CallCopy® | Innovations in Call Recording and Contact Center Solutions

cc: Discover Web Player Guide

Version 4.5

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callcopy.com

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Revision History			
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1.1	Updated Web Player panels, various corrections	Jay Thomas	5/27/2011
Rv 1	Added cc: Analytics Tag Cloud to Quick Filters chapter.	JThomas	9/12/2011
Rv 2	Clarified private/public categories and the calls that users can see in them.	JThomas	10/07/2011

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Chapter 1: Introduction

In this chapter we will cover:

- ✓ Basic product overview

Overview

The cc: Discover Web Player is used to access, playback, and manipulate recorded calls and associated data. The Web Player 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 permissions for controlling users' access to features.

Chapter 2: Web Portal Basics

In this chapter we will cover:

- ✓ Requirements to run the cc: Discover Suite
- ✓ Logging in and out of the systems, log in errors, and password recovery
- ✓ Version number
- ✓ Basic Web Portal navigation

Requirements

The cc: Discover suite includes a Web Portal and a Web Player. The Web Portal has a light-weight administrative system. The Web Player component does have minimum system requirements due to the processing required for full audio and video playback. With those tasks in mind, CallCopy recommends exceeding the minimum system requirements listed below:

- Microsoft Windows XP/2003/Vista/2008/7
- Internet Explorer 7; Firefox 3.0
- Microsoft Silverlight browser plug-in, v4.0 or higher
- 2.0Ghz Processor
- 1GB RAM
- 1280 x 800 screen resolution at 16 bit color depth

Logging In

The CallCopy Installation team will provide you with a user account with system administrator level privileges during installation and Administrator training. Your User account will consist of a Username and Password.

It is recommended you change your password from the default provided as soon as possible.

Additionally, a hostname or IP address for the server will be established so that you may access the web-based administration interface.

Type in the hostname or IP address for your server into your browser's address bar (http://callcopyserver.yourcompany in the example above). You will be presented with a login page similar to the one displayed below.

Login Screen Fields

Login Mode: There are two authentication modes available.

Database mode utilizes cc: Discover's internal user database that has been populated from manually entered user accounts.

Active Directory Mode is available only if the Active Directory Sync module is enabled and configured in the cc: Discover software. This mode uses Kerberos authentication to validate an Active Directory user is logged in and a member of the proper AD groups to access cc: Discover. With this mode, entering a username and password is not necessary as the user is already logged into the computer with their domain credentials.

Username: Enter your CallCopy username

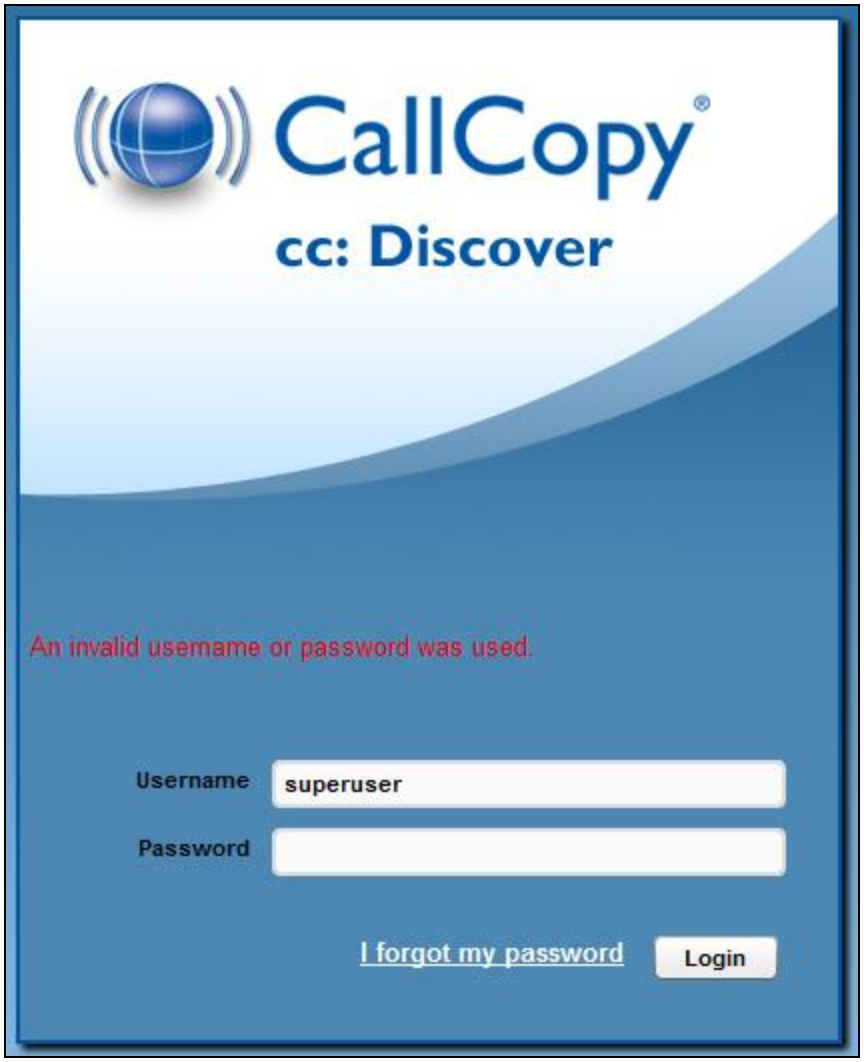
Password: Enter your CallCopy password

Fill in the listed field and click the **'Login'** button to continue.

Login Errors

If your login fails, you will be presented with the following error:

"Username or password is incorrect."



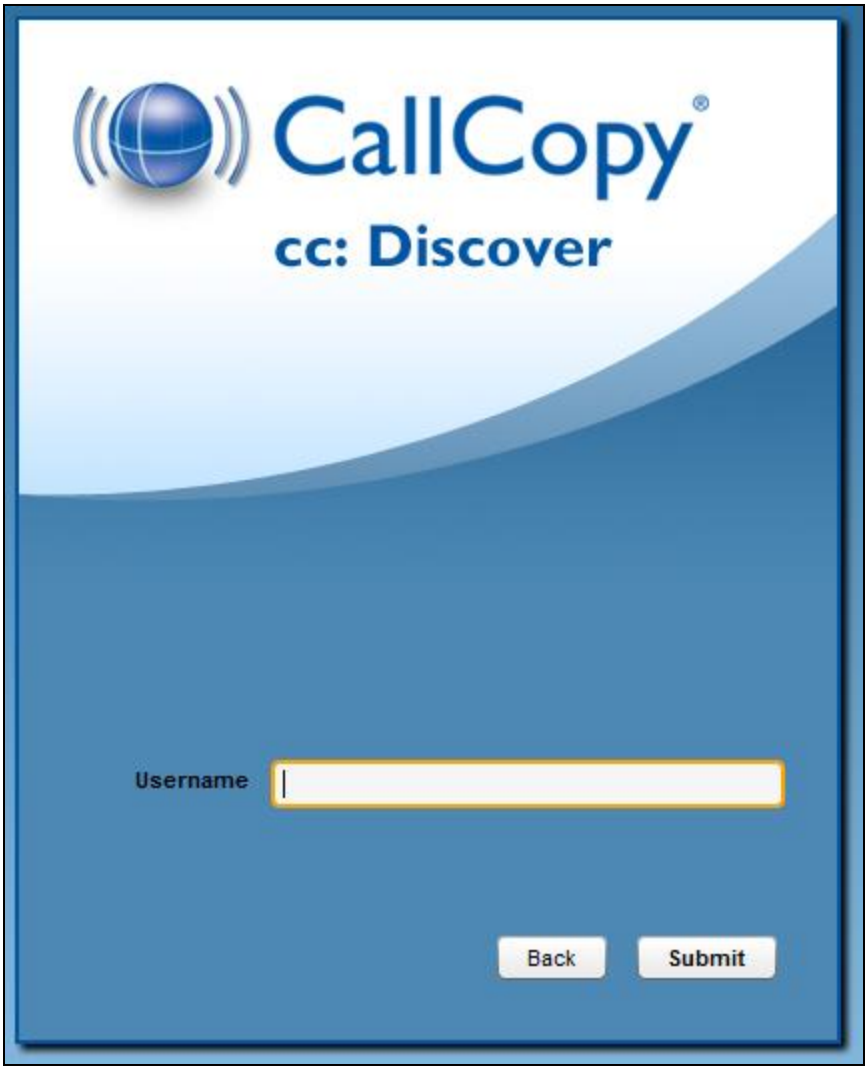
Note: *Passwords are case sensitive. If you are unable to login using the username and password you believe to be correct, please contact your CallCopy Support provider.*

"Forgot Password" Reset

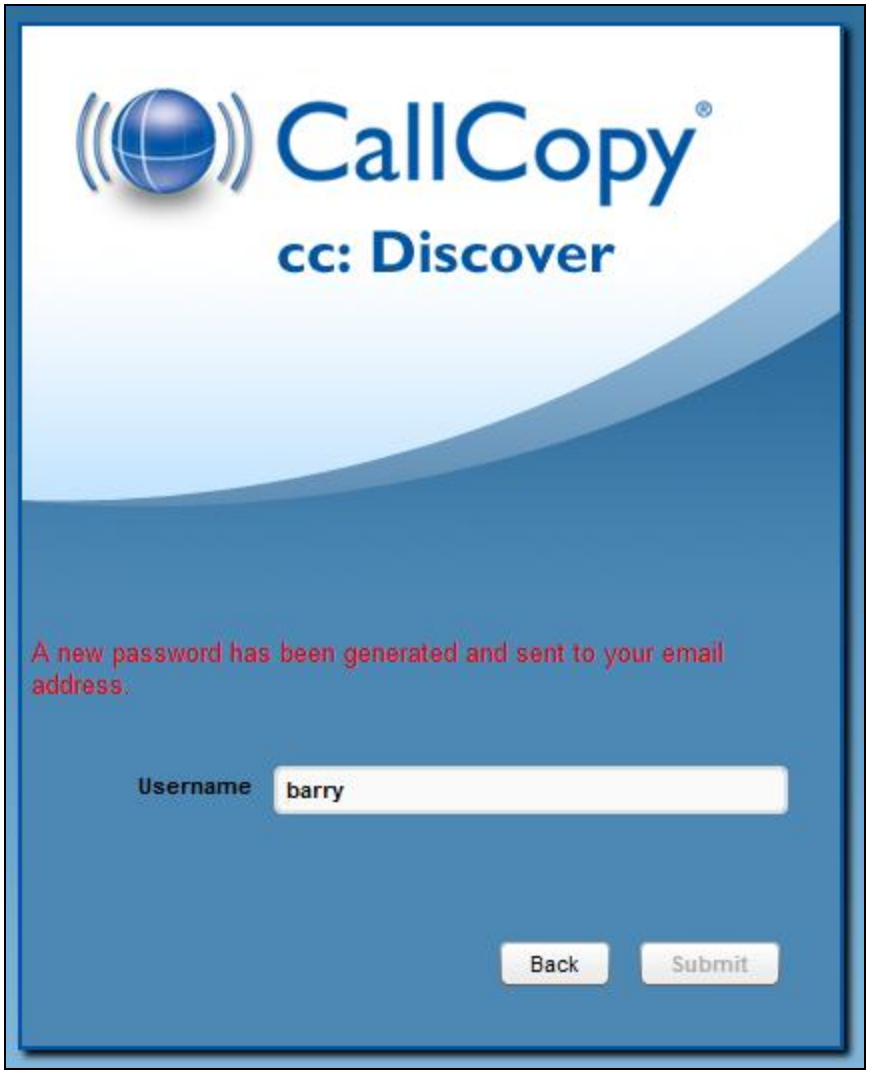
If you are unsure of or have forgotten your password, you can use the "Forgot Password" function on the login page. Your password will be reset and a temporary password will be e-mailed to you if you use this option.

To use the feature, first click the **'I forgot my password'** link on the login screen.

You will be taken to a page asking for the username that you wish to reset the password for. Enter the username and click **'Submit'**.

