



DISCOVER BY UPTIVITY WEB PLAYER MANUAL, V5.4

April 2014

Reference Guide

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Revision History		
Revision	Change Description	Effective Date
	Re-branded for v5.4. Revised to reflect that using "Forgot Password" requires the "Allow Password Change" permission.	2014-04-30

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Table of Contents

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

Web Player Settings.....	19
Context Menu.....	20
Play.....	20
Flag.....	20
Export Selected.....	21
Export Call List.....	21
Evaluate This Agent.....	21
View Completed Evaluations.....	22
View Completed Survey.....	22
Bookmark.....	22
Find Call Segments.....	23
Archive Options.....	23
Categorize.....	23
Edit a Call Record.....	26
Copy Call Link.....	27
Delete Call.....	27
Filters.....	28
Options.....	28
Data Fields.....	28
Quality Management.....	31
Surveys.....	31
Date/Days of the Week.....	31
Duration.....	32
Data Comparison.....	32
Other Options.....	33
Filter Option Controls.....	33
Saving My Filters.....	33
Accessing My Filters.....	34
Call Segments.....	35
Call Segment Scenario Examples.....	35
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	41
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	45
Screen Capture Panel	45
Layer Details Panel	46
Live Monitoring	47
Live Monitor List	47
Quick Filter Agent List	49
Search for Agents	49
Live Monitoring Play	50
Screens View	52
Screens View Playback	53
About Uptivity	54

Introduction

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

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

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

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

Note Discover allows administrators to customize field names and terminology in the Web Portal to fit your unique environment. Therefore, screen examples and field names used in this manual may differ from those seen in your implementation.

Web Portal Basics

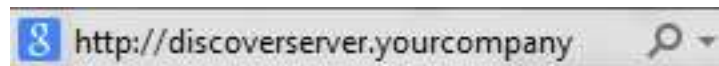
The Discover Web Portal is a series of Web pages that enable users to perform tasks. The Web Player is one page in the portal.

Log In

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

To log in:

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



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

Note: Discover does not support browser-based saving of your username for security reasons. You will need to enter your username at each login.

4. Enter your 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**. 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 log in 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 if you have the appropriate permissions.

Forgot Password Feature

Note This feature does not work if your account has been locked due to login failures and/or you do not have the "Allow Password Changes" permission.

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.

To use this feature:

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." If you do not have proper permissions, you will receive an email with this message: "Someone has submitted a request for a new password for the Uptivity account linked to this email address. Your account does not have the appropriate permissions to generate a new password. Contact your Uptivity system administrator to generate a new password." In either case, contact your Discover system administrator to resolve the issue.

Locate Version Number

The version number for your Discover software appears in the upper-right corner of the login page. This version number can be useful for locating correct documentation for your software and 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 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.

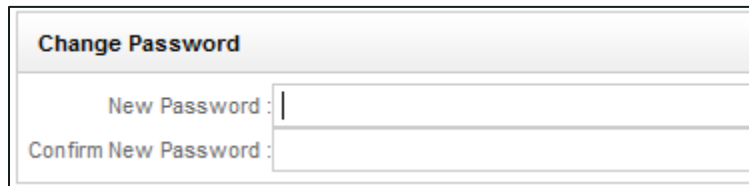


Change Your Password

Note You must have the "Allow Password Changes" permission.

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**.



The screenshot shows a form titled "Change Password". It contains two input fields: "New Password" and "Confirm New Password". The "New Password" field has a cursor in it, and the "Confirm New Password" field is empty.

Log Out

Once you have completed your session, it is very important to log out for security purposes. To log out, 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 Discover users. See the *Discover by Uptivity QA Coaching Manual* for additional information on:

- **Content Library:** Distributing items by adding content via the Coaching tab's Manage Content menu and assigning the content to groups.
- **QA Review Process:** Question and dispute actions involving evaluations in the Assignments Inbox.

Tip Distribute the 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 users have new assignments, a letter icon appears at the top of the portal. Clicking the letter icon opens the New Assignments list.

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 and acknowledge the assignment, and move it to the **Reviewed Assignments** section. If the Done button is grayed out, that means the user has not opened and reviewed the assignment yet. If **File Not Found** appears in the column, the assignment has been deleted, moved, or renamed in the 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. Refer to the *Discover by Uptivity Administration Manual* for more information on these permissions. For details on questioning or disputing QA evaluations, refer to the *Discover by Uptivity QA Coaching Manual's* "QA Dispute Process" section.
- **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.

To review an assigned file, click on 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 New Assignments and now appears in Reviewed Assignments.

Pending Assignments

When an agent reviews an evaluation and questions or disputes it, the evaluation's status changes to Question or Dispute, respectively, and it moves from the New Assignments page to the Pending Assignments page. The status change is reflected when performing a search under the Coaching tab on the Search QA Acknowledgments page. The current number of pending assignments appears next to the link in the navigation pane. Items in the pending assignments list are sorted alphabetically by title, then by assigned date, oldest to newest. For details on questioning or disputing QA evaluations, refer to the *Discover by Uptivity QA Coaching Manual's* "QA Dispute Process" section.

Reviewed Assignments

Reviewed 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. Click on an item to review it again.

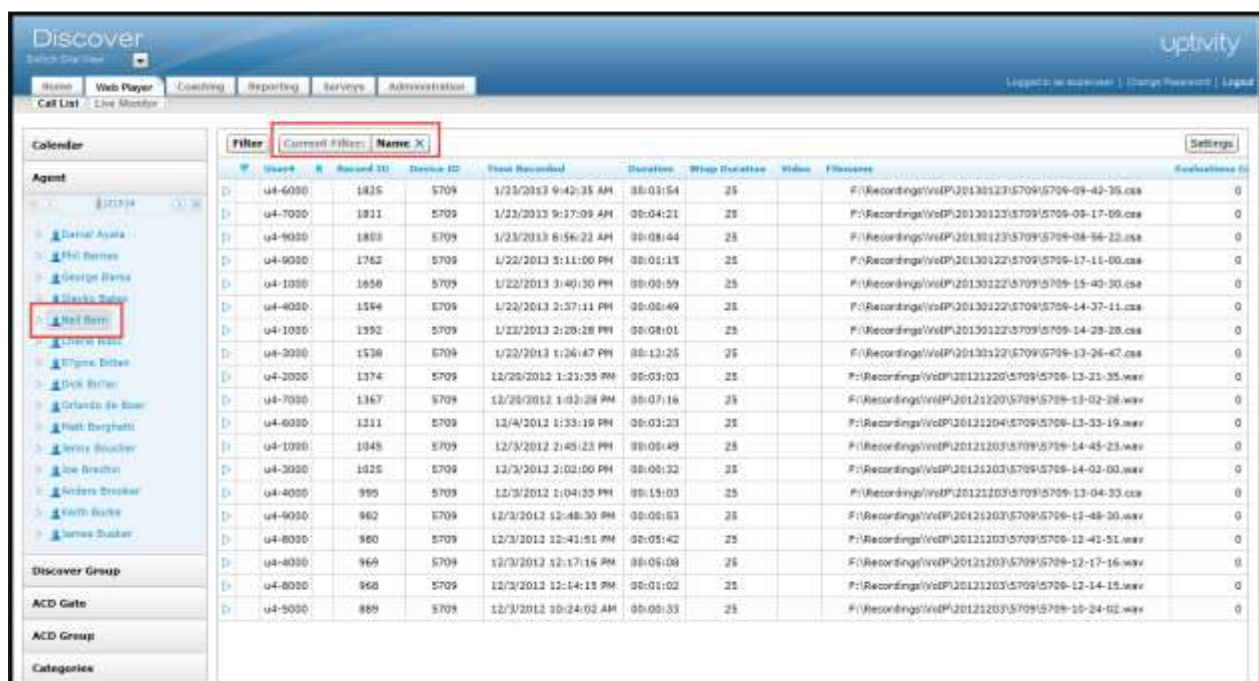
Call List Quick Filters

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.

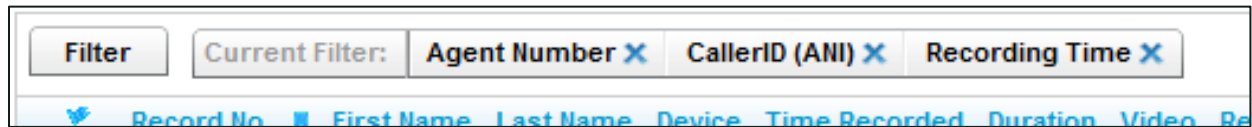
Columns can be reorganized by clicking a column header with the mouse and dragging it to the left or right. Records can be sorted (Low to High, High to Low, A to Z, Z to A) by clicking the header and clicking the up or down arrows that appear. This organization affects only the user that creates it,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



Filter Bar

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

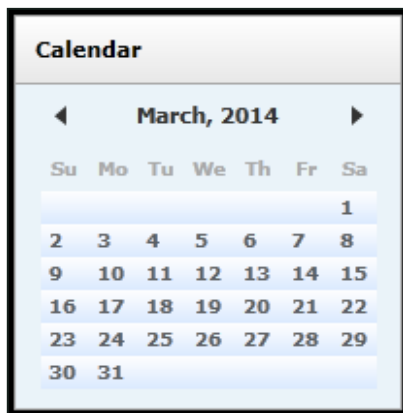
Removing all filters displays all call recordings in the system. You should avoid this because it can cause system performance issues.

