



CallCopy®

Innovations in Call Recording
and Contact Center Solutions

cc: Discover Web Player Manual, v5.1 R2

April 2013

Reference Guide

www.callcopy.com

Security Classification: CallCopy Confidential.

Distribution: Approved internal CallCopy staff only and licensed CallCopy customers.

Note: Applicable non-disclosure agreements must be in force for authorization.

| Revision History | | | |
|------------------|---|-------------|----------------|
| Revision | Change Description | Author | Effective Date |
| 0 | Initial release. | MBuckingham | 2013-02-15 |
| 1 | Explained permissions required to view, edit, or delete user's own QA evaluations. Added acceptable values for the Call List Survey filter. Added CAV Player details under Export file types. | MBuckingham | 2013-03-28 |
| 2 | Updated Call List Filter > Surveys to include Other Score Values component. | MBuckingham | 2013-04-30 |

© Copyright 2014, CallCopy, Inc. All rights reserved.

No part of this document may be transmitted or distributed, or copied, photocopied, scanned, reproduced, translated, microfilmed, or otherwise duplicated on any medium without written consent of CallCopy. If written consent is given, the same confidential, proprietary, and copyright notices must be affixed to any permitted copies as were affixed to the original. The information contained in this document does not constitute legal advice, and should not be considered a replacement for sound legal counsel. CallCopy shall be in no way liable for any use or misuse of the information presented herein.

Table of Contents

| | |
|---|-----------|
| Introduction | 6 |
| Web Portal Basics | 7 |
| Log In | 7 |
| Forgot Password Feature | 8 |
| Locate Version Number | 8 |
| Navigate the Web Portal | 9 |
| Change Your Password | 9 |
| Log Out | 10 |
| Home Tab | 10 |
| New Assignments | 11 |
| Reviewed Files | 11 |
| Call List Quick Filters | 12 |
| Filter Bar | 13 |
| Quick Filter Menu | 13 |
| Calendar | 13 |
| Apply Calendar Filter with another Quick Filter | 13 |
| Agent | 14 |
| CallCopy Group | 14 |
| ACD Queue | 14 |
| ACD Group | 15 |
| Categories | 15 |
| Build a New Category | 16 |
| Edit or Delete a Category | 16 |
| My Filters | 16 |
| Tag Cloud | 17 |
| Page Navigation Bar | 18 |
| Call List Management | 19 |
| Call List Settings | 19 |
| Web Player Settings | 20 |

| | |
|---------------------------------|-----------|
| Context Menu | 21 |
| Play | 21 |
| Flag | 21 |
| Export Selected | 22 |
| Export Call List | 22 |
| Perform Evaluation | 22 |
| View Completed Evaluations..... | 23 |
| View Completed Survey..... | 23 |
| Bookmark | 23 |
| Archive Options | 24 |
| Categorize | 24 |
| Edit a Call Record..... | 26 |
| Copy Call Link | 27 |
| Delete a Call Record..... | 28 |
| Filters..... | 29 |
| Options..... | 29 |
| Data Fields | 29 |
| Quality Management..... | 32 |
| Surveys | 32 |
| Date/Days of the Week | 33 |
| Duration..... | 33 |
| Data Comparison..... | 33 |
| Other Options | 34 |
| Filter Option Controls..... | 34 |
| Saving My Filters | 35 |
| Accessing My Filters..... | 36 |
| Call Playback..... | 37 |
| Playback Details Panel | 38 |
| Waveform Display..... | 38 |
| Waveform Indicators..... | 39 |
| Playback Controls..... | 40 |

| | |
|---|-----------|
| Play/Pause and Playback Speed Icons | 40 |
| Interaction Timer..... | 40 |
| Volume Control..... | 41 |
| Add Bookmarks | 41 |
| Waveform Zoom | 42 |
| In-Call Bookmarking | 43 |
| Add Bookmarks | 43 |
| View Bookmarks..... | 44 |
| Edit or Delete Bookmarks | 44 |
| Feature Panels | 44 |
| Screen Capture Panel..... | 45 |
| Layer Details Panel..... | 46 |
| Live Monitoring | 47 |
| Live Monitor List | 47 |
| Live Monitoring Play | 48 |
| Sort and Filter List Monitor Agents | 51 |
| Screens View | 52 |
| Screens View Playback | 54 |
| About CallCopy | 55 |

Introduction

This document explains how to use the cc: Discover Home and Web Player tabs. These tabs are used by managers and agents to

- Playback call recordings and view data associated with the calls.
- Perform QA evaluations on recordings. (See the *cc: Discover QA Coaching Manual* for instructions on how to perform evaluations.)
- Review QA evaluations.
- Monitor agents audio and computer desktops in real time (i.e., live).

The Web Player tab can be used by anyone that has been assigned permissions from an administrator.

Reference the *cc: Discover Administration Manual* for more information regarding how features described in this guide are managed, including encryption and permissions for controlling users' access to features.

Web Portal Basics

The cc: Discover Web Portal is a series of Web pages that enable users to perform tasks. The Web Player is one page in the portal.

Log In

Your system administrator should provide you with the necessary information to log into the cc: Discover Web Portal: username, initial password, possibly a login mode, and the URL or link to the portal. Your system may be setup to use your Windows network account or a cc: Discover account, which your administrator should explain to you.

Follow these steps to login:

1. In a web browser, type the URL (hostname or IP address) of the site into your browser's address bar. (http://callcopyserver.yourcompany in this example.) The login page appears.



2. The Login Mode box appears in some cc: Discover setups. If your administrator told you to use your Windows network login, select Active Directory. Otherwise, select Database.
3. Enter your cc: Discover or Windows network username.
4. Enter your cc: Discover password.

Note Passwords are case sensitive.

5. (Optional) Select 'Remember my username?' if you want your username to appear automatically each time you access the login page.
6. Click **Login**. cc: Discover opens to the last page you accessed. For a first time login, it opens to the Home tab.

If your login fails, you will be presented with the following error: "An invalid username or password was used."

To attempt another login, you should

- Check that the Caps Lock is not on.
- Check that you have the correct username, password, and login mode.

Note If you fail to login after three or more attempts, you may be locked out of the system and have to contact the system administrator. Instead, after two login failures, use the Forgot Password feature.

Forgot Password Feature

Note This feature does not work if your account has been locked due to login failures.

If you forget your password, you can use the Forgot Password feature on the login page. Your password will be reset, and a temporary password will be e-mailed to you if you use this option.

Follow these steps:

1. Click the **Forgot Password** link on the login screen.
2. On the page, enter the username and click **Submit**.

If the reset is successful, you will see the following message: “A new password has been generated and sent to your email address.” Once you have logged into the system, you will be able to change your password.

If the reset fails, you will see this message: “User does not exist, or email address not available.” Please contact your cc: Discover system administrator to resolve this issue.

Locate Version Number

The version number for your cc: Discover software appears in the upper-right corner of the login page. It also appears if you place the cursor over the CallCopy icon. This version number can be useful for locating correct documentation for your software and when obtaining support for your system.



Navigate the Web Portal

Web Portal navigation is achieved by tabs and menus. The tabs available depend on the user's security permissions and the cc: Discover modules purchased.

The navigation menu for a tab is on the left side of the portal. Clicking a menu header will open a list of page links, menu items, or other content. When you click on a header to display its content, any other open sections of the menu will collapse. You can expand that section again by clicking on its header.

The screenshot shows the cc: Discover Web Player interface. At the top, there are navigation tabs: Home, Web Player (selected), Coaching, Reporting, and Administration. Below these are sub-tabs: Call List and Live Monitor. On the left side, there is a sidebar menu with sections: Calendar (showing May 2011), Agent, CallCopy group, ACD Gate, Group, Categories, and My Filters. The main content area displays a table of call records with a filter set to 'Time Recorded'. The table has columns for Record ID, Video, First Name, Last Name, Agent Number, Voice Port, Time Recorded, Duration, and Call Direction.

| Record ID | Video | First Name | Last Name | Agent Number | Voice Port | Time Recorded | Duration | Call Direction |
|-----------|-------|------------|-----------|--------------|------------|-----------------------|----------|----------------|
| 24251 | | LYNNE | WALL | 4023 | 1173 | 5/24/2011 9:58:17 PM | 00:06:12 | I |
| 11312 | | MEREDITH | MICHAEL | 4028 | 1245 | 5/24/2011 8:34:51 PM | 00:04:15 | I |
| 34089 | | MANUEL | PATE | 4020 | 1034 | 5/24/2011 7:35:09 PM | 00:04:15 | I |
| 9397 | | PATRICE | ACEVEDO | 4014 | 1160 | 5/24/2011 5:49:10 PM | 00:04:15 | I |
| 29093 | | ADRIENNE | WALLACE | 4017 | 1454 | 5/24/2011 3:36:18 PM | 00:07:44 | O |
| 7500 | | JEANIE | PRICE | 4009 | 1314 | 5/24/2011 1:57:49 PM | 00:07:44 | I |
| 4716 | | JEANIE | PRICE | 4009 | 1434 | 5/24/2011 1:50:48 PM | 00:08:11 | O |
| 13999 | | ANTONIO | COPELAND | 4029 | 1424 | 5/24/2011 1:37:47 PM | 00:06:12 | O |
| 5792 | | GORDON | WIGGINS | 4032 | 1378 | 5/24/2011 12:49:15 PM | 00:07:44 | O |
| 7837 | | KATHLEEN | BYERS | 4034 | 1160 | 5/24/2011 12:28:55 PM | 00:07:44 | O |
| 43835 | | FREDDIE | OSBORN | 4004 | 1493 | 5/24/2011 12:23:31 PM | 00:08:11 | O |
| 40274 | | ADAM | COX | 4007 | 1266 | 5/24/2011 12:09:06 PM | 00:07:44 | O |
| 1150 | | TERRI | PARSONS | 4012 | 1034 | 5/24/2011 10:32:20 AM | 00:06:12 | I |
| 37825 | | BONNIE | MORROW | 4031 | 1023 | 5/24/2011 10:29:17 AM | 00:03:57 | O |
| 36010 | | MIGUEL | CHARLES | 4022 | 1484 | 5/24/2011 10:04:25 AM | 00:03:57 | O |

Change Your Password

Follow these steps to change your password:

1. Click the **Change Password** link in the upper right-hand corner of every page.
2. On the Change Password page, enter a new password, and then retype the password in the Confirm New Password field.
3. Click **Save**.

Change Password

New Password :

Confirm New Password :

Log Out

Once you have completed your session, it is very important to log out for security purposes. To logout, click the **Logout** link located at the top-right of every page. Once you have successfully logged out, you are returned to the login page.



Home Tab

All users have access to the Home tab but what they see depends on their role permissions and group memberships.

The Home tab's Assignment Inbox enables supervisors to distribute evaluations and documents (e.g., training material and announcements) to cc: Discover users. Items are distributed by adding content via the Coaching tab's Manage Content menu and assigning the content to groups. (See the *cc: Discover QA Coaching Manual* for additional information.)

Tip Distribute the cc: Discover manuals to the appropriate users via the Content Library. Doing this ensures that users always have access to the manuals when they are in the application, and it can reduce the number of questions to system administrators.

New Assignments

The New Assignments page shows documents that have been assigned to a user's groups but not yet viewed by the user. When user's have new assignments, a letter icon appears at the top of the portal. Clicking the letter icon opens the New Assignments list.

| Actions | Title | Type | Assigned Date | Priority | Doc Type | Size | Duration | Assigned by |
|----------------|--|------|---------------|----------|----------|--------|----------|-----------------------------|
| Done | TW Test | ✓ | 2/29/2012 | Normal | -- | -- | 00:00:00 | Administrator Administrator |
| File Not Found | How a CC_ScreenCapClient.ini should look | □ | 9/20/2011 | High | INI | 386 | 00:00:00 | Administrator Administrator |
| Done | Losing.png | □ | 2/28/2012 | Low | PNG | 184328 | 00:00:00 | Administrator Administrator |

This information is assigned when the document is added to the Content Library:

- **Actions** – After users open documents, they can click **Done** in this column to report that they have reviewed the assignment. If File Not Found appears in the column, the assignment has been deleted, moved, or renamed in the cc: Discover database. Users must contact their supervisor to reload the assignment.
- **Title** – Title an administrator gave to the document.
- **Type** – A check mark appears for QA evaluations. A white square appears for all other documents. No special permissions are required for acknowledging QA evaluations, but to view, edit, or delete them, there are specific coaching permissions necessary to enable this functionality. Please refer to the *cc: Discover Administration Manual* for more information on these permissions.
- **Assigned Date** – Date that a supervisor assigned the document to a group.
- **Priority** – Assigned by supervisor for agent to know how soon a document should be reviewed. Can be Low, Normal, or High.
- **Doc Type** – File type (e.g., Excel, Word, PDF, etc.)
- **Size** – File size
- **Duration** – Estimated length of time (hours:minutes:seconds) needed to review the document.
- **Assigned by** – Name of the user who assigned the document to a group.

Reviewed Files

To review an assigned file, double-click it. It opens in a separate window or tab, depending on the file type.

To confirm that a file has been reviewed, click **Done** on its entry. The entry is removed from the inbox and now appears in the Reviewed Files list. Documents remain in this list until they are deleted by an administrator from the Content Library. Evaluations remain in this list until they are deleted by evaluators.

Call List Quick Filters

The Web Player tab has the Call List, which displays individual call recording records and enables users to review recorded calls.