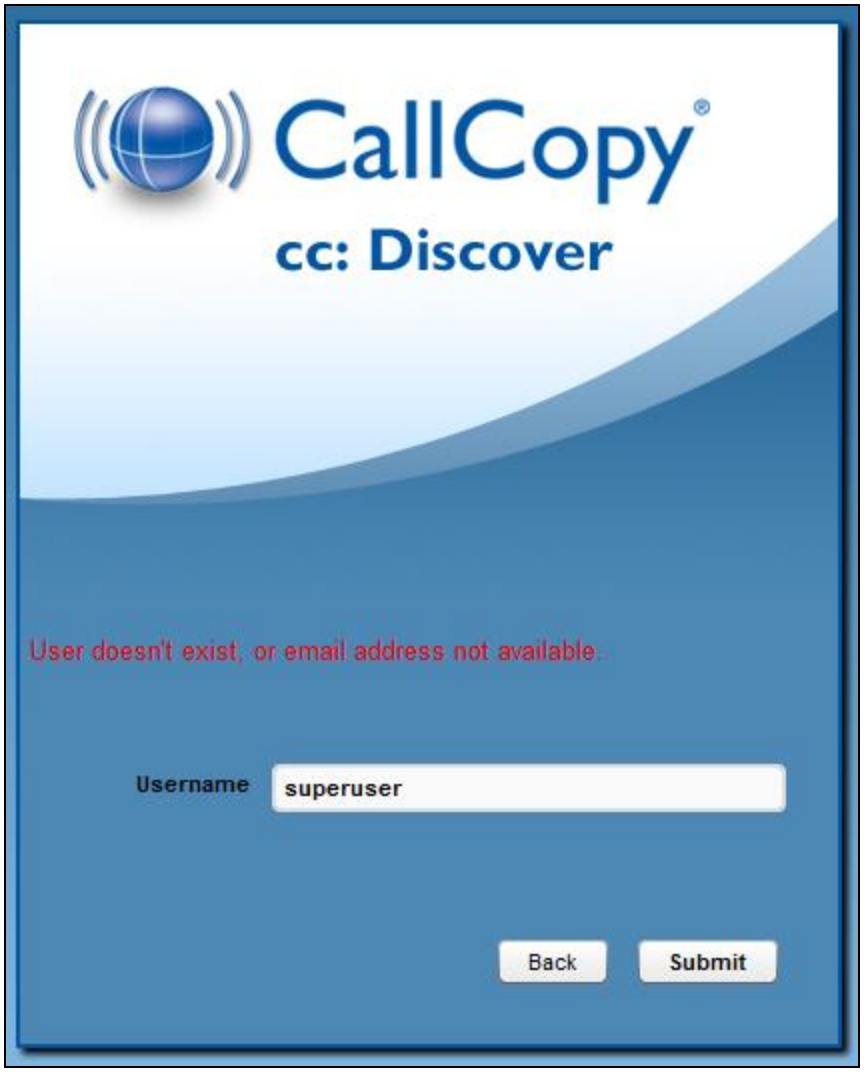


If successful, you will see the following message:



A randomly generated password will be sent to the email address associated with your username. Once you have logged into the system, you will be able to change your password.

If there was an issue locating your username, or if your user account does not have an e-mail address associated with it, you will see the following message. Please contact your cc: Discover system administrator to resolve this issue.



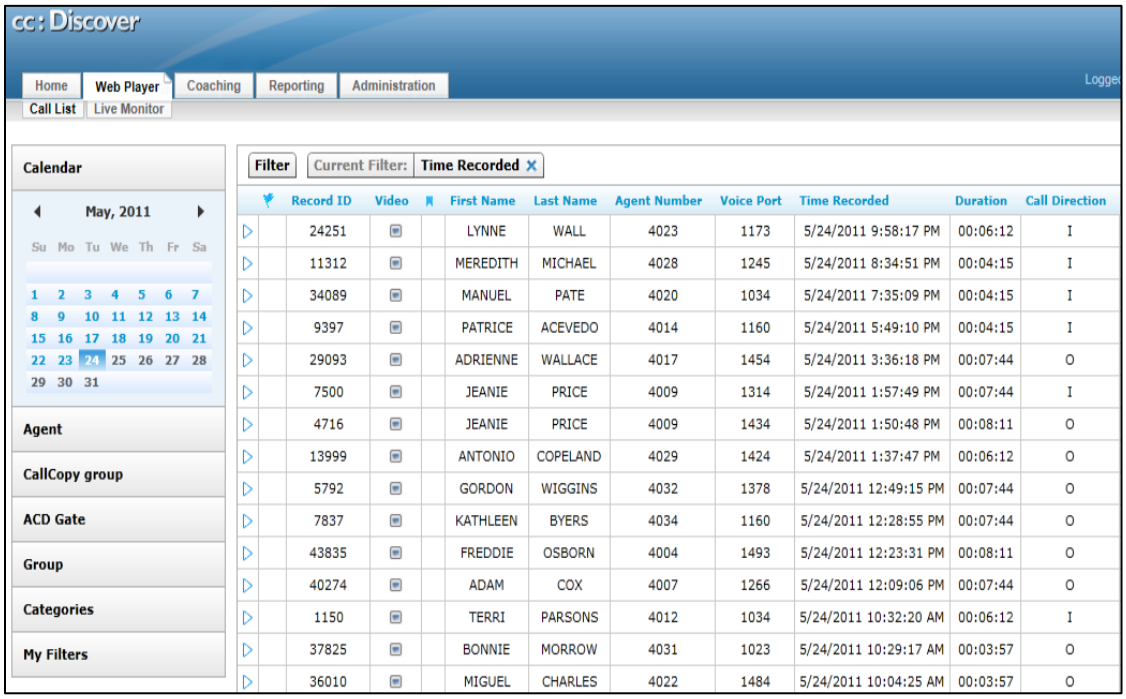
Locating Version Number

The version number for your cc: 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 when obtaining support for your system.

Navigating the Web Portal

Web Portal navigation is achieved by functional tabs and menus. The tabs available depend on the user's security permissions and the cc: Discover modules purchased. The navigation menu for a functional tab is on the left side of the page.

On the navigation menu, pages are organized under menu headers. Clicking a menu header will display the 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.

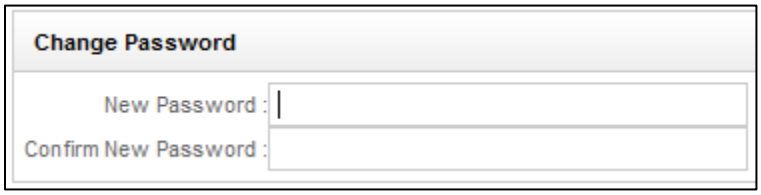


Logging Out

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

Changing Your Password

Clicking on the 'Change Password' link in the upper right-hand corner of every page will direct you to a page that prompts you to enter a new password, and then confirm the password you have just entered. After you have entered your new password, click the Save button to save the new password.



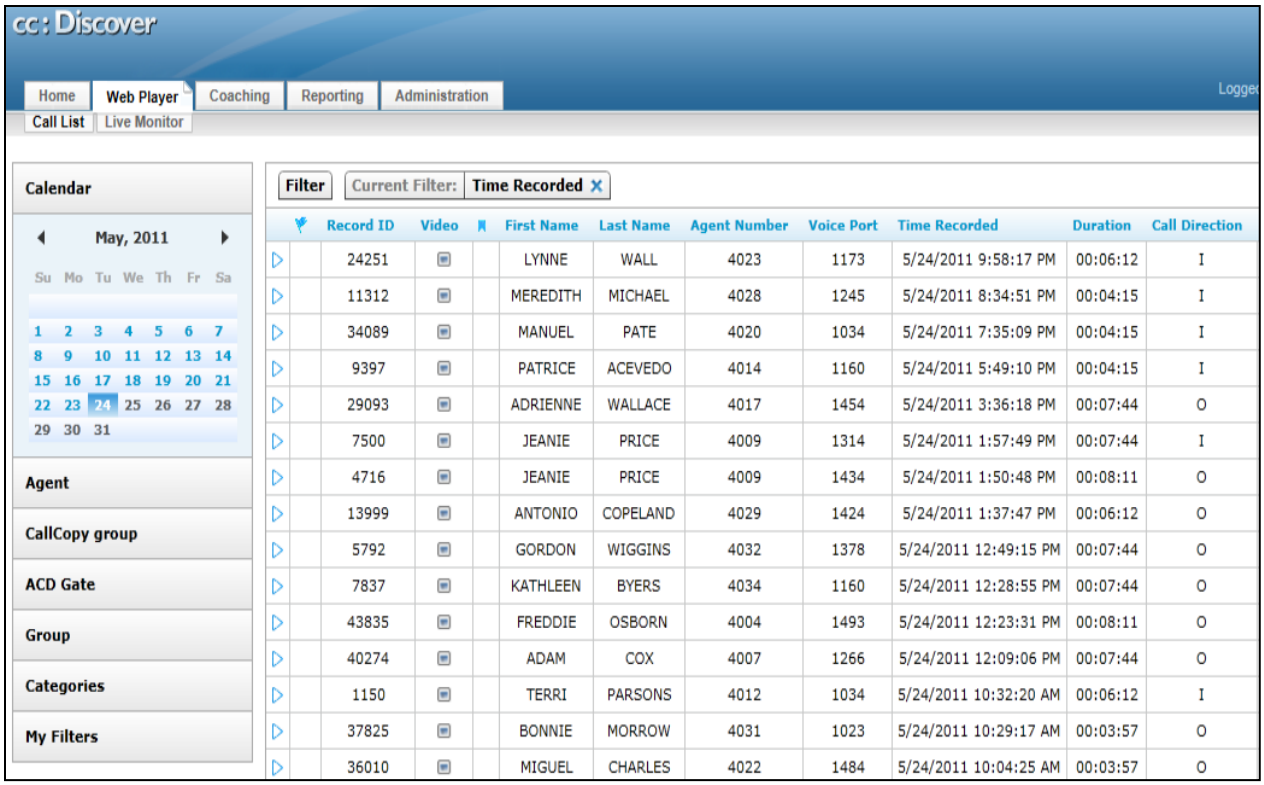
Chapter 3: The Web Player

In this chapter we will cover:

- ✓ The Web Player Tab
- ✓ The Filter Bar
- ✓ Quick Filter Menu

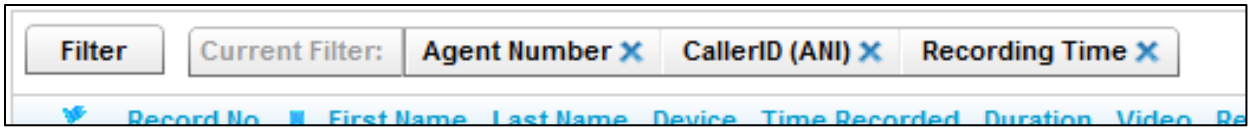
The Web Player Tab

To access the Web Player, click the Web Player tab. Under the tab, the Pages list allows you to switch between the Call List and Live Monitor views. The Quick Filter menu is displayed on the left, and the Call List is displayed in the main section of the screen.



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 current filter 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 (✕) 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.

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.

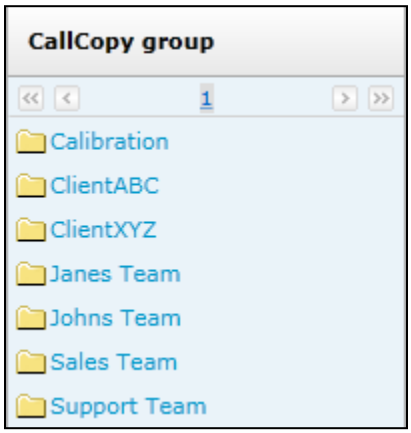
Apply Calendar Filter with another Quick Filter

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.

Agent

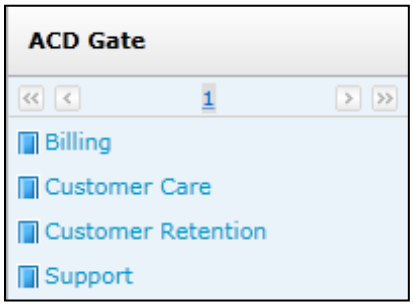
Displays the list of agents that the logged-in user can access. Selecting an agent will display records only for that Agent. Users can also drill down and select a specific Phone ID by clicking the triangle icon next to the agent icon. If an Agent is configured for multiple phone extensions or login numbers, you can select and filter records for the individual identifier.