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

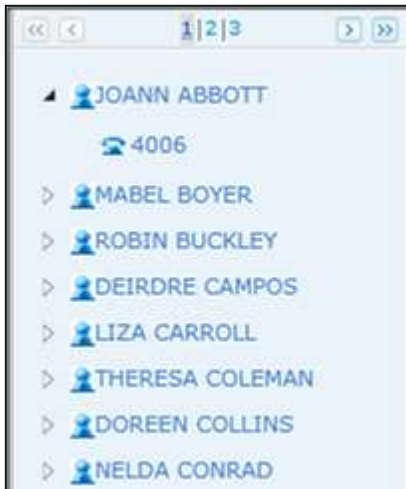


Allows you to select and display records from a specific date. Dates with available records are colored blue, while dates without records are gray. The current selected date is highlighted. Each date is selectable, and you can move between months by using the arrow icons to the left and right of the 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. For details on applying multiple filter criteria to the call list, see [Filters](#).

Agent

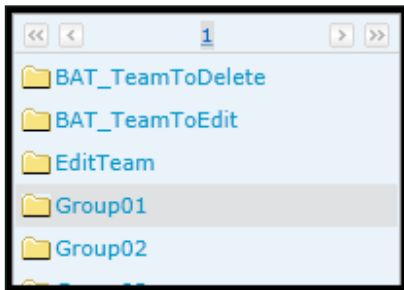


Displays the list of agents you can access. Selecting an agent will display records only for that agent.

You 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.

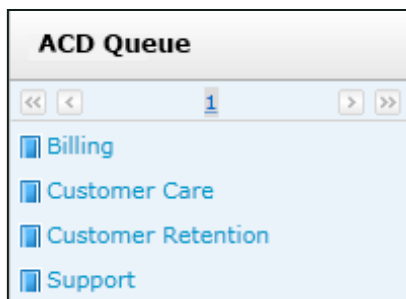
Only current extensions specified on the user account appear. If the agent had other extensions in the past, those extensions remain on the call record, but you cannot filter for just those extensions for an agent.

Discover Group



Displays the Discover Groups that the logged-in user can access. Discover 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



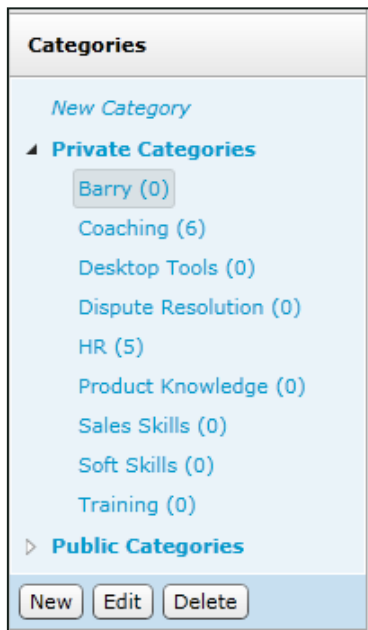
This is an optionally populated list. Depending on the recording integration and telephony equipment setup, values such as Queue or Gate can be listed by name or number, if available. Selecting an item from this list would filter the Call List to only display calls that were delivered to selected queues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

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



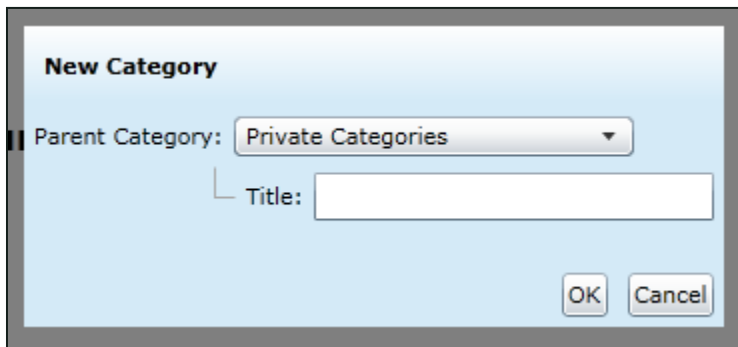
Lists any Categories that are accessible to you. The number of calls in a category appears in parentheses. Clicking on an item will display any calls that have been tagged with the selected Category.

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.

For details, see [Categorize](#).

Build a New Category

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

A dialog box titled "New Category" with a light blue background. It contains a "Parent Category:" label followed by a dropdown menu showing "Private Categories". Below this is a "Title:" label followed by a text input field. At the bottom right are "OK" and "Cancel" buttons.

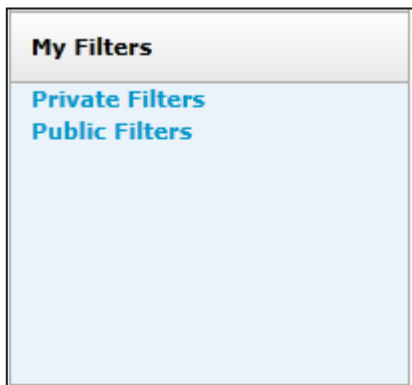
Select the Parent Category (Public, Private, or another category previously created to make your new category a sub-category). Type in the name of the category (25 characters max) and click **OK**.

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 your Private and Public Saved Filters. For details, see [Saving My Filters](#).

Tag Cloud

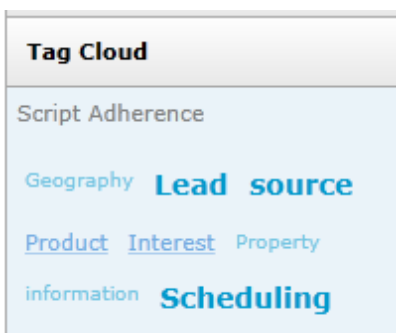


This filter menu is available only if your organization uses Uptivity Speech Analytics. The Tag Cloud is used to sort call recordings by the tag groups assigned when the speech analytics engine reviewed the call.

The tag size is weighted.

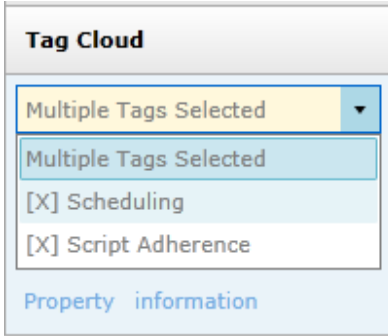
If you have created a large number of call tags, or one particular tag occurs very frequently, the Tag Cloud may not display correctly. Notify your Speech Analytics administrator if you experience this issue.

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 (i.e. Script Adherence as shown here) displays all recordings that match that tag. The selected tag moves to the top left corner of the Tag Cloud menu. Clicking the tag again removes it as the filter.

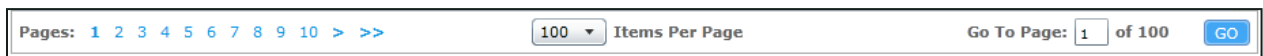
Notice that the tag weights change based on the new number of call records.



You can click on additional tags to view calls for multiple tag selections. The display changes to a drop-down list, as shown here. To remove a tag from the criteria, select the pull-down and click the "x" next to the tag.

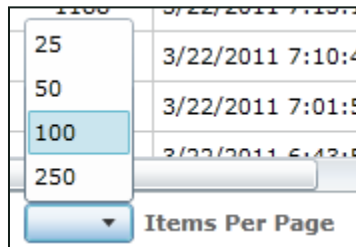
Page Navigation Bar

The Page Navigation Bar will always be displayed at the bottom of the Record List. This bar contains controls that 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 section explains how to manage the call records and their appearance in the Call List.

Call List Settings

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

Call List Settings let you 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 on which the call was recorded. 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. When viewing a call list in a time zone other than where the recording server resides, call times displayed may be off by the difference between the two time zones.
- **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.
- **Total Hold Time:** The total amount of time a call was in a "hold" status, according to your PBX. Availability of this feature and how it is calculated varies depending on the make/model of the PBX. Hold time is treated the same way as Silence in playback. TSAPI integrations calculate and display hold time on the call list. This can be filtered for by searching for calls with hold time greater than zero.
- **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 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 *Discover by Uptivity 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 Uptivity Support for additional information.

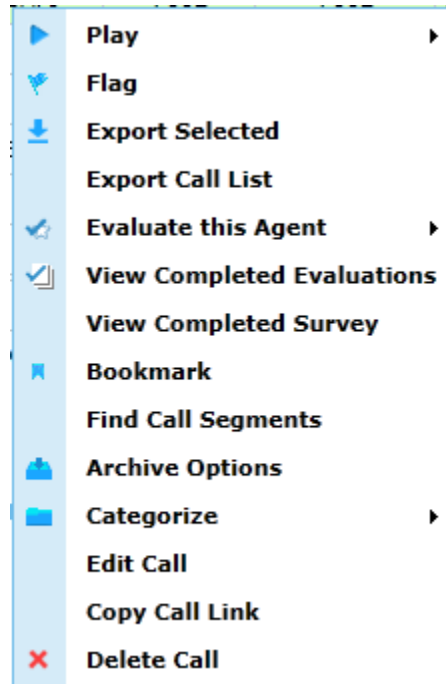
Web Player Settings

Web Player Settings allow you to set defaults for how the Web Player and video are going to be displayed. These options are configurable on a user-by-user basis. To access 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.