Data available for record fields depends on the source telephone system. Some telephone systems may not provide the data listed.

Columns can be reorganized by clicking a column header with the mouse and dragging it to the left or right. Records can be sorted (Low to High, High to Low, A to Z, Z to A) by clicking the header and clicking the up or down arrows that appear. This organization affects only the user that creates it, and it remains in effect the next time the user logs into the system.

The Quick Filter menu is displayed on the left, and the Call List is displayed in the main section of the page.

cc: Discover

Home | **Web Player** | Coaching | Reporting | Administration | Logout

Call List | Live Monitor

Calendar

◀ May, 2011 ▶

| | | | | | | |
|----|----|----|----|----|----|----|
| Su | Mo | Tu | We | Th | Fr | Sa |
| | | | | | | |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | | | | |

Agent

CallCopy group

ACD Gate

Group

Categories

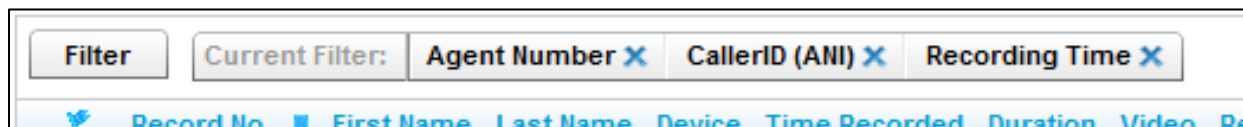
My Filters

Filter | Current Filter: **Time Recorded** X

| Record ID | Video | First Name | Last Name | Agent Number | Voice Port | Time Recorded | Duration | Call Direction | |
|-----------|-------|------------|-----------|--------------|------------|---------------|-----------------------|----------------|---|
| ▶ | 24251 | ☐ | LYNNE | WALL | 4023 | 1173 | 5/24/2011 9:58:17 PM | 00:06:12 | I |
| ▶ | 11312 | ☐ | MEREDITH | MICHAEL | 4028 | 1245 | 5/24/2011 8:34:51 PM | 00:04:15 | I |
| ▶ | 34089 | ☐ | MANUEL | PATE | 4020 | 1034 | 5/24/2011 7:35:09 PM | 00:04:15 | I |
| ▶ | 9397 | ☐ | PATRICE | ACEVEDO | 4014 | 1160 | 5/24/2011 5:49:10 PM | 00:04:15 | I |
| ▶ | 29093 | ☐ | ADRIENNE | WALLACE | 4017 | 1454 | 5/24/2011 3:36:18 PM | 00:07:44 | O |
| ▶ | 7500 | ☐ | JEANIE | PRICE | 4009 | 1314 | 5/24/2011 1:57:49 PM | 00:07:44 | I |
| ▶ | 4716 | ☐ | JEANIE | PRICE | 4009 | 1434 | 5/24/2011 1:50:48 PM | 00:08:11 | O |
| ▶ | 13999 | ☐ | ANTONIO | COPELAND | 4029 | 1424 | 5/24/2011 1:37:47 PM | 00:06:12 | O |
| ▶ | 5792 | ☐ | GORDON | WIGGINS | 4032 | 1378 | 5/24/2011 12:49:15 PM | 00:07:44 | O |
| ▶ | 7837 | ☐ | KATHLEEN | BYERS | 4034 | 1160 | 5/24/2011 12:28:55 PM | 00:07:44 | O |
| ▶ | 43835 | ☐ | FREDDIE | OSBORN | 4004 | 1493 | 5/24/2011 12:23:31 PM | 00:08:11 | O |
| ▶ | 40274 | ☐ | ADAM | COX | 4007 | 1266 | 5/24/2011 12:09:06 PM | 00:07:44 | O |
| ▶ | 1150 | ☐ | TERRI | PARSONS | 4012 | 1034 | 5/24/2011 10:32:20 AM | 00:06:12 | I |
| ▶ | 37825 | ☐ | BONNIE | MORROW | 4031 | 1023 | 5/24/2011 10:29:17 AM | 00:03:57 | O |
| ▶ | 36010 | ☐ | MIGUEL | CHARLES | 4022 | 1484 | 5/24/2011 10:04:25 AM | 00:03:57 | O |

Filter Bar

The filter bar displays any current filters applied to the Record List. This could be filtering by the date the call was recorded, by a specific agent, or a phone number.



The options being used are displayed after the **Current Filter:** label. Hovering over each filter will display the details of their settings. To remove a filter from the current list, click the close icon **X** next to that filter's label.

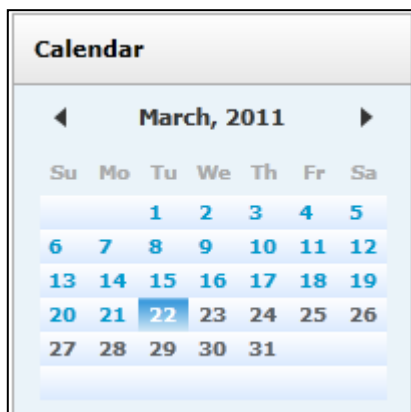
Removing all filters displays all call recordings in the system. This should be avoided because it can cause system performance issues.

Quick Filter Menu

The Quick Filter menu on the left side of the page has shortcuts for locating specific calls in the system. Some Quick Filters may not be populated on all systems, depending on the recording integration type and items set by your system administrator.

The available filters are described on the following pages.

Calendar

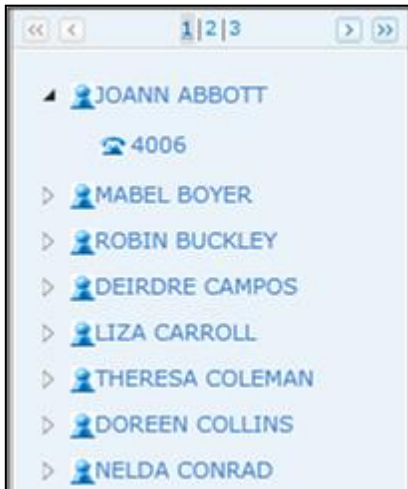


Allows the user to select and display records from a specific date. Dates with available records are colored blue, while dates without records are gray. The current selected date is highlighted. Each date is selectable, and users can move between months by using the arrow icons to the left and right of the Month and Year display.

Apply Calendar Filter with another Quick Filter

Call records can be filtered by date and a second filter. For example, the system can retrieve all calls for an agent on a specific date. First, click a filter menu and select an agent, group, or category. Then click the Calendar menu and a specific date. (See the "[Filters](#)" section of this document for information on how to apply multiple filter criteria to the call list.)

Agent

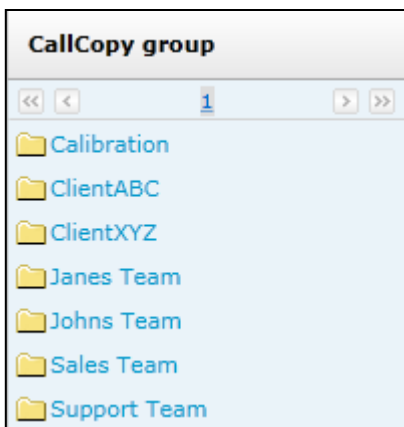


Displays the list of agents that the logged-in user can access. Selecting an agent will display records only for that Agent.

Users can also drill down and select a specific Phone ID by clicking the triangle icon next to the agent icon. If an agent is configured for multiple phone extensions or login numbers, you can select and filter records for the individual identifier.

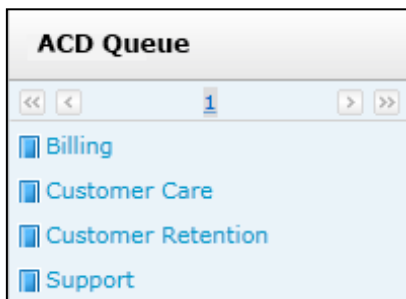
Only current extensions specified on the user account appear. If the agent had other extensions in the past, those extensions remain on the call record, but you cannot filter for just those extensions for an agent.

CallCopy Group



Displays the CallCopy Groups that the logged-in user can access. CallCopy Groups are created by system administrators and are often based on a company's organization or projects. Selecting a group displays records for Agents that are members of that group.

ACD Queue



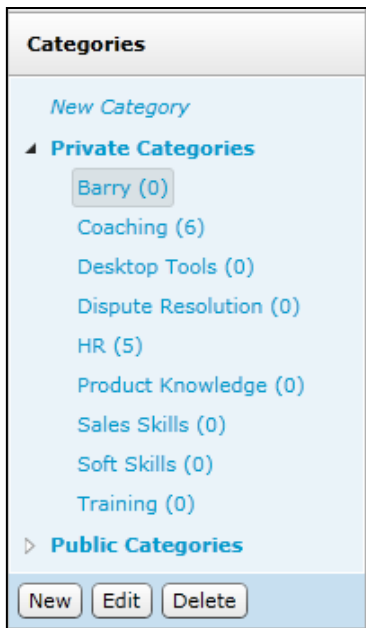
(This is an optionally populated list.) Depending on the recording integration and telephony equipment setup, values such as Queue or Gate can be listed by name or number, if available. Selecting an item from this list would filter the Call List to only display calls that were delivered to the selected queue or gate.

ACD Group



(This is an optionally populated list.) ACD Group filter items depend on the recording integration and information configured on the telephony equipment. For example, values such as Hunt or Skill group can be listed by name or number, if available.

Categories



Lists any Categories accessible by the logged-in user. The number of calls in a category appears in parenthesis. Clicking on an item will display any calls that have been tagged with the selected Category.

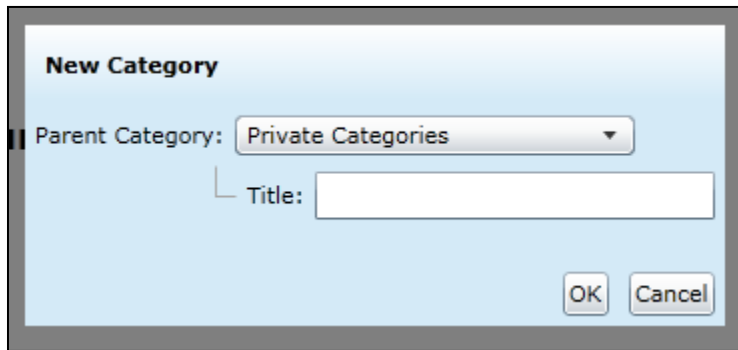
Private categories are those only you can see. Public categories can be seen by any user with access to the Web Player.

However, users can see only the calls within that category for the Discover Group(s), ACD Group(s), and ACD Gate(s) to which they have been associated. Only the creator of a public category can add or remove calls from that category.

See the "[Call List Management > Categorize](#)" section of this guide for more information.

Build a New Category

To build a category, click on the **New Category** link.



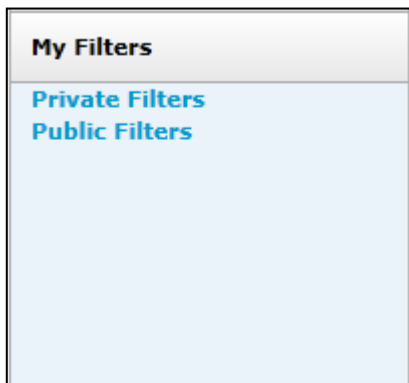
Select the Parent Category (Public, Private, or another category previously created to make your new category a sub-category). Type in the name of the category (25 characters max) and click **OK**.

Edit or Delete a Category

To edit or delete an existing category or sub-category, click the category name. An option menu will populate at the bottom of the Category Quick Filter and will display the options for New, Edit, and Delete.

Note If a category is deleted, the calls in it are not deleted. Only the category retrieval tag associated with the calls is deleted.

My Filters



This list links to Private and Public Saved Filters for the logged-in user. See the "[Filters > Saving My Filters](#)" section of this guide for more information.

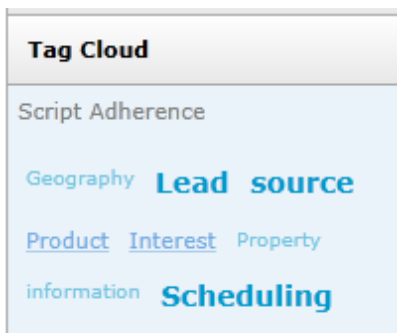
Tag Cloud



This filter menu is available only for clients that have installed cc: Analytics. The Tag Cloud is used to sort call recordings by the tag groups that have been assigned to them when the speech analytics engine reviewed them.

The tag size is weighted.

| Weight | Found on ... of the calls in the selection | Tag Image |
|--------|--|------------------|
| 1 | 99% or more | sales |
| 2 | 70% but less than 99% | callcopy |
| 3 | 40% but less than 70% | support |
| 4 | 20% or more and less than 40% | survey |
| 5 | less than 20% | negative phrases |

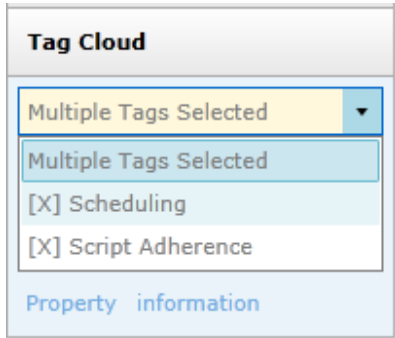


Clicking on a tag, such as the Script Adherence tag, will display all of the recordings that matched that tag. That tag then moves to the top left corner of the Tag Cloud menu.

