GENESYS™

Interaction Recorder Client for IC Business Manager Help

Printed help

PureConnect powered by Customer Interaction Center® (CIC)

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Abstract

This document is a printable version of the Interaction Recorder Client for IC Business Manager help. Interaction Recorder client is an add-on module for IC Business Manager that allows you to build searches, display stored recordings, and score recordings, for policy-based recordings and Snippet Recordings. Using Interaction Recorder, you can playback and score stored recordings, which include the following media types: phone calls, e-mails, Web chats, and screen recordings. You can also monitor live call recordings that are in progress, score recordings, and search and view scorecards.

Table of Contents

Interaction Recorder for IC Business Manager

Welcome to Interaction Recorder Client for IC Business Manager

Interaction Recorder, an add-on module for IC Business Manager, is used to search and playback media recordings such as Call, Chat, Chat Transcript, E-mail, Screen, and Social Conversation. And you can monitor live call recordings that are in progress. Interaction Recorder is also used to score recordings and search and view scorecards. **Interaction Quality Manager** is used to create questionnaires that you use to score recordings.

For more information, see About the Interaction Recorder Client.

About the Interaction Recorder Client

Interaction Recorder client is an add-on module for IC Business Manager that allows you to build searches, display stored recordings, and score recordings, for policy-based recordings and Snippet Recordings. Using Interaction Recorder, you can playback and score stored recordings, which include the following media types: Call, Chat, Chat Transcript, E-mail, Screen, and Social Conversation. You can also monitor live call recordings that are in progress, score recordings, and search and view scorecards.

About Recordings

Policy-based recordings are created by an Interaction Recorder Policy Editor Initiation Policy. Snippet Recordings are created by users and agents in Interaction Desktop and Interaction Connect, and by supervisors in Interaction Supervisor.

For more information on Policy-based recordings and Snippet Recordings, see the *Interaction Recorder and Interaction Quality Manager Technical Reference.* For additional information on creating Snippet Recordings, see the Interaction Desktop Help.

Using **Interaction Quality Manager**, you can create questionnaires that are used to score interactions.

Interaction Recorder client has an intuitive user interface to help you build effective searches to display stored recordings, playback those recordings, and search and view scorecards. You can also use Interaction Recorder Questionnaires for scoring and quality assessment of a recording.

Use Interaction Recorder client for IC Business Manager to:

- Build searches to retrieve recordings
- Build searches to retrieve scorecards
- View recording details
- Playback recordings
- Monitor live call recordings in progress
- Score recordings
- Delete recordings
- Send a recording in an e-mail
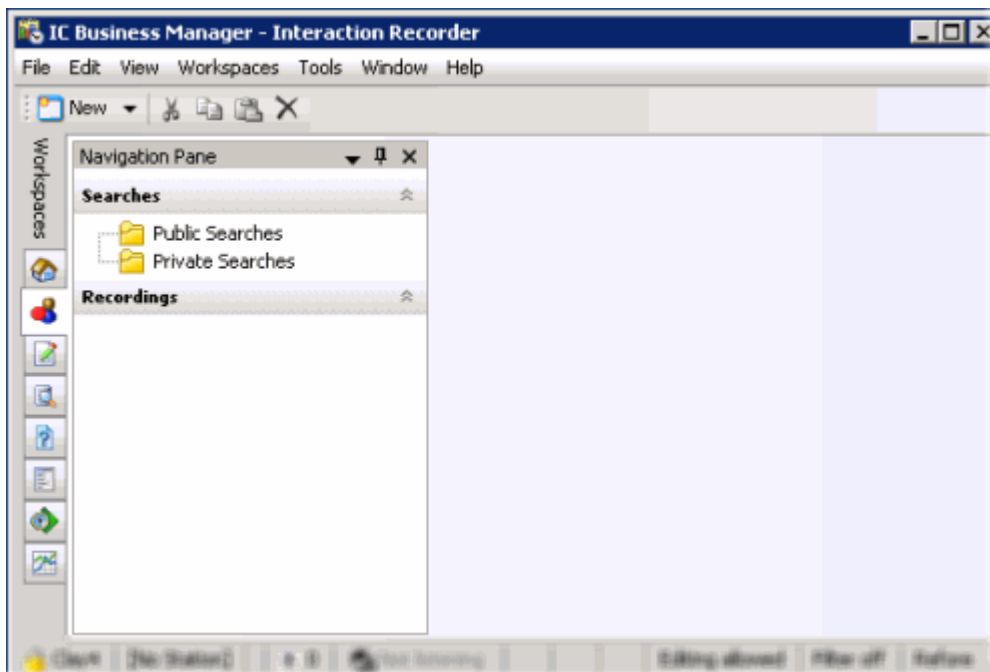
- Export recordings

- Archive recordings

For more information on Interaction Recorder user interfaces, see:

- Interaction Recorder User Interface

- Interaction Recorder Navigation Pane

Interaction Recorder User Interface

Interaction Recorder uses the IC Business Manager user interface, which makes it easier to navigate your options when creating searches, viewing stored recordings and scorecards, and creating questionnaires. The interface includes menus, toolbars, navigation panes, and a workspace for **Interaction Recorder.** For basic information on using the IC Business Manager interface, see **Getting Started** on the Help menu.

To learn more about the Interaction Recorder user interface features, pause the mouse pointer over the menu bar, toolbar, navigation panes, or workspaces on the graphic below, and click to display more information.
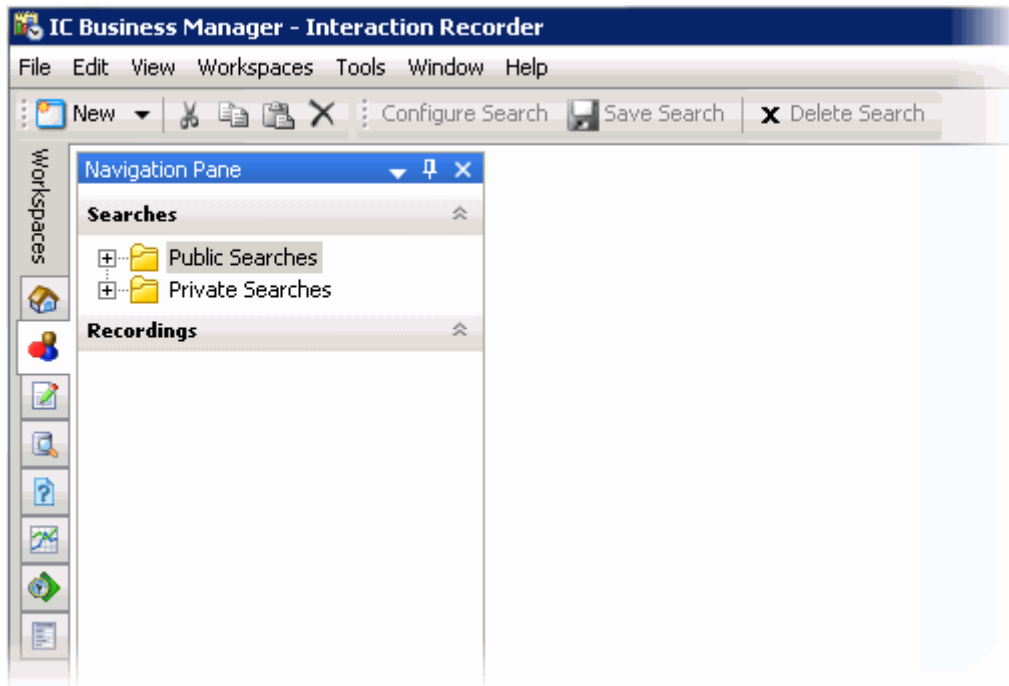

Related Topics

About the Interaction Recorder Client

Interaction Recorder Navigation Pane

Interaction Recorder Navigation Pane

The **Interaction Recorder** navigation pane provides easy access to create recording searches and scorecard searches, using the **Searches** navigation pane. The **Recordings** navigation pane displays recordings that are open in the workspace.

To learn more about the Interaction Recorder Navigation Pane, pause the mouse pointer over one of the panes below, and click to display more information.

Related Topics

About the Interaction Recorder Client

Interaction Recorder User Interface

Additional Interaction Recorder Resources

Because Interaction Recorder is integrated with Customer Interaction Center, there are additional technical references, user guides, and online Helps that include Interaction Recorder information. Documents are available in the PureConnect Documentation Library on your CIC server.

The latest versions of these documents can also be accessed from the PureConnect Documentation Library on the Genesys Documentation web site at: https://help.genesys.com

For Interaction Recorder related information, see the following technical references and Helps:

- *Interaction Recorder and Interaction Quality Manager Technical Reference*
- *PureConnect Installation and Configuration Guide*
- Interaction Administrator Help for Interaction Recorder components
- Interaction Recorder Policy Editor Help
- IC Business Manager Help
- Interaction Reporter Help
- *Interaction Analyzer Technical Reference*
- Interaction Quality Manager Help
- Interaction Connect Help
- *Social Media Technical Reference*

Create a Search

Creating a Search

Use **Searches** in the Interaction Recorder Navigation Pane to quickly build **Public Searches** and **Private Searches** for retrieving recorded interactions and viewing scorecards.

There are two types of Public and Private searches: **Recording Search** and **Scorecard Search**.

- **Recording Searches** display a list of recorded interactions for the configured search.
- **Scorecard Searches** display search results in a graph or a grid in the Search Results.

Recording Search

Recording Search

Use **Recording Search** to quickly build **Public** and **Private** searches for retrieving recorded interactions. To get started building searches see Recording Searches.

Recording Searches

Recording Searches are created to retrieve recorded interactions. In the Interaction Recorder Navigation Pane, you can create Public and Private Recording Searches. Searches are then easily built in the Workspace using the SearchBuilder control and selecting search attributes. Search Attributes are grouped into six main categories:
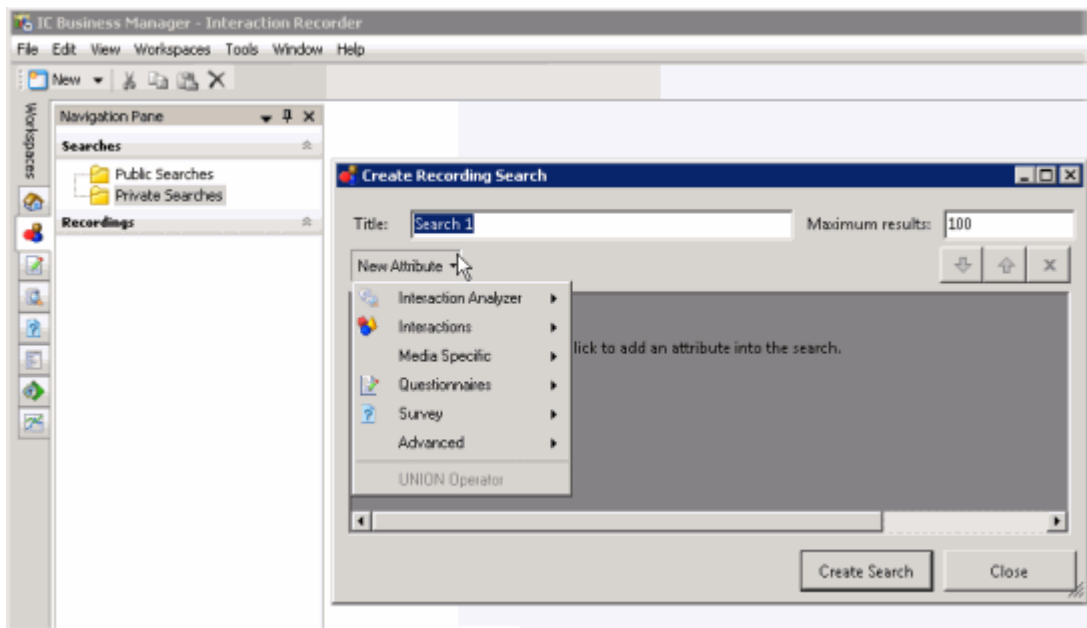
- Interaction Analyzer

- Interactions
- Media Specific
- Questionnaires
- Survey
- Advanced

For details on search attributes for each of these categories, see Recording Search Attributes.

SearchBuilder control

After adding an attribute to your search, use the SearchBuilder control to configure simple and rich attributes in the Workspace.
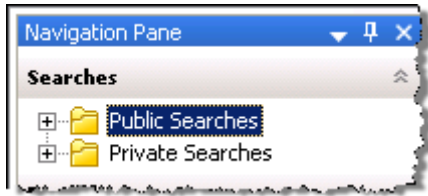

Related Topics

Adding Attributes to a Search

Creating Private Searches

Creating Public Searches

Recording Search Attributes

Creating Public Searches

Public searches can be seen and managed by all users on a server that have been assigned an Interaction Recorder client Access license in Interaction Administrator. Public Searches are created in the Interaction Recorder Navigation Pane.

Creating a Public Search

Public Searches that a user creates, for public sharing, are stored in **Public Searches**. Folders can be created to store searches or searches can be stored directly in the Public Searches folder.

Creating a folder to contain your search

To create a folder to contain your search:

1. In the **Searches** pane, select **Public Searches**.

2. Right-click, and on the shortcut menu, point to **New**, and click **Folder**. A **New Folder** is highlighted under Public Searches.

3. Right-click the new folder and click **Rename**.

4. Type a name for the folder and press **Enter**.

Creating a search in your new folder

To create a search to be stored in a folder:

1. Select the folder, right-click, and on the submenu point to **New** and click **Recording Search** or **Scorecard Search**. The Search dialog is displayed in the Workspace. To create a search directly in the Public Searches folder, right-click the **Public Searches** folder and follow the same steps.

2. To name your search, in the **Title** box type a name for your search. The Search item in the Navigation Pane will also display the updated title.

3. In the **Max results** box, type the number for the maximum number of results to display. The default is 100.

Adding Attributes to a Search

Use the SearchBuilder control to select attributes to add to your search. Simple and rich attributes can be added. Sub-instances can be added to a simple attribute, and rich attributes contain multiple sub-fields. First, add an attribute to your search.

To add an attribute to your search:

1. In the **New Attribute** drop-down list, point to the type of attribute you want to include. A submenu is displayed with a list of available attributes for the type you have selected.

2. In the submenu, click the attribute. The attribute control is added to the Workspace.

> For detailed information on attributes see Recording Search Attributes and Scorecard Search Attributes.

Configuring a simple attribute

A simple attribute contains an operator and a field value that can be a string, list, or numeric type value. To configure a simple attribute:

1. Select the operator

2. Configure the values for the attribute

Working with attributes

Attributes within the search are logically AND'd together. You can add in a UNION operator in-between attributes to logically OR them together. To do this, right-click in the Workspace, and click **UNION Operator**.

Use the Up and Down buttons to prioritize the order in which the attributes and unions should be considered when running the search. These controls are also available on the right-click shortcut menu.

Use the Delete button to remove an attribute from the search. Delete is also available from the right-click shortcut menu.

Adding sub-instances to a simple attribute

When a simple attribute has been added to the Workspace, the Add More button is displayed in the upper right corner of the attribute control. To add an additional sub-instance of the attribute:

1. First, in the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute, and the Add More button is displayed.

2. Click Add More. The attribute sub-instance is nested within the parent control, with an additional operator and field value control.

> **Note** After you have added the number of sub-instances allowed by the attribute, the is no longer displayed as an option. For example, **Direction** has four available attributes, Inbound , Intercom, Outbound, and Unknown. After three sub-instances have been added to the original attribute, the Add More icon is no longer displayed.

Deleting sub-instances from a simple attribute

When more than one sub-instance is included in a simple attribute, the Delete More button is available to the right of the active sub-instance, allowing you to delete the sub-instance. To do this:

1. In the search builder control on the Workspace, in the attribute, select the sub-instance. The Delete More button is displayed next to the sub-instance.

2. Click Delete More. The sub-instance is removed from the attribute.

Configuring a rich attribute

Rich attributes contain multiple sub-fields. Sub-fields are logically OR'd together within the search. To configure a rich attribute:

1. In the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute.

2. Depending on the type of rich attribute you selected, configure the operator values.

3. Use the Up and Down buttons [icon] [icon] to prioritize the order in which the attributes and unions should be considered when running the search.