Play

See [Call Playback](#).

Flag

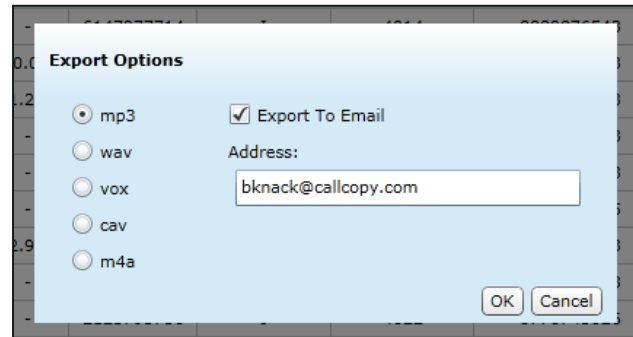
Flagging a call will display the flag icon (🚩) on the selected record. This makes it easier to see certain calls. The flag does not affect any reporting or other Discover functions. To remove a flag, repeat these steps.

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

Export Selected

The Export Selected option allows you to export the recording to a file for playback outside the Web Player. If you do not have appropriate permissions, you will not see this option in your menu.

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 Discover CAV Player application for playback, which is available in the \CallCopy\Installers directory on any Uptivity 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. For more information, see the "API Server" section in the *Discover by Uptivity 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, you must have additional permissions and your system must be configured to use SMTP.

Export Call List

The Export Call list feature allows you to generate 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. If you do not have appropriate permissions, you will not see this option in your menu.

Evaluate This Agent

Clicking this option will load the available Quality Evaluation forms for the call, which can then be completed and submitted for review. See the *Discover by Uptivity QA Coaching Manual* for more information on evaluating calls. If you do not have appropriate permissions, you will not see this option in your menu.

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 *Discover by Uptivity QA Coaching Manual's* section on searching QA evaluations. Look in the Evaluations Completed column to see if a call has been evaluated. If you do not have appropriate permissions, you will not see this option in your menu.

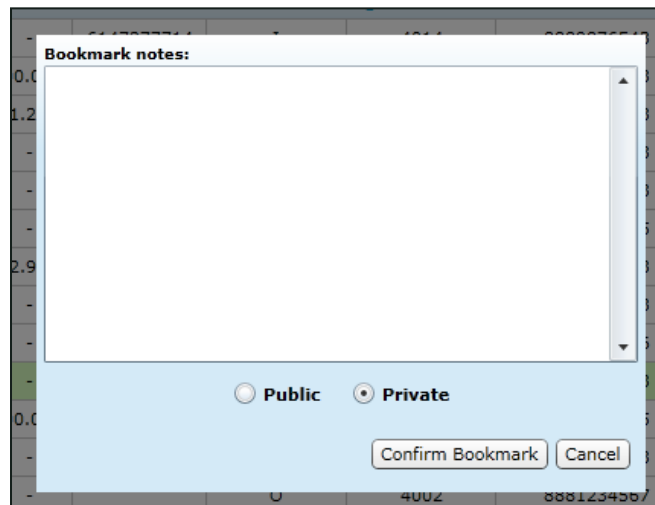
View Completed Survey

This option allows you 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. If you do not have appropriate permissions, you will not see this option in your menu.

Bookmark

Bookmarking allows you 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.

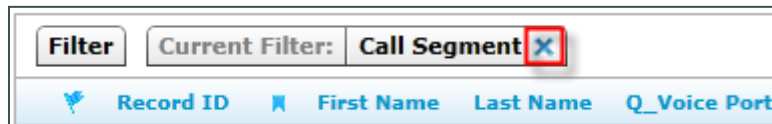


You can enter up to 200 characters (including spaces) into the text box. The bookmark can then be set to Public or Private. For Public bookmarks, any users that have access to play back the selected call will also see the bookmark text in the call. For Private bookmarks, only you will see the bookmark 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. You may need to refresh the screen for the icon to appear.

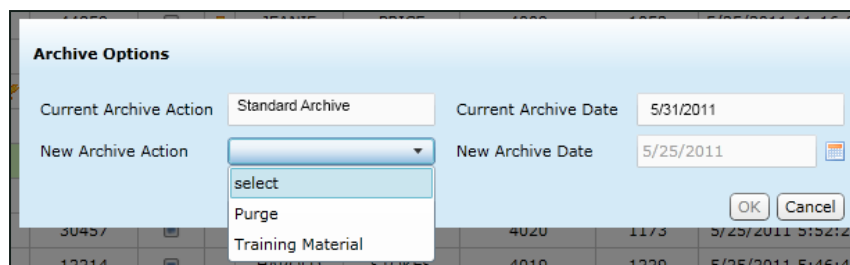
Find Call Segments

This option displays call records related to the selected call, displaying them in the order in which they occurred chronologically. This allows for calls broken up by conferences or transfers to be reviewed together without searching for each individual call manually. This feature ignores any filters that are currently applied to the Call List because some segments would not fit the criteria of filters such as Time Recorded, Agent, and Discover Group. For details, see [Call Segments](#). To clear the Call Segments filter once applied, click the X on the icon at the top of the page. The call list will refresh and display all calls again.



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. For details on how to add or remove available Categories, see [Call List Quick Filters](#).

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.

Call List Management

				1114	10/31/2011 2:
				1230	10/23/2011 9:
				1002	10/20/2011 7:
				1236	10/18/2011 12:
				1113	10/14/2011 9:
				1382	10/6/2011 1:2
				1223	10/3/2011 7:3
TASHA	SAMPSON	4013			
LYNNE	WALL	4023			
AROLD	STOKES	4019			
YOUNG	NICHOLS	4008			
ATRICE	ACEVEDO	4014			
RTHUR	GREGORY	4005			
RTHUR	GREGORY	4005			

- Export Selected
- Play
- Flag
- Perform Evaluation
- View Completed Evaluations
- Bookmark
- Archive Options
- Categorize
 - Coaching
 - Desktop Tools
 - Dispute Resolution
 - HR
 - Product Knowledge
 - Public Training
 - Sales Skills
 - Soft Skills
 - Time Outs
 - Training
- Edit Call
- Delete Call

Alternatively, you can also categorize a call record by dragging and dropping it to the category in the left navigation menu.

Group								
			2891	CHANDRA	GREGORY	00:06:12	1401	3/22/2011
			7053	CHANDRA	GREGORY	00:04:15	1078	3/22/2011
			5840	CLARISSA	ELLIOTT	00:04:15	1269	3/22/2011
			7459	CLARISSA	ELLIOTT	00:04:15	1117	3/22/2011
			4358	SONJA	PENNINGTON	00:04:15	1080	3/22/2011
			3863	DEIRDRE	CAMPOS	00:07:44	1339	3/22/2011
			1604	THERESA	COLEMAN	00:08:11	1392	3/22/2011
			5840	CLARISSA	ELLIOTT	00:04:15	1269	3/22/2011
			2940	HOLLY	WALSH	00:08:11	1297	3/22/2011
			6010	ADELINE	GILBERT	00:07:44	1330	3/22/2011
			12	MAX	FREDERICK	00:08:11	1298	3/22/2011
			8921	ROSALIND	MOODY	00:08:11	1180	3/22/2011
			1099	BENJAMIN	WEBER	00:08:11	1441	3/22/2011
			9080	CHANDRA	GREGORY	00:08:11	1046	3/22/2011
			7321	CLAUDIA	HESTER	00:07:44	1011	3/22/2011
			5367	MAX	FREDERICK	00:04:15	1313	3/22/2011

Categories

New Category

Private Categories

- Barry (0)
- Coaching (6)
- Desktop Tools (0)
- Dispute Resolution (0)
- HR (5)
- Product Knowledge (0)
- Sales Skills (0)
- Soft Skills (0)
- Training (0)

Public Categories

New Edit Delete

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

Sequential: 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	7/13/2012 11:14:17 PM
Categories				DUANE	HUNT	1441	4037	7/13/2012 11:13:04 PM
New Category				ERIK	JUAREZ	1497	4030	7/13/2012 11:12:28 PM
Private Categories				ERIK	JUAREZ	1096	4030	7/13/2012 11:00:47 PM
Coaching (20)				DOMINIQUE	CLARK	1174	4034	7/13/2012 11:13:04 PM
Desktop Tools (3)		3115	ERIK JUAREZ	RAFAEL	YORK	1096	4025	7/13/2012 11:14:17 PM
Dispute Resolution (6)		26528	DOMINIQUE CLARK	KRISTINE	CONTRERAS	1174	4032	7/13/2012 11:13:04 PM
HR (23)		39782	RAFAEL YORK	TRACY	MASON	1225	4005	7/13/2012 11:12:28 PM
Product Knowledge (2)		742	KRISTINE CONTRERAS	ALFREDO	MONTGOMERY	1041	4032	7/13/2012 11:00:47 PM
Sales Skills (2)				NICHOLAS	MILLER	1212	4026	7/13/2012 11:14:17 PM
Soft Skills (3)				RENE	RILEY	1317	4027	7/13/2012 11:12:28 PM

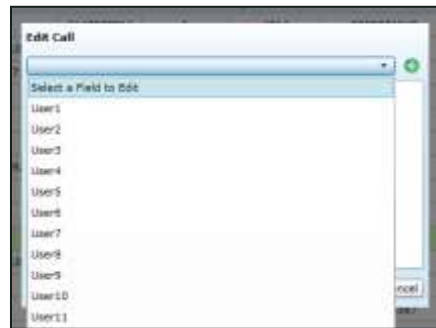
Non-Sequential: CTRL-click on each call you want to categorize. With the CTRL key still held down, left-click once on any of the highlighted calls (it will deselect it for the moment), and then left-click the same call, hold the mouse button down, and drag all the calls to the desired category, then release the left mouse button.