Notice that the tag weights change based on the new number of call records.

Clicking that tag then removes it as the filter.

Call List Quick Filters

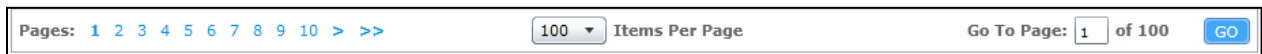


You can click on multiple tags to combine them.

You can remove a tag from the criteria by selecting the pull-down and clicking the “x” next to the tag.

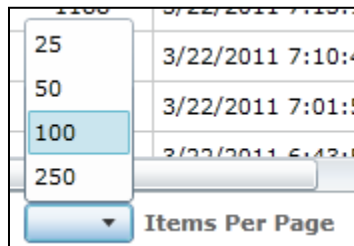
Page Navigation Bar

The Page Navigation Bar will always be displayed at the bottom of the Record List. This bar contains the controls to allow you to easily switch between pages of records.



You can click on an individual page number using the page links on the left-hand side. Clicking the single arrow link on the left side of the list will take you to the previous set of pages, clicking the icon on the right side will take you to the next set of pages. The double arrow links will take the user to the beginning or end of the entire list. Alternatively, you can manually enter a page number in the page field on the right-hand side of the bar, and click **Go** to take you to that page.

You can also select the number of records that you would like to display in the Record List, by selecting the option from the “dropdown” list in the navigation bar.



Call List Management

This chapter explains how to manage the call records and their appearance in the Call List.

Call List Settings

To access the Call List Settings, click the **Settings** button at the top right of the Filter bar.

The Call List Settings let the user choose what information appears in the Call List records by selecting or clearing the available options. The Reset button undoes selections made since the page was opened.

The Default Columns are:

- **Extension:** The physical port the call was recorded on. This term is variable based on your system's "terminology" settings.
- **Duration:** The time length of the recording.
- **First Name:** The first name of the recorded employee.
- **Last Name:** The last name of the recorded employee.
- **Record ID:** Unique ID used to identify call recordings.
- **Flagged:** Displays the flag icon (🚩), if a user has marked the record as 'Flagged'.
- **Bookmarked:** Displays the bookmark icon (🔖), if a user has marked the record with notes.
- **Evaluations Completed:** Indicates the number of Quality Assurance evaluations submitted.
- **QA Score:** The average score for all evaluations performed on the transaction.
- **Time Recorded:** The date and time of the recording.
- **Video:** Indicates whether screen activity was recorded. Screen recording is a system and scheduling option.

Other Columns are:

- **Caller ID (ANI):** The phone number or extension of the calling party.
- **Call Direction:** Denotes if a call was Inbound (I) or Outbound (O).
- **Call ID:** The Call ID assigned from the PBX/ACD to identify the call.
- **Channel:** Logical internal identifier for the recording port/channel.
- **Agent ID:** The Phone ID that will be recorded.
- **Number Called (DNIS):** The phone number or extension that was called.

Call List Management

- **Total Hold Time:** The total amount of time a call was in a "hold" status, according to the customer's PBX. Availability of this feature and how it is calculated varies depending on the make/model of the PBX.
- **Filename:** Location and name of the file with the call recording.
- **ACD Queue:** If a call was delivered over an ACD system, the ACD Gate/Queue name.
- **Global ID:** Value used by the system to associate voice recording and video capture.
- **ACD Group:** For inbound routed ACD calls, this is the Hunt Group or Skill value.
- **Wrap Duration:** For video captures, the time after a call ends and the agent finishes working with the PC applications.
- **Survey Score:** Overall score for a call if the customer completed an IVR survey after the call ended. Requires that the cc: Survey module is in use.

User Columns are data fields not normally utilized in the system. Data received from third party IVR, CRM, or ACD platforms can be inserted data into these fields. See the *cc: Discover Administration Manual's* "Terminology" section for additional information.

Note Customers can request a custom default setting configuration that is applied when a user account is created. Contact CallCopy Support for additional information.

Web Player Settings

The Web Player Settings allow you to set the default for how the Web Player and video are going to be displayed. These options are configurable on a user-by-user basis. To access the Web Player Settings, click the **Settings** button at the top right of the Filter bar.

| Web Player Settings | | |
|--|--|---|
| Play Video Automatically <input checked="" type="checkbox"/> | Always Play Calls In New Window <input type="checkbox"/> | Perform Evaluation In New Window <input type="checkbox"/> |

Context Menu

The context menu contains many functions that can be applied to a call record. To access the context menu, left-click the call record that you want to work with, then right-click the mouse button to display the menu.

| | | | | | |
|-------|------|--|-----------------------------------|-------|---------------|
| NTON | STR | | Play | - | 1/24/2013 5:1 |
| FAEL | YC | | Flag | - | 1/24/2013 5:0 |
| INALD | GI | | Export Selected | - | 1/24/2013 5:0 |
| RIK | JUA | | Export Call List | - | 1/24/2013 5:0 |
| FERY | AY | | Perform Evaluation | - | 1/24/2013 5:0 |
| STINE | CONT | | View Completed Evaluations | 0.0 % | 1/24/2013 5:0 |
| ARI | KE | | View Completed Survey | - | 1/24/2013 5:0 |
| DRED | SHA | | Bookmark | 0.0 % | 1/24/2013 5:0 |
| IANE | HU | | Archive Options | - | 1/24/2013 5:0 |
| INA | FLET | | Categorize | 0.0 % | 1/24/2013 5:0 |
| .COPY | AG | | Edit Call | - | 1/24/2013 5:0 |
| ACY | MA | | Copy Call Link | - | 1/24/2013 4:5 |
| OLAS | MII | | Delete Call | - | 1/24/2013 4:5 |

Play

See the "[Call Playback](#)" section of this document.

Flag

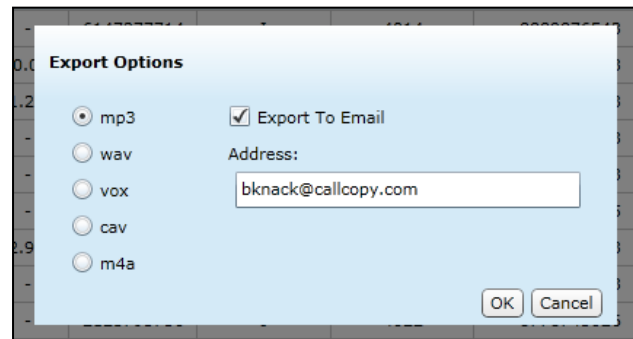
Flagging a call will display the flag icon () on the selected record. This makes it easier to see certain calls. The flag does not affect any reporting or other cc: Discover functions. To remove a flag, repeat these steps.

Multiple calls can be selected for flagging or exporting by pressing the Control key and clicking each record or clicking a record, holding the Shift key, and clicking another record.

Export Selected

The Export Selected option allows the user to export the recording to a file for playback outside the Web Player. This feature must be enabled in the logged-in user's permissions for the menu item to be displayed.

Selecting this function will display a sub-menu of available Export file types.



The available supported file types are:

- MP3: Suitable for playback on most computer and portable media players. File sizes can be large depending on call length, which can cause issues when trying to e-mail the file.
- WAV: Compatible with most computer media players. Uses GSM compression to achieve a very small file size that makes it ideal for transfer via e-mail or other methods.
- VOX: An older file type, normally used for playing back over a telephony system. Not compatible with most computer or portable media players.
- CAV: A proprietary format that contains both the audio and video for a call. Requires the use of the CallCopy CAV Player application for playback, which is available in the \CallCopy\Installers directory on any CallCopy server. If general access to the CAV Player is required, the customer should copy it to a shared location.
- M4A: The M4A file type is primarily associated with 'MPEG-4 Audio Layer'. Files in .M4A format are actually the audio layer of (non-video) MPEG 4 movies.

Files are exported to the location specified on the API server's settings. (See the *cc: Discover Administration Manual*.) If the user does not have access to that directory, the file can be sent to an email account.

To export via email, additional permissions must be granted to the user, and the system must be configured to use SMTP.

Export Call List

The Export Call list feature allows generating a CSV file containing information that can be defined during the export process. Columns available for export are the same available in the Call List Settings. This feature must be enabled in the logged-in user's permissions for the menu item to be displayed.

Perform Evaluation

Clicking this option will load the available Quality Evaluation forms for the call, which can then be completed and submitted for review. See the *cc: Discover QA Coaching Manual* for more information on evaluating calls.

View Completed Evaluations

This option opens a Coaching Quality Assurance window that lists the evaluations done for a call. The window is explained in further detail in the *cc: Discover QA Coaching Manual's* section on searching QA evaluations. Look in the Evaluations Completed column to see if a call has been evaluated.

View Completed Survey

This option allows a logged in user with permission to view surveys to pop-out the related survey detail report for the corresponding survey ID. It will display the same as when generated from the Survey Detail Report in the Reporting tab, but without the options for changing parameters.

Bookmark

Bookmarking allows a user to add a free-form text note to a call. This notation will be visible when playing back the call. The bookmarks are searchable using the Filter Options.

When you select the Bookmark function, a **Bookmark Notes** window will open.

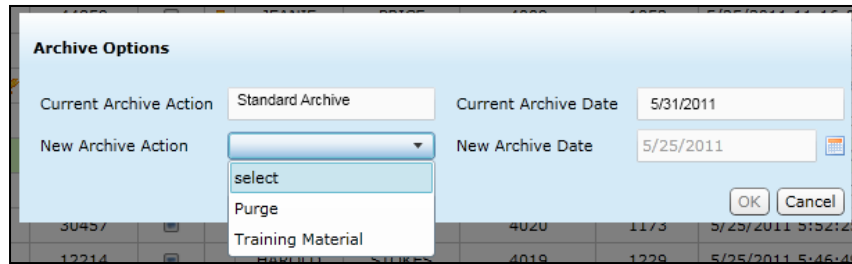
The image shows a screenshot of a 'Bookmark notes' dialog box. The dialog has a title bar with the text 'Bookmark notes:'. Below the title bar is a large, empty text input area. At the bottom of the dialog, there are two radio buttons: 'Public' and 'Private'. The 'Private' radio button is selected. To the right of the radio buttons are two buttons: 'Confirm Bookmark' and 'Cancel'.

Users can enter up to 200 characters (including spaces) into the text box. The bookmark can then be set to Public or Private. For Public bookmarks, any users that have access to play back the selected call will also see the bookmark text in the call. For Private bookmarks, only the current logged-in user will see the bookmark icon and text.

When completed, click the **Confirm Bookmark** button. You will be returned to the Call List page and the bookmark icon 📌 will be displayed in the selected record (may require refreshing the screen for icon to appear).

Archive Options

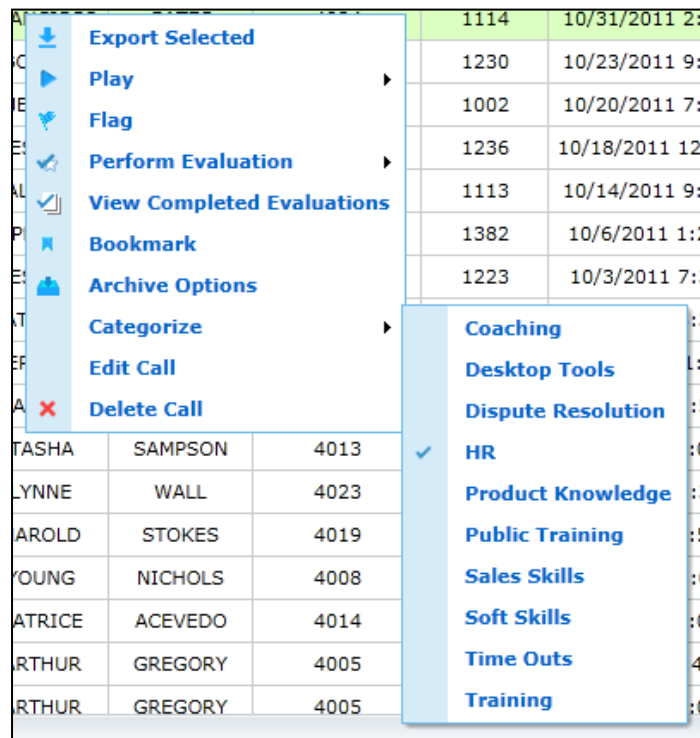
Archive Options will allow you to make changes to the Archive settings for single calls. For example, you may want to archive calls to use as training materials. You will see the currently applied archive action and the date it is slated to take place. The Purge action will delete the call record on the new archive date. Current and new archive actions must be setup by the system administrator before they can be used on calls.



Categorize

Call Categories are custom folders created to organize calls. (To add or remove available Categories, see the "[Call List Quick Filters](#)" chapter of this guide.)

Selecting the Category option from the Context Menu will display the available Categories. Clicking a category will add that call to the Category Quick Filter. If a call is already in a category, a check mark appears beside that category. Selecting the category removes the call from the category and clears the mark. Only the creator of a category can add calls to or remove calls from that category.