CallCopy Group



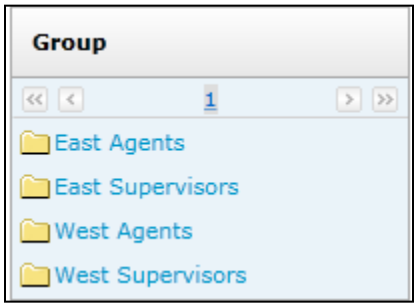
Displays the CallCopy Groups that the logged-in user can access. CallCopy Groups are created by system administrators and are often based on a company's organization or projects. Selecting a group displays records for Agents that are members of that group.

ACD Gate



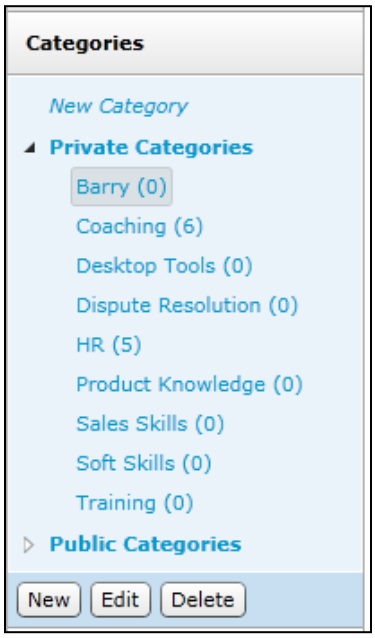
(This is an optionally populated list.) Depending on the recording integration and telephony equipment setup, values such as Queue or Gate can be listed by name or number, if available. Selecting an item from this list would filter the Call List to only display calls that were delivered to the selected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

Group



(This is an optionally populated list.) 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



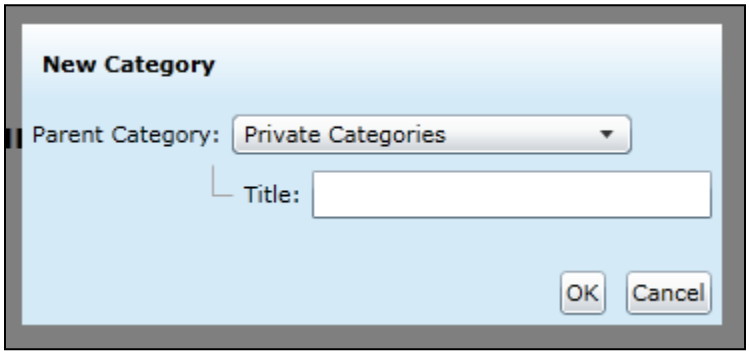
Lists any Categories accessible by the logged-in user. The number of calls in a category appears in parenthesis. Clicking on an item will display any calls that have been tagged with the selected Category.

Private categories are visible only to the user currently logged into the system. Public categories can be seen by any user with access to the Web Player. However, users see only the calls for the CallCopy Group, ACD Group, and ACD Gate to which they have been associated.

See the **Categories** section in the *Call List* chapter of this guide for more information.

Building a New Category

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



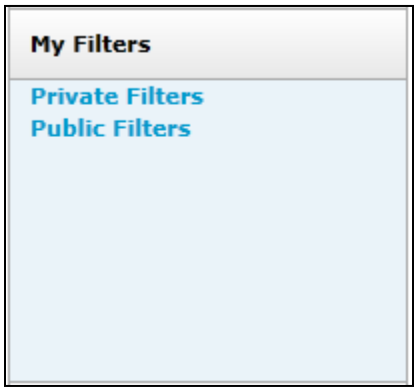
Select the Parent Category (Public, Private, or another category previously created to make your new category a sub-category). Type in the name of the category and click OK.

Editing or Deleting 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 are deleted.

My Filters



This list links to Private and Public Saved Filters for the logged-in user. See the **Saved Filters** section in the *Call List* chapter of this guide for more information.

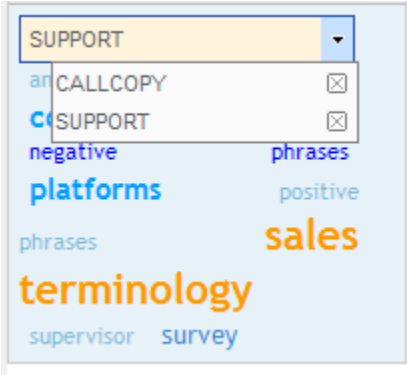
Tag Cloud

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 the “Support" tag will display all of the recordings which matched the tag “support.”

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.

Chapter 4: Call List

In this chapter we will cover:

- ✓ Call List overview
- ✓ Call List and Web Player Settings
- ✓ Context Menu
- ✓ Page Navigation Bar

Call List Overview

The Call List displays individual call recording records. 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. This organization affects only the user that creates it, and it remains in effect the next time the user logs into the system.

Filter | Current Filter: Time Recorded ✕ | Settings

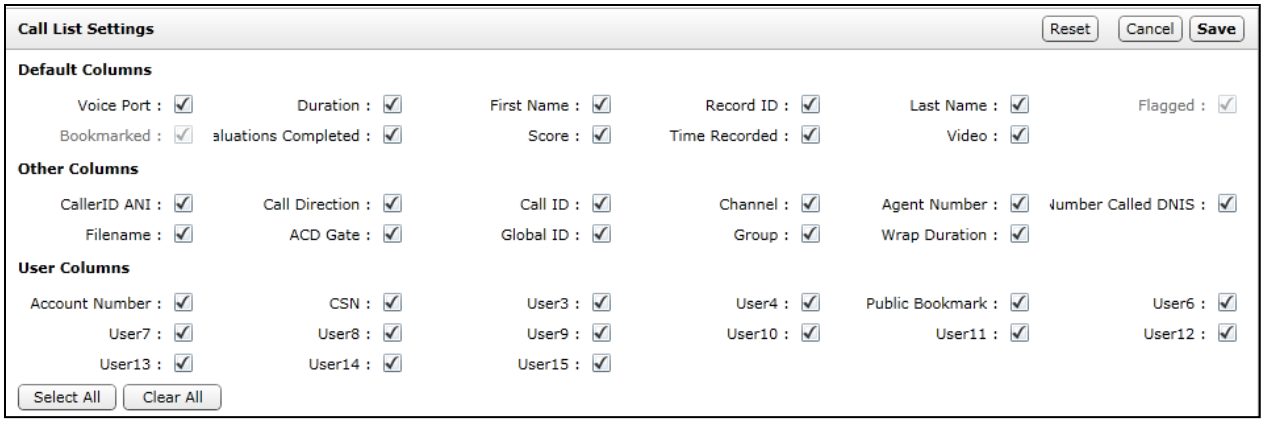
		Record ID	Video		First Name	Last Name	Agent Number	Voice Port	Time Recorded	Duration	Call Direction	CallerID ANI
▷		44859			JEANIE	PRICE	4009	1052	5/25/2011 11:16:06 PM	00:04:15	O	
▷		21641			BILL	ESTRADA	4026	1326	5/25/2011 11:02:58 PM	00:06:12	I	6142546579
▷		34451			BILL	ESTRADA	4026	1180	5/25/2011 9:10:46 PM	00:03:57	O	
▷		28314			KATHLEEN	BYERS	4034	1096	5/25/2011 7:38:41 PM	00:03:57	I	6144984568
▷		13459			BILL	ESTRADA	4026	1196	5/25/2011 7:33:03 PM	00:07:44	I	6142467373
▷		29612			BERNARD	TYSON	4038	1105	5/25/2011 6:16:27 PM	00:03:57	O	
▷		30457			MANUEL	PATE	4020	1173	5/25/2011 5:52:25 PM	00:03:57	O	
▷		12214			HAROLD	STOKES	4019	1229	5/25/2011 5:46:49 PM	00:04:15	O	

Call List and Web Player Settings

The Call List Settings page contains the configurable options for the components of the Record List. To access this page, click the **Settings** button at the top right of the Filter bar.

Call List Settings

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



The Default Columns are:

- **Voice Port:** 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 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.
- **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 Number:** The Phone ID that will be recorded.
- **Number Called (DNIS):** The phone number or extension that was called.
- **Filename:** Location and name of the file with the call recording.
- **ACD Gate:** 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.
- **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.

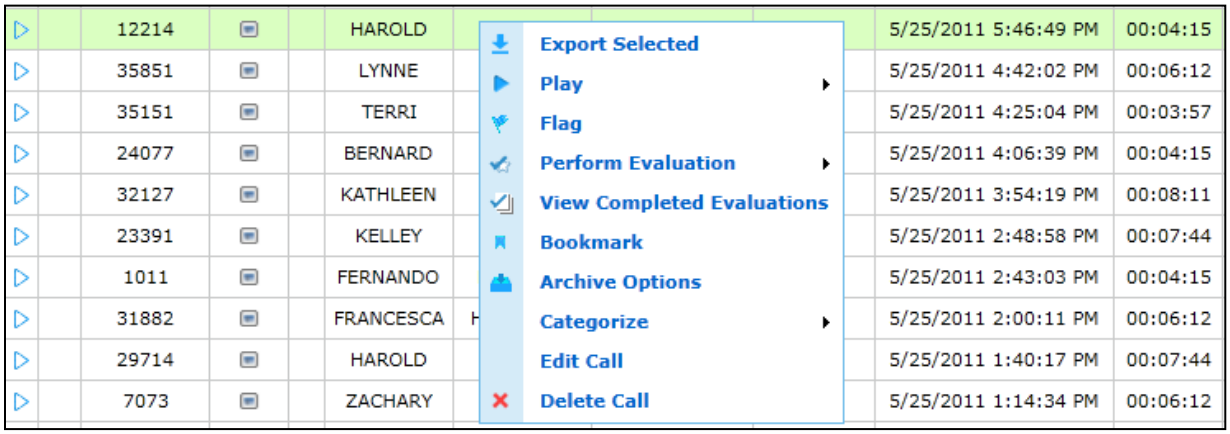
User Columns are data fields not normally utilized in the system. Data received from third party IVR, CRM, or ACD platforms can be inserted data into these fields. See the *cc: Discover Administration Manual* for additional information.

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.

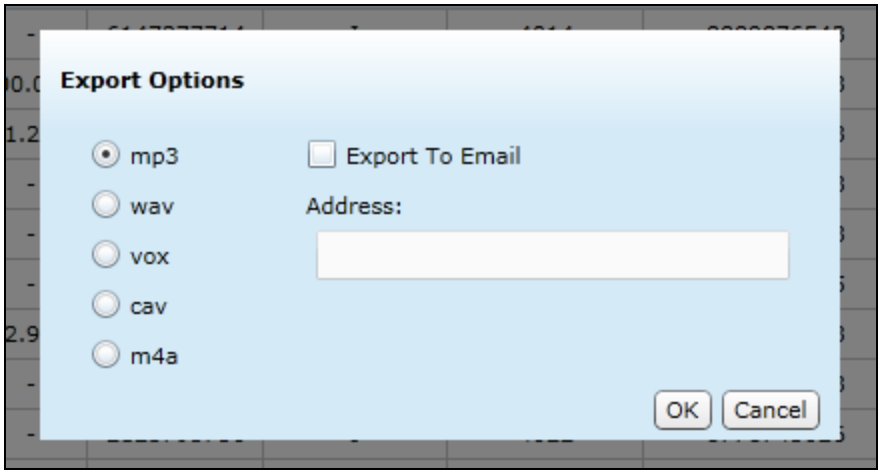
Context Menu

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.



Export Selected

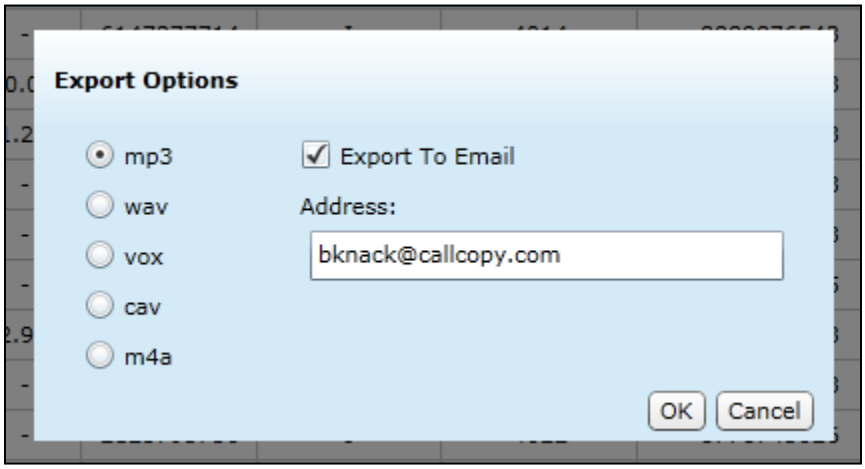
The Export Selected option allows the user to export the recording to a file for playback outside the Web Player. This feature must be enabled in the logged-in user's permissions for the menu item to be displayed. Selecting this function will display a sub-menu of available Export file types.