When all attributes have been configured for a search, click **Create Search**. The search is executed, the name of the search is displayed under the folder in the Navigation Pane, and the search results are displayed in the Workspace.

Related Topics

Editing a Search

Running a Recording Search
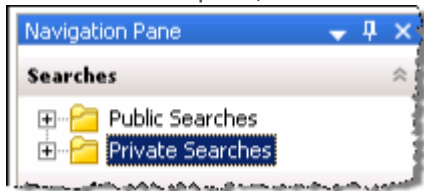
Saving a Search

Creating Private Searches

Private searches can be built, viewed, configured, and run only by the owner of the search. Private Searches are created in the Interaction Recorder Navigation Pane.

Creating a Private Search

To create a Private Search: first, create a folder in the Searches pane; next, create and name a search in the folder; and then create the search using the SearchBuilder control displayed in the Workspace.

Creating a folder to contain your search

1. In the **Searches** pane, select **Private Searches**.

2. Right-click, and on the shortcut menu, point to **New**, and click **Folder**. A **New Folder** is highlighted under Private Searches.

3. Right-click the new folder and click **Rename**.

4. Type a name for the folder and press **Enter**.

Creating a search in your new folder

To create a search to be stored in a folder:

1. Select the folder you have named, right-click, point to **New**, and click **Recording Search** or **Scorecard Search**. The Search dialog is displayed in the Workspace. To create a search directly in the Private Searches folder, right-click the **Private Searches** folder and follow the same steps.

2. To name your search, in the **Title** box type a name for your search. The Search item in the Navigation Pane will also display the updated title.

3. In the **Max results** box, type the number for the maximum number of results to display. The default is 100.

Adding Attributes to a Search

Use the SearchBuilder control to select attributes to add to your search. Simple and rich attributes can be added. Sub-instances can be added to a simple attribute, and rich attributes contain multiple sub-fields. First, add an attribute to you search.

To add an attribute to your search:

1. In the **New Attribute** drop-down list, point to the type of attribute you want to include. A submenu is displayed with a list of available attributes for the type you have selected.

2. In the submenu, click the attribute. The attribute control is added to the Workspace.

For detailed information on attributes see Recording Search Attributes and Scorecard Search Attributes.

Configuring a simple attribute

A simple attribute contains an operator and a field value that can be a string, list, or numeric type value. To configure a simple attribute:

1. Select the operator

2. Configure the values for the attribute

Working with attributes

Attributes within the search are logically AND'd together. You can add in a UNION operator in-between attributes. To do this, right-click in the Workspace, and click **UNION Operator**.

Use the Up and Down buttons to prioritize the order in which the attributes and unions should be considered when running the search. These controls are also available on the right-click shortcut menu.

Use the Delete button to remove an attribute from the search. Delete is also available from the right-click shortcut menu.

Adding sub-instances to a simple attribute

When a simple attribute has been added to the Workspace, the Add More button is displayed in the upper right corner of the attribute control. To add an additional sub-instance of the attribute:

1. First, in the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute, and the Add More button is displayed.

2. Click Add More . The attribute sub-instance is nested within the parent control, with an additional operator and field value control.

Note After you have added the number of sub-instances allowed by the attribute, the is no longer displayed as an option. For example, **Direction** has four available attributes: Inbound ,

> Intercom, Outbound, and Unknown. After three sub-instances have been added to the original attribute, the Add More icon is no longer displayed.

Deleting sub-instances from a simple attribute

When more than one sub-instance is included in a simple attribute, the Delete More button is available to the right of the active sub-instance, allowing you to delete the sub-instance. To do this:

1. In the SearchBuilder control on the Workspace, in the attribute, select the sub-instance. The Delete More button is displayed next to the sub-instance.

2. Click Delete More . The sub-instance is removed from the attribute.

Configuring a rich attribute

Rich attributes contain multiple sub-fields. Sub-fields are logically OR'd together within the search. To configure a rich attribute:

1. In the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute.

2. Depending on the type of rich attribute you selected, configure the operator values.

3. Use the Up and Down buttons to prioritize the order in which the attributes and unions should be considered when running the search.

When all attributes have been configured for a search, click **Create Search**. The search is executed, the name of the search is displayed under the folder in the Navigation Pane, and the search results are displayed in the Workspace.
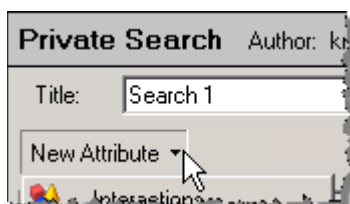
Related Topics

Editing a Search

Running a Recording Search

Saving a Search

Adding Attributes to a Search

After you have created a Public or Private search, use the SearchBuilder control, displayed in the Workspace, to add and configure attributes in your search. To display SearchBuilder in the Workspace, select a search in the Searches pane. The search is displayed in the Workspace, and the SearchBuilder is displayed with the **New Attribute** drop-down list.

Click **New Attribute**, to select the attributes to include in your search.

To select an attribute, point to the type of attribute you want to add to your search, and the available attributes are displayed in a submenu. Simple and rich attributes can be added to your search. Sub-instances can be added to a simple attribute, and rich attributes contain multiple sub-fields.

For a detailed description of all available attributes, see Recording Search Attributes and Scorecard Search Attributes.

Adding Attributes to a Search

Use the SearchBuilder control to select attributes to add to your search. To add an attribute to a search:

1. In the **New Attribute** drop-down list, point to the type of attribute you want to include. A submenu is displayed with a list of available attributes for the type you have selected.

2. In the submenu, click the attribute. The attribute control is added to the Workspace.

An attribute might be a simple attribute or a rich attribute. A simple attribute contains an operator and a field value that can be a string, list, or numeric type value. A rich attribute contains multiple sub-fields.

To configure a simple attribute:

1. In the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute.

2. Select the operator for the attribute

3. Configure the values for the attribute

To configure a rich attribute:

1. In the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute.

2. Depending on the type of rich attribute you selected, configure the operator values.

Attributes within the search are logically AND'd together. You can add in a UNION operator in-between attributes. To do this, right-click in the Workspace, and click **UNION Operator**.

Arranging attributes within a search attribute

Use the Up and Down buttons to prioritize the order in which the attributes and unions should be considered when running the search. These controls are also available on the right-click shortcut menu.

Deleting an attribute from the search

Use the Delete button to remove an attribute from the search. Delete is also available from the right-click shortcut menu.

Adding sub-instances to a simple attribute

When a simple attribute has been added to the Workspace, the Add More button is displayed in the upper right corner of the attribute control. To add an additional sub-instance of the attribute:

1. First, in the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute, and the Add More 🔲 button is displayed.

2. Click Add More🔲. The attribute sub-instance is nested within the parent control, with an additional operator and field value control.

> **Note** After you have added the number of sub-instances allowed by the attribute, the 🔲 is no longer displayed as an option. For example, **Direction** has four available attributes: Inbound , Intercom, Outbound, and Unknown. After three sub-instances have been added to the original attribute, the Add More icon is no longer displayed.

Deleting sub-instances from a simple attribute

When more than one sub-instance is included in a simple attribute, the Delete More button 🔲 is available to the right of the active sub-instance, allowing you to delete the sub-instance. To do this:

1. In the SearchBuilder control on the Workspace, in the attribute, select the sub-instance. The Delete More button 🔲 is displayed next to the sub-instance.

2. Click Delete More 🔲. The sub-instance is removed from the attribute.

Related Topics

Editing a Search

Running a Recording Search

Saving a Search

Recording Search Attributes

The information in the following table describes the available Recording Search attributes that are used to create recording searches for recorded interactions. These attributes are available in the search builder control when a recording search is displayed in the Workspace.

The Recording Search Attributes are defined by the following types:

- Interaction Analyzer

- Interactions

- Media Specific

- Questionnaires

- Survey

- Advanced

Attribute Type	Attribute	Description
Interaction Analyzer	**Agent Keyword Score**	The Agent Keyword Score attribute searches for recordings that contain

		Interaction Analyzer Keywords that have a matching Negative Score, Positive Score, or Total score based on the selection in the first drop-down list box.
		Available operators for Agent Keyword Score include Equal to, Not equal to, Greater than, Greater than or equal to, Less than, Less than or equal to, Is empty, or Is not empty.
		For information on Interaction Analyzer Keywords, see the *Interaction Analyzer Technical Reference* in the PureConnect Documentation Library.
	Customer Keyword Score	The Customer Keyword Score attribute searches for recordings that contain Interaction Analyzer Keywords that have a matching Negative Score, Positive Score, or Total score based on the selection in the first drop-down list box.
		Available operators for Customer Keyword Score include Equal to, Not equal to, Greater than, Greater than or equal to, Less than, Less than or equal to, Is empty, or Is not empty.
		For information on Interaction Analyzer Keywords, see the *Interaction Analyzer Technical Reference* in the PureConnect Documentation Library.
	Total Keyword Score	The Total Keyword Score attribute searches for recordings that contain Interaction Analyzer Keywords that have a matching Negative Score, Positive Score, or Total score based on the selection in the first drop-down list box.
		Available operators for Total Keyword Score include Equal to, Not equal to, Greater than, Greater than or equal to, Less than, Less than or equal to, Is empty, or Is not empty.
		For information on Interaction Analyzer Keywords, see the *Interaction Analyzer Technical Reference* in the PureConnect

		Documentation Library.
	Interaction Was Analyzed	The Interaction Was Analyzed attribute searches for recordings that *were* analyzed for keywords <u>or</u> recordings that were *not* analyzed for keywords. This attribute is configured to search recordings by the audio channel, for either Agent channel, Customer channel, or both channels. Select Yes to search for recordings that *were* analyzed for keywords. Select No to search for recordings that were *not* analyzed for keywords. To configure the search to select recordings by *either* the Agent audio channel or by the Customer audio channel, select the Specify channel analyzed check box, and in the drop-down list select either Agent or Customer. To configure the search to select recordings by *both* the Agent and Customer audio channels, clear the Specify channel analyzed check box. For example: selecting Yes and clearing the Specify channel analyzed check box returns recordings that have been analyzed for keywords by the Agent or Customer. Or, for example, if you want to search for recordings that were *not* analyzed for any agents, select No and select the Specify channel analyzed check box, and select the Agent channel.
	Keyword	The Keyword attribute searches for recordings that contain Interaction Analyzer keywords. Available operators for Keyword include: Equal to, Not equal to, Contains, Does not contain, Is empty, and Is not empty. You can use the drop-down list to select a Keyword or you can begin typing a keyword to display available keywords to choose from.

		Keyword is a simple attribute that can contain sub-instances.
		For information on Interaction Analyzer Keywords, see the *Interaction Analyzer Technical Reference* in the PureConnect Documentation Library.
	Keyword Set Category	The Keyword Set Category attribute searches for recordings that contain keywords based on the Keyword Set Category.
		Available operators for Keyword Set Category include: Available operators for Keyword include: Equal to, Not equal to, Contains, Does not contain, Is empty, and Is not empty.
		You can use the drop-down list to select a Category or you can begin typing a Category to display available categories to choose from.
		Keyword Set Category is a simple attribute that can contain sub-instances.
		For information on Interaction Analyzer Keywords, see the *Interaction Analyzer Technical Reference* in the PureConnect Documentation Library.
	Keyword Score	The Keyword score attribute searches for recordings that contain Interaction Analyzer Keywords and have a matching Customer/Agent Positive or Negative score based on the selected operator.
		Available operators for Keyword Score include Equal to, Greater than, Greater than or equal to, Less than, Less than or equal to, or Not equal to.
		Keyword Score is a simple attribute that can contain sub-instances.
		For information on Interaction Analyzer Keywords, see the *Interaction Analyzer Technical Reference* in the PureConnect Documentation Library.

	Keyword Set Name	The Keyword Set Name attribute searches for recordings that contain keywords based on the Keyword Set Name. Available operators for Keyword Set Category include: Available operators for Keyword include: Equal to, Not equal to, Contains, and Does not contain. You can use the drop-down list to select a Name or you can begin typing a Name to display available names to choose from. For information on Interaction Analyzer Keywords, see the *Interaction Analyzer Technical Reference* in the PureConnect Documentation Library.
	Spotted Keyword Confidence	The Spotted Keyword Confidence attribute searches for recordings based on the Confidence Threshold percentage defined for a Keyword. Available operators for Spotted Keyword Confidence are: Greater than, Greater than or equal to, Less than, and Less than or equal to. For information on Interaction Analyzer Keywords, see the *Interaction Analyzer Technical Reference* in the PureConnect Documentation Library.
Interactions	**Account Code**	Use an Account Code, which is an identifying numeric code, assigned to an account name, that has been associated with an outgoing or incoming interaction, as an argument for your search. Available operators include: Contains, Does not contain, Equal to, Is empty, Is not empty, or Not equal to. Type a numerical value for the argument in the value field. Note that Account Codes are treated as strings. so leading zeros in an account code number must be

		included in the value entered.
		Account Code is a simple attribute that can contain sub-instances.
		Note: Screen Recordings are not returned on searches using this attribute, as screen recordings are not associated with Tracker Segments.
	Assigned Workgroup	Use a Workgroup in your search, which is a defined logical group of Users related by function, department, project, or other organization and used for ACD call processing queues.
		Available operators include: Contains, Does not contain, Equal to, Is empty, Is not empty, or Not equal to.
		In the value field, type a Workgroup name or select an available Workgroup from the drop-down list. The list of available workgroups is filtered by the workgroup access rights the user has when logging on to IC Business Manager. Note, you can also type an obsolete workgroup name in this field.
		Assigned Workgroup is a simple attribute that can contain sub-instances.
		Note: Screen Recordings are not returned on searches using this attribute, as screen recordings are not routed through workgroup queues.
	Date/Time	Date/Time is a rich attribute that contains multiple sub-fields. You can select: Specify a date/time range, Specify a date period, or Specify shift date/time period. Operands are displayed depending on your selection.
		For Specify a date/time range, specify a date argument using the drop-down box and selecting a date from the calendar. Type or select a time to specify a time argument.
		For Specify a date period, specify a date in which the interactions occurred to be included in the search: Today, Last week, Last month, Last N hours, or Last N days.
		For Specify shift date/time period, specify a shift date range and time of day range. For example, a shift date/time might be Monday through Friday, 8:00 a.m. to 5:00 p.m.
		This attribute uses the Windows time zone set for the Windows User on the Interaction Recorder Client machine.