Alternatively, a call record can also be categorized by left-clicking on it, holding the mouse button down, dragging the call over to a particular category, and releasing the left mouse button (dragging and dropping).

| Group | | | 2891 | CHANDRA | GREGORY | 00:06:12 | 1401 | 3/22/2011 |
|---------------------------|------|--|------------------|----------|------------|----------------------|------|-----------|
| | | | 7053 | CHANDRA | GREGORY | 00:04:15 | 1078 | 3/22/2011 |
| Categories | | | 5840 | CLARISSA | ELLIOTT | 00:04:15 | 1269 | 3/22/2011 |
| <i>New Category</i> | | | 7459 | CLARISSA | ELLIOTT | 00:04:15 | 1117 | 3/22/2011 |
| Private Categories | | | 4358 | SONJA | PENNINGTON | 00:04:15 | 1080 | 3/22/2011 |
| Barry (0) | | | 3863 | DEIRDRE | CAMPOS | 00:07:44 | 1339 | 3/22/2011 |
| Coaching (6) | | | 1604 | THERESA | COLEMAN | 00:08:11 | 1392 | 3/22/2011 |
| Desktop Tools (0) | 5840 | | CLARISSA ELLIOTT | NELDA | CRISBY | 3/22/2011 9:17:55 PM | 1269 | 3/22/2011 |
| Dispute Resolution (0) | | | 2940 | HOLLY | WALSH | 00:08:11 | 1297 | 3/22/2011 |
| HR (5) | | | 6010 | ADELINE | GILBERT | 00:07:44 | 1330 | 3/22/2011 |
| Product Knowledge (0) | | | 12 | MAX | FREDERICK | 00:08:11 | 1298 | 3/22/2011 |
| Sales Skills (0) | | | 8921 | ROSALIND | MOODY | 00:08:11 | 1180 | 3/22/2011 |
| Soft Skills (0) | | | 1099 | BENJAMIN | WEBER | 00:08:11 | 1441 | 3/22/2011 |
| Training (0) | | | 9080 | CHANDRA | GREGORY | 00:08:11 | 1046 | 3/22/2011 |
| Public Categories | | | 7321 | CLAUDIA | HESTER | 00:07:44 | 1011 | 3/22/2011 |
| New Edit Delete | | | 5267 | MAX | FREDERICK | 00:04:15 | 1212 | 3/22/2011 |

To categorize multiple calls at once, use one of the following two techniques.

Sequential: If all the calls you want to categorize are listed one after another, left-click on the first call you want to categorize, then press and hold the Shift key on the keyboard and left-click on the last call to be categorized. Release the Shift key and then press and hold the Ctrl key. With that key pressed, click once on any of the highlighted calls (it will deselect it for the moment), and then left-click the same call, hold the mouse button down, and drag all the calls to the category you want to associate them with and release the left mouse button.

| Hunt Group | | | | CLINTON | STRONG | 1385 | 4033 | 7 |
|---------------------------|-------|--|--|--------------------|----------|--------------|------|-----------------------|
| | | | | DUANE | HUNT | 1441 | 4037 | 7 |
| Categories | | | | ERIK | JUAREZ | 1497 | 4030 | 7 |
| <i>New Category</i> | | | | ERIK | JUAREZ | 1096 | 4030 | 7 |
| Private Categories | | | | DOMINIQUE | CLARK | 1174 | 4034 | 7 |
| Coaching (20) | | | | ERIK JUAREZ | RAFAEL | YORK | 1096 | 7/13/2012 11:14:17 PM |
| Desktop Tools (3) | 3115 | | | DOMINIQUE CLARK | KRISTINE | CONTRERAS | 1174 | 7/13/2012 11:13:04 PM |
| Dispute Resolution (6) | 26528 | | | RAFAEL YORK | TRACY | MALONE | 1225 | 7/13/2012 11:12:28 PM |
| HR (23) | 39782 | | | KRISTINE CONTRERAS | RAFAEL | MONTEFERRERY | 1041 | 7/13/2012 11:00:47 PM |
| Product Knowledge (2) | 742 | | | NICHOLAS | MILLER | | 1212 | 4026 |
| Sales Skills (2) | | | | RENE | RILEY | | 1317 | 4027 |
| Soft Skills (3) | | | | | | | | |

Call List Management

Non-Sequential: If you want to select a group of calls, but not certain calls that fall between them in the list, hold the Ctrl key on the keyboard and left-click on each call you want to categorize. Each corresponding row will highlight. With the Ctrl key still held down, left-click once on any of the highlighted calls (it will deselect it for the moment), and then left-click the same call, hold the mouse button down, and drag all the calls to the category you want to associate them with and release the left mouse button.

| Hunt Group | | | | | | | |
|------------|---|--|--------------------|------------|------|------|-----------------------|
| | ▶ | | CLINTON | STRONG | 1385 | 4033 | 7/13/2012 11:14:17 PM |
| | ▶ | | DUANE | HUNT | 1441 | 4037 | 7/13/2012 11:12:28 PM |
| | ▶ | | ERIK | JUAREZ | 1497 | 4030 | 7/13/2012 11:12:28 PM |
| | ▶ | | ERIK | JUAREZ | 1096 | 4030 | 7/13/2012 11:12:28 PM |
| | ▶ | | DOMINIQUE | CLARK | 1174 | 4034 | 7/13/2012 11:12:28 PM |
| | ▶ | | RAFAEL | YORK | 1225 | 4025 | 7/13/2012 11:12:28 PM |
| | ▶ | | KRISTINE | CONTRERAS | 1041 | 4032 | 7/13/2012 11:12:28 PM |
| | ▶ | | TRACY | MASON | 1168 | 4005 | 7/13/2012 11:12:28 PM |
| | ▶ | | ALFREDO | MONTGOMERY | 1179 | 4006 | 7/13/2012 11:12:28 PM |
| | ▶ | | NICHOLAS | MILLER | 1212 | 4026 | 7/13/2012 11:14:17 PM |
| | ▶ | | ERIK JUAREZ | 1096 | 1317 | 4027 | 7/13/2012 11:12:28 PM |
| | ▶ | | RENE | RILEY | 1225 | 4027 | 7/13/2012 11:12:28 PM |
| | ▶ | | RAFAEL YORK | 1225 | 1106 | 4028 | 7/13/2012 10:54:43 PM |
| | ▶ | | TERRENCE | WELCH | 1179 | 4028 | 7/13/2012 10:54:43 PM |
| | ▶ | | ALFREDO MONTGOMERY | 1179 | 1379 | 4028 | 7/13/2012 10:54:43 PM |
| | ▶ | | TERRENCE | WELCH | 1379 | 4028 | 7/13/2012 10:54:43 PM |

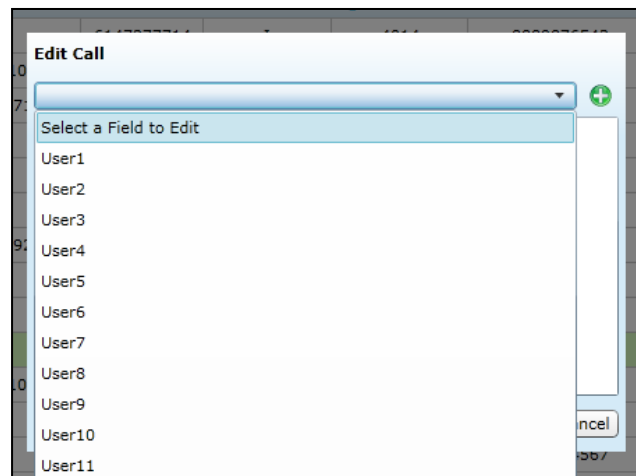
Categories

- New Category
- Private Categories
 - Coaching (20)
 - Desktop Tools (3)
 - Dispute Resolution (6)
 - HR (23)
 - Product Knowledge (2)
 - Sales Skills (2)
 - Soft Skills (3115)
 - test1 (0) 39782
 - Training (25856)
 - Training Opportunities (2)

Edit a Call Record

You can add information (metadata) to an individual call record after the call has been captured in the system. Edit Call uses the 15 User Defined fields supplied out of the box to allow you to add data to a record that is then searchable and filterable. The added information appears for the record only if the Call List settings have been configured to display the specific User Defined fields.

1. Select a field to edit using the dropdown menu.



2. Then enter your text. Character limits for these fields are as follows:

- user1-3: 20 characters
- user4-8: 255 characters
- user9-15: 50 characters

3. Multiple fields can be edited time by making multiple selections with the drop down menu.

4. Click **OK** to amend your data to the call record.

Click the red X to remove a field. Data can be edited following the same process.

Copy Call Link

This feature provides a link to an individual call that another user can use to directly access that call.

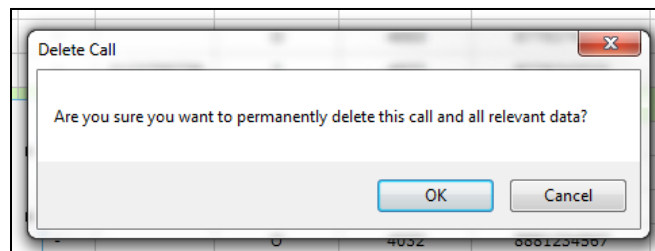
Clicking on **Copy Call** link will open a pop-up with the link to the call, and instructions on how to copy the link to your system's clipboard. From there, the link can be pasted into another program for distribution.

While no specific permissions are required to generate the link, standard permission checks will control access to the call by viewers using the link.

Delete a Call Record

Deleting a call will remove the record of the call from the database and also delete any audio and video files associated with the call. This function is only available for users that have been granted the 'File Delete' permission. A record of any user performing a delete is written to the system's audit log.

When the Delete option is selected from the menu, you will be prompted to confirm your action before performing the delete. To continue, click **OK**. To cancel the delete operation, click **Cancel**.



Filters

Options

Clicking the **Filter** button will open the Filter page that can be used to change the current filter settings, add new filters, or create a custom filter. The filter options are broken into sections of fields, listed on the next pages. Any filters currently applied through Quick Filters menus are selected when the page opens.

Data Fields

Most filters use operators and criteria to identify values to display. These standard operators are:

| | |
|--------------------------|---|
| Equals: | <p>The field being filtered must match the value entered exactly.</p> <p><i>Example: 'CallerID' Equals '614-555-5555'. This will only return calls from that exact phone number.</i></p> |
| Not Equals: | <p>The field being filtered must not exactly match the value entered.</p> <p><i>Example: 'CallerID' Not Equals '614-555-5555'. This will return every call recorded except those from 614-555-5555.</i></p> |
| Starts With: | <p>The field being filtered must begin with the same value that is entered.</p> <p><i>Example: 'CallerID' Starts With '614'. This will display every call recorded that the Caller ID begins with 614.</i></p> <p>TIP: Useful for area code searches.</p> |
| Ends With: | <p>The field being filtered must end with the same value that is entered.</p> <p><i>Example: 'CallerID' Ends With '5555'. This will display every call recorded that the Caller ID Ends with '5555'.</i></p> <p>TIP: Useful for locating calls that you only have the last four digits of the caller's phone number.</p> |
| Contains: | <p>The field being filtered must contain the value entered at any location in the field.</p> <p><i>Example: 'CallerID' Contains '555-55'. This will display every call recorded that the Caller ID field contains the numbers '555-55'.</i></p> <p>TIP: Useful for locating calls that you only have a partial phone number for.</p> |
| Does Not Contain: | <p>The field being filtered must not contain the value entered at any location in the field.</p> <p><i>Example: 'CallerID' Does Not Contain '555-5555'. This will exclude every call recorded that has the caller's phone number '555-5555', regardless of area code.</i></p> |

Filters

| | |
|----------------------|--|
| Less Than: | The contents of the field being filtered must be less than the value entered (numeric values only). <i>Example: 'Record ID' Less Than '3264'. This will exclude every call recorded that has a record ID number greater than '3264'.</i> |
| Greater Than: | The contents of the field being filtered must be greater than the value entered (numeric values only). <i>Example: 'Record ID' Greater Than '3264'. This will exclude every call recorded that has a record ID number less than '3264'.</i> |
| In: | The contents of the field being filtered must match one of a list of values. <i>Example: Extension In 1234, 1235, 1236. This would return all calls recorded on the extensions.</i> |
| Not In: | The contents of the field being filtered must NOT match one of a list of values. <i>Example: Extension Not In 1234, 1235, 1236. This would return all calls recorded on extensions other than the ones listed.</i> |

The Data Fields section allows you to search against specific meta-data recorded in the call record. This could include agent information, caller information, or any custom data fields that may be in use for a specific integration.

To filter to the Call List for specific data fields, check a data field, select an operator, and enter a criteria value. Multiple data fields can be filtered at once. Character limits for these fields range from 20 (user1-3) to 255 (user4-8).