Hunt Group				CLINTON	STRONG	1385	4033	7/13/2012 11:14:17 PM
Categories				DUANE	HUNT	1441	4037	7/13/2012 11:13:04 PM
New Category				ERIK	JUAREZ	1497	4030	7/13/2012 11:12:28 PM
Private Categories				ERIK	JUAREZ	1096	4030	7/13/2012 11:00:47 PM
Coaching (20)				DOMINIQUE	CLARK	1174	4034	7/13/2012 11:13:04 PM
Desktop Tools (3)				RAFAEL	YORK	1225	4025	7/13/2012 11:12:28 PM
Dispute Resolution (6)				KRISTINE	CONTRERAS	1041	4032	7/13/2012 11:00:47 PM
HR (23)				TRACY	MASON	1168	4005	7/13/2012 11:12:28 PM
Product Knowledge (2)				ALFREDO	MONTGOMERY	1179	4006	7/13/2012 10:54:43 PM
Sales Skills (2)				NICHOLAS	MILLER	1212	4026	7/13/2012 11:14:17 PM
Soft Skills (3)		3115	ERIK JUAREZ	RENE	RILEY	1317	4027	7/13/2012 11:12:28 PM
test1 (0)		39782	RAFAEL YORK	TERRENCE	WELCH	1106	4028	7/13/2012 10:54:43 PM
Training (25856)		25856	ALFREDO MONTGOMERY	TERRENCE	WELCH	1179	4028	7/13/2012 10:54:43 PM
Training Opportunities (2)				TERRENCE	WELCH	1379	4028	7/13/2012 10:54:43 PM

Edit a Call Record

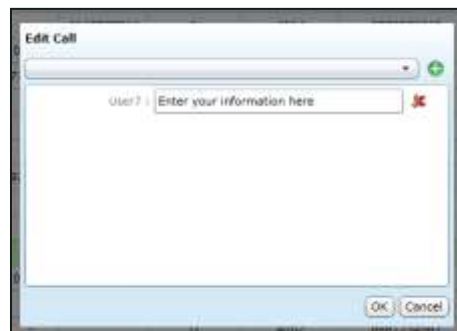
You can add information (metadata) to an individual call record after the call has been captured in the system. Edit Call uses the 15 User-Defined fields supplied out of the box to allow you to add data to a record that is then searchable and filterable. The added information appears for the record only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

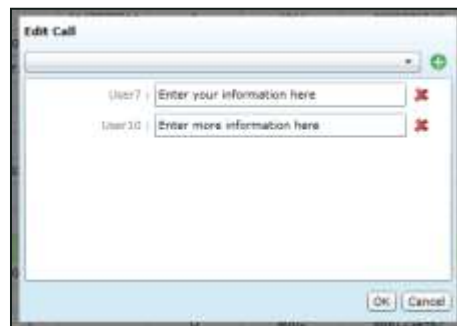


2. Enter your text. Character limits for these fields are as follows:

- **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

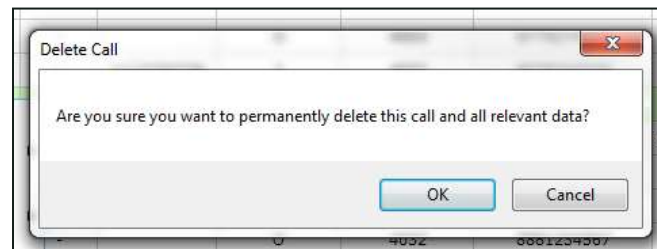
This feature provides a link to an individual call that another user can use to directly access that call. Clicking on **Copy Call Link** will open a pop-up with the link to the call, and instructions on how to copy the link to your system's clipboard. From there, the link can be pasted into another 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. For example, a user with the **Allow Viewing of User's Own Records** permission could not see calls for another user, even if you send them the link.

Delete Call

Deleting a call record will remove the record of the call from the database and also delete any audio and video files associated with the call. However, any evaluations and scores associated with the call are not deleted in order to preserve historical and reporting accuracy. A record of any user performing a delete is written to the system's **audit log**. If you do not have appropriate permissions, you will not see this option in your menu.

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**. The record will be deleted from the database and disappear from the web player immediately. The audio, video, and metadata files will be deleted the next time a file purge Archive Action runs, which is based on the Archive Interval in the Archiver Settings.



Filters

Options

Clicking the **Filter** button opens the Filter page, where you can 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'.</i> This will only return calls from that exact phone number.</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'.</i> This will return every call recorded <i>except</i> those from 614-555-5555.</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'.</i> This will display every call recorded that the Caller ID begins with 614.</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'.</i> This will display every call recorded that the Caller ID Ends with '5555'.</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'.</i> This will display every call recorded that the Caller ID field contains the numbers '555-55'.</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'.</i> This will exclude every call recorded that has the caller's phone number '555-5555', regardless of area code.</p>

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

The Data Fields section allows you to search against specific metadata 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.

Filters

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; display: inline-block; width: 150px;"><p>Script Adherence</p><p>Property Information</p><p>Scheduling</p><p>Lead Source</p><p>Product Interest</p><p>Geography</p></div> <input style="width: 100px; height: 100px; vertical-align: top; margin-left: 10px;" type="text"/> <input style="margin-left: 5px;" type="button" value=" >> "/> <input style="margin-left: 5px;" type="button" value=" << "/>

Quality Management

Quality Management

Evaluations Completed : Equals

Avg. QA Score : Equals

Randomizer : Number

These fields will filter for any Quality Coaching data associated with 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 QA 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. For details, see the *Uptivity Surveys Administration Guides* for details on Survey Linking. The **Survey Score** field only accepts positive numerical values. The **Other Score Values** drop-down allows searching for values matching **Inc** (Incomplete), **N/A**, or both.

Surveys

Survey Score : Equals

Other Score Values : Equals

Date/Days of the Week

Date

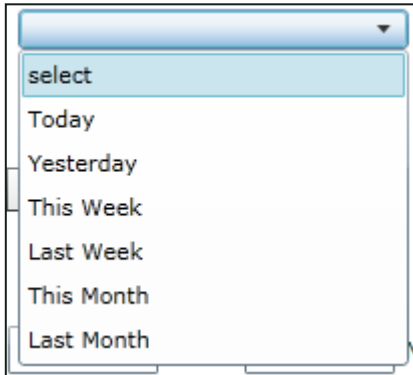
Start Date : 3/25/2011 10:39:29 AM 

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'.

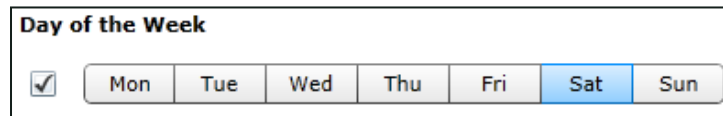
Filters



The **Relative Date Range** fields allow you to search for calls based on the intervals shown here.

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.



Duration

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

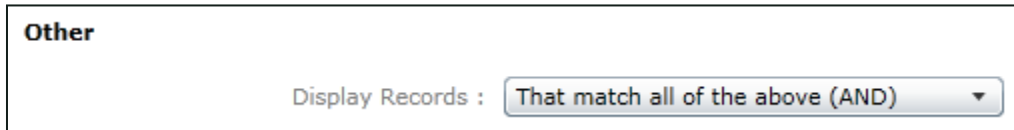
Screen Capture : Calls with or without screen capture

Call Type : All Calls

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

- **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



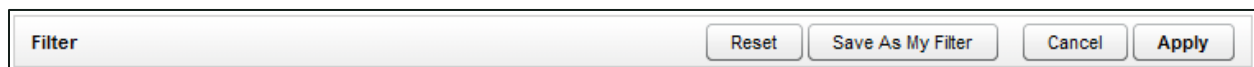
Other

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.