	Has Related Recordings	Select this attribute to search for recordings that have related recordings or do not have related recordings. Select Yes to return recordings in the search results that have a related recording. Related recordings apply to all media types, such as screen recordings and replies to e-mails. Select No to return recordings in the search results that do not have any related recordings.
	Holds	**Search Attributes for Interactions > Holds** There are three Holds Search Attributes: **Number of Holds**, **Hold Time**, and **Total Hold Time**. **Number of Holds** Select this attribute to search for recordings by specifying the number of holds in a recording. Select an operator and enter the number of Holds in the field. A valid value for the number of Holds is 0 or a positive integer. **Note:** When the Number of Holds operator is configured as **Equals to** and the value is set to **0**, only recordings that *do not* have Holds are retrieved. Available operators are: Equal to, Greater than, Greater than or equal to, Less than, and Less than or equal to. The **Less than** and **Less than or equal to** operators *include* recordings that have no Hold events. To specify the Hold type, select the **Specify hold type** check box and select **Hold** or **Transfer** or **Park**. **Hold Time** Select this attribute to search for recordings by specifying an individual Hold time in a recording. Select an operator and enter a time in hh:mm:ss in the field. Available operators are: Equal to, Greater than, Greater than or equal to, Less than, and Less than or equal to. To specify the Hold type, select the **Specify hold type** check box and select **Hold** or **Transfer** or **Park**. **Notes** for **Hold Time** attribute**:** 1. The **less than** and **Less than or equal to** operators only retrieve recordings for which there is at least one Hold event. 2. When the Hold Time operator is configured as **Equals to** and the value is set to **0**, only recordings that have at least one zero-second hold are retrieved. **Total Hold Time** Select this attribute to search for recordings by specifying the sum of all hold times for a recording. Available operators are: Equal to, Greater than, Greater than or equal to, Less than, and Less than or equal to. To specify the Hold type, select the **Specify hold type** check box and

		select **Hold** or **Transfer** or **Park**.
		Notes for **Total Hold Time** attribute:
		3. The **less than** and **Less than or equal to** operators only retrieve recordings for which there is at least one Hold event.
		4. When the Total Hold Time operator is configured as **Equals to** and the value is set to **0**, recordings that have no holds as well as recordings that have at least one zero-second hold are retrieved.
		Hold Type Events
		You can specify a Hold type to associate with a **Holds** search attribute. **Holds** event types are: **Hold**, **Transfer**, and **Park**.
		A **Hold** event type indicates the Hold button was used to place a recording participant on hold; the Hold event duration indicates the amount of time the participant was on hold.
		A **Transfer** event type indicates a recording participant was transferred to another entity during the recording; the Transfer event duration indicates the amount of time the participant was on hold while the interaction was being transferred.
		A **Park** event type indicates the Park on Queue button was used to park a recording participant on a queue. The Park event duration indicates the amount of time the participant was on hold before the parked call was picked up from the queue.
		Note A Park Hold type search can only be run against a CIC Server running CIC 2018 R1, or later.
	Initiation Policy	Select this attribute to search for recordings based on an Initiation Policy. Select an operator, and enter the Initiation Policy name in the field. Available operators include: Contains, Does not contain, Equal to, Is empty, Is not empty, or Not equal to. You can use the drop-down list to select an Initiation Policy or you can begin typing a name to display available Initiation Policies to choose from. The Initiation Policy attribute can include sub-instances.
	Interaction Address	Select this attribute to search for

		recordings based on the Interaction Address.
		Available operators include: Contains, Does not contain, Equal to, Is empty, Is not empty, or Not equal to.
		Note: Screen Recordings are not returned on searches using this attribute, as screen recordings do not have interaction addresses.
	Direction	Select this attribute to search for recordings based on the Interaction Direction (Inbound, Intercom, Outbound, or Unknown).
		Note: The owner of an intercom recording is the person who is receiving the call.
		The Direction attribute can include sub-instances.
	Interaction ID	The Interaction ID uniquely identifies an interaction in a CIC system. An Interaction ID is assigned every time an interaction takes place. An Interaction ID identifies the *interaction* that got recorded.
		Interaction IDs are useful in finding recordings when you use the Contains operator along with the Call Id, from the Interaction Desktop.
		Use the Interaction ID as a simple attribute for your search.
		Type a numerical value for the argument in the value field.
		The Interaction ID attribute can include sub-instances.
		The speed of the search and the number of recordings returned in your search results is based on the characters entered in the Interaction ID value field. For example:
		- If you enter 18 characters, the search results will include the recording that has

<table>
<tr><td></td><td></td><td>the Interaction ID that matches the value entered.

- If you enter 10 characters, the search results will contain a list of recordings that have Interaction IDs that start with these 10 characters.

- If you enter any other number of characters, for example 1 through 9 characters or 11 through 17 characters, the search results will contain a list of recordings that contain the value entered anywhere in the Interaction ID.</td></tr>
<tr><td></td><td>**Media Type**</td><td>Select this attribute to search for recordings based on the interaction media type. Available Media types include: Call, Chat, Chat Transcript, E-mail, Screen, Social Conversation, and Social Direct Message.</td></tr>
<tr><td></td><td>**Participant Information**</td><td>Add this attribute to your search to include recordings based on identifiers of a party that are included in the recording. All the fields specified are OR'd together for the search.

The sub-fields for this rich attribute include information sub-fields for participant values, including: Last Name, First Name, Phone Number, Email Address, a Participant Type drop-down list that includes predefined types. Note, if you want all recordings where a specific participant has a Participant Type (or has any other Participant Information fields other than first and last names), use the Participant Name search criteria in addition to Participant Information criteria.

Also included is a Station Name sub-field that includes: an operator drop-down list that displays the operators Contains, Does not contain, Equal to, and Not equal to; and a Station Name field drop-down list that displays a list of current station names to choose from. Note, you can also</td></tr>
</table>

		type an obsolete station name in this field. Note: Screen Recordings are not returned on searches using this attribute, as screen recordings do not have participants or station names.
	Participant Name	Add this attribute to your search to include recordings based on the participant's name. The first and last name are AND'ed together for the search. Available operators include: Equal to, Not equal to, Contains, or Does not contain. In the First Name field, type the first name of the participant. In the Last Name field, type the last name of the participant.
	Recording File Size	Select this attribute to specify a recording file size to be considered in the search. Available operators include: Equal to, Greater than, Greater than or equal to, Less than, Less than or equal to, or Not equal to. Type a numerical value for the argument in the value field.
	Recording Length	Select this attribute to specify a recording length to be considered in the search. Available operators include: Equal to, Greater than, Greater than or equal to, Less than, Less than or equal to, or Not equal to. Enter a time value for the recording length in the value field.
	Site ID	Include this attribute in your search for interactions to be retrieved based on Site ID. Available operators include: Equal to, Greater than, Greater than or equal to, Less than, Less than or equal to, or Not

		equal to.
		Type a numerical value for the argument in the value field.
		This simple attribute can contain sub-instances.
		Note: Screen Recordings are not returned on searches using this attribute, as screen recordings are not associated with Site IDs.
	Wrap-up Code	Include this attribute in your search for interactions to be retrieved based on Wrap-up Codes.
		Available operands include: Contains, Does not contain, Equal to, Is empty, Is not empty, or Not equal to.
		Type a value for the argument in the value field.
		This simple attribute can contain sub-instances.
		Note: Screen Recordings are not returned on searches using this attribute, as screen recordings do not have wrap-up codes.
	User Name	Include this attribute in your search for interactions to be retrieved based on User Name.
		This is a simple attribute with two operators to choose from, Equal to and Not equal to.
		The value field is a drop-down list of User Names. You can use the drop-down list to select a User Name or you can begin typing a name to display available User Names to choose from.
		If duplicate Display Names are detected for the User Name, the IC User name value is appended to the Display Name. For example:
		John Smith (JSmith)
		John Smith (JASmith)

		If further duplicates are detected when there are users with the same Display Name and IC User name, a counter is appended to the end of the Display Name. For example: John Smith (JSmith) John Smith (JASmith) John Smith (JASmith) (1) This attribute can include sub-instances.
Media Specific > **Calls**	**Call Type**	Use this attribute to select recordings based on Call Type. The available Call Types are: Conference, External, Intercom, or Unknown. Note: The owner of an intercom recording is the person who is receiving the call.
	Participant Phone Number	Use this attribute to select recordings based on the participant phone number. Type the phone number for the argument in the value field. The available operators are: Equal to, Not equal to, Contains, or Does not contain. This attribute can include sub-instances.
Media Specific > E-mails	**CC** **Importance** **Subject**	Available e-mail attributes to consider in a search are: **E-mail cc**, to include a recipient's name who was copied on the e-mail. Operators include Contains, Does not contain, Equal to, Is empty, Is not empty, or Not equal to; **E-mail Importance**, options include High, Low, Normal, or Unknown; and **E-mail Subjec**t, operators include Contains, Does not contain, Equal to, Is empty, Is not empty, or Not equal to.

Media Specific > **Social Conversation**	**Platform** **Channel** **Page**	Social Conversation attributes are: **Social Conversation Platform** Use this attribute to select a social media platform from the list, such as Facebook or Twitter. **Social Conversation Channel** Use this attribute to enter a channel name, which has been predefined by your administrator. **Social Conversation Page** Use this attribute to enter a corporate Facebook page name. Twitter does not use Pages.
Media Specific > **Social Direct Message**	**Platform** **Channel** **Page**	Social Direct Message attributes are: **Social Direct Message Platform** Use this attribute to select a social media platform from the list, such as Facebook or Twitter. **Social Direct Message Channel** Use this attribute to enter a channel name, which has been predefined by your administrator. **Social Direct Message Page** Use this attribute to enter a corporate Facebook page name. Twitter does not use Pages.
Questionnaires	**Number of Finished** **Questionnaires**	This simple attribute allows you to search by the number of finished questionnaires that have been scored against a recording. The following operators are available to choose from: Equal to, Greater than, Greater than or equal to, Less than, Less than or equal to, Not equal to. Type a numerical value for the argument in the value field. This attribute can include sub-instances.

Number of Incomplete Scores	This simple attribute allows you to search by the number of incomplete scorecards associated with a recording. The following operators are available to choose from: Equal to, Greater than, Greater than or equal to, Less than, Less than or equal to, Not equal to. Type a numerical value for the argument in the value field. This attribute can include sub-instances.
Questionnaire Name	This simple attribute allows you to search by the name of a questionnaire associated with a recording. There are two operators to choose from, Equal to and Not equal to. The value field is a drop-down list of available questionnaire names. This attribute can include sub-instances.
Ranking	This is a rich attribute. Use it to search by Rank Group and Rank Name. The options are available from drop-down lists. The Rank Name operators are: Contains, Does not contain, Equal to, Is empty, Is not empty, and Not equal to. After you have selected the Rank Group that you want to search for, the associated ranking is displayed in the Rank Name field. Select the Rank Name for your search.
Scorecard Has Signature Comments	Select this attribute to search for Scorecards based on Signature Comments. Select Yes to return scorecards in the search results that *have* signature comments. Select No to return scorecards in the search results that *do not* have any signature comments.

	Scorecard Signature Status	Select this attribute to search for Scorecards based on the status of the signature.
		Select No signature required to return scorecards in the search that do not require a signature.
		Select Awaiting signature/Signature required to return scorecards in the search that require a signature but have not been signed.
		Select Signed to return scorecards in the search that have been signed.
	Scored User	This attribute searches for users who have had questionnaires scored against their recordings.
		This is a simple attribute with two operators to choose from, Equal to and Not equal to.
		The value field is a drop-down list of user `displaynames`, if available, otherwise a UserID appears if a `displayname` is not available.
		This attribute can include sub-instances.
	Scoring User	This attribute searches for users who have scored recordings.
		This is a simple attribute with two operators to choose from, Equal to and Not equal to.
		The value field is a drop-down list of user IDs.
		This attribute can include sub-instances.
	Scoring Status	Use this attribute to search for recordings by their scoring status.
		The options are Assigned, Finished, or Saved.
		This attribute can include sub-instances.

Survey	**Survey Ranking**	This rich attribute allows you to search for a survey by Rank Group. The options are available from drop-down lists. After you have selected the Rank Group that you want to search for, the associated ranking is displayed in the Rank Name field. Select the Rank Name for your search. Available operators include: Contains, Does not contain, Equal to, Is empty, Is not empty, or Not equal to.
	Survey Scored User	This attribute allows you to search for a user that has been scored in a survey. This is a simple attribute with two operators to choose from, Equal to and Not equal to. The drop-down list allows you to select a user name for your search. This attribute can include sub-instances.
	Survey Name	This attribute allows you to search for a survey by Survey Name. This is a simple attribute with two operators to choose from, Equal to and Not equal to. The drop-down list allows you to select a survey name for your search. This attribute can include sub-instances.
	Survey State	This simple attribute allows you to search for surveys by Survey State. The operators are Equal to and Not equal to. The drop-down field list includes the following states of a survey to choose from: Abandoned, Caller disconnected, Complete, Error, Insufficient resources, Not answered, and Opt out. This attribute can include sub-instances.

Advanced	Recording Attribute	Use this rich attribute to search for recordings by a custom Recording Attribute.
		Select the name of the attribute from the drop-down list.
		Choose from the operators Contains, Does not contain, Equal to, Is empty, Is not empty, and Not equal to, and type the value in the field.
		If you leave the operator and value blank, all recordings that have this attribute will be returned regardless of the attribute's value.
		Custom Attributes Not Equal to and Does Not Contain searches find *all* recordings that do not have the attribute equal to the value.
	Recording File Name	This is a simple attribute that allows you to search for a recording by Recording File Name.
		Choose from the operators Contains, Does not contain, Equal to, Is empty, Is not empty, and Not equal to. Type the file name in the field.
		This attribute can include sub-instances.
	Recording ID	A Recording ID is a unique identifier for each recorded interaction. Recording IDs are only used by Interaction Recorder and are only visible when browsing recordings or in search results.
		This is a simple attribute that allows you to search for a recording by Recording ID.
		Choose from the operators Contains, Does not contain, Equal to, Is empty, Is not empty, and Not equal to. Type the Recording ID in the field.
		This attribute can include sub-instances.
	Recording is in Progress	Select this attribute to search for recordings that are in progress or

		recordings that are not in progress.
		Select Yes to return recordings in the search results that are in progress.
		Select No to return recordings in the search results that are not in progress.
	Recording is Encumbered	Select this attribute to search for recordings that are encumbered. Recordings are encumbered if the user or station was not properly licensed for Interaction Recorder when the recording was made.
		Select Yes to return recordings in the search results that are encumbered. When the search results are displayed, the user or station that is not properly licensed is displayed in the Local Party Name column.
		Select No to return recordings in the search results that are not encumbered.
	Recording Tag	Select this attribute to search for recordings based on a Recording Tag. Select an operator, and enter the Recording Tag name in the field. You can use the drop-down list to select a Recording Tag, or you can begin typing a name to display available Recording Tags to choose from.
		Available operators include: Contains, Does not contain, Equal to, Is empty, Is not empty, or Not equal to.
	Recording Type	Select this attribute to retrieve recordings based on the recording type. Select Policy-based for recordings that were created by an Initiation Policy, or select Snippet Recording for recordings that were created using the Snip recording option. Select an operator from the drop-down list. Available operators are Equals to and Not equal to.
	Survey ID	The Survey ID is a unique internal identifier for Interaction Feedback surveys. It is a 32 character hexadecimal

		number that is randomly generated when a survey is created. It is only viewable by administrators who have access to the database.
		This is a simple attribute that allows you to search for a recording by Survey ID.
		Choose from the operators Contains, Does not contain, Equal to, Is empty, Is not empty, and Not equal to. Type the Survey ID in the field.
		This attribute can include sub-instances.
	Has Been Archived	Select this attribute to search for recordings that have or have not been archived.
		Select Yes to return recordings in the search results that have been archived.
		Select No to return recordings in the search results that have not been archived.

Related Topics

[Adding Attributes to a Search](#)

[Creating Private Searches](#)

[Creating Public Searches](#)

[Editing a Search](#)

[Running a Recording Search](#)

[Saving a Search](#)

Running a Recording Search

Run a Recording Search to display a list of recorded interactions, of your Search results, in the Workspace. Specific details of interactions can also be reviewed in this view.

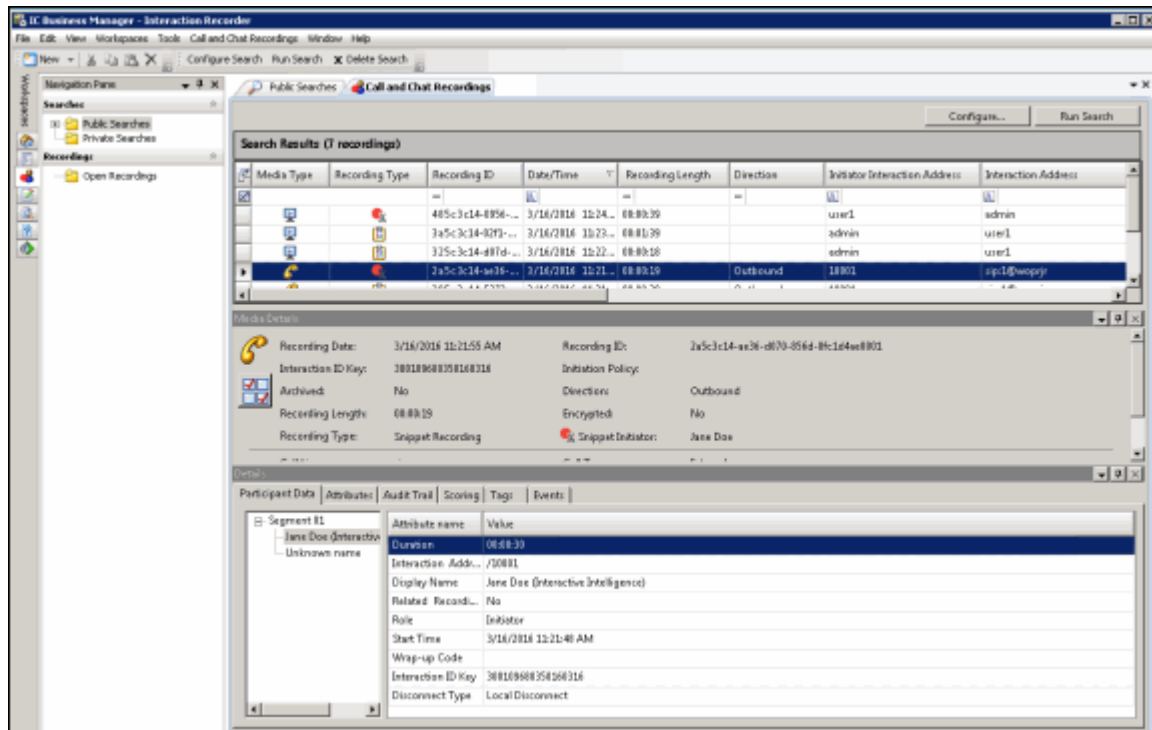
Here are several ways to run a search:

- When you select a search in the Navigation Pane, it automatically runs and the search results are displayed in the Workspace.

