bf Info}$ section.



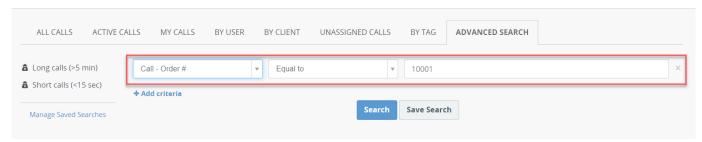
Users, who are granted the appropriate permissions, can edit the custom fields for in-progress or completed calls on the **Call Details** page.



4.14.2 Searching in custom fields

You may use the Quick Search or the Advanced Search to find the recordings by value in the custom fields.

Recordings



4.15 Share recordings with other users

4.15.1 Overview

MiaRec allows you to share call recording(s) with other users on the platform.

Restrictions:

- The number of actions for the recordings shared with you is limited. For instance, you can only view, playback, download and add notes to these recordings. Moreover, each action is regulated by specific permission set up by the administrator for the user's role.
- You can share call recordings only with users who can access the MiaRec web portal.
- If the call recording is marked as confidential, it cannot be shared with other users. Also, a call cannot be marked as confidential if other users have shared access to it.
- You cannot re-share the call recording, that was shared with you. Only the user, who originally shared the recording, can reshare it with other users.

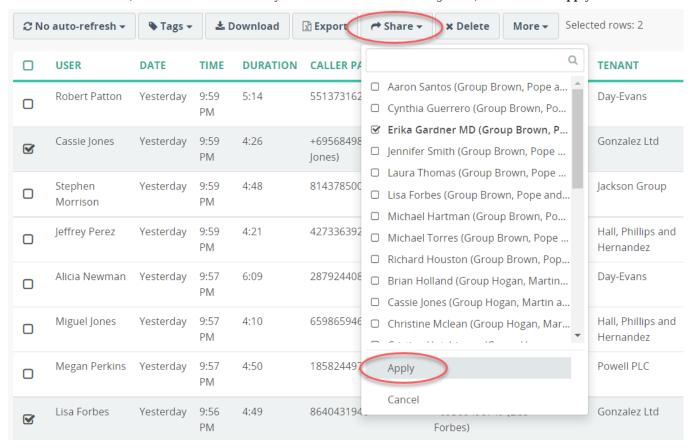
Depending on the role permissions set up by the administrator, the call recordings can be shared:

- with users, who are part of your group.
- with users, who are part of your group, and with users who are your subordinates.
- with all users, who are part of your 'Tenant' account.

4.15.2 Share recordings

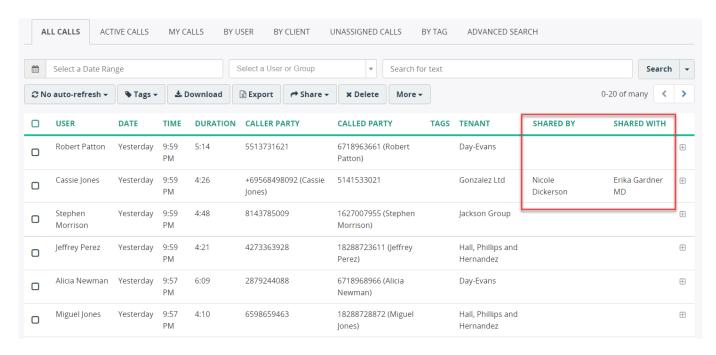
To share a call recording:

- 1. On the **Recordings** tab, select the call recording(s) that you want to share with other users.
- 2. Click the Share button, then select the users who you want to share the recordings with, and then click Apply.

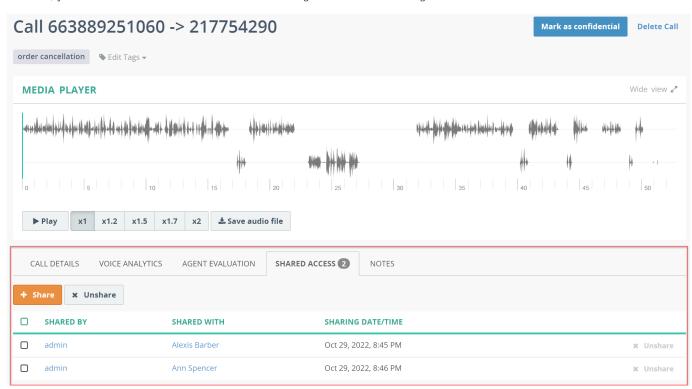


The user, with whom the call recording was shared, will receive an email notification if he/she has the email configured in the platform.