Data Fields

| | | | |
|--------------------------|----------------------|---|---|
| <input type="checkbox"/> | Extension : | Equals | <input type="text"/> |
| <input type="checkbox"/> | Agent Number : | Equals | <input type="text"/> |
| <input type="checkbox"/> | Agent Name : | Equals | <input type="text"/> |
| <input type="checkbox"/> | Group : | Equals | <input type="text"/> |
| <input type="checkbox"/> | Queue : | Equals | <input type="text"/> |
| <input type="checkbox"/> | CallerID ANI : | Equals | <input type="text"/> |
| <input type="checkbox"/> | Number Called DNIS : | Equals | <input type="text"/> |
| <input type="checkbox"/> | Record ID : | Equals | <input type="text"/> |
| <input type="checkbox"/> | Account Number : | Equals | <input type="text"/> |
| <input type="checkbox"/> | CSN : | Equals | <input type="text"/> |
| <input type="checkbox"/> | User3 : | Equals | <input type="text"/> |
| <input type="checkbox"/> | Salesforce Case : | Equals | <input type="text"/> |
| <input type="checkbox"/> | Public Bookmark : | Equals | <input type="text"/> |
| <input type="checkbox"/> | User6 : | Equals | <input type="text"/> |
| <input type="checkbox"/> | User7 : | Equals | <input type="text"/> |
| <input type="checkbox"/> | User8 : | Equals | <input type="text"/> |
| <input type="checkbox"/> | User9 : | Equals | <input type="text"/> |
| <input type="checkbox"/> | User10 : | Equals | <input type="text"/> |
| <input type="checkbox"/> | User11 : | Equals | <input type="text"/> |
| <input type="checkbox"/> | User12 : | Equals | <input type="text"/> |
| <input type="checkbox"/> | User13 : | Equals | <input type="text"/> |
| <input type="checkbox"/> | User14 : | Equals | <input type="text"/> |
| <input type="checkbox"/> | User15 : | Equals | <input type="text"/> |
| <input type="checkbox"/> | Channel : | Equals | <input type="text"/> |
| <input type="checkbox"/> | Bookmark : | Equals | <input type="text"/> |
| <input type="checkbox"/> | CallCopy group : | select | <input type="text"/> |
| <input type="checkbox"/> | Categories : | select | <input type="text"/> |
| <input type="checkbox"/> | Tag : | <div style="border: 1px solid gray; padding: 5px; width: 150px;"> Script Adherence Property Information Scheduling Lead Source Product Interest Geography </div> | <div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid gray; width: 100px; height: 100px;"></div> <div style="border: 1px solid gray; width: 100px; height: 100px;"></div> </div> |

Quality Management

| Quality Management | |
|--------------------------|---|
| <input type="checkbox"/> | Evaluations Completed : Equals <input type="text"/> |
| <input type="checkbox"/> | Avg. QA Score : Equals <input type="text"/> |
| <input type="checkbox"/> | Randomizer : Number <input type="text"/> |

These fields will filter for any Quality Coaching data that is associated for the call. You can search for calls that have only been reviewed a specific number of times or calls that fall above or below an average QA Score percentage.

The **Randomizer** option is a tool to assist QM teams that must perform evaluations on random sets of calls. This option works in conjunction with any other selected filters applied. Once all other selected filters are applied to the records, the randomizer will pick out a chosen number or percentage of those calls based on the value entered, and display them for the user.

Surveys

The survey filter allows you to show only calls matching score criteria. Displaying this column can be toggled from the Call List view settings. (See the *cc: Survey Administration Guides* for details on Survey Linking.) The **Survey Score** field only accepts positive numerical values. The **Other Score Values** dropdown allows searching for values matching **Inc** (Incomplete), **N/A**, or both.


Surveys

| | |
|--------------------------|--|
| <input type="checkbox"/> | Survey Score : Equals <input type="text"/> |
| <input type="checkbox"/> | Other Score Values : Equals <input type="text"/> |

Date/Days of the Week

Date

Start Date : 3/25/2011 10:39:29 AM 

End Date : 3/25/2011 10:39:29 AM 

Relative Date Range : select ▼

The Date option allows you specify a Start and End Date to filter for calls recorded over a specific date range. Notice that the hours/minutes/seconds can be changed. If you want to find records for yesterday and today, set the Start Date time to 12:00 AM and the End Date time to '11:59:59 PM'.

select ▼

Today

Yesterday

This Week

Last Week

This Month

Last Month

The Relative Date Range fields allow you to search for calls based on the setting shown below.

The Day of the Week option allows you to filter for specific days of the week. (Highlighted days are the days found.)

For example, to find all calls that occurred on Saturdays during a three month period, select the Start and End dates of the period and select Saturday in the Day of the Week option.

Day of the Week

Mon Tue Wed Thu Fri Sat Sun

Duration

The Duration values direct the system to return calls that continue for either a minimum OR a maximum length of time. For example, entering 5 minutes in the Minimum option would cause the system to return calls that were at least 5 minutes long.

Data Comparison

Data Comparison

Call Direction : Inbound or Outbound ▼

Screen Capture : Calls with or without screen capture ▼

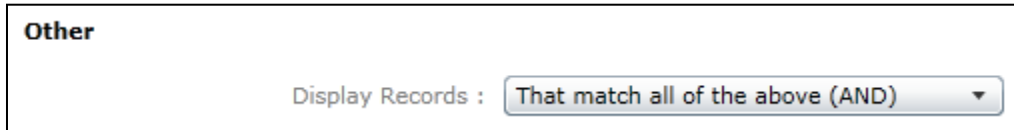
Call Type : All Calls ▼

Data Comparison options are special filters for fields that cannot normally be filtered against.

Filters

- Call Direction – Filter for only inbound, only outbound, or both directions.
- Screen Capture – Filter for calls with screen capture, calls without, or both.
- Call Type – Search for calls that have been moved to an archive location, or calls that are still on the local system.

Other Options



Other

Display Records : That match all of the above (AND) ▼

If multiple filter options are selected, the Display Records option can be used to specify if all filter criteria must be met to display a record (AND), or if the record is displayed if any criteria is matched (OR).

Filter Option Controls

Once you have entered the desired Filter Options, there are different controls available to apply or save the filter.



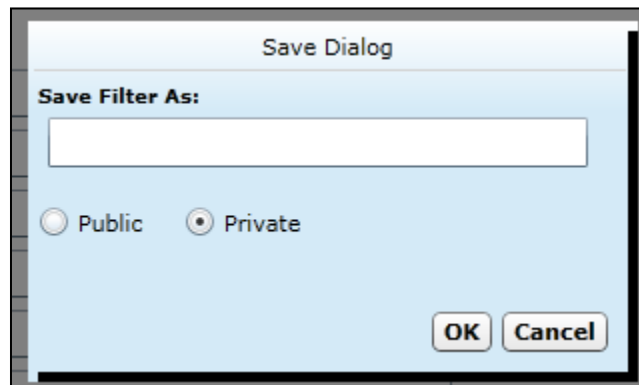
Filter Reset Save As My Filter Cancel Apply

- **Reset:** Clears any changes made but keeps the user on the Filter Options page so additional options can be set.
- **Save as My Filter:** Saves the filter options as a Private or Public Quick Filter set that can be quickly applied at a later date.
- **Cancel:** Clears any changes made and returns the user to the Call List.
- **Apply:** Sets the filters currently selected on the page and returns to the Call List with the new filters applied.

Saving My Filters

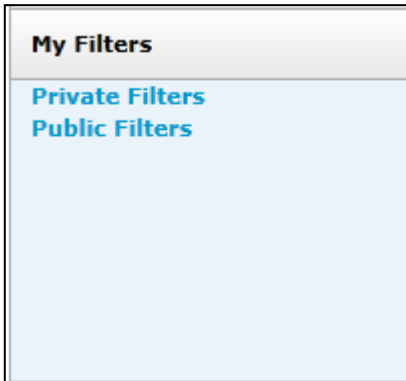
My Filters are saved Filter Options that can be quickly applied to the Call List. This feature is useful if the same or similar searches must be performed frequently. My Filters can be saved for both personal (Private), or general (Public) use.

When you have a filter set that you would like to save, click the **Save as My Filter** button at the top of the Filter Options page, and the **Save Dialog** window will appear.



Enter a name to refer to the filter, and choose if you want the filter to be set to Public or Private. Click **OK** to save the options, or **Cancel** to stop and return to the Filter Options page.

Accessing My Filters



Click **My Filters** on the Quick Filter menu to use filters that have been saved.

The **Private Filters** link displays a list of Filters saved by the logged-in user and marked as Private.

The **Public Filters** link displays a list of any filters saved by the current user, or any other user, and marked as Public.

The My Filters: list displays the available filters.



- Click **Apply** on a filter to load the filter settings, and return to the Call List page. The Call List displayed will now have the My Filter settings applied. You may adjust the filter settings using the standard Filter Options available on the Filter Bar at the top of the Call List.
- Click **Default** to have this filter applied each time you open the Web Player page. The default filter is usually the Today filter (i.e., calls recorded on the current day).

If you are the owner of a listed My Filter, you will also see **Edit** and **Delete** buttons available next to the Filter.

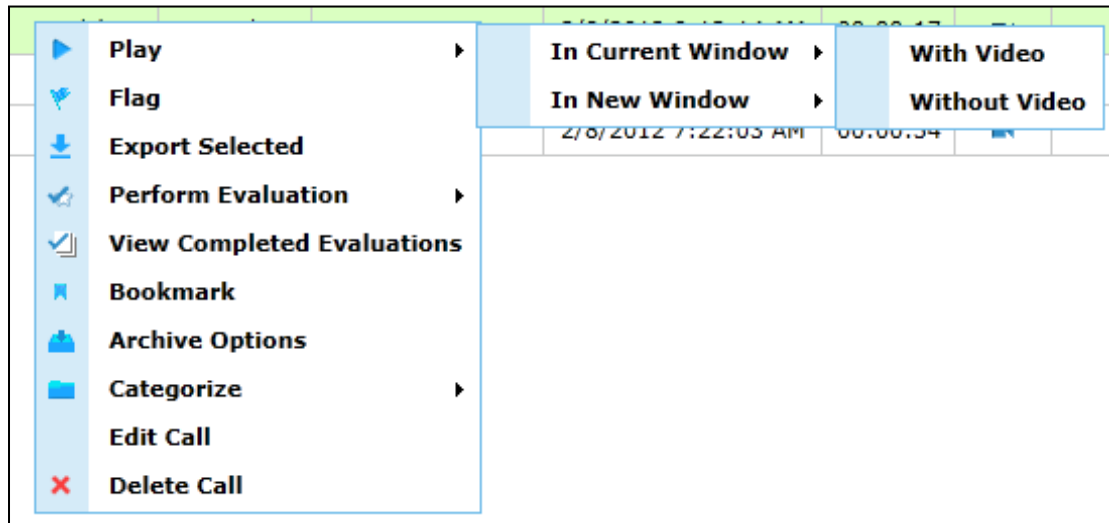
- Click **Edit** to open the open the Filter Options page and change any Filter settings. When you have completed changing any settings, click the **Save as My Filter** option to apply the changes to the saved My Filter. See the "[Filters > Options](#)" section in this guide for more information on Filter Options.
- Click **Delete** to delete the selected My Filter.

Call Playback

Calls can be played by:

- Left-clicking the call record in the Call List. On the context menu, select a Play option.
- Clicking the Play button (▶) located at the far left of the record.



In order for a record to be played in a new window, the user's Web browser must be configured to allow pop-up windows.

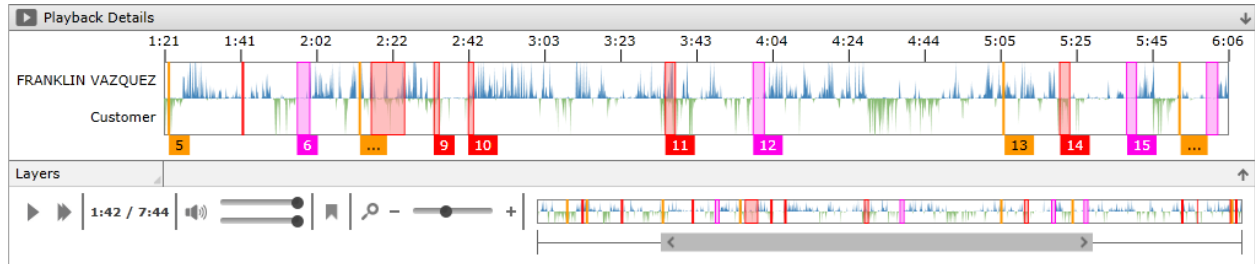


This graphic shows the Web Player at the bottom of the current window. Player controls (e.g., wave bar, volume controls, and feature panels) are used for listening to the call and viewing the agent's desktop activities. Common interface controls include Restore ↑ to expand panels, and Minimize ↓ or Close × to shrink or hide panels. Click the Full Screen icon ↗ to invoke the external media player in a separate window.

| ID | Start | Stop | Type | Info |
|----|-------|------|------------|-------------------------|
| 1 | 0:20 | - | Speech Tag | coupon |
| 2 | 0:33 | - | Speech Tag | save some money |
| 3 | 1:23 | - | Speech Tag | free insulation upgrade |
| 4 | 2:14 | - | Speech Tag | pompano beach |
| 5 | 5:06 | - | Speech Tag | homeowners association |
| 6 | 5:53 | - | Speech Tag | weekend |
| 7 | 7:38 | - | Speech Tag | morning |

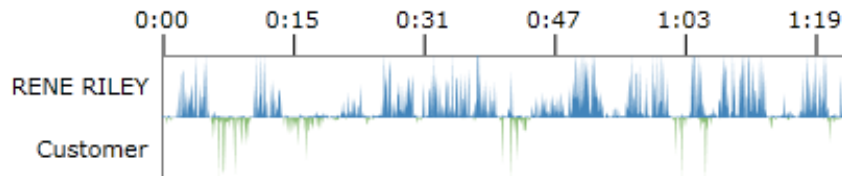
Playback Details Panel

This is where you can control the call playback by pausing or playing the call. When a call record is selected for playback, the player controls will load and immediately begin playback. By default, the Interaction Overview Bar is visible at the bottom right, which summarizes tags and action areas on the waveform. You can click at any point in the bar and the playback marker will seek to that position and play back the interaction from that point. If this is outside the length of the Viewable Area control, playback will still occur, but the progress will not be visible in the Playback Detail bar. Click the Restore icon  to display the detailed waveform, and the Minimize icon  to hide it again.