- From the **Searches** pane, select a search, and in the workspace click **Run Search**.

- Select the search in the Searches pane, and on the menu bar click the *Search Title* Active View menu, and then click **Run Search**.

- From the **Searches** pane, select a search, and click **Run Search** on the toolbar.

- Select a search in the Searches pane, right-click, and on the shortcut menu, click **Run**.

Next, see .

Related Topics

Viewing Recording Search Results

Working with Recording Search Results

Viewing Recording Search Results

Based on the attributes of the recording search, when a search is run the results are displayed in the Search Results view in the Workspace. A list of recorded interactions is displayed at the top of the Workspace in a grid, which gives details of the interaction.

Use the Search Results view to review the details of an interaction and to playback a recording. Information on recordings is displayed in the **Media Details** and **Details** dockable panes, which are initially displayed at the middle and bottom of the Workspace.

Displaying Recording Searches in the Workspace

Multiple recording searches are displayed in tabbed views in the Workspace.
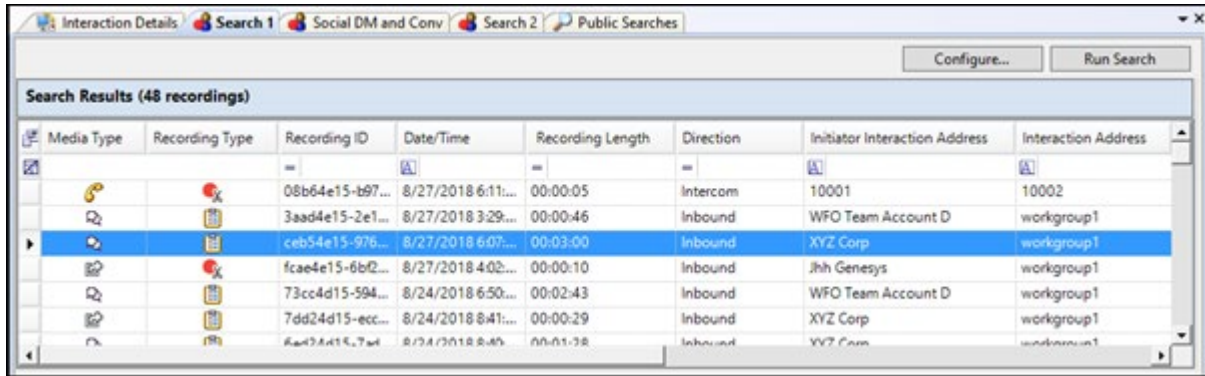
Next, see Working with Recording Search Results.

Working with Recording Search Results

When a recording search is run, the results are displayed in the Search Results view in the Workspace. Multiple searches can be displayed in tabs in the Workspace. A list of recorded interactions is displayed in a grid, which gives details of the recording. Use the Search Results view to review the details of an interaction, playback a recording, delete a recording, export a recording, or archive a recording. The Search results view contains the Recordings grid, the Media Details pane, and the Details pane.

Recordings grid

The results of a recording search are displayed in the grid in the top pane of the Workspace. The grid displays a list of recordings, by **Date/Time** that are found for the search, in descending order (newest to oldest).

Notes

- To paste recording information into another application, use Ctrl+C in the recordings grid to Copy an entire row, or multiple rows, to the clipboard.

- When there is more than one scorecard associated with a recording, the **Scoring Status** column displays the scorecard at the highest level of completion. For example, if a recording has two scorecards and one of the scorecards is **Completed** and the other is **Saved**, the Scoring Status column displays Completed and the Scoring User column displays the user name for the owner of

the Completed scorecard. If there is more than one scorecard at the highest level of completion, the Scoring User column displays the user who is alphabetically first by last name.

- The Scoring User column displays the names of the users that scored the individual recordings displayed in the Search Results grid. If the user, viewing the Search Results, has the **Can Score Recordings** Security Policy rights for a recording, the Scoring User name is displayed in the Scoring User column. If the user does *not* have the **Can Score Recordings** policy rights for the recording, the recording is not displayed in the search results.

- If a recording is in progress, the value in the **Recording Length** field is blank in the search results grid.

- If a call recording is in progress when the recording is opened, the Playback window is replaced with the message **This recording is currently in progress and cannot be retrieved at this time**. You can monitor a recording in process. For more information, see Monitor a Live Call.

Selecting Fields for the grid

To change the Fields that are displayed in the grid, click the **Field Chooser** ⊞ on the top left of the grid. In the Show/Hide Columns dialog select the Fields to display in the grid.

Sorting columns in the grid

To sort a grid column in ascending or descending order, click the Field name.

Refining search results

To further refine the search results, use the Filter Criteria selection fields ⒶⓁ below each Field. To create a field filter for the search results displayed in the grid, select the field below the Field name. The field search filter is displayed. To select an operand for the search, click ⒶⓁ. In the drop-down list, select the search criteria. Depending on the field and your selections, an additional dialog might be displayed. The search results are displayed according to your search filter. To clear the filter criteria, in the field click ⊠. To clear *all* filter criteria, click ⊠ at the left on the Filter Criteria selection fields grid row.

Recording Details

When you select a recording in the Search results list, detailed information on a recording is displayed in **Media Details** and **Details** panes. These panes are displayed at the bottom of the Workspace and can be moved and docked to another location on your screen.

Open a Recording

To Open a Recording, double-click a recording in the Search Results grid. You can also right-click on a recording, and on the shortcut menu click **Open Recording**.

Recording shortcut menu

When a recording is selected in the Search Results grid, you can right-click on the recording to display a shortcut menu. From the Shortcut menu, you can:

- Open a Recording

- Show or hide the Details panes

- View the Audit Trail

- Delete a Recording

- Export a Recording

- Export Results Rows

- Archive a Recording

- Score a Recording

- E-mail a Recording

> **Notes**
>
> **-** A Recording can be deleted from the Recordings grid in the Search Results View. For more information, see Delete a Recording.
>
> **-** Screen recordings cannot be exported. If a screen recording is included in a selection, Export is not available on the shortcut menu.

Media Details pane

When you select an interaction in the search results grid, details of the interaction are displayed in the Media Details pane. The details include: Recording Date, Recording ID, Interaction ID Key, Initiation Policy, Archived indicator, Direction, Recording Length, Encrypted indicator, Recording Type, Snippet Initiator, Call Line, and Call Type.
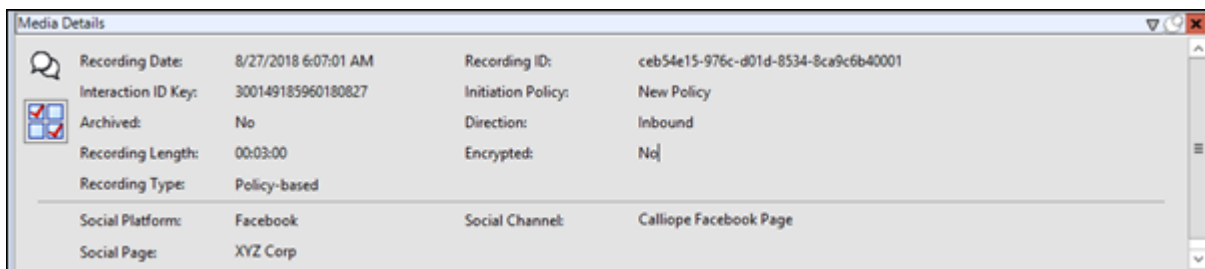
To undock the Media Details pane from the Workspace, double-click the title bar. The Media Details pane moves from the Workspace. To move the Media Details pane to another place on your screen, click the title bar and drag the window.

To dock the Media Details back in the Workspace, right-click, and on the shortcut menu, click **Floating** to clear the check box.

To hide the Media Details pane in the Workspace, right click on the title bar, and in the shortcut menu click **Auto Hide**. A tabbed page is displayed at the bottom of the Workspace. Click the tab to display the **Media Details** view.

Details pane

The Details pane displays additional interaction details for the selected interaction. The Details pane includes the following tabbed pages: Participant Data, Custom Attributes, Audit Trail, Scoring, and Tags. If Interaction Analyzer Keywords are associated with an interaction, a Keywords tab is also displayed.
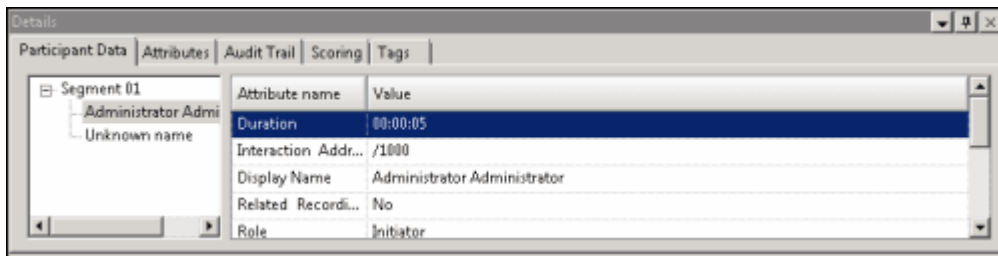
To undock the Details pane from the Workspace, double-click the title bar. The Details pane moves from the Workspace. To move the Details pane to another place on your screen, click the title bar and drag the window.

To dock the Details back in the Workspace, right-click, and on the shortcut menu, click **Floating** to clear the check box.

To hide the Details pane in the Workspace, right click on the title bar, and on the shortcut menu, click **Auto Hide**. A tabbed page is displayed at the bottom of the Workspace. Click the tab to display the **Details** view.

Scoring page

Use the Scoring page in the Details pane to access a Questionnaire and Score a recording. Questionnaires that have previously been assigned to a recording are displayed on the Scoring page. Additional Questionnaires can be assigned to the recording on the Scoring page. Only questionnaires that have been published are available for scoring.

User Scorecard Access

Non-admin users only see Questionnaire scorecards that they have scored. To allow users to see all scorecards for a recording, the CIC administrator can create a **Security Policy** so a user **can view scorecards**. This Security Policy can be applied to Agents or Roles. Questionnaire Directory Admin Access and other security rights will still apply. For non-admin users, in order to finish a scorecard that has already been scored by another user, the user must first save the scorecard to take ownership and then the user can finish the scorecard.

Assigning a Questionnaire

To assign a questionnaire, click **Assign Questionnaire**, and select a questionnaire from the **Select Questionnaire** dialog.

When you click **Assign Questionnaire** the **Select Questionnaire** dialog is displayed. To assign a user to score the recording, select the **Scoring user** from the drop-down list. To select the completed scorecard for calibration purposes, select the **Mark scorecard for calibration** check box. To require an agent signature on the completed scorecard, select the **Require scored agent signature** check box. To assign a questionnaire to a recording you must have the **Can Assign Questionnaires** security right, assigned in Policy Editor.

To score a recording, on the Scoring page, click **Score**. The Questionnaire to score the recording is displayed and the media player is launched displaying details of the recording.

Tags page

The Tags page displays Tags for a recording that were created in Policy Editor and assigned to a recording.

Tags can be added and edited in the Playback window Details pane on the Tags page. To open the Playback window, click **Modify Tags**. The Playback window is displayed. If the Details pane is not showing, in the Playback window right-click, and on the shortcut menu point to **Show** and click **Details**.

Events page

The Events page displays the Hold Event information. This tab is displayed for each recording if the user has sufficient security and access rights to be able to retrieve or playback the recording.

By default, the rows on the Events page are sorted in ascending order by the Start/Date/Time value. The columns displayed on the Events page are:

- **Type** This value indicates the type of Hold event that occurred within the recording. Valid Hold display values are: **Hold**, **Transfer,** and **Park**.

- **Duration** This value indicates the length of the Hold, rounded to the nearest second. The summary row for this column displays the total duration of the Holds (summed before any rounding) for this recording, and is rounded to the nearest second.

- **Hold Date/Time** This value displays when the Hold began in local Date/Time. The summary row for this column displays the total number of Holds that occurred for this recording.

- **Start Offset** This value displays when the Hold began as an offset from the beginning of the recording, rounded to the nearest second.

- **End Offset** This value displays when the Hold ended as an offset from the beginning of the recording, rounded to the nearest second.

Note If the duration for a Hold event is less than .5 seconds and greater than zero (0) seconds, the Event Duration states less than 1 second.

Related Topics

Delete a Recording

Details Pane

Media Details Pane

Score a Recording

Media Details Pane

The Media Details pane is displayed in the Search results view in the workspace.
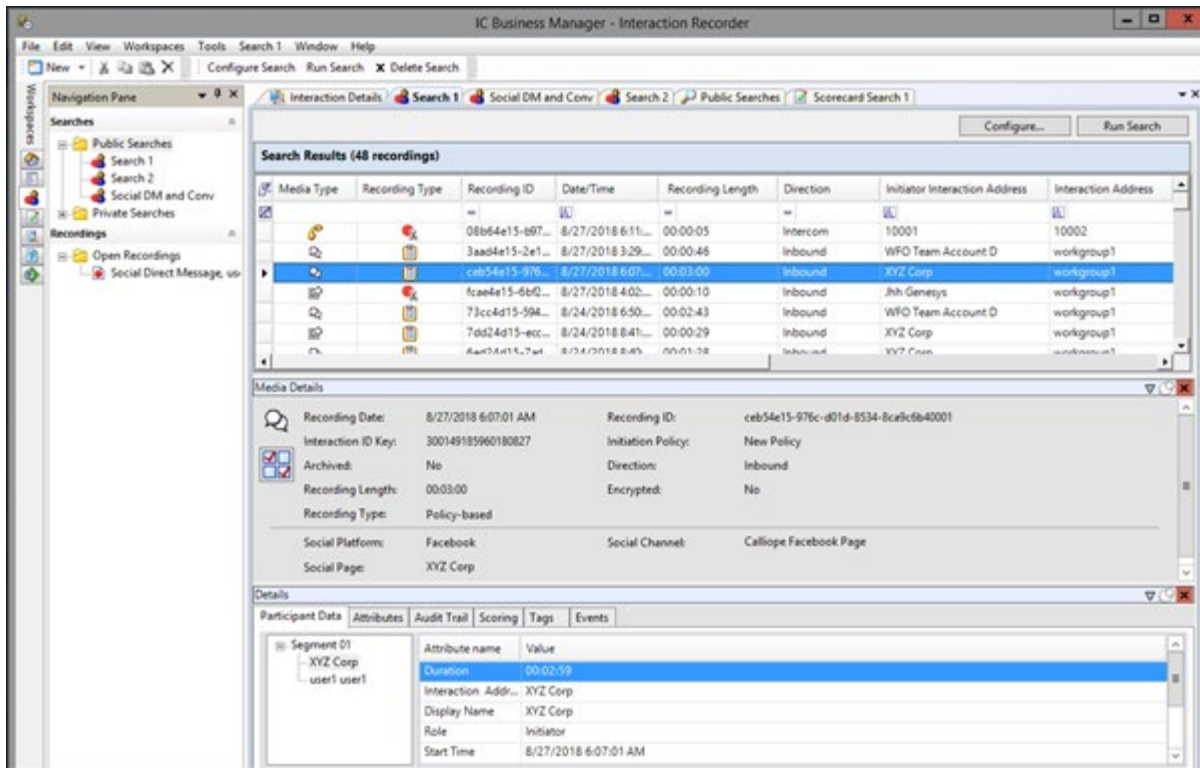
When an interaction is selected, details of the recorded interaction are displayed in the **Media Details** pane. The details include:

- Recording Date

- Recording ID

- Interaction ID Key

- Initiation Policy

- Archived indicator

- Direction

- Recording Length

- Encrypted indicator

- Recording Type

- Snippet Initiator

- Media Type details
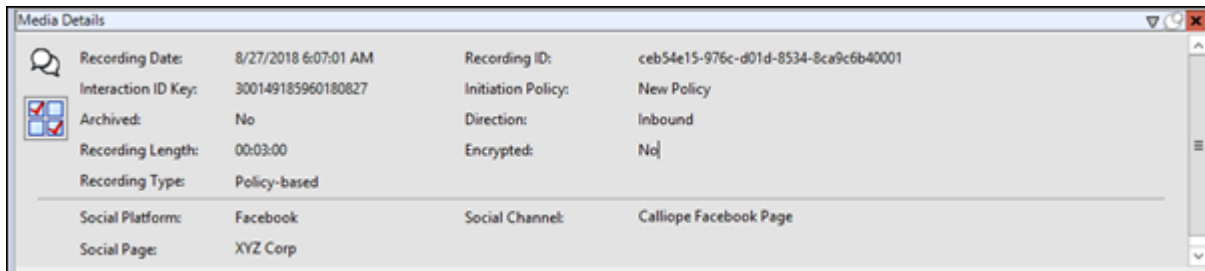
Snippet Initiator

When the Recording Type is a Snippet Recording, the Media Details pane displays the **Snippet Initiator** attribute value, indicating the user who initiated the Snippet Recording.
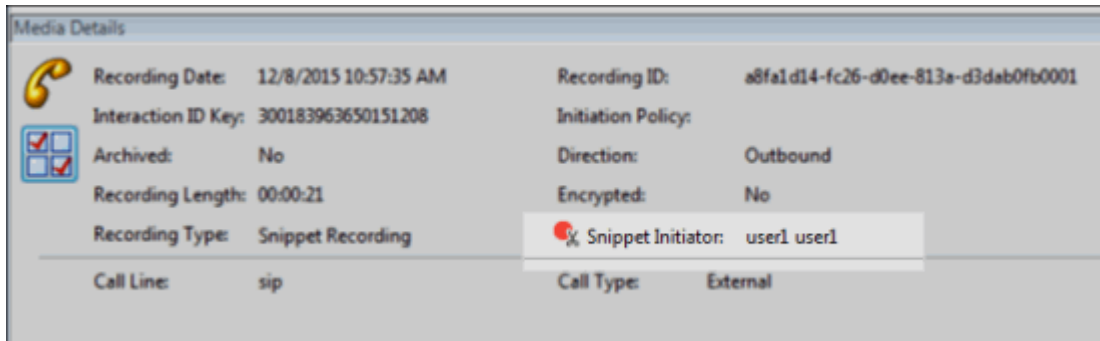
Assign Calibration Scorecards

The Media Details pane also includes an Assign Calibration button to assign calibration scorecards to a recording.

To assign calibration scorecards for a recording, click the Assign Calibration button. The Assign Calibration Scorecards dialog is displayed.
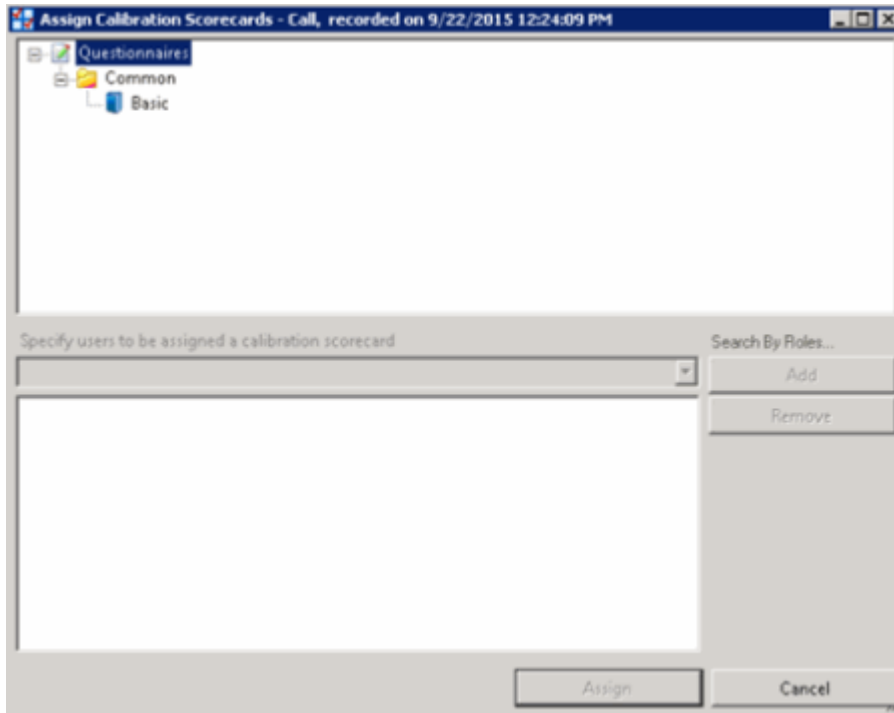
Use the Assign Calibration Scorecards dialog to assign a questionnaire to the recording and to specify the scoring users to be assigned the calibration scorecard.

To assign a questionnaire to be used for calibration:

1. Select a questionnaire from a Questionnaires folder.

2. From the drop-down list specify the scoring users to be assigned the calibration scorecard. You can also specify users by Roles. To do this:

   a. Click **Search by Roles**. The Search by Roles dialog is displayed.

   b. Select a Role to display its members.

   c. Select users from the Role Members.

   d. Click **Add to Calibration** to include the names in the calibrate recording user list in the Assign Calibration Scorecards dialog.

   e. When you have finished adding Role Members, click **Done**.

3. When you have finished specifying users to be assigned the calibration scorecard, click **Assign**.

Moving the Media Details pane

You can undock the Media Details pane from the Workspace and move it to another location on your screen. To undock the Media Details pane, double-click the title bar. The Media Details pane moves from the Workspace. To move the Media Details pane to another place on your screen, click on the title bar and drag the window.

To dock the Media Details pane back in the Workspace, double-click the title bar. The Media Details pane docks back in the Workspace.

Hiding the Media Details pane

There are two ways to Hide the Media Details pane, Hide and Auto Hide. When you Hide the Media Details pane, it does not appear in the Workspace. When you Auto Hide the Media Details pane, a tabbed page is displayed at the bottom of the Workspace. Auto Hide allows you to display a pop-up pane, leaving more Workspace for the Search results view.

To Hide the Media Details pane, right-click the title bar, and on the shortcut menu, click **Hide**. To display the Media Details pane again, right-click in the Workspace and on the shortcut menu point to **Show** and click **Media Details**. The Media Details pane is displayed in the Workspace.

To Auto Hide the Media Details pane, right-click the title bar, and on the shortcut menu, click **Auto Hide**. A tabbed page is displayed at the bottom of the Workspace. To display the Media Details pane again, click the tab, and the Media Details pane pops up in the Workspace. To turn Auto Hide off, when the pane is displayed, right-click the title bar and click **Auto Hide**. The Media Details pane is displayed in the Workspace.

Related Topics

Details Pane

Working with Recording Search Results

Details Pane

The Details pane is displayed in the Search Results View in the Workspace.
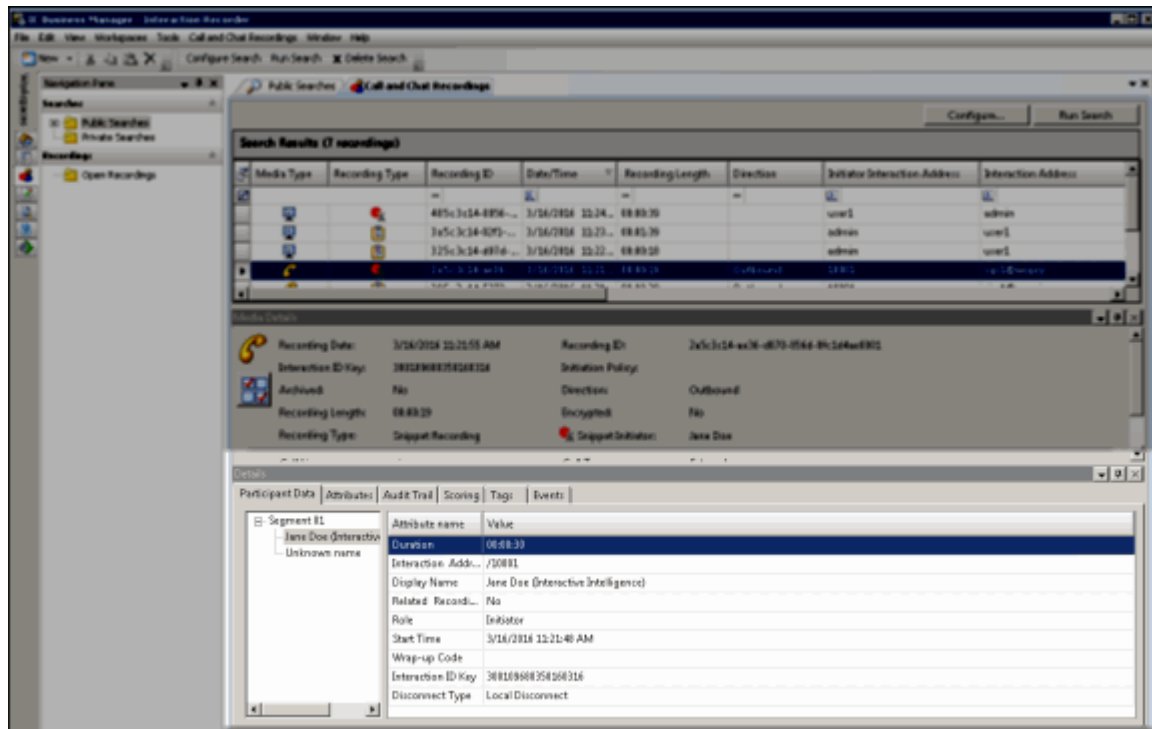
When an interaction is selected, additional interaction details are displayed in the **Details** pane. The Details pane includes the following tabbed pages:

- Participant Data

- Attributes

- Audit Trail

- Scoring

- Tags

- Events
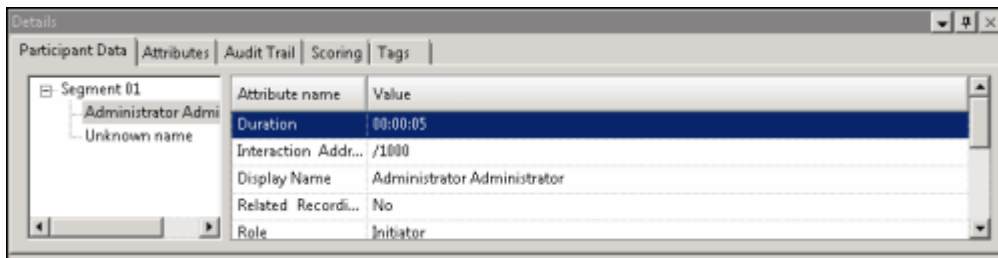
 Note If Interaction Analyzer Keywords are associated with an interaction, a Keywords tabbed page is also displayed.
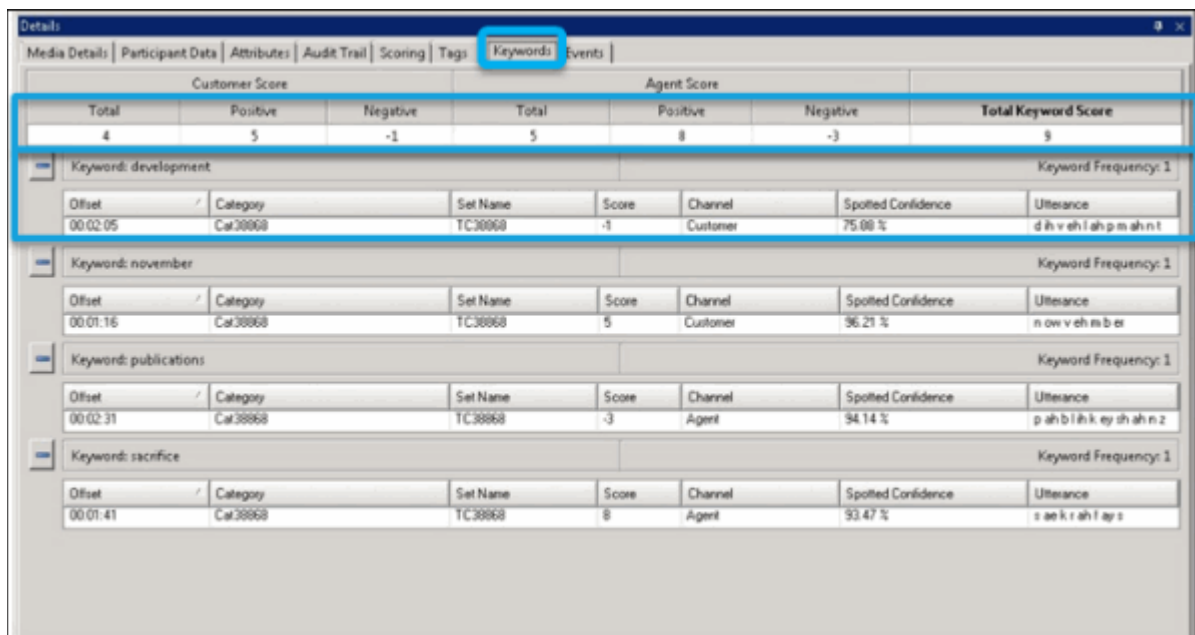
Participant Data page

The Participant Data page displays information on the parties of the selected interaction. The page displays Attributes and Values for the interaction participants.

Attributes page

The Attributes page displays the defined custom attributes that apply to this interaction.

The Attribute value field supports displaying multiple lines with the value text string. When modifying the Value, press **Enter** to add a new line to the attribute value string. To end the edit mode and save the changes, click the pencil icon in the row selector.
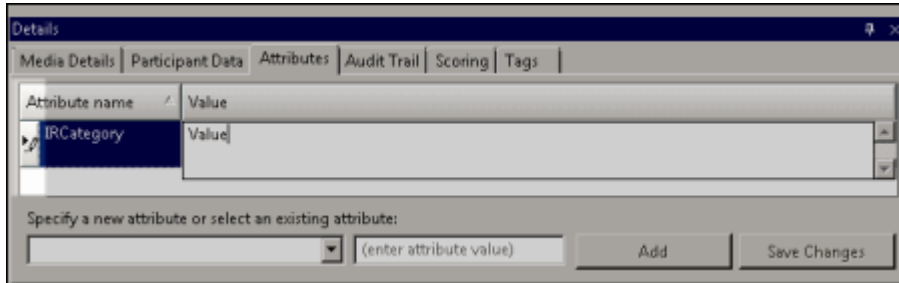
> **Note** Adding or removing a Custom Attribute in Interaction Recorder client in IC Business Manager creates an audit entry for the recording. The audit trail entry for the change contains comments that describe the change.

You can only change the Value on the Attributes page; you cannot change the Attribute name on this page.

Audit Trail page

The Audit Trail page displays information on audit events. The information includes: Date/Time, Audit Event, User, and Comments on the event. Use the shortcut menu from the Audit Trail page to refresh the audit trail data.

Scoring page

The Scoring page is used to access a Questionnaire and Score a recording. Questionnaires that have previously been assigned to a recording are displayed on the Scoring page. Additional Questionnaires can be assigned to the recording on this page. Only questionnaires that have been published are available for scoring.