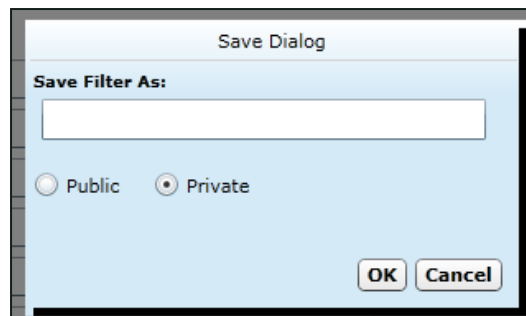
Filter Reset Save As My Filter Cancel Apply

- **Reset:** Clears any changes made but keeps you 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 you to the Call List.
- **Apply:** Sets the filters currently selected on the page and returns you 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.



Save Dialog

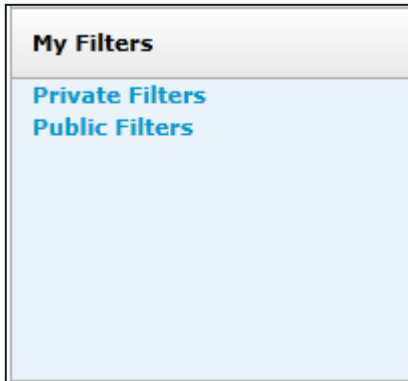
Save Filter As:

Public Private

OK Cancel

Enter a name to refer to the filter, and choose whether 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 you have saved and marked as Private.

The **Public Filters** link displays a list of any filters you or any other user has saved and marked as Public.

The **My Filters** list displays the available filters.

My Filters: Private			Back
Default Filter : Today			
Filter Name	Created On	Owner	
Agent # > 100	9/23/2011 3:44:40 PM	Unknown	Apply Edit Default Delete

- 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 filter's owner, 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 filter. For additional information, see [Options](#).
- Click **Delete** to delete the selected filter.

Call Segments

Note This feature is currently only supported in **Avaya TSAPI** call recording environments. Calls that are transferred or conferenced between different switches will not be tracked for call segments.

Call segments are separate, but related, call recording files. Users may consider an interaction one call, but Discover may have made multiple, separate recording files (i.e., segments). Examples include:

- **Transferred calls** are when an agent transfers a call to another agent or supervisor. Two or more call recordings can be created.
- **Conference calls** can create multiple call recordings based on the number of call participants and the call instancing.
- **Related calls** can be transfers, conferences, or calls performed by one or more agents involved in an original call. For example, if an agent is on a call, puts the first call on hold, calls a supervisor, ends the supervisor call, and returns to the original call, the call to the supervisor is a related call.

This feature provides a comprehensive record of an interaction by identifying all call recordings created for that interaction and displaying them together in chronological order.

The **Find Call Segments** option appears in the Call List Context Menu if

- The global **Allow Call Segments** setting is enabled in the system (refer to the *Discover by Uptivity Administration Manual* for the location of this setting), and
- The selected call has existing call segments related to it.

This option does not provide any permissions beyond those you already have for individual call recordings. If you can see and review only your own call records, when the system retrieves call records using the Find Call Segments option, the system displays only your records. For example, if you transferred a call to another agent, you will see the initial call record but not the call record for the portion of the interaction conducted by the second agent after the transfer.

Call records recorded with versions of Discover previous to v5.3 may have call segments/related calls, but those records do not contain the data needed for the Call Segments feature to identify them. This feature does not affect nor is it affected by call recording scripts, either standard or custom, that already place call CTI data such as Avaya UCID into call record fields.

Call Segment Scenario Examples

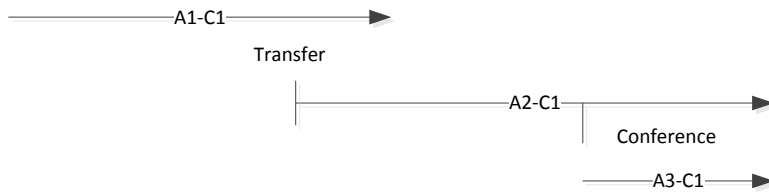
The following diagrams illustrate how call recordings are created in environments that use instancing and non-instancing. (A = Agent, C = Call)

Non-Instancing Transfer/Conference Scenario

In non-instancing call recording, multiple phone calls for an agent can be recorded on the same call recording file. For example, an agent is on a conference call, puts the conference on hold to answer another call, and then returns to the conference. Both of those interactions are recorded in one file even if they do not relate to the same subject.

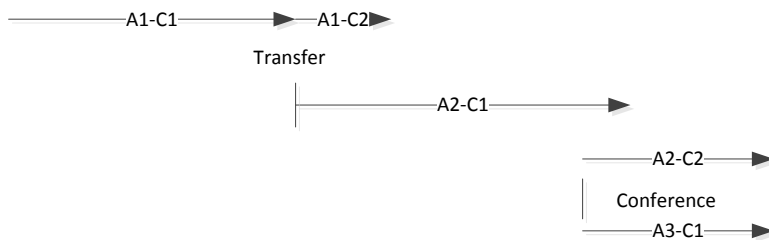
Filters

In the non-instancing scenario, C1, C2, and C3 are segments of one call, with each recording being a separate call recording file.



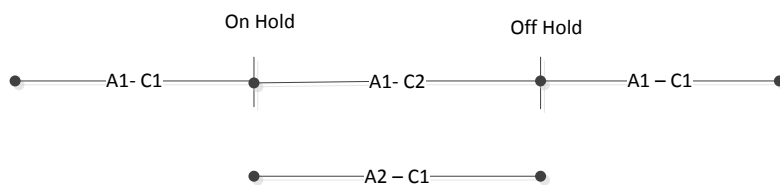
1. A customer calls Agent 1 (A1), which initiates Call 1 (A1-C1).
2. A1 transfers the call to A2, which initiates a new call (A2-C1).
3. A1 disconnects, which stops A1-C1. (A1-C1 includes the portion of the call when A1 tells the customer that he is being transferred.)
4. A2 conferences Agent 3, which initiates Call A3-C1. (In this scenario, A2-C1 includes the conference portion for A2.)
5. A3 receives another call and places the conference on hold. That second call is recorded as part of A3-C1.

Instancing Transfer/Conference Scenario



1. A customer calls Agent 1 (A1), which initiates Call 1 (A1-C1).
2. A1 transfers the call to A2, which initiates a new call for A1 (A1-C2) and A2 (A2-C1).
3. A1 disconnects, which stops A1-C2.
4. A2 conferences Agent 3, which initiates A2-C2 and A3-C1.

Bracketed Call Scenario



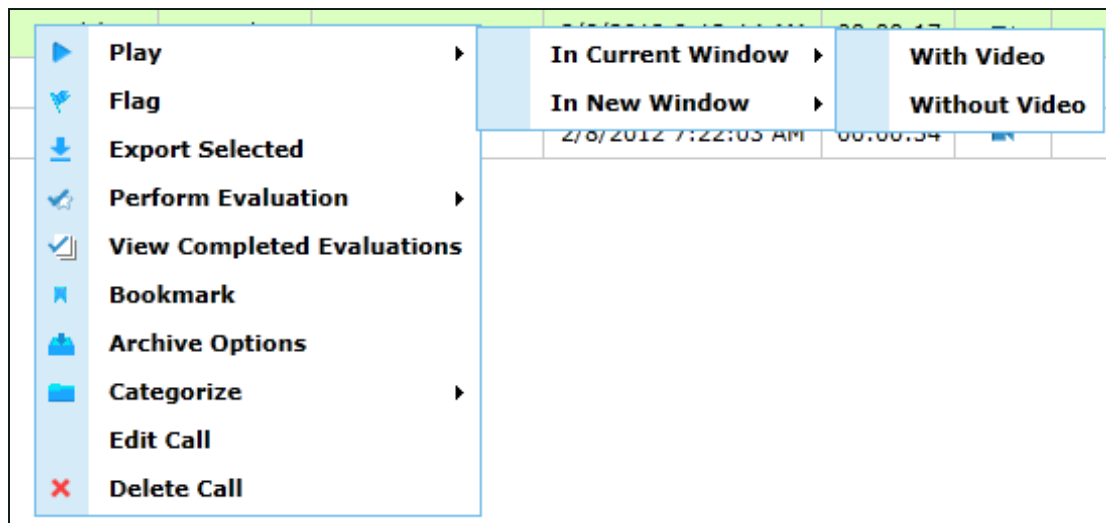
1. Agent 1 is on a call (A1-C1), puts the call on hold, and calls Agent 2, which initiates a new call (A1-C2).
2. Agent 2 picks up the phone, which initiates a new call (A2-C1).
3. Agent 1 and 2 finish talking and disconnect. A1-C2 and A2-C1 end. Note that A1-C2 and A2-C1 contain the same content.
4. Agent 1 returns to A1-C1 and finishes it.