The available supported file types are:

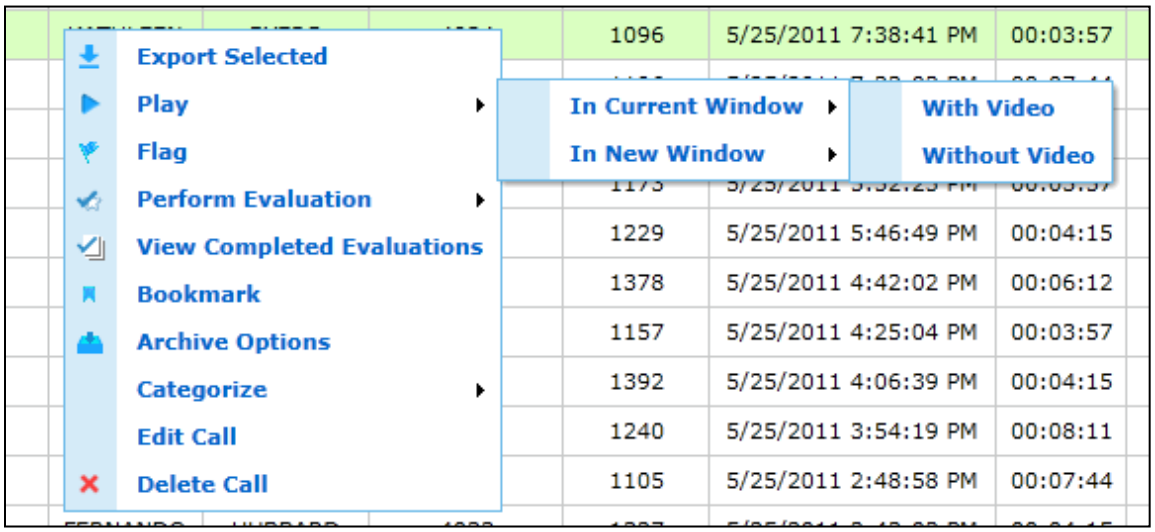
- **MP3:** Suitable for playback on most computer and portable media players. File sizes can be large depending on call length, which can cause issues when trying to e-mail the file.
- **WAV:** Compatible with most computer media players. Uses GSM compression to achieve a very small file size that makes 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.
- **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.

Calls can be exported to an e-mail address if appropriate permissions are granted to the user.



Play

The Play function loads the record into the Player Control for playback. This function can also be accessed by 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.

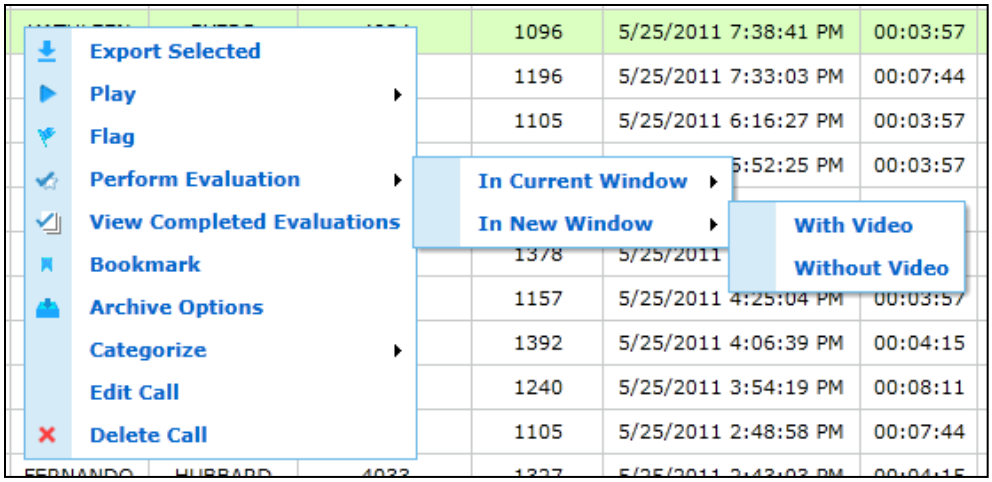


Flag

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.

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 Quality Coaching Guide* for more information on evaluating calls.



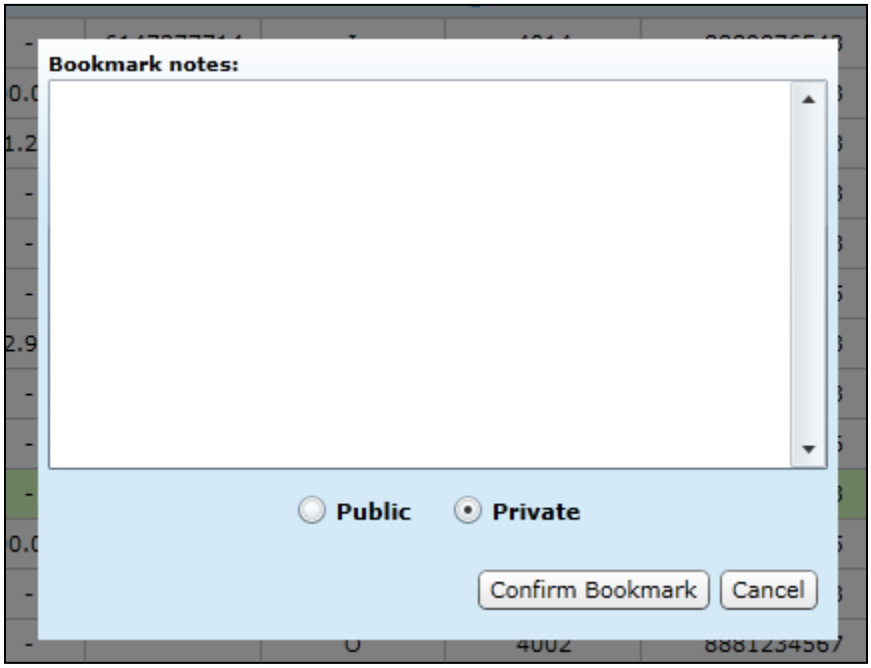
View Completed Evaluations

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 Guide's* section on searching QA evaluations. Look in the Evaluations Completed column to see if a call has been evaluated.

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.

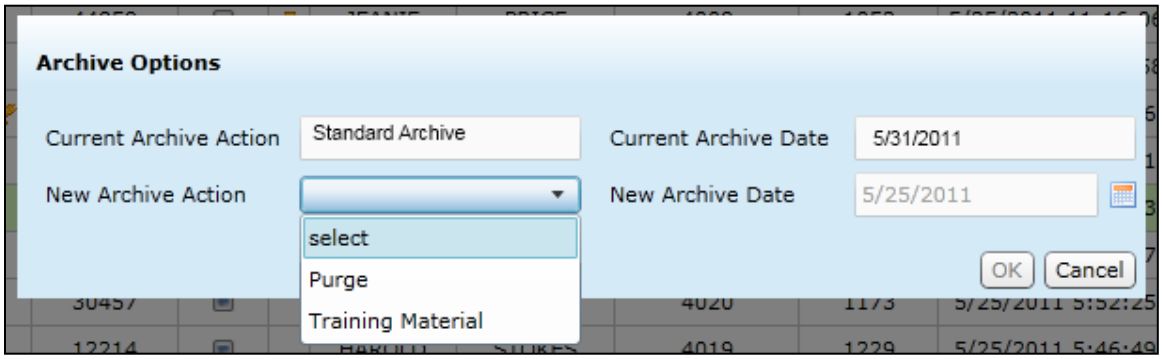


Users can enter up to 1024 characters into the text box. The bookmark can then be set to Public or Private. For Public bookmarks, any users that have access to play back the selected call will also see the bookmark text in the call. For Private bookmarks, only the current logged-in user will see the 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.

Archive Options

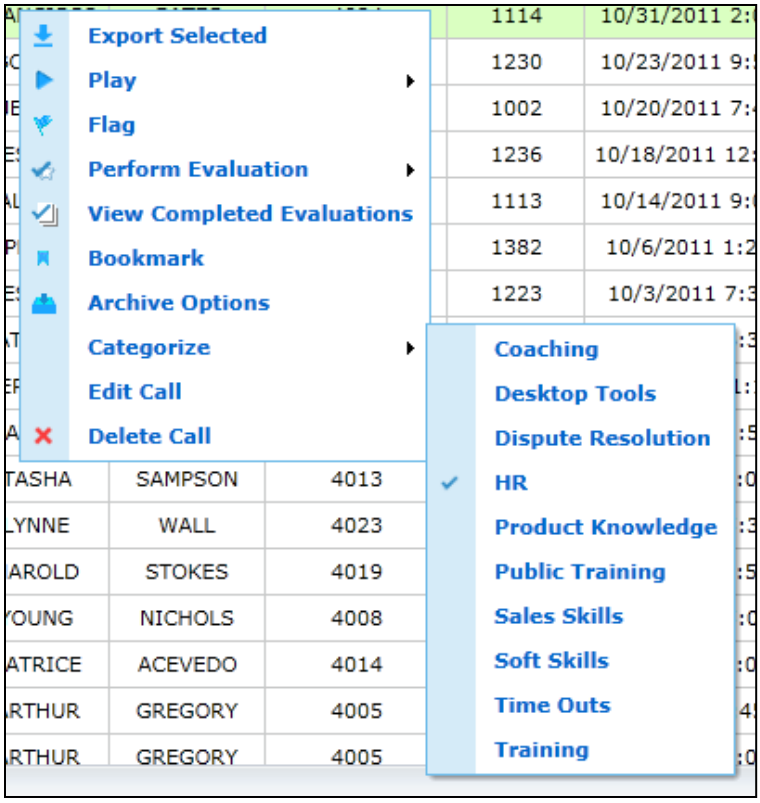
Archive Options will allow you to make changes to the Archive settings for single calls. For example, you may want to archive calls to use as training materials. You will see the currently applied archive action and the date it is slated to take place. The Purge action will delete the call record on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



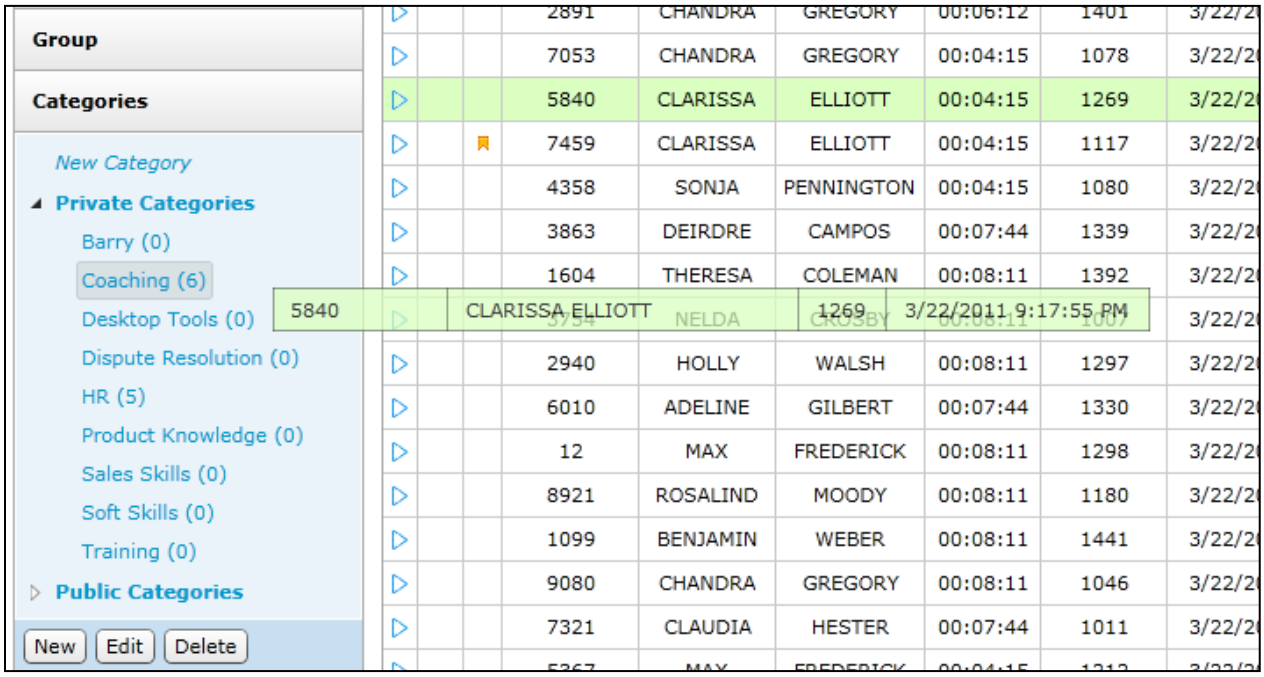
Categorize

Call Categories are custom folders created to organize calls.