> **Notes**
>
> **-** Non-admin users only see Questionnaire scorecards that they have scored. To allow users to see all scorecards for a recording, the CIC administrator can create a **Security Policy** so a user **can view score cards**. This Security Policy can be applied to Agents or Roles. Questionnaire Directory Admin Access and other security rights will still apply. For non-admin users, in order to finish a scorecard that has already been scored by another user, the user must first save the scorecard to take ownership and then the user can finish the scorecard.
>
> **-** The Scoring User column displays the names of the users that scored the recording selected in the Search Results grid. If the user, viewing the Search results, has the **Can Score Recordings** Security Policy rights for the selected recording, the Scoring User name is displayed in the Scoring User column. If the user does *not* have the **Can Score Recordings** policy rights, the Scoring User column is not displayed.

To assign a questionnaire, click **Assign Questionnaire**, and select a questionnaire from the **Select Questionnaire** dialog. When you click **Assign Questionnaire** the **Select Questionnaire** dialog is displayed. To assign a user to score the recording, select the **Scoring user** from the drop-down list. To

select the completed scorecard for calibration purposes, select the **Mark scorecard for calibration** check box. To require an agent signature on the completed scorecard, select the **Require scored agent signature** check box. To assign a questionnaire to a recording you must have the **Can Assign Questionnaires** security right, assigned in Policy Editor.

To score a recording, on the Scoring page, select a Questionnaire and click **Score**. You can also right-click on a Questionnaire, and on the shortcut menu, click **Score**.

The Questionnaire to score the recording is displayed and the media player is launched displaying details of the recording. Playback forms vary according to the Media Type.

A Quality Scorecard Report can be generated from the Scoring page in the Details pane. To generate a report, on the Scoring page select a Questionnaire. Right-click, and on the shortcut menu, click **Run Report.**

Tags page

The Tags page displays Tags for a recording that were created in Policy Editor and assigned to a recording. Spotted Interaction Analyzer categories are also displayed on the Tags page. Tags can be added and edited in the Playback window Details pane on the Tags page. To open the Playback window, click **Modify Tags**. The Playback window is displayed. If the Details pane is not showing, in the Playback window right-click, and on the shortcut menu point to **Show** and click **Details**.

> **Note** Adding or removing a Tag in Interaction Recorder client in IC Business Manager creates an audit entry for the recording. The audit trail entry for the change contains comments that describe the change.

Keywords page

Keywords and phrases spotted by Interaction Analyzer are stored along with recordings, allowing for rapid searching of recordings for playback. Policy Editor Initiation Policies determine which call interactions are analyzed for keywords and phrases.

If Interaction Analyzer Keywords are associated with an interaction, a Keywords page is available.

The Analyzer results information displayed on the Keywords page includes:

- Customer Scores
- Agent Scores
- Total Keyword Score
- Keyword name
- Offset (time point in call of Keyword hit)
- Category
- Set Name
- Keyword Score
- Channel (Agent or Customer)
- Spotted confidence
- Utterance

Note The Spotted Confidence value displayed is rounded to 2 decimal places. The tooltip for Spotted Confidence displays the value up to 4 decimal places.

For information on setting the score of a keyword or phrase, see the *Interaction Analyzer Technical Reference* in the PureConnect Documentation Library.

Events page

The Events page displays the Hold Event information. This tab is displayed for each recording if the user has sufficient security and access rights to be able to retrieve or playback the recording.

By default, the rows on the Events page are sorted in ascending order by the Start/Date/Time value. The columns displayed on the Events page are:

- **Type** This value indicates the type of Hold event that occurred within the recording. Valid Hold display values are: **Hold**, **Transfer,** and **Park**.

- **Duration** This value indicates the length of the Hold, rounded to the nearest second. The summary row for this column displays the total duration of the Holds (summed before any rounding) for this recording, and is rounded to the nearest second.

- **Hold Date/Time** This value displays when the Hold began in local Date/Time. The summary row for this column displays the total number of Holds that occurred for this recording.

- **Start Offset** This value displays when the Hold began as an offset from the beginning of the recording, rounded to the nearest second.

- **End Offset** This value displays when the Hold ended as an offset from the beginning of the recording, rounded to the nearest second.

Note If the duration for a Hold event is less than .5 seconds and greater than zero (0) seconds, the Event Duration states less than 1 second.

Moving the Details pane

You can undock the Details pane from the Workspace and move it to another location on your screen. To undock the Details pane, double-click the title bar. The Details pane moves from the Workspace. To move the Details pane to another place on your screen, click the title bar and drag the window.

To dock the Details pane back in the Workspace, double-click the title bar. The Details pane docks back in the Workspace.

Hiding the Details pane

There are two ways to Hide the Details pane, Hide and Auto Hide. When you Hide the Details pane, it does not appear in the Workspace. When you Auto Hide the Details pane, a tabbed page is displayed at the bottom of the Workspace. Auto Hide allows you to display a pop-up pane, leaving more Workspace for the Search Results View.

To Hide the Details pane, right-click the title bar, and on the shortcut menu, click **Hide**. To display the Details pane again, right-click in the Workspace and on the shortcut menu point to **Show** and click **Details**. The Details pane is displayed in the Workspace.

To Auto Hide the Details pane, right-click the title bar, and on the shortcut menu, click **Auto Hide**. A tabbed page is displayed at the bottom of the Workspace. To display the Details pane again, click the

tab, and the Details pane pops up in the Workspace. To turn Auto Hide off, when the pane is displayed, right-click the title bar and click **Auto Hide**. The Details pane is displayed in the Workspace.

Related Topics

Media Details Pane

Score a Recording

Working with Recording Search Results

Saving a Search

Public and Private searches are automatically saved when they are run. If an invalid attribute field value is detected when running your search, an error message is displayed. Attribute data values are verified before a Search is run, and must contain valid data in order for the search to be saved.

When configuring a search in the SearchBuilder control, a search can be saved *before* running it by clicking **Save Search**. Using the Save Search button allows you to verify and save search attributes while building a search, before running it.

Related Topics

Running a Recording Search

Working with Recording Search Results

Editing a Search

Edit a search to modify existing attributes or configure new search attributes. Here are different ways you can edit the search configuration:

- From the **Searches** pane, right-click the search name, and on the shortcut menu click **Configure**. The properties of the search are displayed in the SearchBuilder control.

- From the **Searches** pane, click on the search name. The search is run and the results are displayed in the Workspace. On the Workspace, click **Configure**. The SearchBuilder control is displayed.

- You can also edit a search by selecting the search name in the Searches pane and clicking **Configure Search** on the toolbar.

> **Important Note** If you have migrated Interaction Recorder from 3.0 to 2015 R1 or later, issues might have occurred with Searches during the migration process. As a result, a Migration Notes control might be displayed in a Search Configuration view. For more information, see Search Configuration Migration Notes control.

Related Topics

Running a Recording Search

Saving a Search

Recording Search Attributes

Scorecard Search

Scorecard Search

Use **Scorecard Search** to quickly build **Public** and **Private** searches for viewing scorecards. To get started building searches see Scorecard Searches.

Scorecard Searches

Scorecard searches are created in the workspace by selecting search attributes that are grouped into four main categories: Scorecard, Scores, Scored Participant, and Scoring Individual.

After you create a scorecard search, simply run the search. The search results are displayed in a graph or a grid in the Search Results view in the workspace. Scorecard search results are displayed initially in a pie chart.

In the Navigation pane, you can create Public and Private Searches. Scorecard searches are easily built in the workspace using the SearchBuilder control and selecting search attributes. Scorecard Search Attributes are grouped into four main categories:

- Scorecard
- Scores
- Scored Participant
- Scoring Individual

After adding an attribute to your search, use the SearchBuilder control to configure simple and rich attributes in the workspace.

For details on search attributes for each of these categories, see Scorecard Search Attributes.

SearchBuilder control

After adding an attribute to your search, use the SearchBuilder control to configure simple and rich attributes in the Workspace.
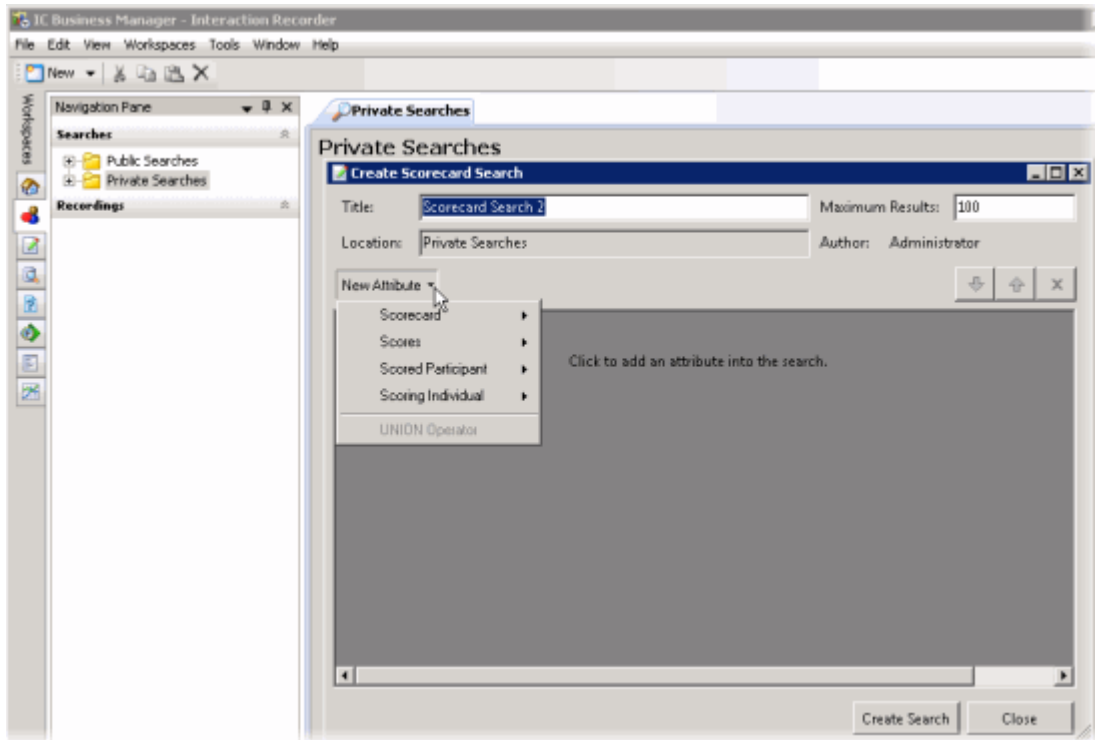
Related Topics

[Adding Attributes to a Search](#)

[Creating Private Searches](#)

[Creating Public Searches](#)

[Scorecard Search Attributes](#)

Creating Public Searches

Public searches can be seen and managed by all users on a server that have been assigned an Interaction Recorder client Access license in Interaction Administrator. Public Searches are created in the Interaction Recorder Navigation Pane.

Creating a Public Search

Public Searches that a user creates, for public sharing, are stored in **Public Searches**. Folders can be created to store searches or searches can be stored directly in the Public Searches folder.

Creating a folder to contain your search

To create a folder to contain your search:

1. In the **Searches** pane, select **Public Searches**.

2. Right-click, and on the shortcut menu, point to **New**, and click **Folder**. A **New Folder** is highlighted under Public Searches.

3. Right-click the new folder and click **Rename**.

4. Type a name for the folder and press **Enter**.

Creating a search in your new folder

To create a search to be stored in a folder:

1. Select the folder, right-click, and on the submenu point to **New** and click **Recording Search** or **Scorecard Search**. The Search dialog is displayed in the Workspace. To create a search directly in the Public Searches folder, right-click the **Public Searches** folder and follow the same steps.

2. To name your search, in the **Title** box type a name for your search. The Search item in the Navigation Pane will also display the updated title.

3. In the **Max results** box, type the number for the maximum number of results to display. The default is 100.

Adding Attributes to a Search

Use the SearchBuilder control to select attributes to add to your search. Simple and rich attributes can be added. Sub-instances can be added to a simple attribute, and rich attributes contain multiple sub-fields. First, add an attribute to your search.

To add an attribute to your search:

1. In the **New Attribute** drop-down list, point to the type of attribute you want to include. A submenu is displayed with a list of available attributes for the type you have selected.

2. In the submenu, click the attribute. The attribute control is added to the Workspace.

For detailed information on attributes see Recording Search Attributes and Scorecard Search Attributes.

Configuring a simple attribute

A simple attribute contains an operator and a field value that can be a string, list, or numeric type value. To configure a simple attribute:

1. Select the operator

2. Configure the values for the attribute

Working with attributes

Attributes within the search are logically AND'd together. You can add in a UNION operator in-between attributes to logically OR them together. To do this, right-click in the Workspace, and click **UNION Operator**.

Use the Up and Down buttons to prioritize the order in which the attributes and unions should be considered when running the search. These controls are also available on the right-click shortcut menu.

Use the Delete button to remove an attribute from the search. Delete is also available from the right-click shortcut menu.

Adding sub-instances to a simple attribute

When a simple attribute has been added to the Workspace, the Add More button is displayed in the upper right corner of the attribute control. To add an additional sub-instance of the attribute:

1. First, in the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute, and the Add More button is displayed.

2. Click Add More . The attribute sub-instance is nested within the parent control, with an additional operator and field value control.

> **Note** After you have added the number of sub-instances allowed by the attribute, the is no longer displayed as an option. For example, **Direction** has four available attributes, Inbound , Intercom, Outbound, and Unknown. After three sub-instances have been added to the original attribute, the Add More icon is no longer displayed.

Deleting sub-instances from a simple attribute

When more than one sub-instance is included in a simple attribute, the Delete More button is available to the right of the active sub-instance, allowing you to delete the sub-instance. To do this:

1. In the search builder control on the Workspace, in the attribute, select the sub-instance. The Delete More button is displayed next to the sub-instance.

2. Click Delete More . The sub-instance is removed from the attribute.

Configuring a rich attribute

Rich attributes contain multiple sub-fields. Sub-fields are logically OR'd together within the search. To configure a rich attribute:

1. In the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute.

2. Depending on the type of rich attribute you selected, configure the operator values.

3. Use the Up and Down buttons to prioritize the order in which the attributes and unions should be considered when running the search.

When all attributes have been configured for a search, click **Create Search**. The search is executed, the name of the search is displayed under the folder in the Navigation Pane, and the search results are displayed in the Workspace.

Related Topics

Editing a Search

Creating Private Searches

Private searches can be built, viewed, configured, and run only by the owner of the search. Private Searches are created in the Interaction Recorder Navigation Pane.

Creating a Private Search

To create a Private Search: first, create a folder in the Searches pane; next, create and name a search in the folder; and then create the search using the SearchBuilder control displayed in the Workspace.

Creating a folder to contain your search

1. In the **Searches** pane, select **Private Searches**.

2. Right-click, and on the shortcut menu, point to **New**, and click **Folder**. A **New Folder** is highlighted under Private Searches.

3. Right-click the new folder and click **Rename**.

4. Type a name for the folder and press **Enter**.

Creating a search in your new folder

To create a search to be stored in a folder:

1. Select the folder you have named, right-click, point to **New**, and click **Recording Search** or **Scorecard Search**. The Search dialog is displayed in the Workspace. To create a search directly in the Private Searches folder, right-click the **Private Searches** folder and follow the same steps.

2. To name your search, in the **Title** box type a name for your search. The Search item in the Navigation Pane will also display the updated title.

3. In the **Max results** box, type the number for the maximum number of results to display. The default is 100.

Adding Attributes to a Search

Use the SearchBuilder control to select attributes to add to your search. Simple and rich attributes can be added. Sub-instances can be added to a simple attribute, and rich attributes contain multiple sub-fields. First, add an attribute to you search.

To add an attribute to your search:

1. In the **New Attribute** drop-down list, point to the type of attribute you want to include. A submenu is displayed with a list of available attributes for the type you have selected.

2. In the submenu, click the attribute. The attribute control is added to the Workspace.

For detailed information on attributes see Recording Search Attributes and Scorecard Search Attributes.

Configuring a simple attribute

A simple attribute contains an operator and a field value that can be a string, list, or numeric type value. To configure a simple attribute:

1. Select the operator

2. Configure the values for the attribute

Working with attributes

Attributes within the search are logically AND'd together. You can add in a UNION operator in-between attributes. To do this, right-click in the Workspace, and click **UNION Operator**.

Use the Up and Down buttons to prioritize the order in which the attributes and unions should be considered when running the search. These controls are also available on the right-click shortcut menu.