Call Playback

Calls can be played by:

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

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





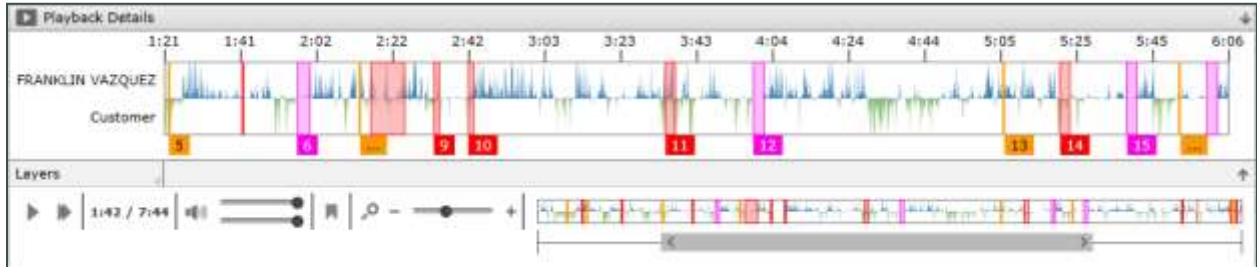
This graphic shows the Web Player at the bottom of the current window. Player controls (e.g., wave bar, volume controls, and feature panels) are used for listening to the call and viewing the agent's desktop activities.

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.



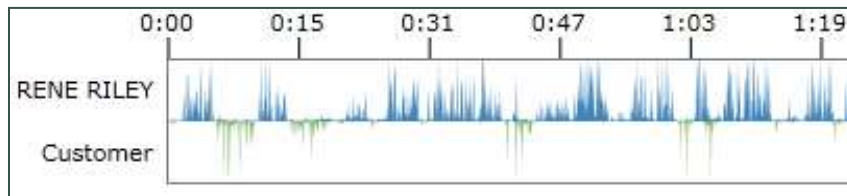
Playback Details Panel

This panel lets you control 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.





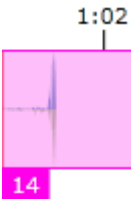



Waveform Display

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. Refer to the <i>Discover by Uptivity 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. Refer to the <i>Discover by Uptivity Administration Manual's</i> "Recorder Settings > Transcoder" section for more information.</p>
	<p>Speech Tags – When Analytics checks a call and detects key words or phrases based on established criteria (refer to the <i>Uptivity Speech 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 Analytics module. Refer to the <i>Discover by Uptivity Administration Manual</i> and <i>Uptivity Speech 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. For more information, see In-Call Bookmarking.</p>
	<p>Blackouts – If Discover 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.

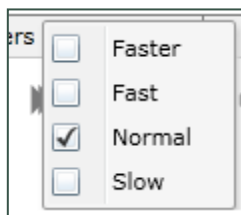


Playback Controls

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 ⏸. 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. The audio pitch will not be affected by changes in playback speed.



Faster: 200% of normal speed.

Fast: 150% of normal speed.

Normal: 100% of normal speed.

Slow: 75% of normal speed.

When the Call Segments feature is in use, **Previous** and **Next** buttons will also appear to allow you to skip between sequential related calls (internal Web Player only; the external player [i.e., playback in a new window] does not support this function). For more information, see [Call Segments](#).



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

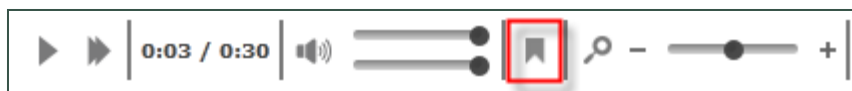


Volume control is displayed beneath the Wave Bar next to the duration indicator. Clicking on the Volume Icon will mute playback. The sliders can be used to independently adjust the volume of the agent and the customer. On mono calls, only one slider will be displayed. The current volume level (0-100%)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

If your system is configured to save files in stereo CSA format, you will see the dual volume control sliders pictured above. These can be used to raise or lower the volume of the individual audio streams.

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.

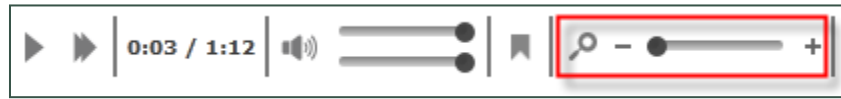
Add Bookmarks




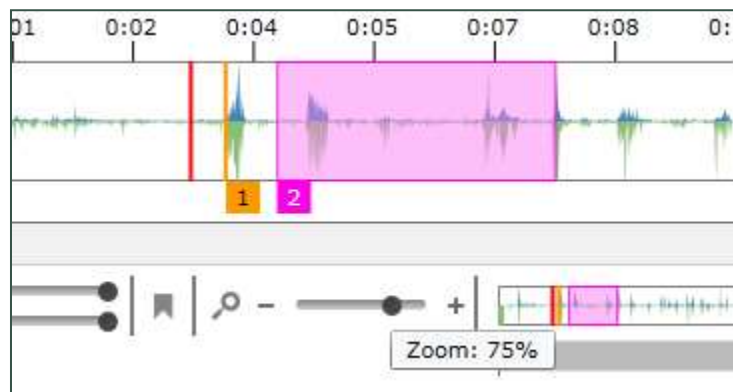
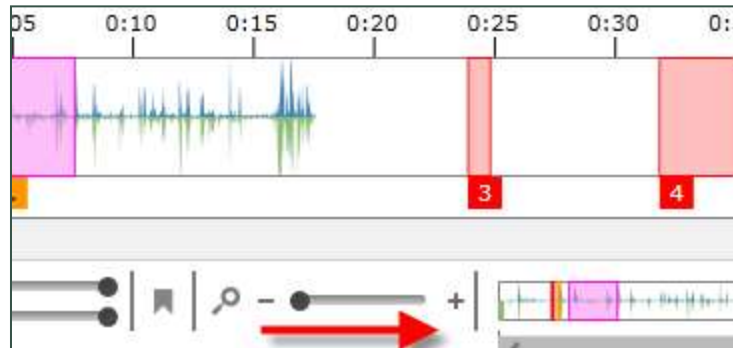
For more information on working with bookmarks, see [In-Call Bookmarking](#).

Call Playback

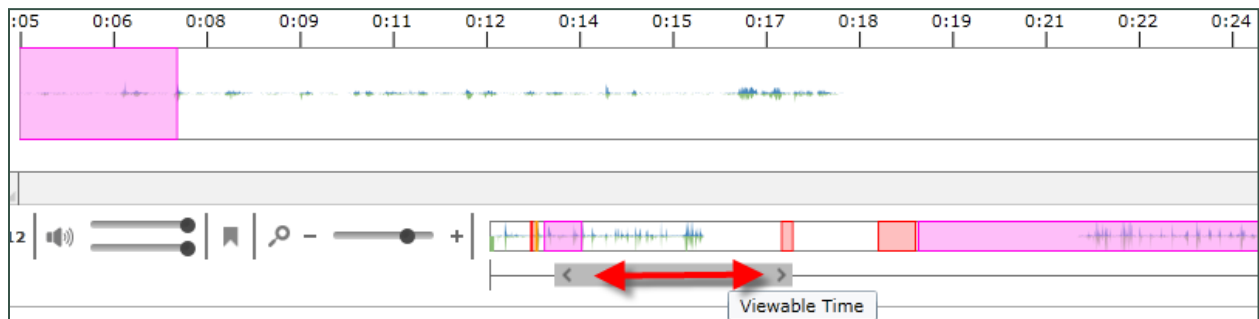
Waveform Zoom



Clicking the Restore icon  on the Playback Details bar expands the waveform to show greater detail. This also makes 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 allows you to tag a specific point within a call and add 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.

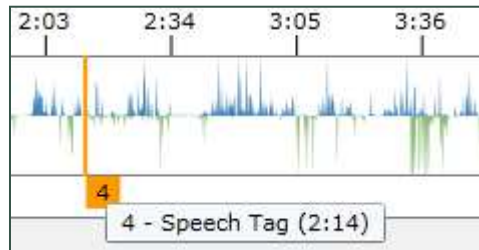
The Bookmark description can be entered in the **Notes:** field on the window. The **Start:** field will show the time at which the tag will be inserted. You can change the value in this field if needed to refine the tag point.

The bookmark can then be set to Public (select the check box) or Private (clear the check box or leave it unselected). For Public bookmarks, any users with access to play the selected call will also see the bookmark text in the call. For Private bookmarks, only you 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 your mouse over a mark in the Waveform Display will pop up the tag type and timestamp. This information is also displayed in the Layer Details Panel above the Wave Bar.



Edit or Delete Bookmarks

You can delete any bookmarks that you inserted.

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.


	4	1:41	-	Bookmark	test
Seek Edit Delete					
Name Value					




Feature Panels

By default, two Feature Panels with additional call data can appear above the Wave Bar. These panels show data from optional components installed on the 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. 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 only if you first open 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 Uptivity Speech Analytics, 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 the mouse over the borders between column headings. When the cursor 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 type. For details, see [Waveform Indicators](#).
- **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 you 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 (refer to the *Uptivity Speech Analytics Administration Guide* for more information on analytics).

Live Monitoring

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 Discover. Live monitoring of agent desktops is a separate feature licensed as part of Uptivity's Desktop Recording product. For the Live Monitor feature to function, the Info Broker service must be configured and running for the environment. Refer to the *Discover by Uptivity Administration Manual* for more information on Info Broker configuration.