To review the details of who shared and with who, check the info in the columns **Shared By** and **Shared With**, respectively. Note, these columns are not visible by default and should be configured as visible by an administrator.



On the extended call details page, you can check and manage the sharing details under the **Shared access tab** section. For instance, you can view the names of the initiator and target user and a "sharing date/time" information.



Also, on this page, you can share the call recording with other users by clicking **Share**, and stop sharing the recording by clicking **Unshare**.

4.15.3 Unshare recordings



To unshare a call recording, the user must have the **Unshare** permission.

Wide view ∠^N

To unshare the call recording:

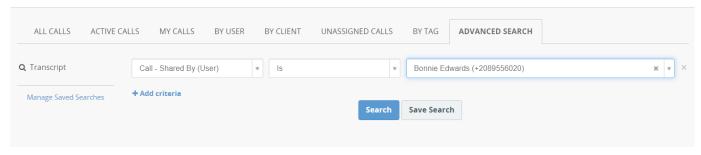
- 1. Select the call recording(s) that you want to unshare
- 2. Click the Share button, then unselect the users who you want to stop sharing the recordings with, and then click Apply.

4.15.4 Search shared recordings

Using Advanced Search, you can find the call recordings that were shared with/by specific users. To do that:

- 1. On the **Recordings** page, click the **Advanced Search** tab.
- 2. In the **Select a parameter** field, choose **Shared By** or **Shared With** search criterion, select the user from the list and click **Search**.

Recordings



If you want to search for all call recordings that were shared with anyone, use the following search criteria:

- In the Select a parameter dropdown box, select Call Shared With (User)
- In the **Select a condition** dropdown box, select **Is not**.
- In the last dropdown box, select --NOT SET ---.

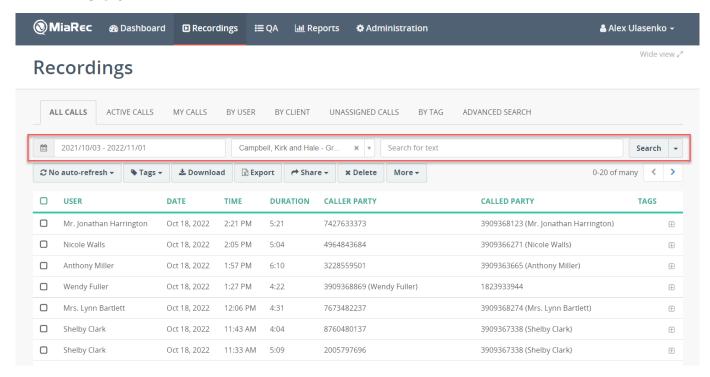


5. Search

5.1 Quick search

5.1.1 Overview

Quick search options are the easiest way to locate call recordings by applying the search criteria in the Quick Search panel on the **Recordings** page.



The panel includes the most frequently used search criteria:

- Date Range
- User or Group
- \bullet Search for text in phone number, caller-id, call notes and custom fields

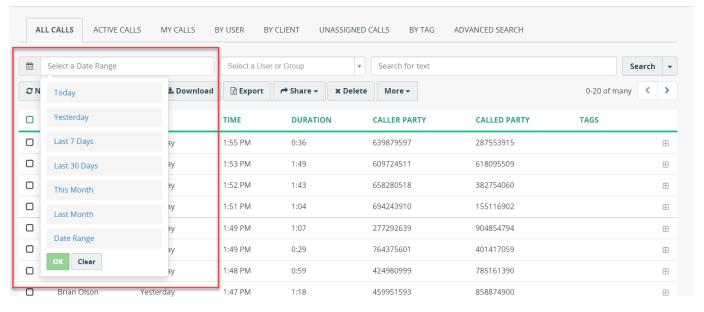
5.1.2 Quick search by date range

This search option lets you find call recordings created within a specific range of dates.