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.



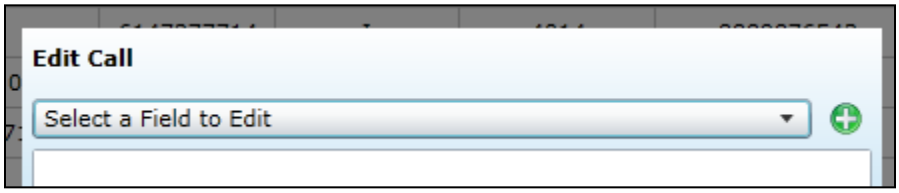
Alternatively, a call record can also be categorized by left clicking on it, holding the mouse button down, dragging the call over to a particular category, and releasing the left mouse button (dragging and dropping).



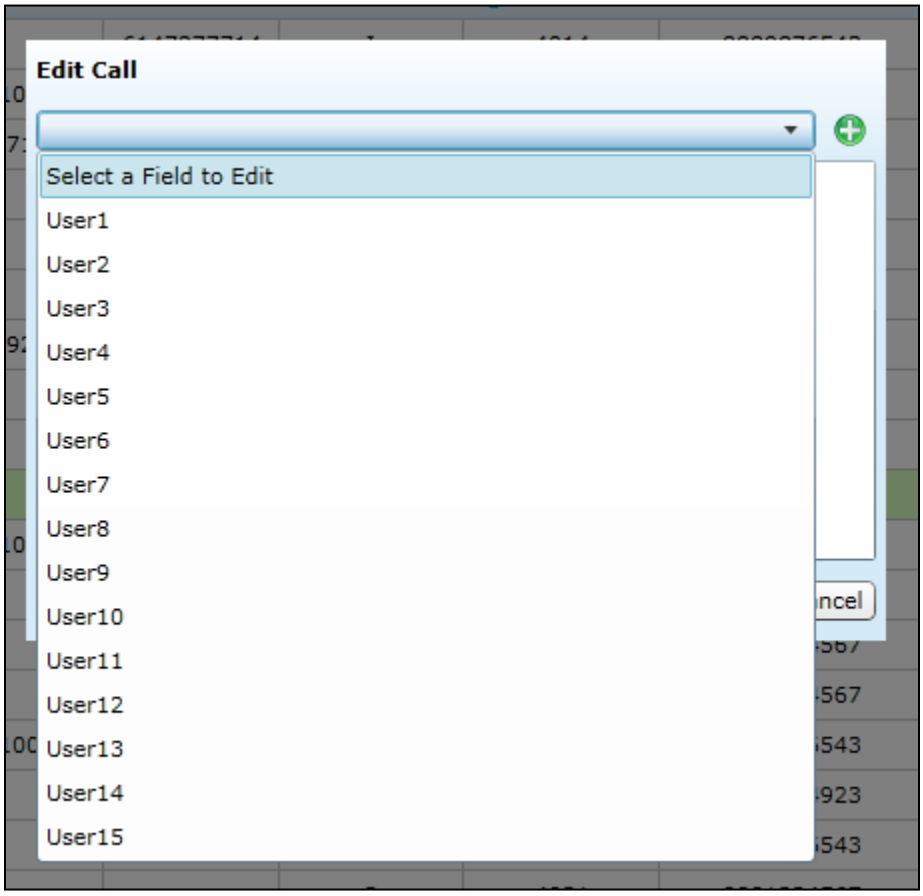
To add or remove available Categories, see the *Web Player* chapter of this guide.

Edit Call

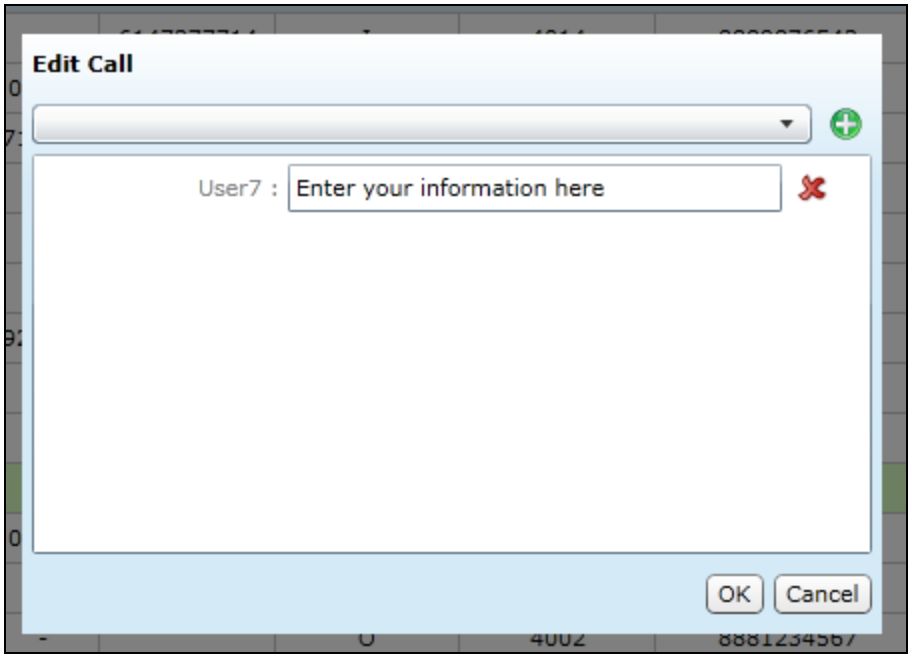
Editing a call allows you to add information (metadata) to an individual call record after the call has been captured in the system. Edit Call uses the 15 User Defined fields supplied out of the box to allow you to add data to a record that is then searchable and filterable.



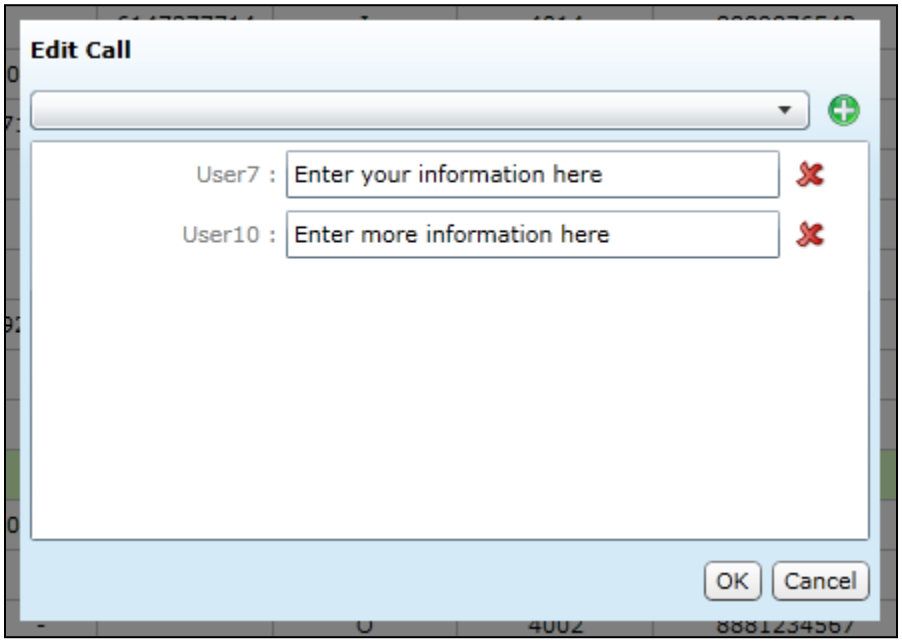
Select a field to edit using the dropdown menu.



Then enter your text.



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

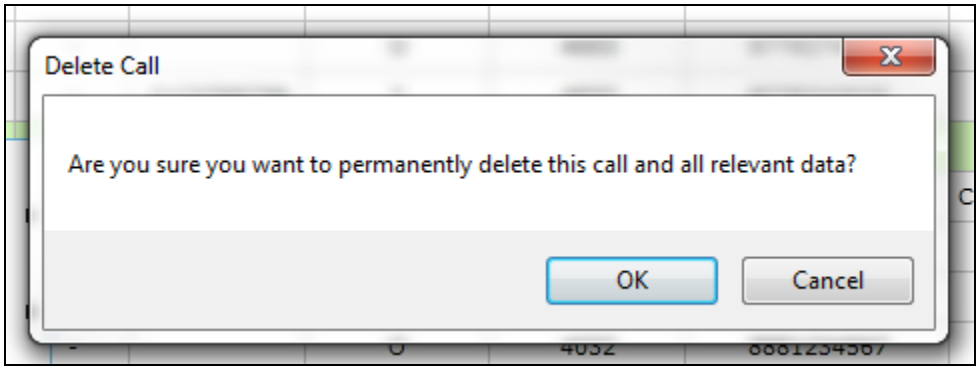


Click OK to amend your data to the call record. Click the red X to remove a field. Data can be edited following the same process.

Delete

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.



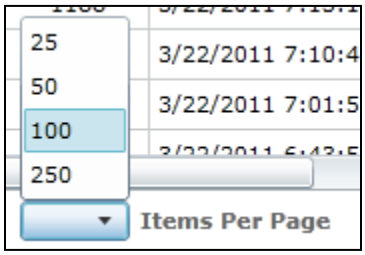
To continue deleting the record, click OK. To cancel the delete operation, click Cancel.

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.



Chapter 5: Filters

In this chapter we will cover:

- ✓ Filter Options
- ✓ Filter Option Controls
- ✓ Saving My Filters
- ✓ Accessing My Filters

Filter 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:	The field being filtered must match the value entered exactly. *Example: 'CallerID' Equals '614-555-5555'*. This will only return calls from that exact phone number.
Not Equals:	The field being filtered must not exactly match the value entered. *Example: 'CallerID' Not Equals '614-555-5555'*. This will return every call recorded *except* those from 614-555-5555.
Starts With:	The field being filtered must begin with the same value that is entered. *Example: 'CallerID' Starts With '614'*. This will display every call recorded that the Caller ID begins with 614. **TIP:** Useful for area code searches.
Ends With:	The field being filtered must end with the same value that is entered. *Example: 'CallerID' Ends With '5555'*. This will display every call recorded that the Caller ID Ends with '5555'. **TIP:** Useful for locating calls that you only have the last four digits of the caller's phone number.

Contains:	The field being filtered must contain the value entered at any location in the field. *Example: 'CallerID' Contains '555-55'*. This will display every call recorded that the Caller ID field contains the numbers '555-55'. **TIP:** Useful for locating calls that you only have a partial phone number for.
Does Not Contain:	The field being filtered must not contain the value entered at any location in the field. *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.
Less Than:	The contents of the field being filtered must be less than the value entered (numeric values only). *Example: 'Record ID' Less Than '3264'*. This will exclude every call recorded that has a record ID number greater that '3264'.
Greater Than:	The contents of the field being filtered must be greater than the value entered (numeric values only). *Example: 'Record ID' Greater Than '3264'*. This will exclude every call recorded that has a record ID number less that '3264'.

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.