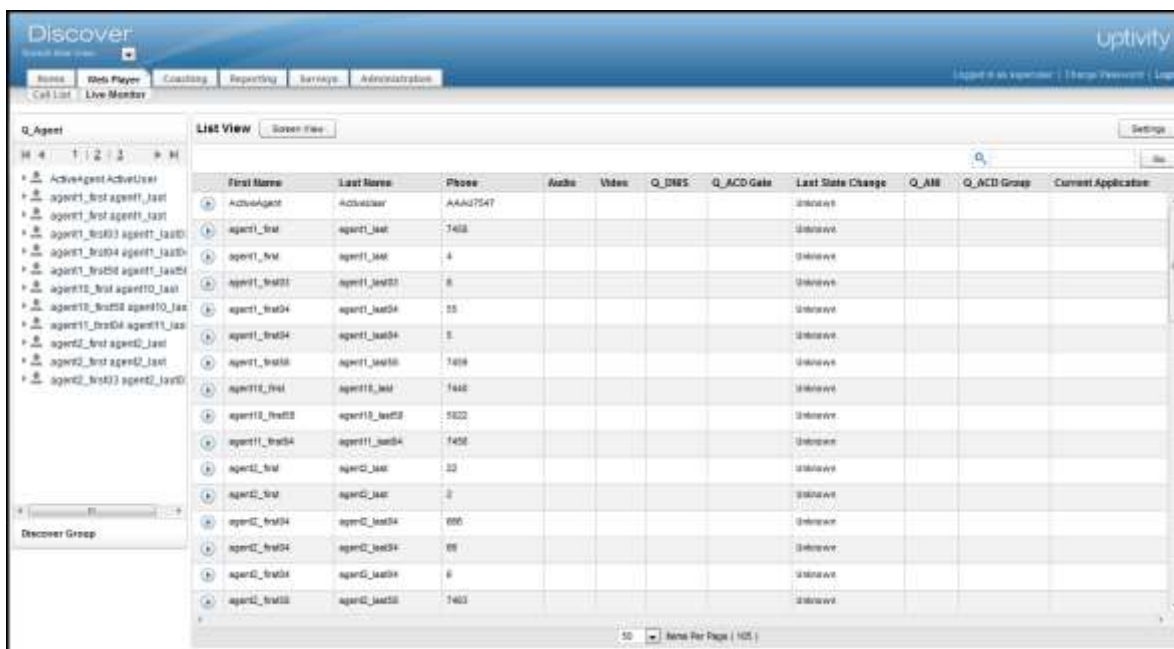
Note Live Monitor list and screen view pages do not time out like other pages in Discover due to frequent refreshes of page content. When you use Live Monitor, you should close your browser or lock your computer screen before leaving it unattended, particularly if you have administrative access to the Discover system.

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, on a single page, agents in the system and their current call state. The **Items Per Page** drop-down at the bottom of the list can be used to adjust (from 25 to all) the number of agents visible on the list at one time. The number displayed in parentheses represents the total number of results for the given filter or search, regardless of how many agents are displayed.



The screenshot shows the Discover Live Monitor interface. The top navigation bar includes 'Home', 'Web Player', 'Monitoring', 'Reporting', 'Settings', and 'Administration'. The main content area is titled 'Q_Agent' and 'List View'. A table lists agents with columns: First Name, Last Name, Phone, Audio, Video, Q_DNIS, Q_ACD Gate, Last State Change, Q_AIR, Q_ACD Group, and Current Application. The table contains 15 rows of agent data.

First Name	Last Name	Phone	Audio	Video	Q_DNIS	Q_ACD Gate	Last State Change	Q_AIR	Q_ACD Group	Current Application
ActiveAgent ActiveUser										
agent1_first agent1_last	ActiveAgent	AAAG7547					Unknown			
agent1_first agent1_last							Unknown			
agent1_first3 agent1_last3	agent1_fra	7403					Unknown			
agent1_first4 agent1_last4	agent1_fm	4					Unknown			
agent1_first5 agent1_last5	agent1_fm21	6					Unknown			
agent10_first agent10_last	agent1_fm24	55					Unknown			
agent11_first agent11_last	agent1_fm24	5					Unknown			
agent11_first2 agent11_last2	agent1_fm36	7406					Unknown			
agent11_first3 agent11_last3	agent11_fm	7446					Unknown			
agent12_first agent12_last	agent12_fm23	5822					Unknown			
agent11_first4 agent11_last4	agent11_fm24	7456					Unknown			
agent2_first agent2_last	agent2_fm	32					Unknown			
agent2_first3 agent2_last3	agent2_fm	2					Unknown			
agent2_first4 agent2_last4	agent2_fm24	686					Unknown			
agent2_first5 agent2_last5	agent2_fm24	69					Unknown			
agent2_first6 agent2_last6	agent2_fm36	6					Unknown			
agent2_first7 agent2_last7	agent2_fm36	7403					Unknown			

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.
- **First Name**: Displays the agent's first name.
- **Last Name**: Displays the agent's last name.
- **Phone**: Lists the physical phone extension being used by the agent.
- **Audio**: Indicates whether the agent is generating audio that can be monitored.
- **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.
- **Last State Change**: The timestamp that the last State change occurred for the agent.

Column names may vary based on settings on the Terminology page (see the *Discover by Uptivity Administration Manual*.) Users can modify which columns are displayed and the order in which they appear by clicking the **Settings** button at the top right of the Live Monitor page. Select or clear check boxes to determine whether the item appears, and click and drag to reorder the columns (items at the top appear farthest left). When finished, click **Save** to commit changes.

Quick Filter Agent List

Quick Filters for agents and groups function the same in Live Monitor as they do in the Call List. For more information, refer to [Agent](#) and [Discover Group](#).


Search for Agents

To the upper right of the Live Monitor Agent List is a search field indicated by a magnifying glass. This function can be used in combination with the quick filters to further refine the list. Search criteria are not column-specific. To search, enter an item to search for (full or partial name, extension, etc.) and click **Go**.



A search field with a magnifying glass icon on the left, the text 'agent' inside, and a 'Go' button on the right.

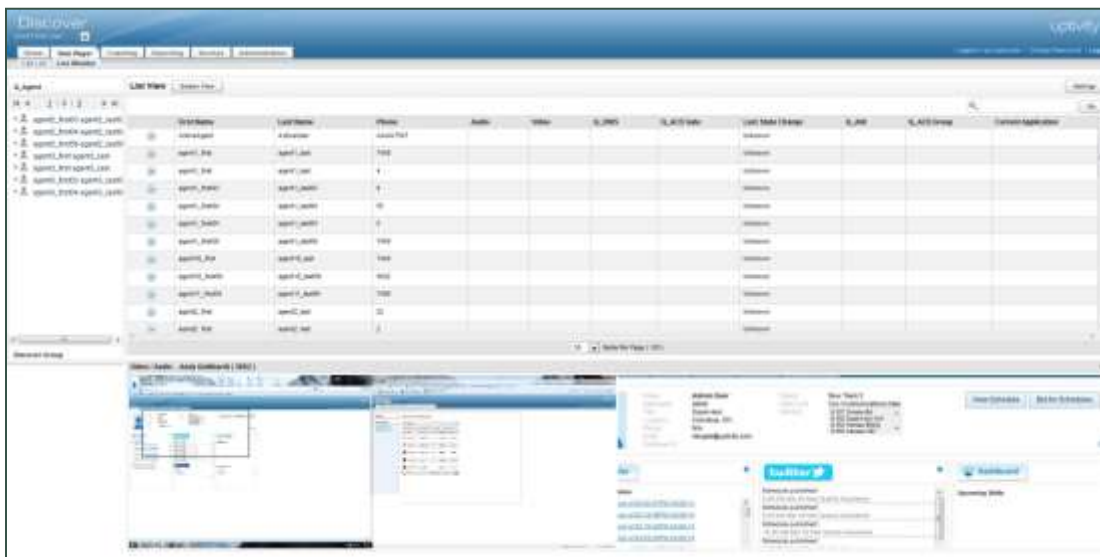
To display the entire list of users again, clear the terms in the Search field and click the search icon.

Live Monitoring Play

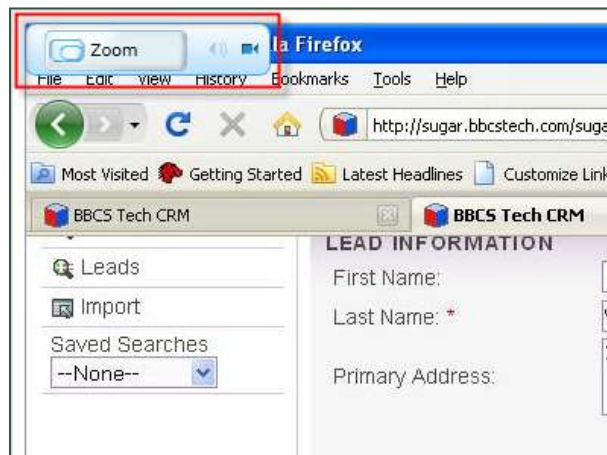
To play a call from the List view, click the Playback indicator. The indicator will change to a Stop button  to indicate the agent is being monitored. Live monaural audio will then begin to play. If video is available for the call, the screen capture panel will appear below the Live Monitor List.