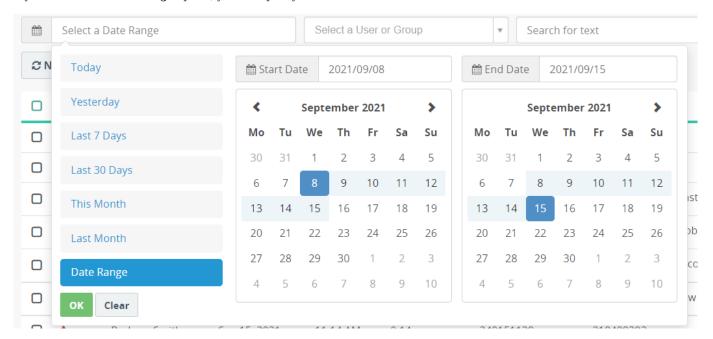
To search the recordings by date range, click the **Select a Date Range** field and choose from one of the available options, like **Today**, **Yesterday**, **Last 7 days**, **Last 30 days**, etc.

Wide view ≥³

Recordings



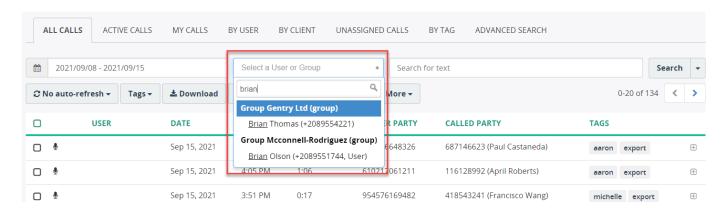
If you choose the Date Range option, you can specify the start and end dates in the calendar.



5.1.3 Quick search by user or group

To search recordings by user or group, click the **Select a User or Group** field, then select the user or group (highlighted in bold) from the list.

The drop-down list includes an inline search box, which you can use to quickly locate the user or group in the long list.

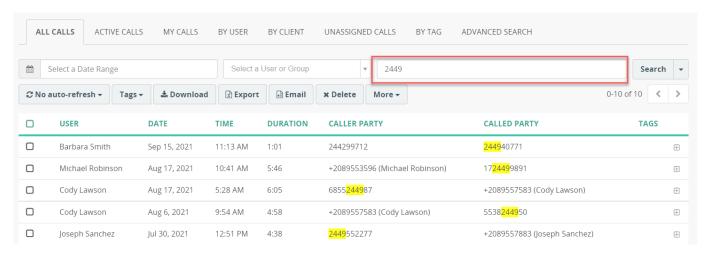


5.1.4 Quick search by text

The **Search for text** field lets you use the free-text search in the following call attributes:

- caller and called-party phone number,
- caller and called-party name (aka CALLER ID) as provided by the phone system,
- original caller number, if available,
- · originally dialed digits, if available,
- call note,
- custom fields, when the Free Text Search option is enabled for the relevant custom field

The search results will be highlighted as shown in the screenshot below.

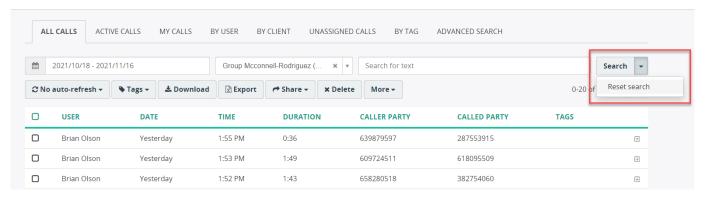


5.1.5 Reset search criteria

To reset search criteria, click the **Search** button and then select **Reset search**.

Wide view ⊮"

Recordings



5.2 Advanced search

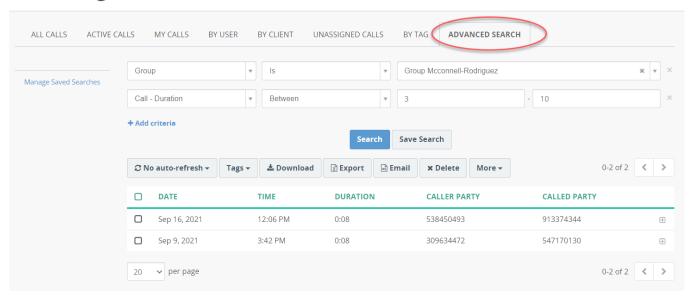
5.2.1 Overview

The Advanced Search allows you to mix and match multiple criteria in the search input.