Data Fields

Extension :	Equals	
Agent Number :	Equals	
Agent Name :	Equals	
Group :	Equals	
Queue :	Equals	
CallerID ANI :	Equals	
Number Called DNIS :	Equals	
Record ID :	Equals	
Account Number :	Equals	
CSN :	Equals	
User3 :	Equals	
Salesforce Case :	Equals	
Public Bookmark :	Equals	
User6 :	Equals	
User7 :	Equals	
User8 :	Equals	
User9 :	Equals	
User10 :	Equals	
User11 :	Equals	
User12 :	Equals	
User13 :	Equals	
User14 :	Equals	
User15 :	Equals	
Channel :	Equals	
Bookmark :	Equals	
CallCopy group :	select	
Categories :	select	

Tag :

Script Adherence
Property Information
Scheduling
Lead Source
Product Interest
Geography

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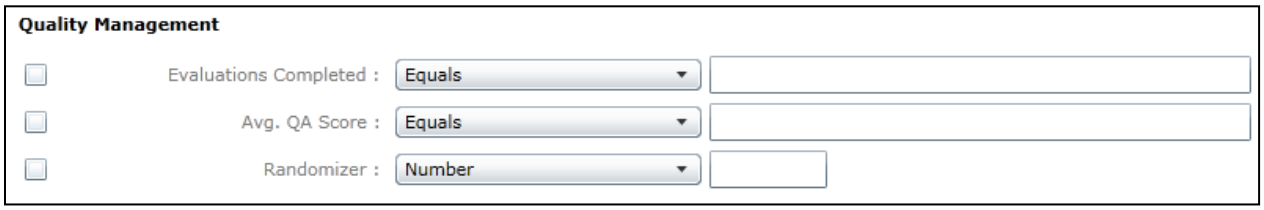
Quality Management

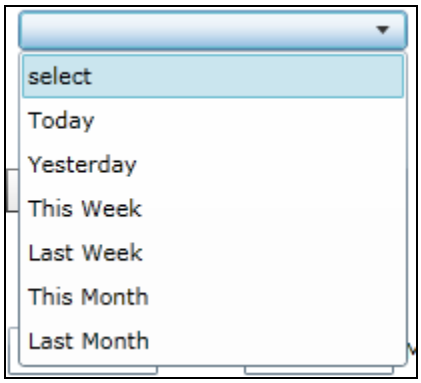


These fields will filter for any Quality Coaching data that is associated for the call. You can search for calls that have only been reviewed a specific number of times or calls that fall above or below an average QA Score percentage.

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.

Date

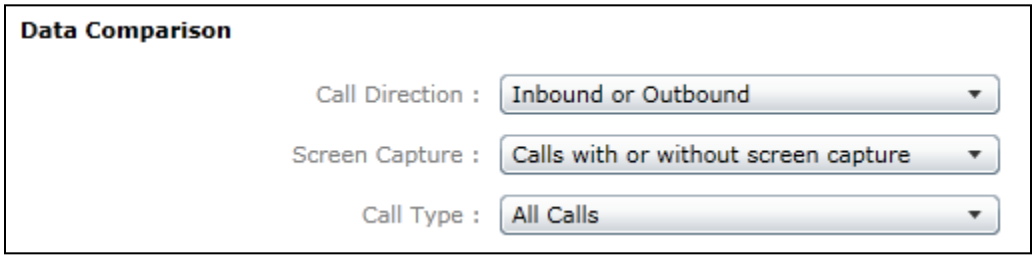
The Date option allows you specify a Start and End Date to filter for calls recorded over a specific date range. The Relative Date Range fields allow you to search for calls based on the setting shown below. The Day of the Week option allows you to filter for specific days of the week. (Highlighted days 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.



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.

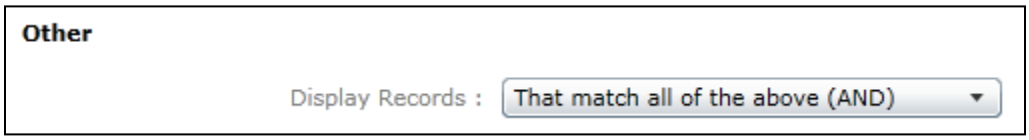
Data Comparison



Data Comparison 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



If multiple filters 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.

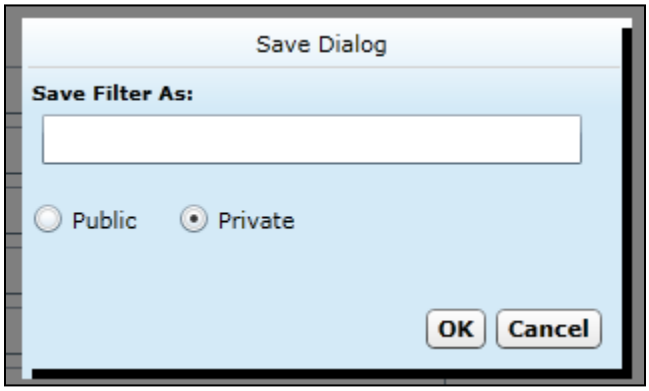
- Reset: Clears any changes made but keeps the user on the Filter Options page so additional options can be set.
- Save as My Filter: Saves the filter options as a Private or Public Quick Filter set that can be quickly applied at a later date.
- Cancel: Clears any changes made and returns the user to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

Clicking on the **Private Filters** link will display a list of Filters saved by the logged-in user and marked as Private. Clicking the **Public Filters** link will list any filters saved by the current user, or any other user, and marked as Public.

The My Filters list displays the available filters. Clicking the **Apply** button on a filter will load the filter settings, and return the user to the Call List page. The Call List displayed will now have the My Filter settings applied. If needed, you may adjust the filter settings using the standard Filter Options available on the Filter Bar at the top of the Call List.

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

Click the **Edit** button to be taken to the Filter Options page for the selected filter. Here you can 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 *Filter Options* section in this guide for more information on Filter Options.

Click the **Delete** button to delete the selected My Filter.

Chapter 6: Call Playback

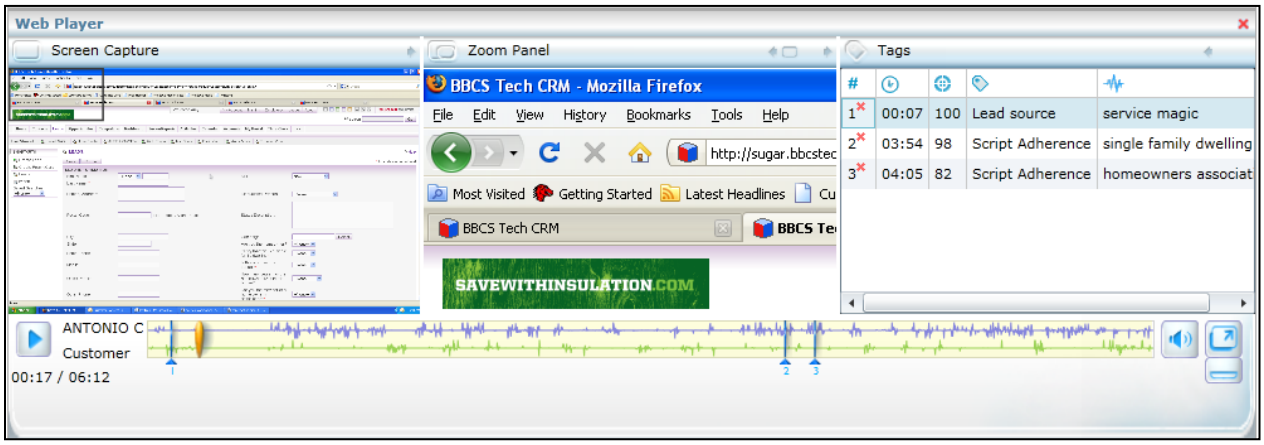
In this chapter we will cover:

- ✓ Player Controls Overview
- ✓ Wave Bar
- ✓ Volume and Full screen Controls
- ✓ Feature Panels
- ✓ In Call Bookmarking

Player Controls Overview

The Player Controls are used for listening and viewing the call, and allow the user to move throughout the call for playback purposes.

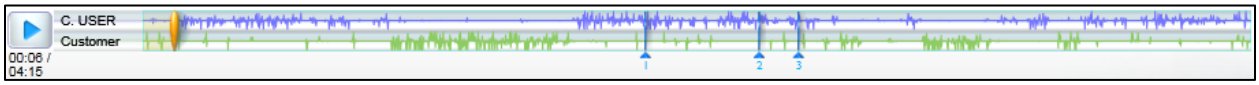
If a call has been selected from the Call List for playback, the Player Controls will appear at the bottom of the page or in a different window, depending on what play option was selected.



The Player Controls are comprised of multiple components that perform different functions.

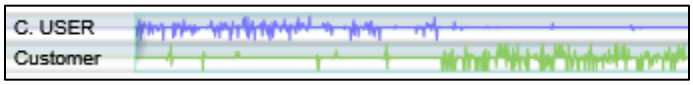
Wave Bar

The Wave Bar 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.



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 purple at the top, while the customer audio is displayed in green below the agent.



Play/Pause Icon

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.

Below the Icon is the duration status. This displays the point of time the call is currently playing, and the total duration of the call in Minutes and Seconds.

Playhead Indicator

The Playhead Indicator 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.

Volume and Fullscreen Controls

Volume Control

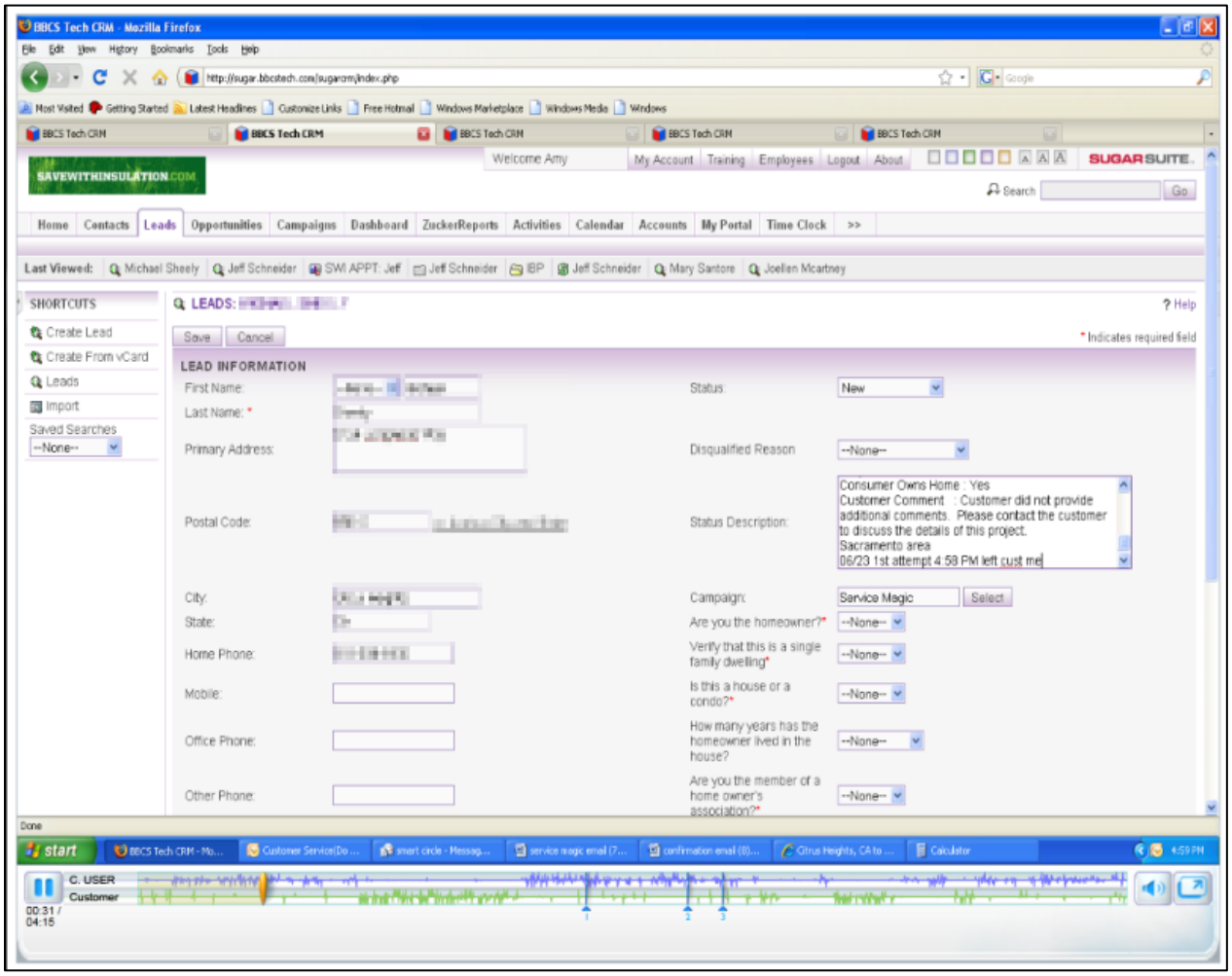
The Volume control Icon is displayed to the right side of the Wave Bar. Clicking on the Volume Icon will display a slider control that can be used to increase or decrease the audio playback volume.