Use the Delete button to remove an attribute from the search. Delete is also available from the right-click shortcut menu.

Adding sub-instances to a simple attribute

When a simple attribute has been added to the Workspace, the Add More button is displayed in the upper right corner of the attribute control. To add an additional sub-instance of the attribute:

1. First, in the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute, and the Add More button is displayed.

2. Click Add More . The attribute sub-instance is nested within the parent control, with an additional operator and field value control.

Note After you have added the number of sub-instances allowed by the attribute, the is no longer displayed as an option. For example, **Direction** has four available attributes: Inbound , Intercom, Outbound, and Unknown. After three sub-instances have been added to the original attribute, the Add More icon is no longer displayed.

Deleting sub-instances from a simple attribute

When more than one sub-instance is included in a simple attribute, the Delete More button is available to the right of the active sub-instance, allowing you to delete the sub-instance. To do this:

1. In the SearchBuilder control on the Workspace, in the attribute, select the sub-instance. The Delete More button is displayed next to the sub-instance.

2. Click Delete More . The sub-instance is removed from the attribute.

Configuring a rich attribute

Rich attributes contain multiple sub-fields. Sub-fields are logically OR'd together within the search. To configure a rich attribute:

1. In the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute.

2. Depending on the type of rich attribute you selected, configure the operator values.

3. Use the Up and Down buttons ⬇ ⬆ to prioritize the order in which the attributes and unions should be considered when running the search.

When all attributes have been configured for a search, click **Create Search**. The search is executed, the name of the search is displayed under the folder in the Navigation Pane, and the search results are displayed in the Workspace.

Related Topics

[Editing a Search](#)

[Running a Recording Search](#)

[Saving a Search](#)

Adding Attributes to a Search

After you have created a Public or Private search, use the [SearchBuilder control](#), displayed in the Workspace, to add and configure attributes in your search. To display SearchBuilder in the Workspace, select a search in the Searches pane. The search is displayed in the Workspace, and the SearchBuilder is displayed with the **New Attribute** drop-down list.

Click **New Attribute**, to select the attributes to include in your search.

To select an attribute, point to the type of attribute you want to add to your search, and the available attributes are displayed in a submenu. Simple and rich attributes can be added to your search. Sub-instances can be added to a simple attribute, and rich attributes contain multiple sub-fields.

For a detailed description of all available attributes, see [Recording Search Attributes](#) and [Scorecard Search Attributes](#).

Adding Attributes to a Search

Use the SearchBuilder control to select attributes to add to your search. To add an attribute to a search:

1. In the **New Attribute** drop-down list, point to the type of attribute you want to include. A submenu is displayed with a list of available attributes for the type you have selected.

2. In the submenu, click the attribute. The attribute control is added to the Workspace.

An attribute might be a simple attribute or a rich attribute. A simple attribute contains an operator and a field value that can be a string, list, or numeric type value. A rich attribute contains multiple sub-fields.

To configure a simple attribute:

1. In the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute.

2. Select the operator for the attribute

3. Configure the values for the attribute

To configure a rich attribute:

1. In the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute.

2. Depending on the type of rich attribute you selected, configure the operator values.

Attributes within the search are logically AND'd together. You can add in a UNION operator in-between attributes. To do this, right-click in the Workspace, and click **UNION Operator**.

Arranging attributes within a search attribute

Use the Up and Down buttons to prioritize the order in which the attributes and unions should be considered when running the search. These controls are also available on the right-click shortcut menu.

Deleting an attribute from the search

Use the Delete button to remove an attribute from the search. Delete is also available from the right-click shortcut menu.

Adding sub-instances to a simple attribute

When a simple attribute has been added to the Workspace, the Add More button is displayed in the upper right corner of the attribute control. To add an additional sub-instance of the attribute:

1. First, in the SearchBuilder control on the Workspace, select the attribute. A highlighted selection rectangle appears around the attribute control to indicate it is the active attribute, and the Add More button is displayed.

2. Click Add More . The attribute sub-instance is nested within the parent control, with an additional operator and field value control.

> **Note** After you have added the number of sub-instances allowed by the attribute, the is no longer displayed as an option. For example, **Direction** has four available attributes: Inbound , Intercom, Outbound, and Unknown. After three sub-instances have been added to the original attribute, the Add More icon is no longer displayed.

Deleting sub-instances from a simple attribute

When more than one sub-instance is included in a simple attribute, the Delete More button is available to the right of the active sub-instance, allowing you to delete the sub-instance. To do this:

1. In the SearchBuilder control on the Workspace, in the attribute, select the sub-instance. The Delete More button is displayed next to the sub-instance.

2. Click Delete More . The sub-instance is removed from the attribute.

Related Topics

Editing a Search

Running a Recording Search

Saving a Search

Scorecard Search Attributes

The information in the following table describes the available Scorecard Search attributes that are used to create scorecard searches. These attributes are available in the search builder control when a scorecard search is displayed in the workspace.

The Scorecard Search Attributes are defined by the following types:

5. Scorecard

• Scores

6. Scored Participant

• Scoring Individual

Attribute Type	Attribute	Description
Scorecard	Marked for Calibration	Select this attribute to search for scorecards that have been marked for calibration. Select Yes to return scorecards in the search results that have been marked for calibration. Select No to return scorecards in the search results that have not been marked for calibration. The Marked for Calibration attribute can include a sub-instance. Note Calibration provides confidence that

		monitored interactions will be scored consistently among Quality Assurance team members. Calibrating scoring ensures fairness to agents whose recorded interactions are being evaluated.
		When a questionnaire is marked for Calibration, the score is excluded from other scored interactions and does not count toward the agent's performance results. Questionnaires marked for Calibration are also excluded from the overall group performance results.
		When creating a Scorecard Search in IC Business Manager, you can search for Scorecards Marked for Calibration, to include them in your search results.
		Calibration reports, in Interaction Reporter, are based on the results of *completed* evaluations marked for Calibration.
	Questionnaire	Include this attribute in your search for scorecards to be retrieved based on Questionnaire names. This is a simple attribute with two operators to choose from, Equal to and Not equal to. The value field is a drop-down list of Questionnaire names. Use the drop-down list to select a Questionnaire name. This attribute can include sub-instances.
	Recording ID	A Recording ID is a unique identifier for each recorded interaction. Recording IDs are only used by Interaction Recorder and are only visible when browsing recordings or in search results. This is a simple attribute that allows you to search for a Scorecard by Recording ID. Choose from the operators Equal to, Not equal to, Contains, Does not contain, Is empty, and Is not empty. This attribute can include sub-instances.
	Scorecard Rank	Include this attribute in your search for scorecards to be retrieved based on Scorecard rank. Choose from the operators Equal to, Not equal to, Contains, Does not contain, Is empty, and Is not empty. The value field is a drop-down list of Scorecard ranks. Use the drop-down list to select a Scorecard rank. If you want to search for a rank string that is not yet

		available in the list, manually enter a scorecard rank in the value field. This attribute can include sub-instances.
	Scoring Date/Time	Scoring Date/Time is a rich attribute that contains multiple sub-fields. You can select: Specify a date/time range, Specify a date period, or Specify shift date/time period. Operands are displayed depending on your selection. For Specify a date/time range, specify a date argument using the drop-down box and selecting a date from the calendar. Type or select a time to specify a time argument. For Specify a date period, specify a date in which the interactions occurred to be included in the search: Today, Last week, Last month, Last N hours, or Last N days. For Specify shift date/time period, specify a shift date range and time of day range. For example, a shift date/time might be Monday through Friday, 8:00 a.m. to 5:00 p.m. This attribute uses the Windows time zone set for the Windows User on the Interaction Recorder Client machine. Note: The Scoring Date/Time attribute retrieves scorecards based on the last scoring date/time stamp. This stamp is the last time a scorecard was changed and saved to the database.
	Scoring Status	Select this attribute to search for Scorecards based on the scoring status Assigned, Scoring incomplete, or Finished. The Scoring Status attribute can include sub-instances.
	Has Signature Comments	Select this attribute to search for Scorecards based on Signature Comments. Select Yes to return scorecards in the search results that *have* signature comments. Select No to return scorecards in the search results that *do not* have any signature comments.
	Signature Status	Select this attribute to search for Scorecards based on the status of the signature. Select No signature required to return scorecards in the search that do not

		require a signature. Select Awaiting signature/Signature required to return scorecards in the search that require a signature but have not been signed. Select Signed to return scorecards in the search that have been signed.
Scores	**Critical Score**	The Critical Score attribute searches for scorecards by Critical Score percentage. Available operators for Critical Score (percentage) include Equal to, Not equal to, Greater than, Greater than or equal to, Less than, and Less than or equal to. In the value field, enter a percentage from 0.00 to 100.00. Critical Score is a simple attribute that can contain sub-instances.
	Non-critical Score	The Non-critical Score attribute searches for scorecards by Non-critical Score percentage. Available operators for Non-critical Score (percentage) include Equal to, Not equal to, Greater than, Greater than or equal to, Less than, and Less than or equal to. In the value field, enter a percentage from 0.00 to 100.00. Non-critical Score is a simple attribute that can contain sub-instances.
	Total Score	The Total Score attribute searches for scorecards by Total Score percentage. Available operators for Total Score (percentage) include Equal to, Not equal to, Greater than, Greater than or equal to, Less than, and Less than or equal to. In the value field, enter a percentage from 0.00 to 100.00. Total Score is a simple attribute that can contain sub-instances.
Scored Participant	**Role**	Use a Role in your Scored Role search to return scorecards for scored participants who are assigned to this Role. In the value field, select a Role from the drop-down list to include in your search.

		Scored Role is a simple attribute that can contain sub-instances. Note: The Scored Role attribute is based on the current configuration of a CIC user's Role. The Scored Role attribute is not a historical lookup of a scored participant's role at the time the scorecard was scored. For example, if a user was in the Agent role at the time a scorecard was scored and is now in the Supervisor role, a search of scorecards using the Scored Role attribute set to Agent would *not* return any of this user's scorecards. You could only search for scorecards where this user was scored in the current Role, Supervisor.
	User	Select a User for your Scored User search to return scorecards for specific Scored Participants. Available operators include: Equal to, Not equal to, Is empty, and Is not empty. In the value field, select a User from the drop-down list to include in your search. ıf duplicate Display Names are detected for the User Name, the IC User name value is appended to the Display Name. For example: John Smith (JSmith) John Smith (JASmith) If further duplicates are detected when there are users with the same Display Name and IC User name, a counter is appended to the end of the Display Name. For example: John Smith (JSmith) John Smith (JASmith) John Smith (JASmith) (1) Scored User is a simple attribute that can contain sub-instances.
	Workgroup	Use a Workgroup in your search, which is a defined logical group of Users related by function, department, project, or other organization and used for ACD call processing queues. In the value field, select an available Scored Workgroup from the drop-down list to include in your search. The list of available workgroups is filtered by the workgroup access rights the user has when logging on to IC Business Manager.

		Note: The Scored Workgroup attribute is based on the current configuration of a CIC user's Workgroup. The Scored Workgroup attribute is not a historical lookup of a scored participant's workgroup at the time the scorecard was scored. For example, if a user was in the Support workgroup at the time a scorecard was scored and is now in the Sales workgroup, a search of scorecards using the Scored Workgroup attribute set to Support would *not* return any of this user's scorecards. You could only search for scorecards where this user was scored in the current Workgroup, Sales.
Scoring Individual	**Role**	Use a Role in your Scoring Role search to return scorecards for scoring individuals who are assigned to this Role. In the value field, select a Role from the drop-down list to include in your search. Scoring Role is a simple attribute that can contain sub-instances. Note: The Scoring Role attribute is based on the current configuration of a CIC user's Role. The Scoring Role attribute is not a historical lookup of a scoring participant's role at the time the scorecard was scored. For example, if a user was in the Agent role at the time a scorecard was scored and is now in the Supervisor role, a search of scorecards using the Scoring Role attribute set to Agent would *not* return any of this user's scorecards. You could only search for scorecards where this user was scoring in the current Role, Supervisor.
	User	Select a User for your Scoring User search to return scorecards for specific Scoring Users. Available operators include: Equal to, Not equal to, Is empty, and Is not empty. In the value field, select a User from the drop-down list to include in your search. ıf duplicate Display Names are detected for the User Name, the IC User name value is appended to the Display Name. For example: John Smith (JSmith) John Smith (JASmith) If further duplicates are detected when there are users with the same Display Name and IC User name, a counter is appended to the end of the Display Name.

		For example:
		John Smith (JSmith)
		John Smith (JASmith)
		John Smith (JASmith) (1)
		Scoring User is a simple attribute that can contain sub-instances.
	Workgroup	Use a Workgroup in your search, which is a defined logical group of Users related by function, department, project, or other organization and used for ACD call processing queues. In the value field, select an available Scoring Workgroup from the drop-down list to include in your search. The list of available workgroups is filtered by the workgroup access rights the user has when logging on to IC Business Manager. Note: The Scoring Workgroup attribute is based on the current configuration of a CIC user's Workgroup. The Scoring Workgroup attribute is not a historical lookup of a scoring participant's workgroup at the time the scorecard was scored. For example, if a user was in the Support workgroup at the time a scorecard was scored and is now in the Sales workgroup, a search of scorecards using the Scoring Workgroup attribute set to Support would not return any of this user's scorecards. You could only search for scorecards where this user was scoring in the current Workgroup, Sales.

Related Topics

Adding Attributes to a Search

Creating Private Searches

Creating Public Searches

Editing a Search

Running a Recording Search

Running a Scorecard Search

Run a Scorecard search to display search results in a graph or a grid in the Search Results view.

Scorecard search results are displayed initially in a pie chart drill-down graph.
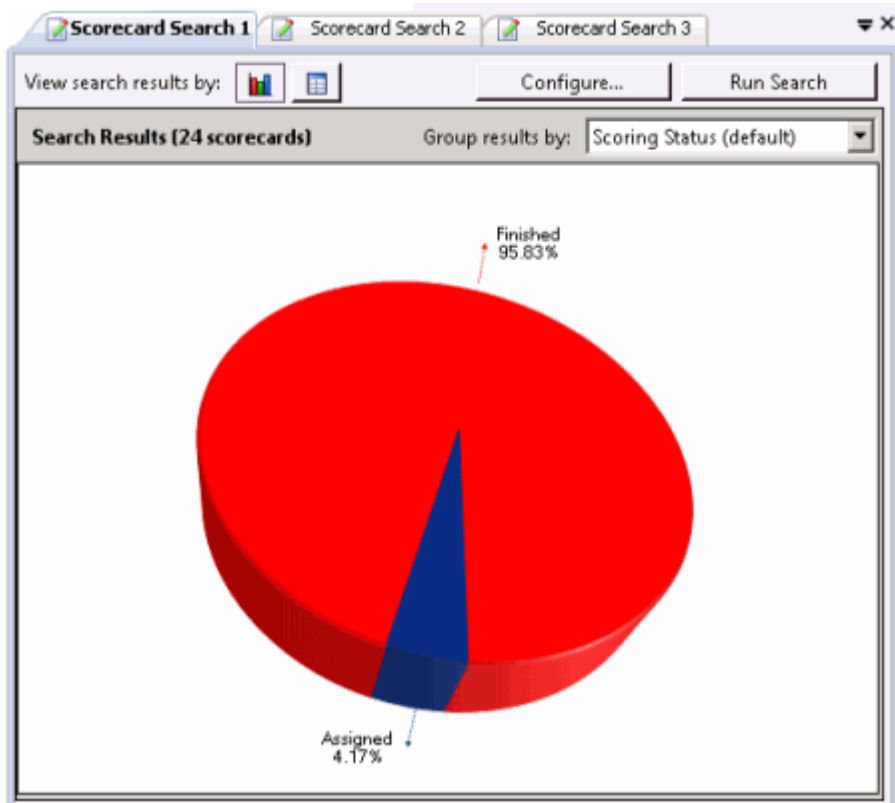
Or, Scorecard Search results can be displayed in a grid.

Here are several ways to run a Scorecard Search:

- When you select a search in the Navigation Pane, it automatically runs and the search results are displayed in the Workspace.

- From the **Searches** pane, select a search, and in the workspace click **Run Search**.

- Select the search in the Searches pane, and on the menu bar click the ***Search Title*** Active View menu, and then click **Run Search**.