- 1. On the **Recordings** page, click the **Advanced Search** tab.
- 2. Select the appropriate call attribute in the **Select a Parameter** list
- 3. Select the appropriate condition in the **Select a condition** list
- 4. Enter the searched value in the Value input, if applicable
- 5. Click Add criteria to add more attributes for searching.

Recordings

Wide view _≥ⁿ



6. Click **Search** to run the search query.

5.3 Save search criteria

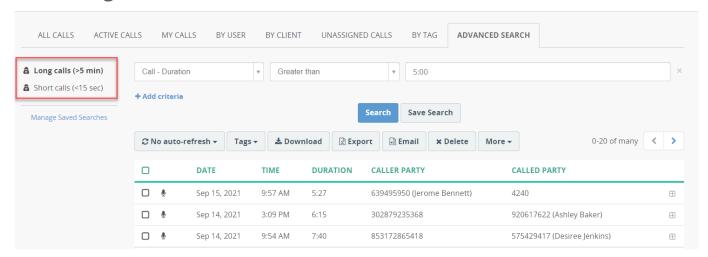
5.3.1 Overview

You can save the advanced search criteria so that you can reuse them in the future.

The saved searches are shown in the left pane, from where you can load them in one click.

Recordings

Wide view 🚜



5.3.2 Create a saved search

To save the advanced search criteria:

- 1. Navigate to the **Advanced Search** page.
- 2. Enter the search criteria and click Save Search.



- 3. On the \boldsymbol{Add} \boldsymbol{Saved} \boldsymbol{Search} page, specify the following parameters:
 - Name provide the unique name
 - · Visibility decide whether you want to share this search with all users or use it privately only.
 - Refine your search criteria, if needed.

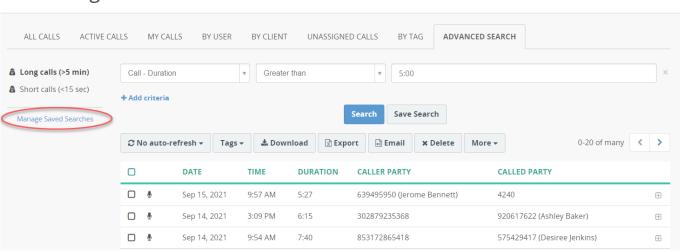


4. Click Save.

5.3.3 Manage a saved search

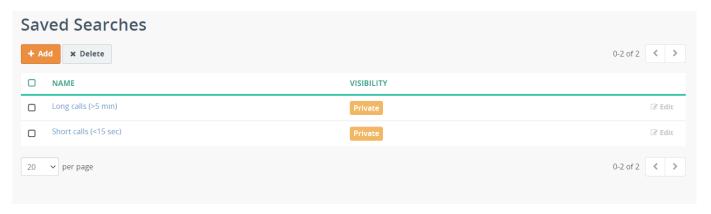
To manage a saved search, click the **Manage Saved Searches** link in the left-side pane.

Recordings



Wide view ⊮

On the $\bf Saved\ Searches$ page, you can add, edit or delete the existing saved searches.



6. Reports

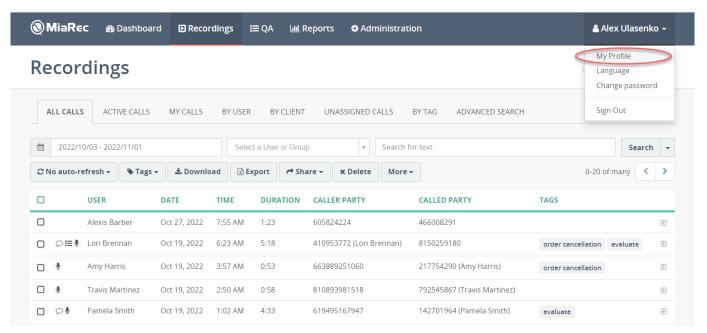
6.1 Overview

For details on reporting, check the Reporting User Guide.

7. My Profile

7.1 My Profile Overview

To access your user profile settings, click your name in the top right corner and select My Profile.



On the Personal Info page, you can edit your email, and change the default timezone and language.