You can also right-click a user and select Play from the context menu. The menu allows you to monitor in the current window or a new window (see example at [Screens View](#)).

The audio is streamed across the network from the recording server to your workstation. Streaming begins when you click  and stops when you click .



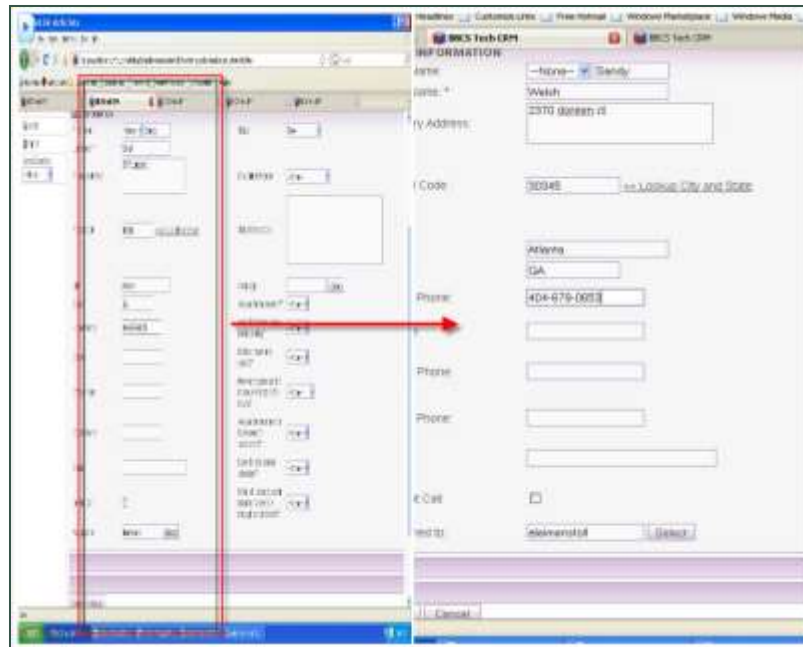
Hover the mouse cursor over the tab  in the upper left of the playback area to display the zoom menu.



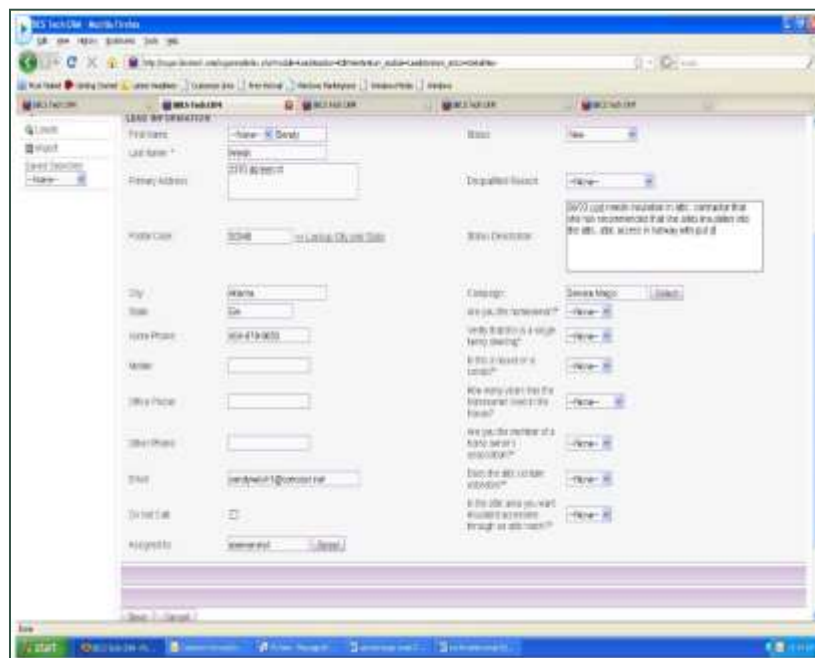
The speaker and camera icons indicate the presence or absence of audio and screen feeds. In this example, video is available, but no audio.

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.

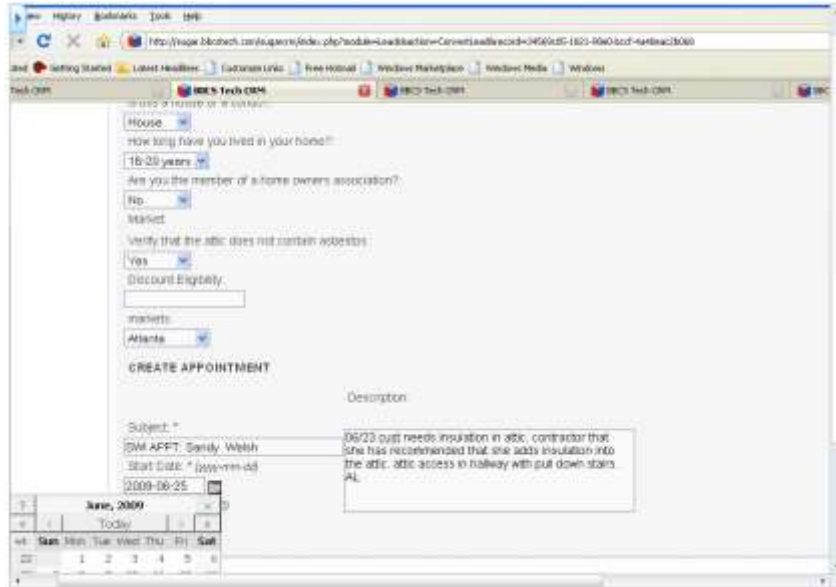




- **Stretch-to-Fit** resizes the full screen image to fit the window. It allows viewing the entire screen but may be difficult to read due to the compression.



- **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.

Live Monitoring

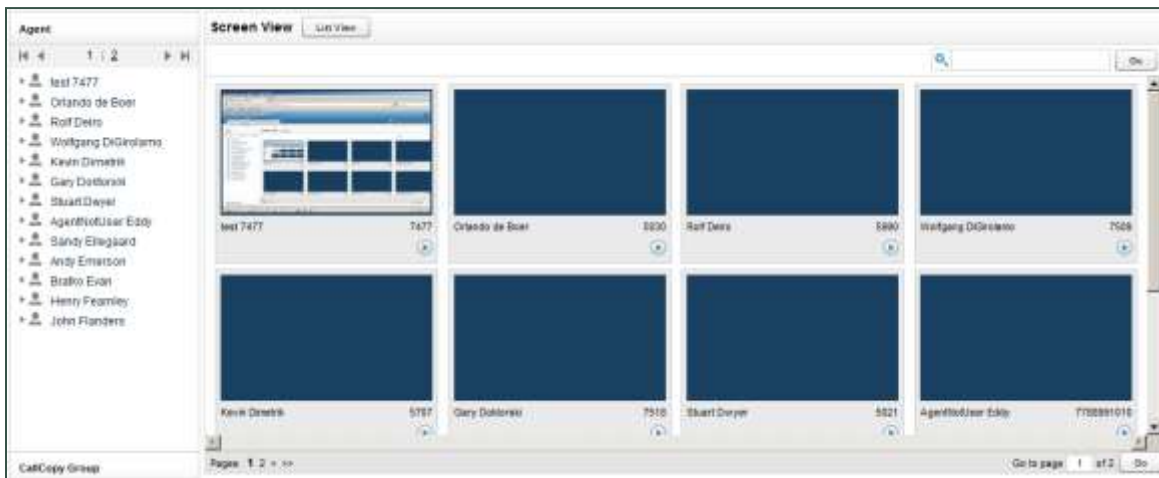


To stop playing the live stream, click the **Stop** button . The indicator will revert back to the idle state  and the audio and video playback will stop. Live monitoring will run continuously until you stop playback.

Screens View

The Screens View can be activated by clicking the **Screens View** button at the top of the Live Monitor page. For more information, refer to [Quick Filter Agent List](#) and [Search for Agents](#).

The Screens View displays each agent thumbnail in alphabetical order, according to agent last name. Navigating between pages is achieved by clicking the buttons at the bottom of the page or entering a specific page number in the text field. Clicking **Go** will take you directly to the specified page.



Screens View Playback

Screen thumbnails are updated for each agent desktop every five seconds. The thumbnails are compressed to 60% of JPEG quality and scaled down to a width of 120 pixels to help conserve network bandwidth. 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 you to the List View and begin playing back the live stream from the selected agent.

About Uptivity

What boosts the bottom line for any company with a contact center? How about getting the best that every agent can deliver from their first day on the job and constantly optimizing contact center management and performance? Only Uptivity gives you the tools you need to continuously improve every aspect of each step of every agent's life cycle and enhance customer satisfaction. You get exactly what you need thanks to a modern, integrated, and easy-to-use suite of tools that offers a unified system for performance management, workforce management, speech analytics, and call recording. Unparalleled customer service and support from our in-house staff combine with a better bundle for a better value, and a lower total cost of ownership.

Headquartered in Columbus, Ohio, and on the Web at www.uptivity.com.