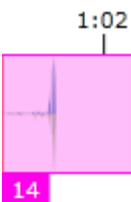


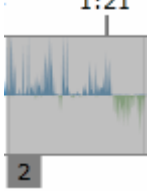
Waveform Display

The Waveform Display shows audio activity on the line for the duration of the call. For most telephony systems, audio from the agent and customer side can be separated for easier viewing. In these cases the Agent audio will be displayed in blue at the top, while the customer audio is displayed in green below the agent.



Waveform Indicators

Information about the call is highlighted on the waveform with the following overlay indicators:

| | |
|---|--|
|  | <p>Playhead Indicator – this shows what point of the call is currently playing back. This indicator can be dragged to any point in the Waveform Display to play at any point in the call. When the Playhead is being moved, you will see the duration status also change to match the position of the Playhead.</p> |
|  | <p>Cross-talk – times when both parties on the line are speaking simultaneously can be displayed on the waveform shaded red. Clicking on the number below the highlighted area will seek to the corresponding ID in the Layer Details panel. Enabling and configuring parameters for cross-talk detection is part of the Transcoder configuration settings. Please refer to the <i>cc: Discover Administration Manual's</i> "Recorder Settings > Transcoder" section for more information.</p> |
|  | <p>Silence – periods where neither party is speaking during a call can be displayed on the waveform shaded magenta. Clicking on the number below the highlighted area will seek to the corresponding ID in the Layer Details panel. Enabling and configuring parameters for silence detection is part of the Transcoder configuration settings. Please refer to the <i>cc: Discover Administration Manual's</i> "Recorder Settings > Transcoder" section for more information.</p> |
|  | <p>Speech Tags – When <i>cc: Analytics</i> checks a call and detects key words or phrases based on established criteria (refer to the <i>cc: Analytics Administration Manual</i> for more information), these indicators are placed on the waveform to show what the tags are and where they occur in the call. Clicking on the number below the highlighted area will seek to the corresponding ID in the Layer Details panel. This feature requires analytics to be enabled in the Transcoder configuration and a valid license for the <i>cc: Analytics</i> module. Please refer to the <i>cc: Discover Administration Manual</i> and <i>cc: Analytics Administration Manual</i> respectively for further details.</p> |
|  | <p>Bookmarks – When reviewing a call, bookmarks can be inserted manually into the waveform to leave notes or comments, denoted with a blue indicator. Clicking on the number below the highlighted area will seek to the corresponding ID in the Layer Details panel. More information on bookmarks can be found in the "In-Call Bookmarking" section of this document.</p> |
|  | <p>Blackouts – If <i>cc: Discover</i> is configured to blackout specific sections of audio or video, this portion of the waveform will be shaded black. Clicking on the number below the highlighted area will seek to the corresponding ID in the Layer Details panel.</p> |

Call Playback

If tags for different items overlap, their number tags below the waveform will stack. Placing the mouse cursor over the corresponding tag will cause a more detailed pop-up to appear, containing the Layer Details ID numbers and timestamps.

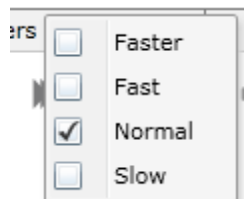


Playback Controls

Play/Pause and Playback Speed Icons



The Play icon ▶ denotes the call is currently playing back. To pause the call playback, click the Play icon again, and it will switch to the Pause icon ||. At this time the call should stop playing back. To speed up or slow down playback speed, click the Playback Speed Selection icon ▶ next to the Play/Pause icon and choose the appropriate speed.



Faster: 200% of normal speed.

Fast: 150% of normal speed.

Normal: 100% of normal speed.

Slow: 75% of normal speed.

Interaction Timer



Next to the Playback Speed icon is the Interaction Timer. This displays the point of time the call is currently playing, and the total duration of the call in HH:MM:SS format.

Volume Control



Volume control is displayed beneath the Wave Bar next to the duration indicator. Clicking on the Volume Icon will mute playback. The sliders can be used to independently adjust the volume of the agent and the customer. On mono calls, only one slider will be displayed. The current volume level (0-100%) is displayed when the mouse hovers over the

Note The Volume Control in the Web Player is limited by the Master Volume level set in your Windows Audio settings. These settings may need to be adjusted to make the Web Player controls effective.

Add Bookmarks




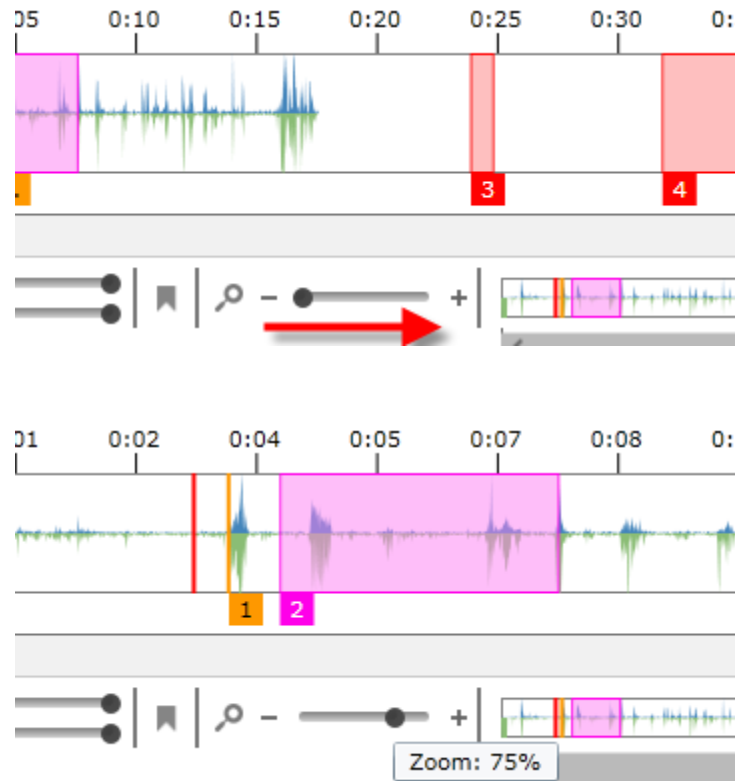
For information on working with bookmarks, please refer to the "[In-Call Bookmarking > Add Bookmarks](#)" section of this document.

Call Playback

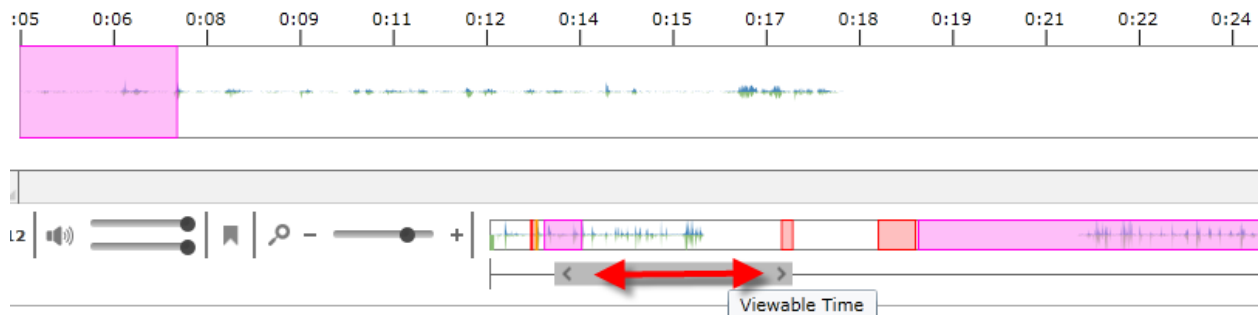
Waveform Zoom



Clicking the Restore icon  on the Playback Details bar will expand the waveform to show greater detail. This will also make the Waveform Zoom slider appear. Move the slider from left to right to increase the zoom and detail of the waveform.



With the view zoomed in, use the horizontal Viewable Time scroll bar to reposition the view within the waveform.




In-Call Bookmarking

In-Call Bookmarking is a feature that allows the user to tag a specific point within a call with notes. These bookmarks can be set to personal (Private) or general (Public) use.

Add Bookmarks



To insert a bookmark at a specific point in the call, place the Playhead Indicator where you want the bookmark set, then click on the Bookmark icon  to open the **Add Bookmark** window.

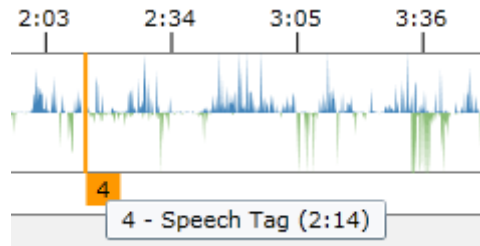
The Bookmark description can be entered in the **Notes:** field on the window. The **Start:** field will show the time at which the tag will be inserted. The user can change the value in this field if needed to refine the tag point.

The bookmark can then be set to Public (checked) or Private (unchecked). For Public bookmarks, any users that have access to play the selected call will also see the bookmark text in the call. For Private bookmarks, only the current logged-in user will see the bookmark icon and text.

Click **OK** to insert the bookmark, or click **Cancel** to stop the action and return to the Player controls. The bookmark will appear on the Wave Bar and in the Tags panel immediately.


View Bookmarks

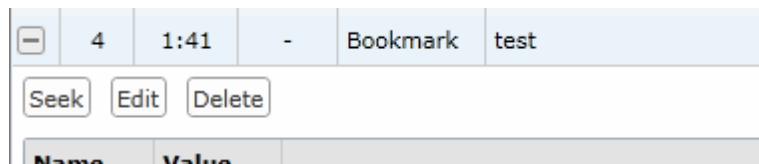
After an In-Call Bookmark has been inserted, a mark in the Waveform Display will be shown at the time indicated for the bookmark. The mark will be labeled with the Tag ID assigned to the bookmark. Hovering over a mark in the Waveform Display with the mouse will pop up the tag type and timestamp. This information is also displayed in the Layer Details Panel which is displayed above the Wave Bar.



Edit or Delete Bookmarks

If a bookmark was inserted by the logged-in user, that user can also delete any bookmarks that they submitted.

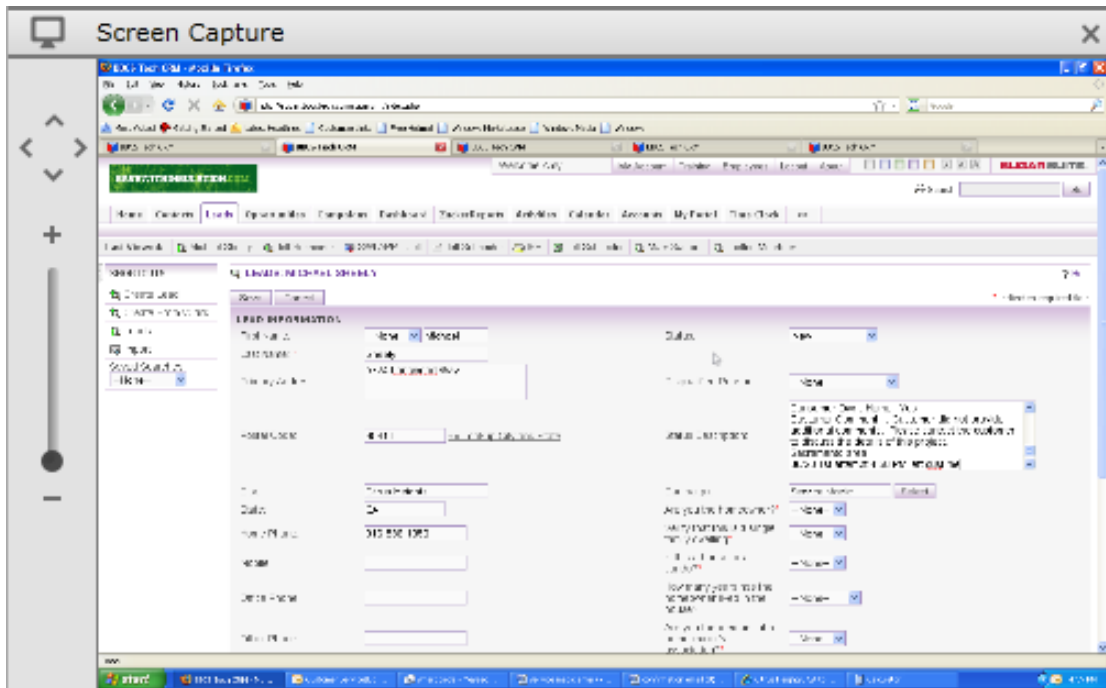
To delete a bookmark, go to the Tag Data Panel and locate the bookmark. Click the expand icon  next to it, and if you have permissions to delete a bookmark, you will see Edit and Delete buttons. Click the icon to edit or delete the bookmark, as needed.







Feature Panels

By default, two Feature Panels with additional call data appear above the Wave Bar. These panels show data from optional components installed on the cc: Discover system, which may not be available in all deployments.