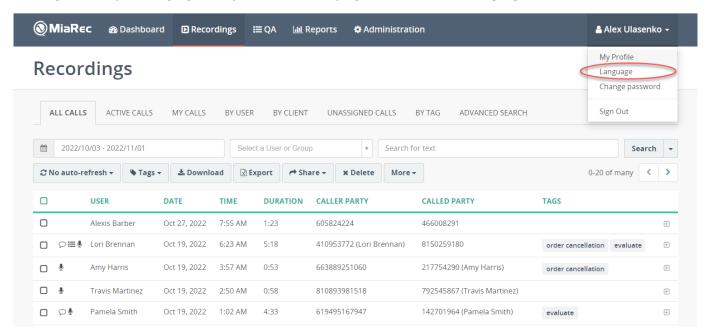
My Profile



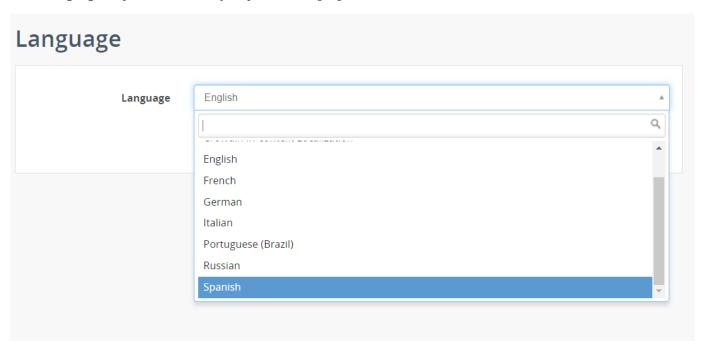
Wide view 2

7.2 Change language

To change the web portal language, click your name in the top right corner and select Language.



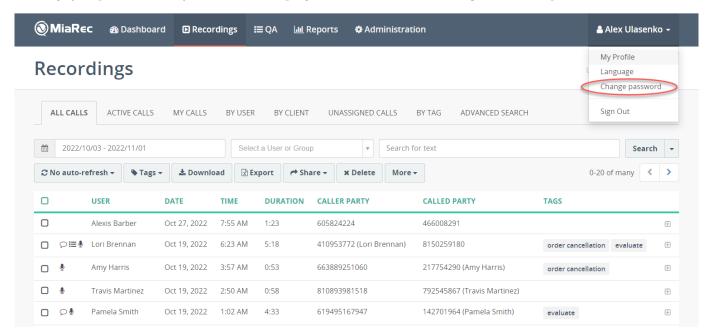
In the ${\bf Language}$ dropdown box, select your preferred language and click ${\bf Save}.$



Wide view 🗹

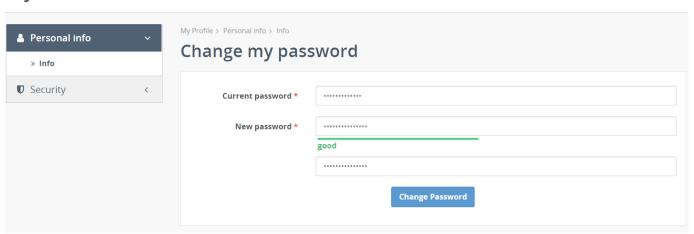
7.3 Change password

To change your password, click your name in the top right corner and select the Change Password option.



Enter your current and new passwords, and click the **Change Password** button.

My Profile



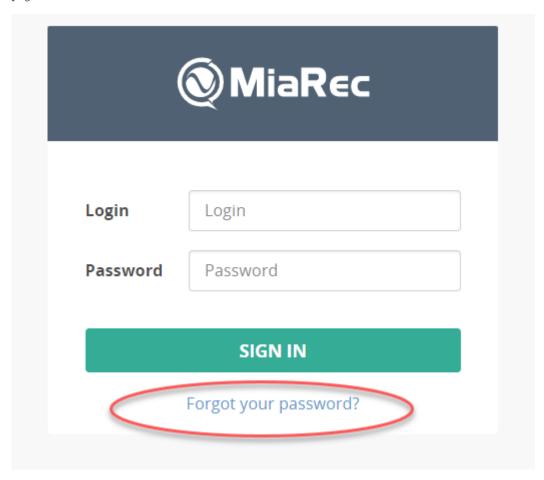
7.3.1 Reset password by email



A password reset by email may not be available for your account if:

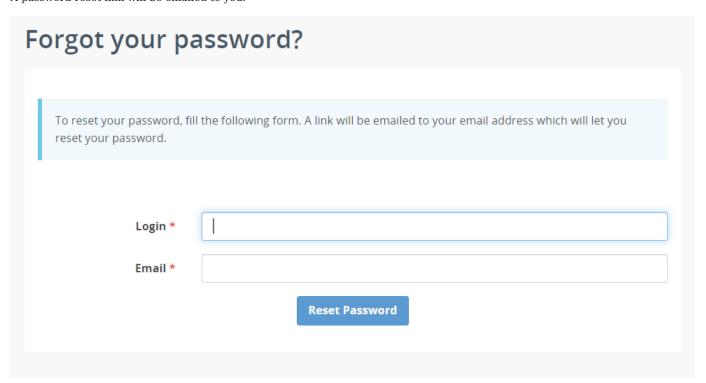
- An email address is not configured for your user profile. Contact your system administrator for assistance.
- A Single Sign-On is activated for your user profile. In this case, you need to reset the password in the corresponding web portal (Identity Provider) rather than in MiaRec.

If you forgot your password, you can request to reset your password by clicking the **Forgot your password?** link on the login page.



On the Forgot your password? page, provide your login and email and click the Reset Password button.

A password reset link will be emailed to you.



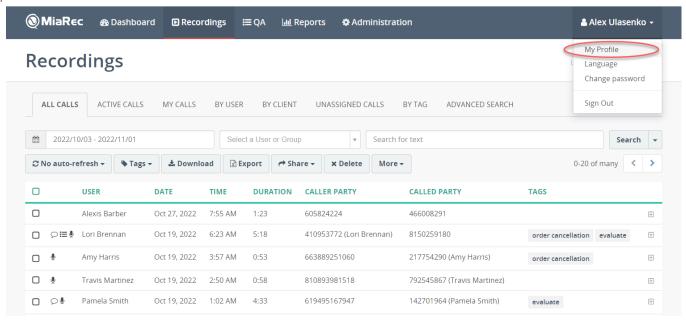
7.4 Security settings

7.4.1 2-Step Verification

A multi-factor authentication, also referred to as two-factor authentication (2FA), is a combination of your login credentials and a verification code to access the web portal. Each time you sign into your account, you'll require to enter a one-time verification code that is sent to you via email or SMS.

To activate 2-step verification in your account:

 $_{
m 1.}$ Click your name in the top right corner and select My Profile.



2. Expand the $\bf Security$ pane and click $\bf 2\text{-}Step$ $\bf Verification.$

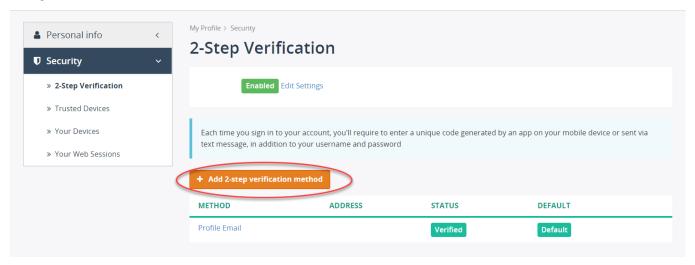
My Profile



3. Click the Add 2-step verification method button. You will be prompted to enter the password for your account.

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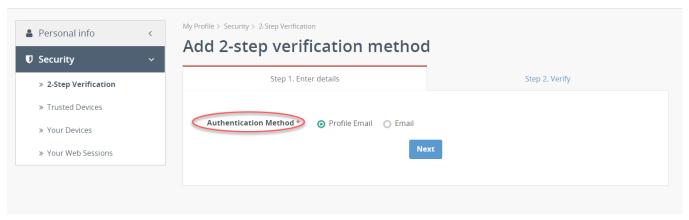
My Profile



4. In **Step 1**, in the **Authentication method** field, specify the email address type to which the verification code will be sent. This could be either the profile email or an alternative email address. After that, click **Next**.

My Profile

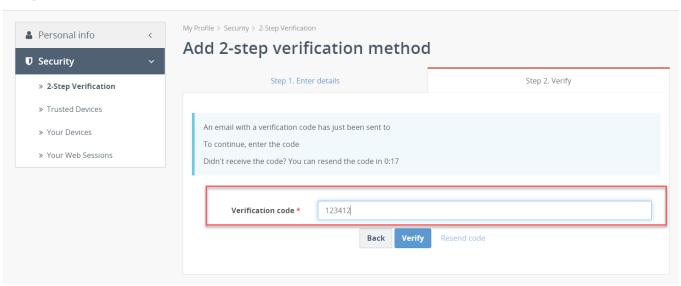
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5. Under Step 2, in the Verification code field, enter the code that was sent to your email address.