> ***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.*

Fullscreen Mode

The Fullscreen mode opens the Player Control in a separate window, and expands the size of the controls to the full size of your screen. This mode is useful for viewing calls that have screen capture video playback along with audio.

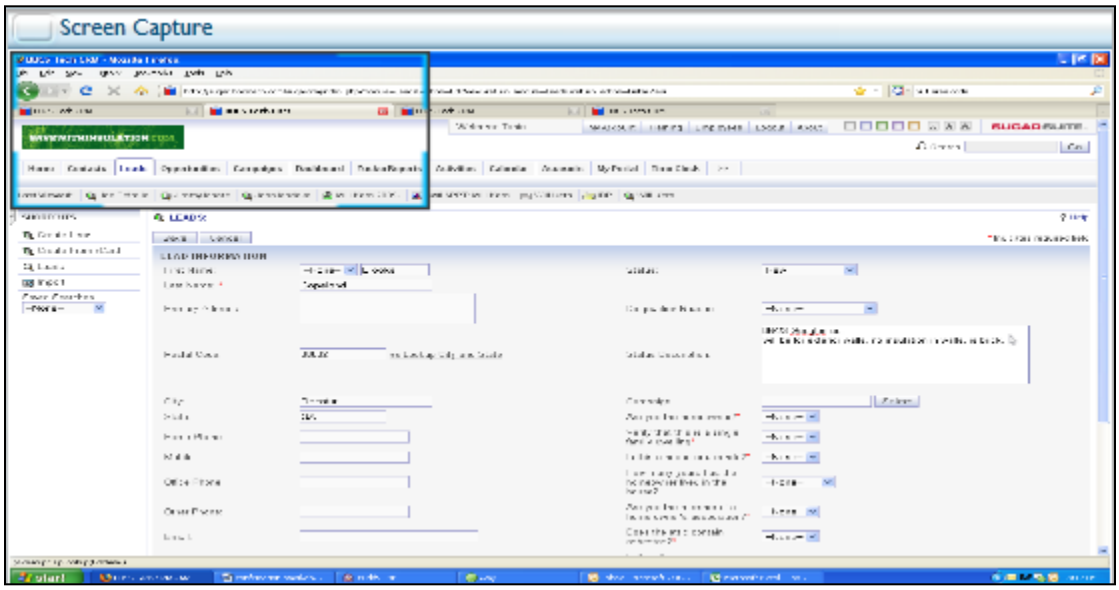
To activate this mode, click the Fullscreen Icon located to the right of the Volume Controls. If you wish to return to the standard controls, close the Fullscreen window by clicking the Close icon at the top right of the window.



Feature Panels

The Feature Panels icon is in the bottom right corner of the player. Click the icon to display or hide three Feature Panels with additional call data above the Wave Bar. This data is obtained from optional components installed on the cc: Discover system, which may not be available in all integrations.

Screen Capture Panel

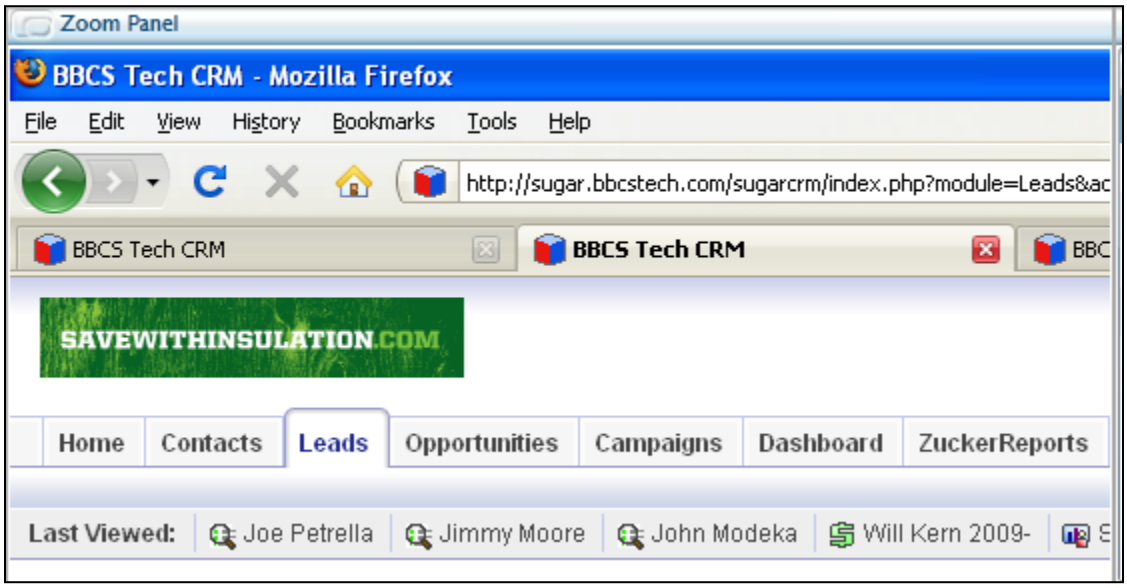


The Screen Capture panel displays a scaled down feed of recorded video for the call.

A Zoom target box can be moved around the panel by clicking and dragging it. The contents inside the box appear in the Zoom panel for easier viewing.

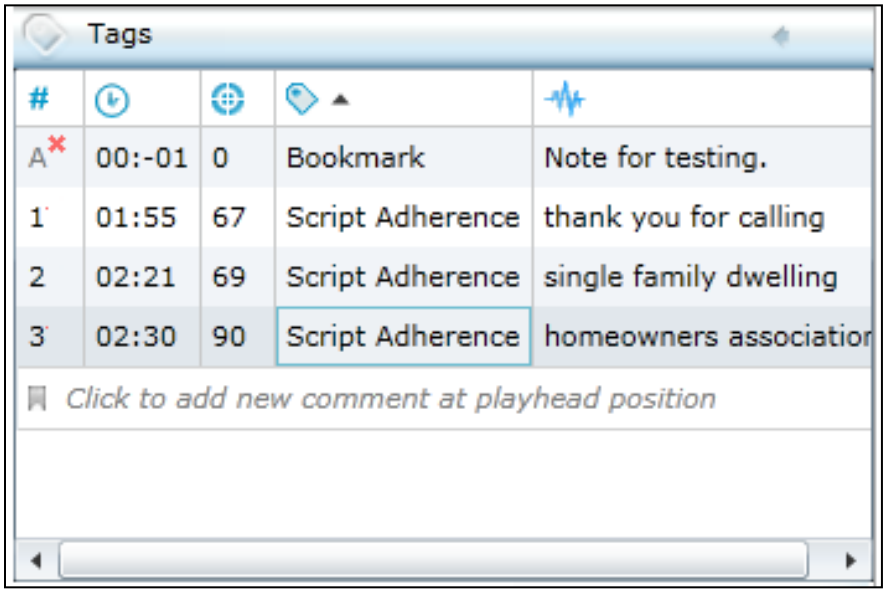
Capture Zoom Panel

This panel displays a zoomed in view of the screen area selected in the zoom target box in the Screen Capture Panel. As the target box is moved in the Screen Capture panel, the Zoom panel will display an enlarged view of the contents inside the box.



Tag Data Panel

This panel displays any meta-data that has been added (tagged) to the call after it was recorded. This could include user-generated data such as bookmarks, or data generated from another component, such as the cc: Analytics speech analytics product.



The Tag Data Panel organizes tag data into four columns. Not every column will be populated, depending on the type of data listed.

The listed columns are the following:

- **Tag 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 Tag ID will also display in the Wave Bar for reference.
- **Timestamp**: For data that is tagged at a specific point within a call, the 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.
- **Analytics Matching Percentage:** For voice analytics tags, this value indicates accuracy percentage, which is how well the agent's word choice matched the desired vocabulary.
- **Type:** This field lists the type of tag listed. This could be a bookmark, analytics tag name or category, or other types.
- **Tag Data:** 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.

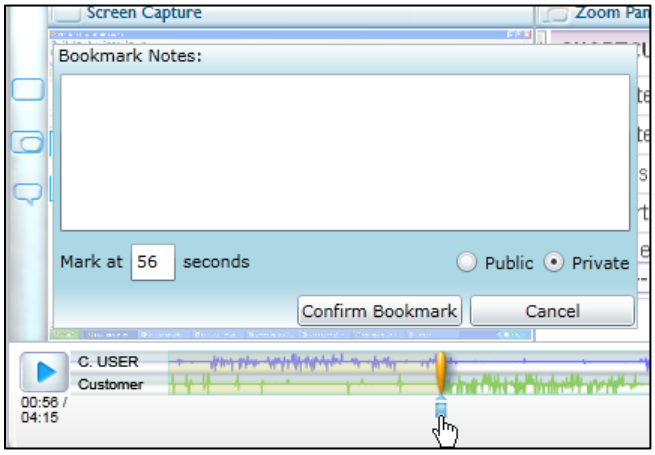
In-Call Bookmarking

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.

Adding Bookmarks

To insert a bookmark at a specific point in the call, pause the call at the point you would like the bookmark to be tagged. Hover the mouse pointer over the Playhead indicator, and the Bookmark icon ( ) will appear below the Playhead.

Clicking on the Bookmark icon ( ) will open the **Bookmark Notes** window above the Wave Bar.



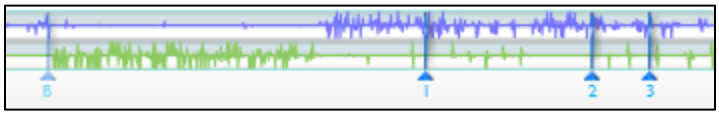
The Bookmark notes can be entered in the text box on the window. The Mark at field will show the time (in seconds) that the tag will be inserted. The user can change the value in this field if needed to refine the tag point.

The bookmark can then be set to Public 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.

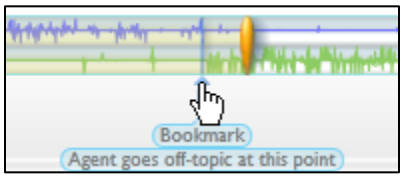
Click **Ok** to insert the bookmark. Or click **Cancel** to stop the action and return to the Player controls. The bookmark will not appear on the Wave Bar or in the Tags panel until the call is closed and replayed.

Viewing 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 tag data.

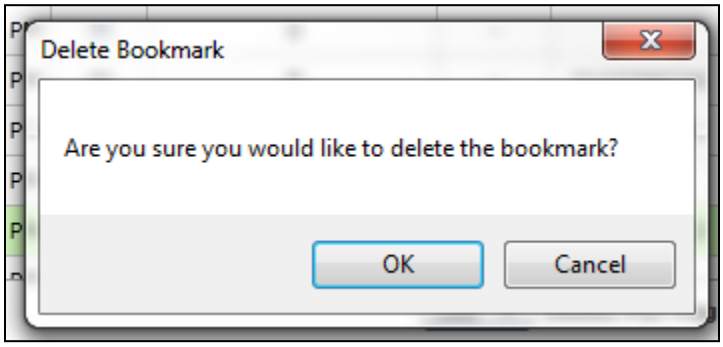


This information is also displayed in the Tag Data Panel which is displayed above the Wave Bar.

Deleting 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. If you have permissions to delete a bookmark, you will see a Delete icon (a red X) next to the Tag ID. Click the icon to delete the bookmark.