Screen Capture Panel





The Screen Capture panel displays a scaled down feed of recorded video for the call. Click the Screen Capture icon  to hide or restore this panel. The screen controls work as follows:

| | |
|---|--|
|  | <p>The arrow icons can be used to scroll around the playback window when zoomed in. The video playback can also be repositioned by clicking on the video and dragging it until the desired area is in view.</p> |
|  | <p>The zoom slider allows you to increase + or decrease - the size of video playback. The playback pane can also be resized by dragging the right edge of it or the top border of the Web Player. The video is auto-scaled to fit the window when playback begins, but can be zoomed in up to 100% of the original capture size. Playback zoom can also be adjusted by scrolling the mouse inside the playback pane.</p> <p>Note Due to Microsoft Silverlight limitations, mouse scroll zoom in the playback pane only works in Internet Explorer. If you are using another browser, mouse scroll zoom can be used by first opening the recording in the external player by clicking on the Full Screen icon .</p> |

Layer Details Panel


| Layer Details | | | | | |
|---------------|----|-------|------|------------|------------------------|
| | ID | Start | Stop | Type | Info |
| + | 1 | 1:55 | - | Speech Tag | thank you for calling |
| + | 2 | 2:21 | - | Speech Tag | single family dwelling |
| + | 3 | 2:30 | - | Speech Tag | homeowners association |

The Layer Details panel displays any metadata that has been added to the call after it was recorded. This could include user-generated data such as bookmarks, data generated from another component such as the cc: Analytics speech analytics product, or detected cross-talk or silence.

Data is organized into columns. Which columns are populated depends on the type of data listed. Each column's width can be resized by hovering with the mouse over the borders between column headings, and when it changes to a double-headed arrow , click and drag to resize. Data can also be sorted in ascending or descending order by clicking on a column heading. Click the Layer Details icon  to hide or restore this panel.

The listed columns are the following:

- **ID:** This is an identifier (e.g., 1, 2, 3, A, B) for the tag. For data that is tagged at a specific time within a call, this ID will also display on the Wave Bar for reference.
- **Start:** For data that is tagged at a specific point within a call, the starting location of the tag will be listed in mm:ss format. For data that is not tagged at a specific point inside a call, the time '00:-01' will be listed.
- **Stop:** Indicates the ending point for data relative to its starting point. Some data types like Speech Tags and Bookmarks will not have a stop time, but instead display a dash (-).
- **Type:** This field lists the type of tag listed. This could be a bookmark, speech analytics tag name or category, cross-talk, silence, or other types. Please see the "[Playback Details Panel > Waveform Indicators](#)" section in this document for more information on these.
- **Info:** This is the data contained in the tag. The information in this field can vary, depending on the tag type. For bookmarks, the Bookmark Notes will display here (e.g., 'Great sales pitch'). For Analytic tags, the detected phrase will be listed.

Clicking the expand icon  will display a list of options relative to that particular item. Depending on the type of item and whether or not the logged in user created the item, the options shown may vary.

- **Seek:** Moves the Playhead Indicator on the waveform to the place in the call where the item occurs.
- **Edit:** Allows changes to be made to the item, such as updating notes or the bookmark timestamp.
- **Delete:** Removes the item from the call and the waveform.

For bookmarks and speech tags, additional information will be displayed. Bookmarks will indicate whether the bookmark is public or private, and display the username of the person who added it. Speech tags will show Confidence (likelihood of match), Group (if specified by the customer during setup), and the Phrase detected by speech analytics (please refer to the *cc: Analytics Administration Guide* for more information on analytics).

Live Monitoring

cc: Discover's Live Monitor feature enables supervisors to listen to an agent's call and view the agent's desktop in near-real time. It also enables system administrators to see if calls are being recorded.

Live monitoring of audio is a feature of cc: Discover. Live monitoring of agent's desktop is a separate feature licensed as part of CallCopy's cc: Screen product.

Live Monitor List

To access the Live Monitor list, click the **Live Monitor** page link under the Web Player tab.







The Live Monitor list will load in place of the Call List. The Live Monitor list view will display all agents in the system and their current call state.

| List View | | Screens View | | | | | | | | | |
|-------------------------------------|---------------------|--------------|-------|-------------------|-----------------------|--------------------------|--------------------|-------|----------|---------------------|--|
| Live Screens Remaining: 12 | | | | | | | | | | | |
| Name | Voice Port | Agent Number | State | Last State Change | Video | Caller ID ANI | Number Called DNIS | Group | ACD Gate | Current Application | |
| <input type="checkbox"/> | Reeves, Michael | 7522 | 91 | Recording | 8/27/2010 9:58:35 AM | <input type="checkbox"/> | 5032 | 4838 | | | MReeves-VH on vm-support.callcopy.com(459578) |
| <input type="checkbox"/> | Knack, Barry | 7512 | 106 | Ready | 8/27/2010 10:08:58 AM | <input type="checkbox"/> | | | | | Videos(1968174) |
| <input type="checkbox"/> | Nunnery, Morgan | 7538 | 90 | Ready | 8/27/2010 10:13:33 AM | <input type="checkbox"/> | | | | | Sybase-tds38-102306.pdf (application/pdf Object) - Mozilla Firefox(197134) |
| <input type="checkbox"/> | Abbruzzese, Vanessa | 5202 | 77 | Unknown | Unknown | | | | | | |
| <input type="checkbox"/> | Anastos, Nick | 7503 | 87 | Ready | 8/25/2010 2:16:14 PM | <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | Anderson, Brad | 5013 | 36 | Ready | 8/27/2010 10:24:13 AM | | | | | | |
| <input type="checkbox"/> | Anderson, Chris | 5031 | 11 | Ready | 8/26/2010 3:17:26 PM | | | | | | |
| <input type="checkbox"/> | Bohac, Ray | 5526 | 1 | Unknown | Unknown | | | | | | |
| <input checked="" type="checkbox"/> | Bohac, Ray | 5525 | 1 | Recording | 8/27/2010 10:23:30 AM | <input type="checkbox"/> | 5525 | 4838 | | | |
| <input type="checkbox"/> | Bohac, Ray | 5527 | 1 | Unknown | Unknown | | | | | | |
| <input type="checkbox"/> | Bowen, Kent | 7541 | 96 | Ready | 8/26/2010 2:13:24 PM | | | | | | |


Live Monitoring

The following columns appear:

- **Playback indicator** : If an agent is in a call that is currently being recorded, the playback indicator will be displayed. Clicking the indicator will begin playing back the live audio and video stream.
- **Screen View Favorite** : If the agent has the Screen Capture Agent running on his or her workstation, you can check this box to have the agent appear on the Screens View page.
- **First Name**: Displays the agent's first name.
- **Last Name**: Displays the agent's last name.
- **Device/Voice Port ID**: Lists the physical phone extension being used by the agent.
- **Agent Number (Device Alias)**: The agent's ACD or phone login identifier.
- **State**: Will either display Recording, Ready, or Unknown. The Recording state indicates that the agent is either in a call or finishing 'wrapup' work in an application.
- **Last State Change**: The timestamp that the last State change occurred for the agent.
- **Video**: If screen capture is being recorded for the call, the Video icon () will display in this field. If PC users lock their computers (i.e. press Windows key + L), a lock icon () appears. If a supervisor is monitoring the user, the display will close when the PC is locked and open again when the PC is unlocked.
- **Caller ID (ANI)**: The caller's phone number for the agent's active call.
- **Number Called (DNIS)**: The number dialed by the caller for the agent's active call.
- **Group**: If a call was delivered over an ACD system, the ACD Group/Skill number configured on the switch will display here.
- **ACD Gate**: If a call was delivered over an ACD system, the ACD Gate/Queue number will display here.
- **Current Application**: The title of the application window the agent currently has opened on their desktop. This information is updated every 5 seconds and is only available for agent workstations running the Screen Capture agent.

The column names may vary based on settings on the Terminology page. (See the *cc: Discover Administration Manual*.)

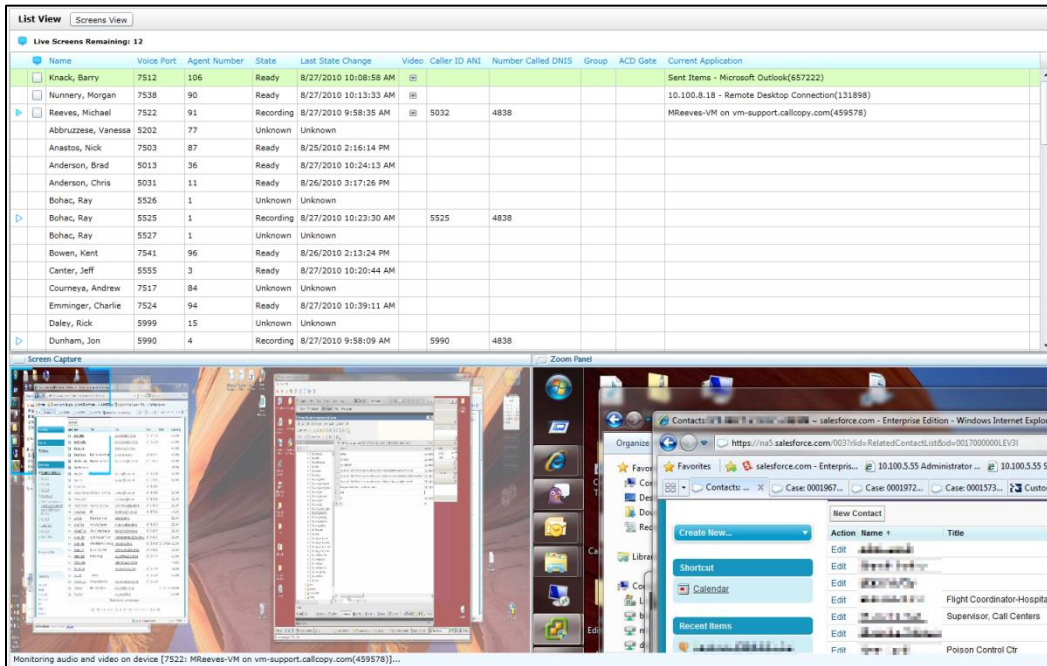
Live Monitoring Play


To play a call from the List view, click the Playback indicator. The indicator will change to a solid blue color () to indicate the agent is being monitored. At the bottom of the Live Monitor List the monitoring status will be displayed. When a live monitor has successfully started, the following message will appear:

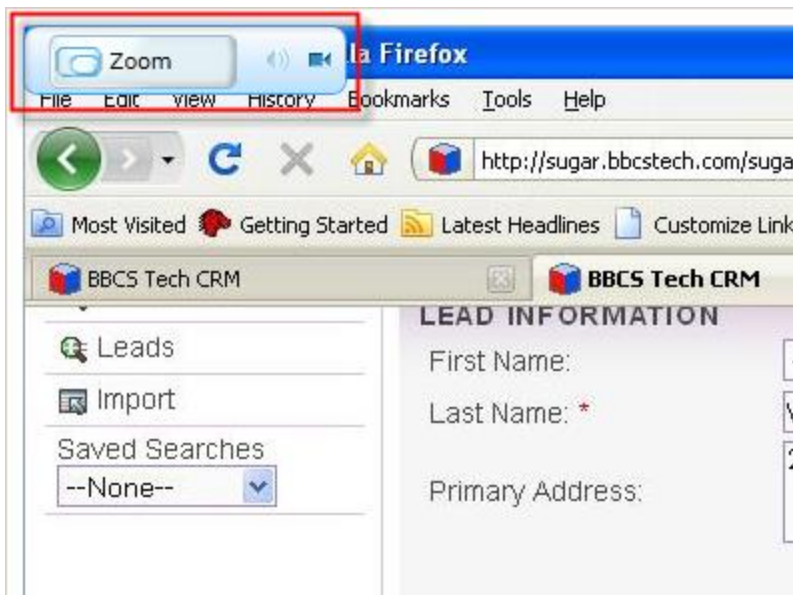
Monitoring audio and video on device

Live audio will then begin to play. If video is available for the call, the screen capture panel will appear below the Live Monitor List.

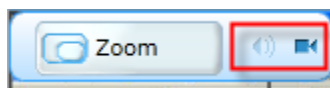
You can also right-click a user and select Play from the context menu. The menu allows monitoring to be done in the current window or a new window. (See the "[Screens View](#)" section for a graphic.)



Hover the mouse cursor over the tab  in the upper left of the playback area to display the zoom menu.



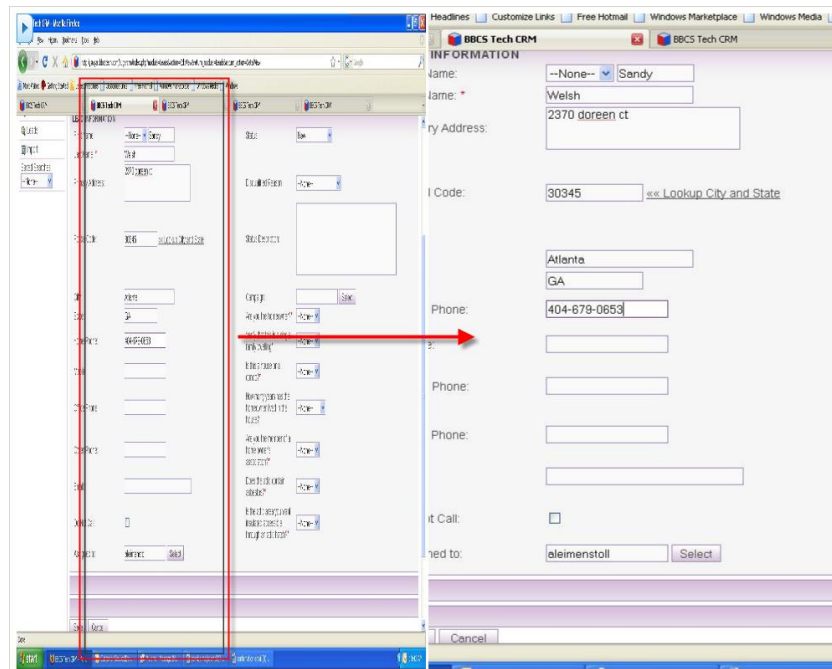
The speaker and camera icons indicate the presence or absence of audio and screen feeds. In the following example, video is available, but no audio.