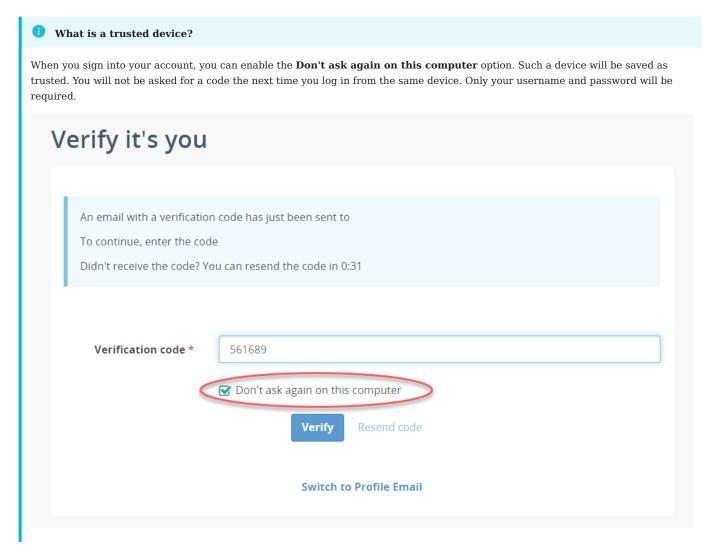
My Profile

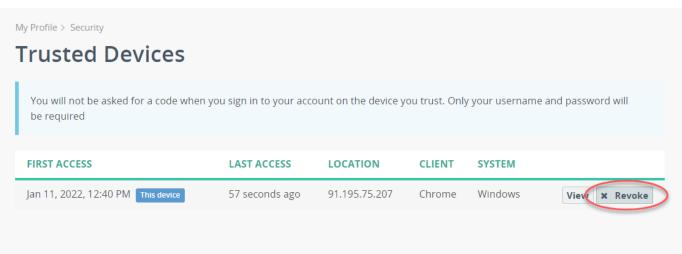
Wide view ⊌



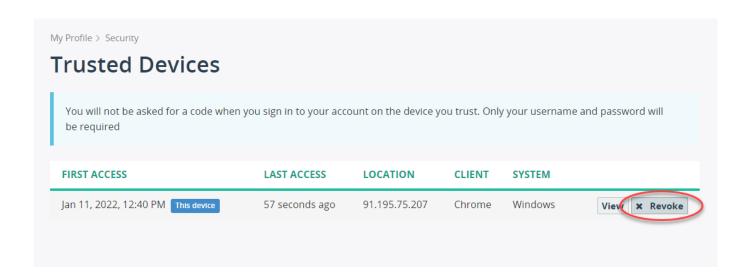
7.4.2 Trusted Devices

On the Trusted Devices page, you can view the devices that were marked as trusted when you signed in to your account.





For a device listed that you do not recognize, you revoke a trust by clicking the **Revoke** button.



7.4.3 Your Devices

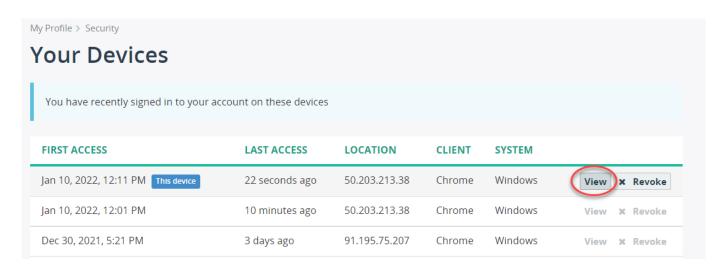
The **Your Devices** page shows all the devices and their IP addresses from where you accessed your MiaRec account. When you access the web portal from a new device, you will receive an email notification.

My Profile

Wide view 🚜



To view detailed information about the device, click the ${\bf View}$ button in a list.



My Profile

Wide view ⊮[™]



7.4.4 Your Web Sessions

The **Your Web Sessions** page shows all your currently active web sessions.

If you see any suspicious activity, click Terminate to terminate the session and change your password.

My Profile

Wide view ⊮[™]