Chapter 7: Live Monitoring

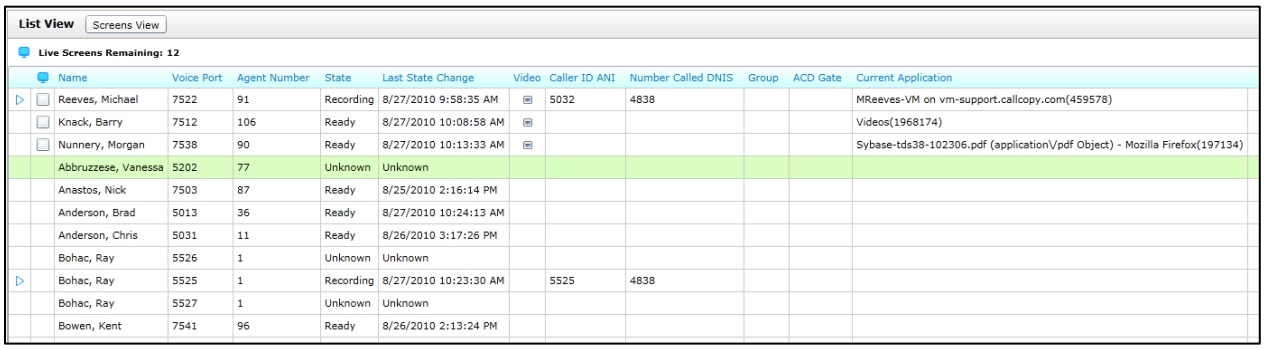
In this chapter we will cover:

- ✓ Live Monitor List
- ✓ Screens View
- ✓ Playing a Live Call

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
Reeves, Michael	7522	91	Recording	8/27/2010 9:58:35 AM		5032	4838			MReeves-VM on vm-support.callcopy.com(459578)
Knack, Barry	7512	106	Ready	8/27/2010 10:08:58 AM						Videos(1968174)
Nunnery, Morgan	7538	90	Ready	8/27/2010 10:13:33 AM						Sybase-tds38-102306.pdf (application\/pdf Object) - Mozilla Firefox(197134)
Abbruzzese, Vanessa	5202	77	Unknown	Unknown						
Anastos, Nick	7503	87	Ready	8/25/2010 2:16:14 PM						
Anderson, Brad	5013	36	Ready	8/27/2010 10:24:13 AM						
Anderson, Chris	5031	11	Ready	8/26/2010 3:17:26 PM						
Bohac, Ray	5526	1	Unknown	Unknown						
Bohac, Ray	5525	1	Recording	8/27/2010 10:23:30 AM		5525	4838			
Bohac, Ray	5527	1	Unknown	Unknown						
Bowen, Kent	7541	96	Ready	8/26/2010 2:13:24 PM						

The List View displays the agents in a sortable list. Each column is sortable in ascending or descending order by clicking the column header title. The following columns are displayed.

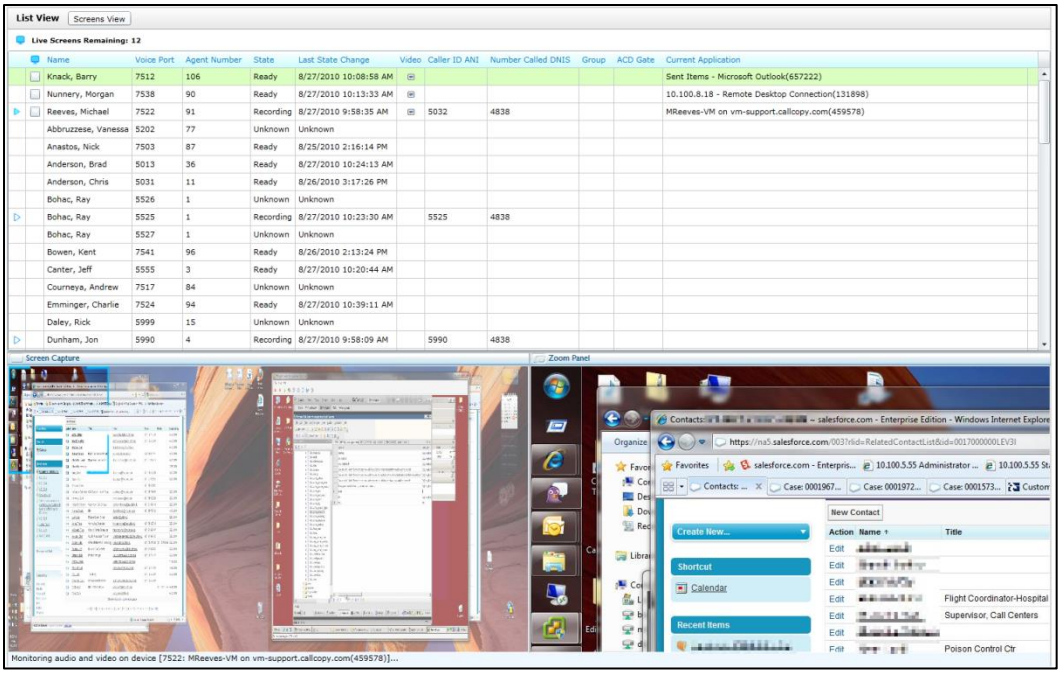
- **Playback indicator :** If an agent is in a call that is currently being recorded, the playback indicator will be displayed. Clicking the indicator will begin playing back the live audio and video stream.
- **Screen View Favorite :** If the agent has the Screen Capture Agent running on his or her workstation, you can check this box to mark the agent as a 'Favorite'. This option filters the agents that appear on the Screens View page. Up to 12 agents can be designated as a 'Favorite'.
- **First Name:** Displays the agent's first name.
- **Last Name:** Displays the agent's last name.
- **Voice Port:** Lists the physical phone extension being used by the agent.
- **Agent Number:** The agent's ACD or phone login identifier.
- **State:** Will either display Recording, Ready, or Unknown.
- **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.
- **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.
- **ACD 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.

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

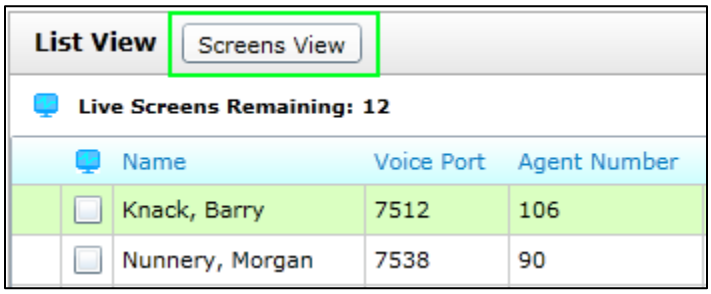
Live audio will then begin to play. If video is available for the call, the screen capture panel will appear below the Live Monitor List.



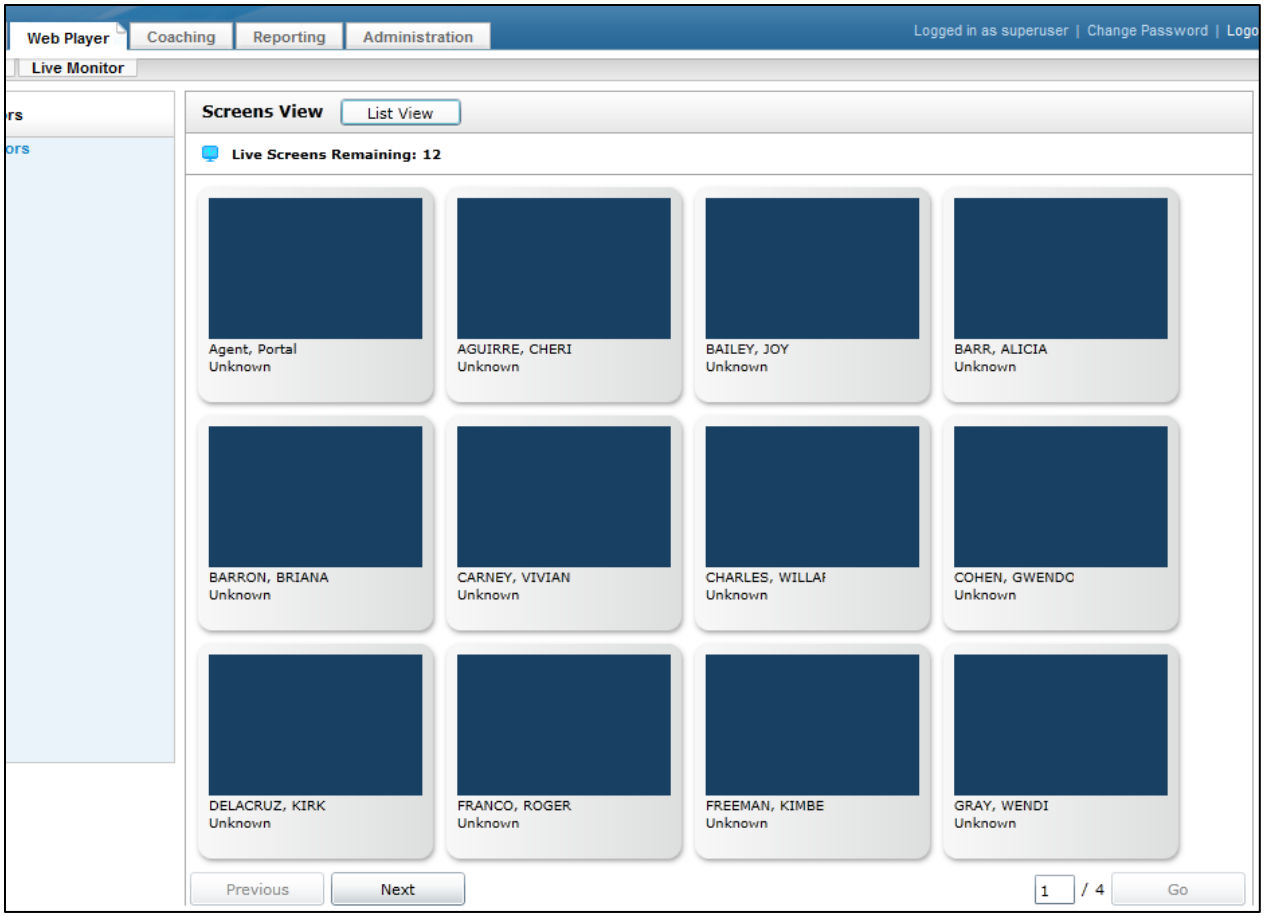
To stop playing the live stream, click the Playhead indicator. The indicator will revert back to the idle state (▷) and the audio and video playback will stop.

Screens View

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



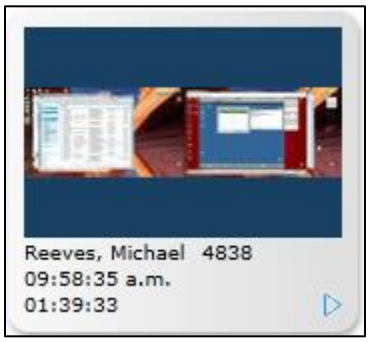
The Screens View will display each agent from the Live Monitors list as a thumbnail view of the agent's desktop. Up to 12 thumbnails will be displayed per page. Screens View displays all agents from the list unless any agents have been selected as a Screen View Favorite. In that case, only agents selected as Favorites appear.



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 **Previous** and **Next** buttons at the bottom left of the page. Alternatively, a specific page number can be entered in the text field at the bottom-right of the page. 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:

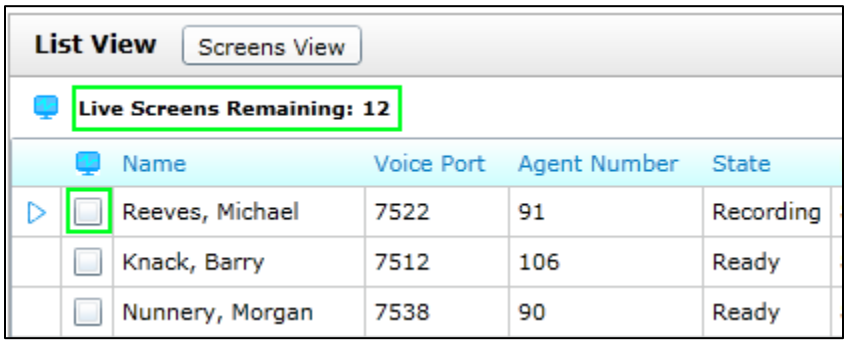
- Agent Name
- Caller ID
- Time of recording start
- Duration of call recording

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

Screens View Favorites

The Screens View also has the ability to display a set of specific 'Favorite' agents. This feature is useful for displaying a set of agents on a single page that would otherwise require a user to navigate through multiple pages to view.

To create a list of Favorites, select an agent from the Live Monitor List View by checking the Screen View Favorite ( ) checkbox next to his or her name. The **Live Screens Remaining** field above the list will display how many Favorites you have remaining.



Once you have the desired agents selected, click the **Screens View** button to display the selected agent's thumbnails.

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.

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