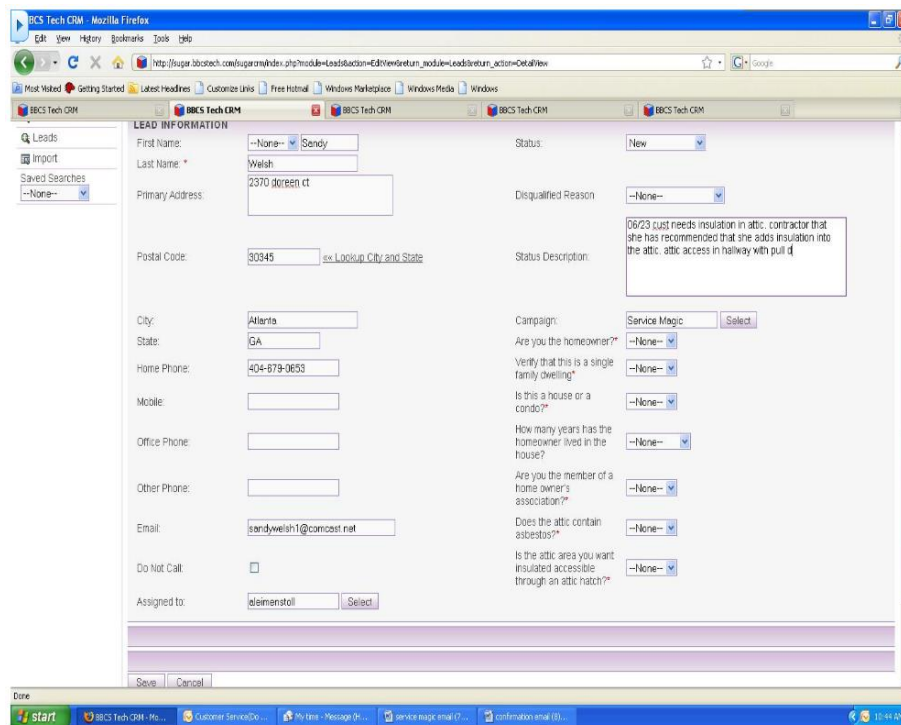
Live Monitoring

Clicking the **Zoom** button will toggle through three different zoom levels:

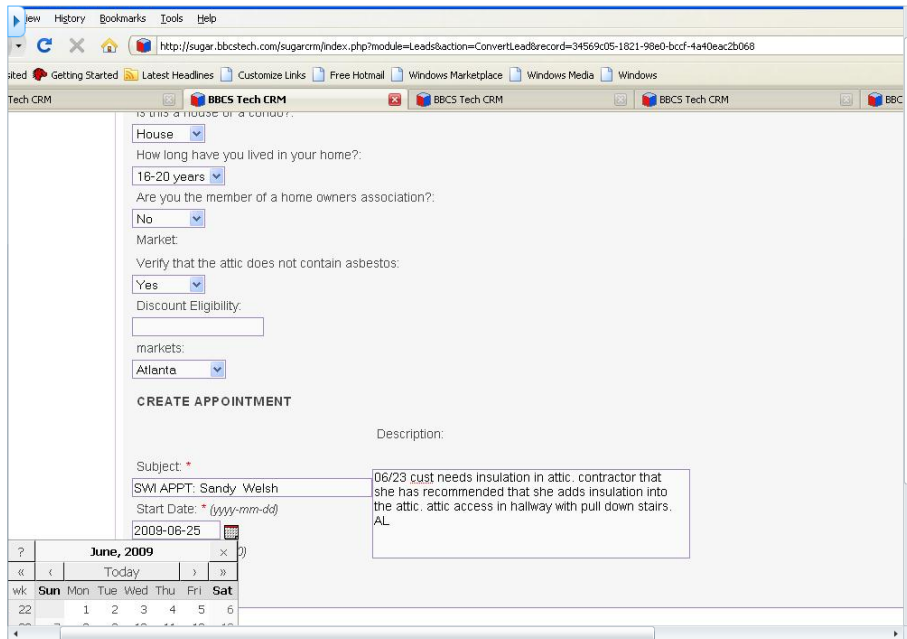
- **Split** shows a compressed view of the entire screen on one side with a movable zoom marker to indicate the portion of the screen to show zoomed 100% on the other side.



- **Stretch-to-Fit** resizes the full screen image to fit the window. It allows viewing the entire screen but may be difficult to read due to the compression.



- **Actual Size** displays the live feed at 100% of what the agent sees. Scrollbars appear at the side and bottom of the playback to allow scrolling to different parts of the screen.



To stop playing the live stream, click the Playhead indicator. The indicator will revert back to the idle state (▶) and the audio and video playback will stop. Live monitoring will run continuously until the observer stops playback.

Sort and Filter List Monitor Agents

Most List View columns are sort-able in ascending or descending order by clicking the column header title. The triangle indicates the direction.

The Screen View Favorite and Video columns sort by whether an agent is/is not a favorite or has/does not have screen capture installed.



Live Monitoring

Filters enable you to display specific agents:

1. Click the filter icon beside a column header.
2. In the dialog box, filter by Agent Number (Device Alias) by selecting specific numbers in the list. Or click **Select All** and then clear the boxes for numbers.
3. Select an evaluation statement from the top drop-down list.
4. Enter a text or numeric criterion. For example, on the Group header, entering Sales would return agents in that group.
5. Click the **aA** option to make the filter match records that fit the case of the criterion text.
6. (Optional.) Select **And** to return agents that match two criteria. Select **Or** to return agents that match one of two criteria.
7. Select a second evaluation statement in the lower drop-down list. Enter a criterion.
8. Click **Filter**. Agents matching the criteria appear.

Click **Clear Filter** to display all agents again.

Select All

- 4584
- 5004
- 5009
- 5013
- 5014
- 5016
- 5017
- 5019
- 5021
- 5023
- 5024

Show rows with value that

Is equal to

aA

And

Is equal to

aA

Filter Clear Filter

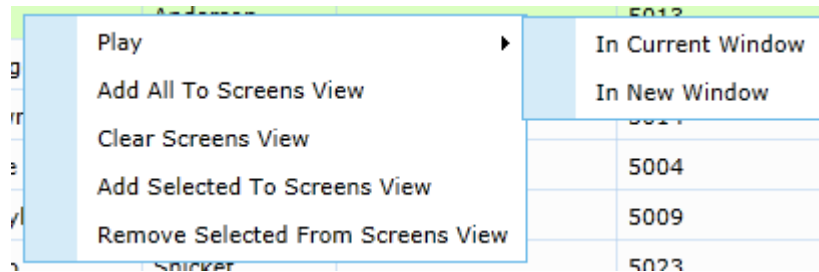
Screens View

The Screens View can be activated by clicking the **Screens View** button at the top of the Live Monitors page.

You control which agents appear on the Screens View page by selecting the Screen View Favorite () checkbox next to his or her name in the Live Monitoring List View list.

| List View | | Screens View |
|-------------------------------------|------------|--------------|
| | First Name | Last Name |
| ^ True | | |
| <input checked="" type="checkbox"/> | Cheryl | Eddy |
| <input type="checkbox"/> | Brad | Anderson |
| <input checked="" type="checkbox"/> | George | Barsa |
| <input type="checkbox"/> | Shawn | Eddy |

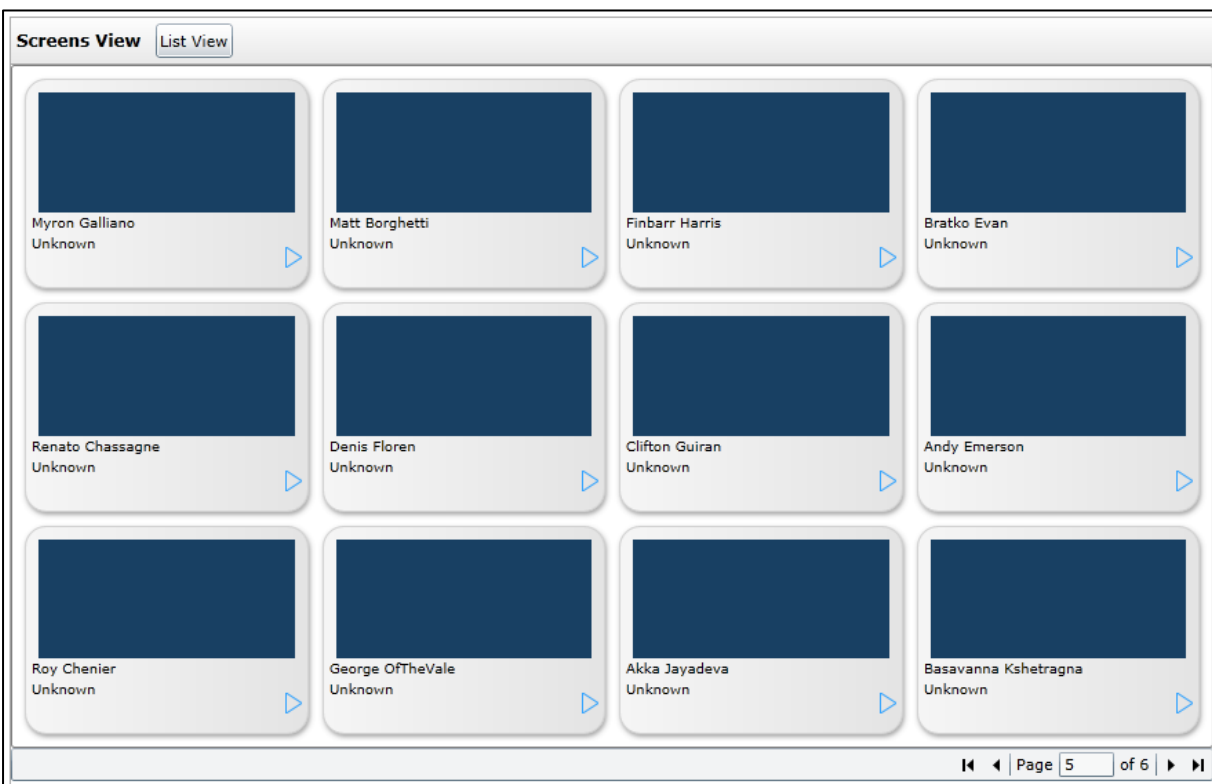
Multiple agents can be added or removed from the Screens View page by right-clicking in the **List View** and using the context menu.



- **Play** – Begins live monitoring of the agent. The In New Window option plays the desktop monitoring in a browser separate window.
- **Add All To Screens View** – Makes all agents in the List View to appear on the Screens View page.
- **Clear Screens View** – Removes all agents from the Screens View page.
- **Add To/Remove From Screens View** – Useful if adding/removing multiple agents that appear beside each other in the List View. Click one agent in the list, press the Shift key, and press the last agent that to be added removed. All agents between the first one and the second one clicked are selected. Right-click and select **Add** or **Remove**. Each agent's Favorite box is either selected or cleared.

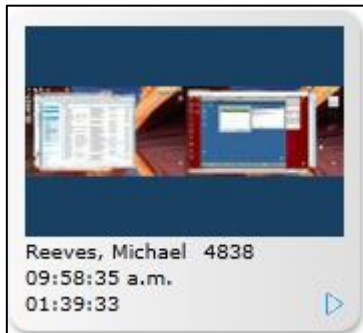
The Screens View displays each agent thumbnail in alphabetic order, according to the agent's last name. Navigating between pages is achieved by clicking the buttons at the bottom-right of the page.

Alternatively, a specific page number can be entered in the text field. Clicking the **Go** button will take the user directly to the specified page.



Screens View Playback

Screen thumbnails are updated for each agent desktop every 5 seconds. If an agent is being recorded and their call is available for live monitoring, a playback indicator will display in the bottom-right corner of the agent's thumbnail window.



Along with the playback indicator, the following information will be displayed:

- Agent Name
- Caller ID
- Time of recording start
- Duration of call recording

Clicking the playback indicator will return the user to the List View and begin playing back the live stream from the selected agent.

About CallCopy

CallCopy, a leading provider of innovative call recording and contact center solutions, is dedicated to ensuring the highest standards of customer and employee satisfaction. The award-winning, enterprise-proven cc: Discover suite delivers advanced call recording, screen capture, quality management, speech analytics, performance management, customer survey and workforce management capabilities to organizations of all sizes and industries across the globe.

CallCopy empowers these organizations to gather business intelligence, which is leveraged to maximize operational performance, reduce liability, achieve regulatory compliance and increase customer satisfaction.

For more information, visit www.callcopy.com.