- From the **Searches** pane, select a search, and click **Run Search** on the toolbar.

- Select a search in the Searches pane, right-click, and on the shortcut menu, click **Run**.

Based on the attributes of the search, when a search is run the results are displayed in the Scorecard Search Results view in the Workspace.

Displaying searches in the Workspace

Multiple searches are displayed in tabbed views in the Workspace.
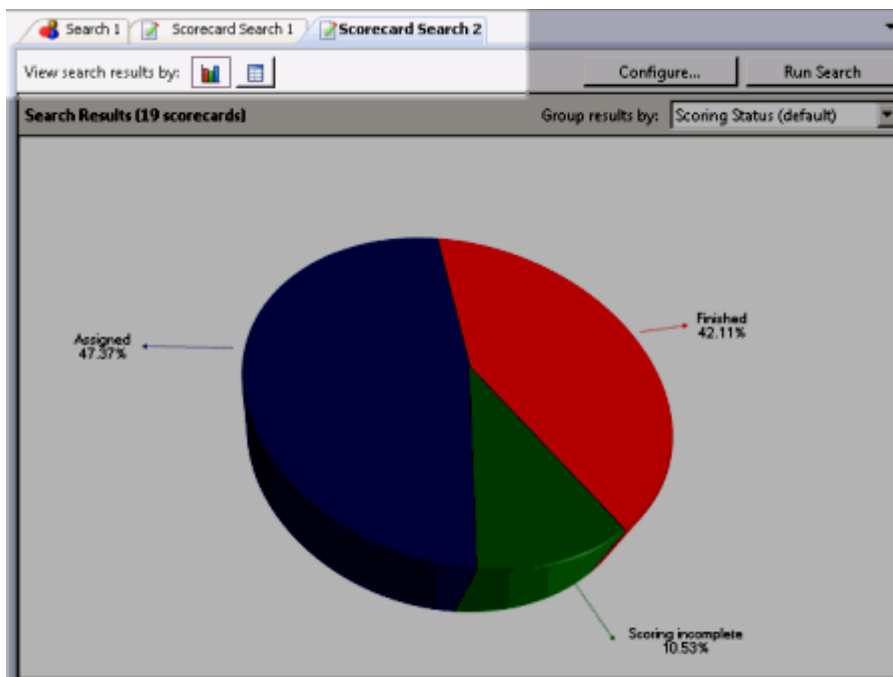
Related Topics

Viewing Scorecard Search Results

Working with Scorecard Search Results

Viewing Scorecard Search Results

Based on the attributes of the scorecard search, when a scorecard search is run the results are displayed in the Search Results view in the Workspace. Scorecard search results are first displayed in a drill-down graph view. Scorecard search results can also be displayed in a detailed grid view.

Scorecard Search Results Graph View

Scorecard Search Results are initially displayed in a graph view.
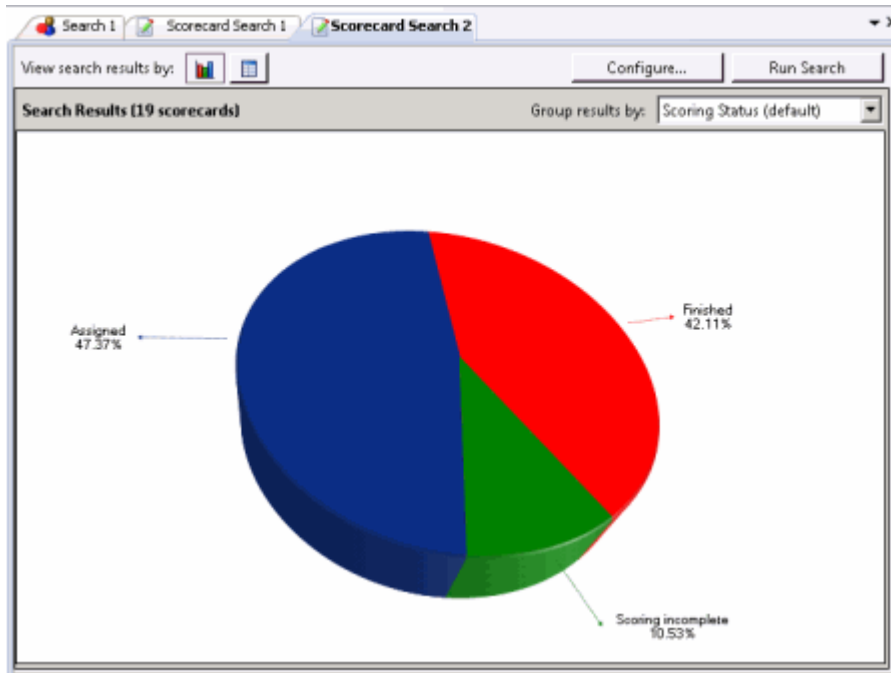
To drill down in the graph view, double-click on a slice of the chart to display a bar graph for the selected scorecards from the search results.
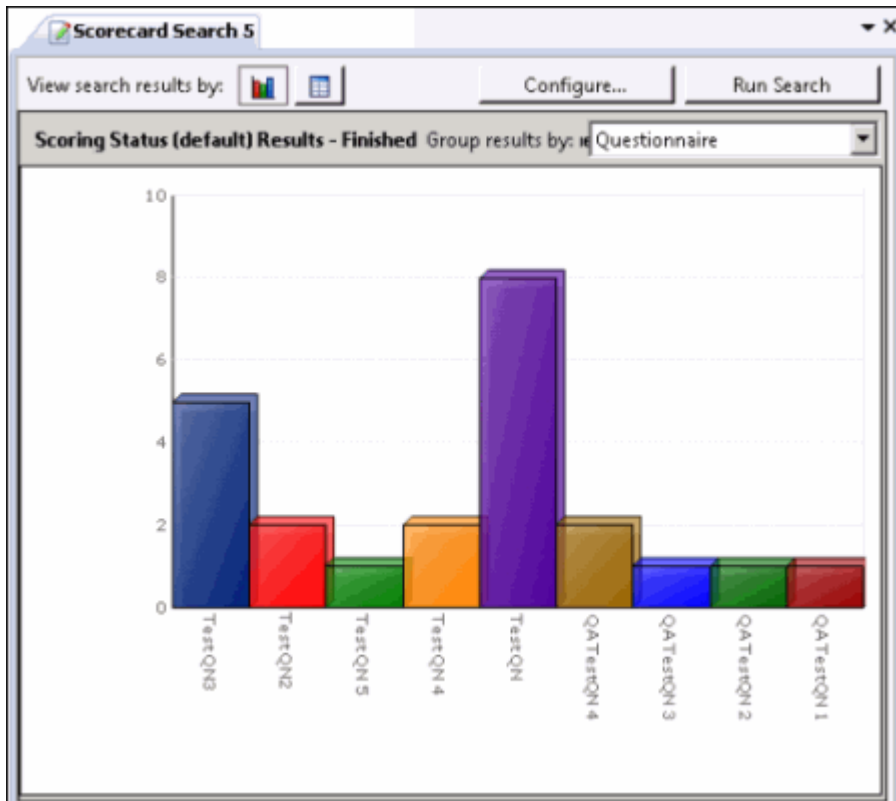
Scorecard Search Results Grid View

You can also view the search results in a grid. Click the **View search results by** buttons to switch between the grid view and graph view of your search results.

Next, see <u>Working with Scorecard Search Results</u>.

Working with Scorecard Search Results

You can work with Scorecard Search Results in a Scorecard Search Results Graph View or a Scorecard Search Results Grid View. You can also run a Quality Scorecard Report to generate a report with the details for a scorecard.

Scorecard Search Results Graph View

Click the **View search results by** graph button ![icon] to view all scorecards returned within the search results, displayed in a graph. Use the Search Results graph view to view and sort scorecard results based on drill-down graph data.
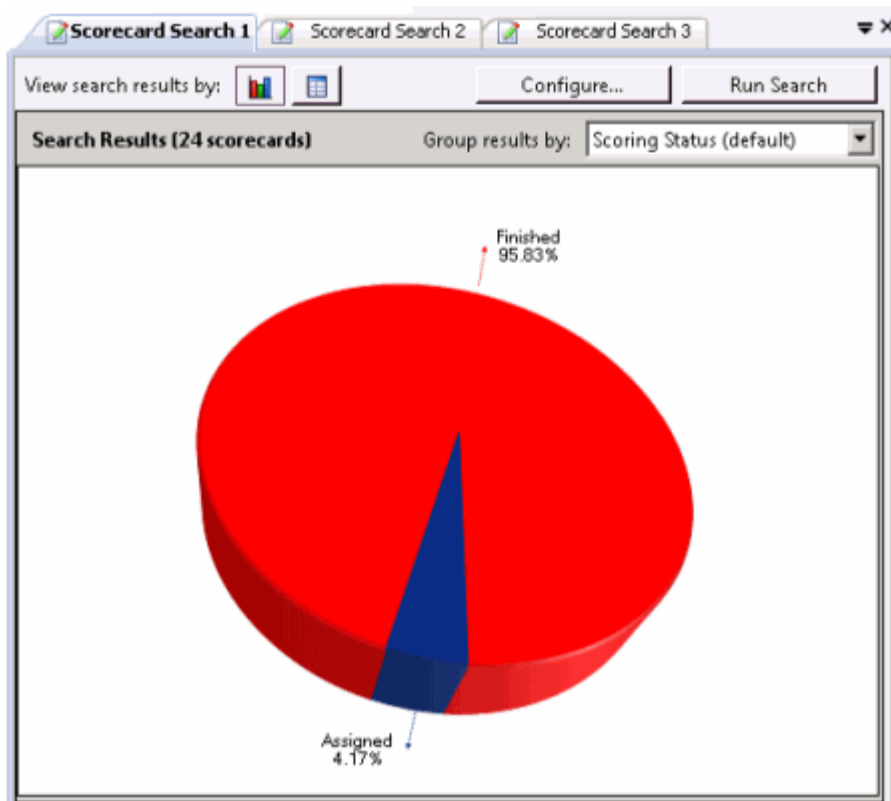
The initial default graph is a pie chart grouped by Scoring Status. When you pause the mouse over a slice of the pie, the number of scorecards for that percentage of the search results is displayed. To display the pie chart legend, right-click in the workspace and on the shortcut menu point to **View** and select **Legend**.

Use the **Group results by** drop-down list to display graphs grouped by:

- Scoring Status

- Scorecard Rank

- Scoring User

- Scored User

- Questionnaire

Here is a description of the **Group results by** options.

Group results by	Description
Scoring Status	Groups the search results by Scoring Status: Assigned, Scoring incomplete, and Finished. The graph displays the percentage of scorecards in each status.
Scorecard Rank	Groups the search results by Scorecard Rank and displays a graph showing the percentage of scorecards for each Scorecard Rank in the search results.
Scoring User	Groups search results by Scoring User and displays a graph showing the percentage of scorecards for each user that scored interactions in the search results.
Scored User	Groups search results by Scored User and displays a graph showing the percentage of scorecards for each user that was scored in the search results.
Questionnaire	Groups search results by Questionnaire and displays a graph showing the percentage of scorecards for each questionnaire in the search results.

Drill Down Graphs

Double-clicking a slice of the pie chart displays a bar graph for selected scorecards from the search results, sorted by questionnaire name.
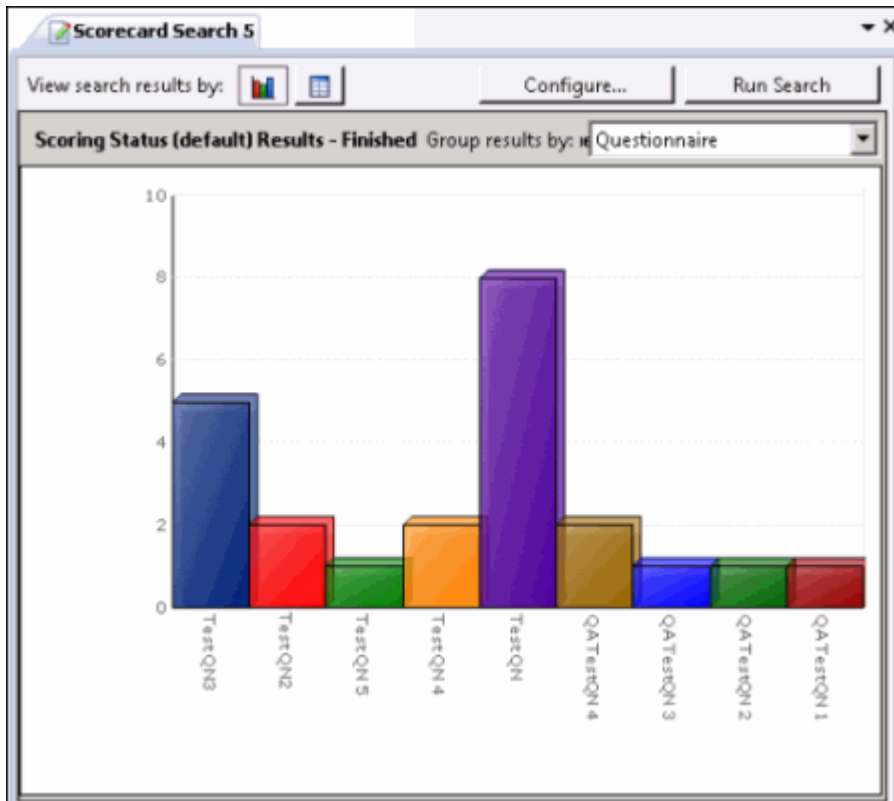
Note When drilling down in the pie chart, if there is only one questionnaire associated with the selected recordings in the slice of pie, a bar graph will not be displayed, and a data grid containing the selected scorecards is displayed instead.

When you pause the mouse over a questionnaire bar in the graph, the number of scorecards for that questionnaire in the search results is displayed.
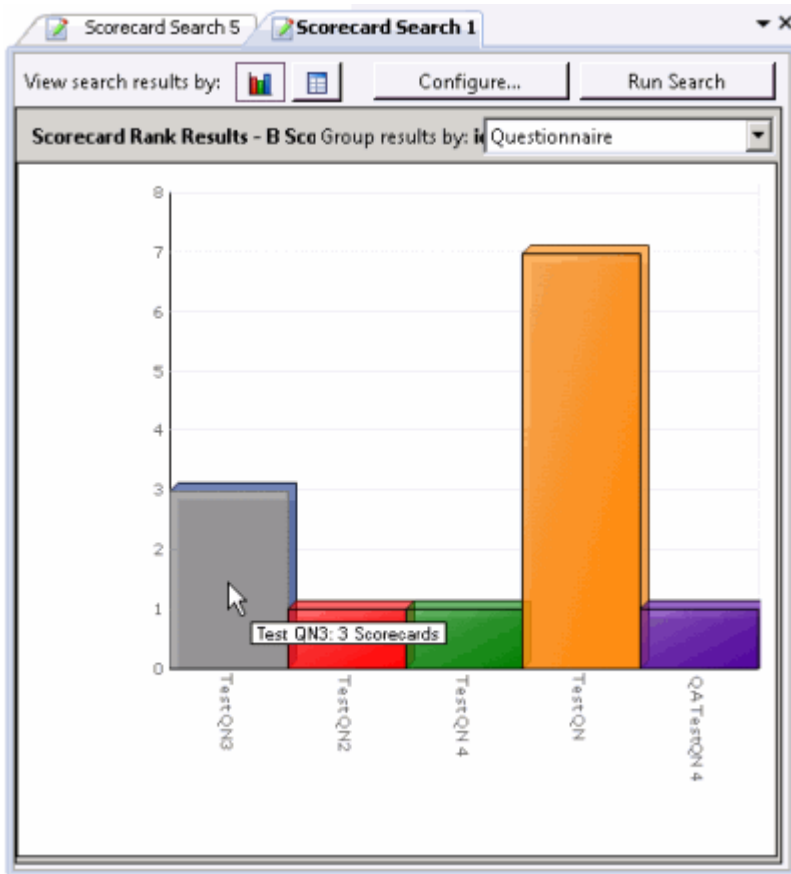
Double-clicking a questionnaire bar in the graph displays a data grid that includes the information for the scorecards that used that specific questionnaire.
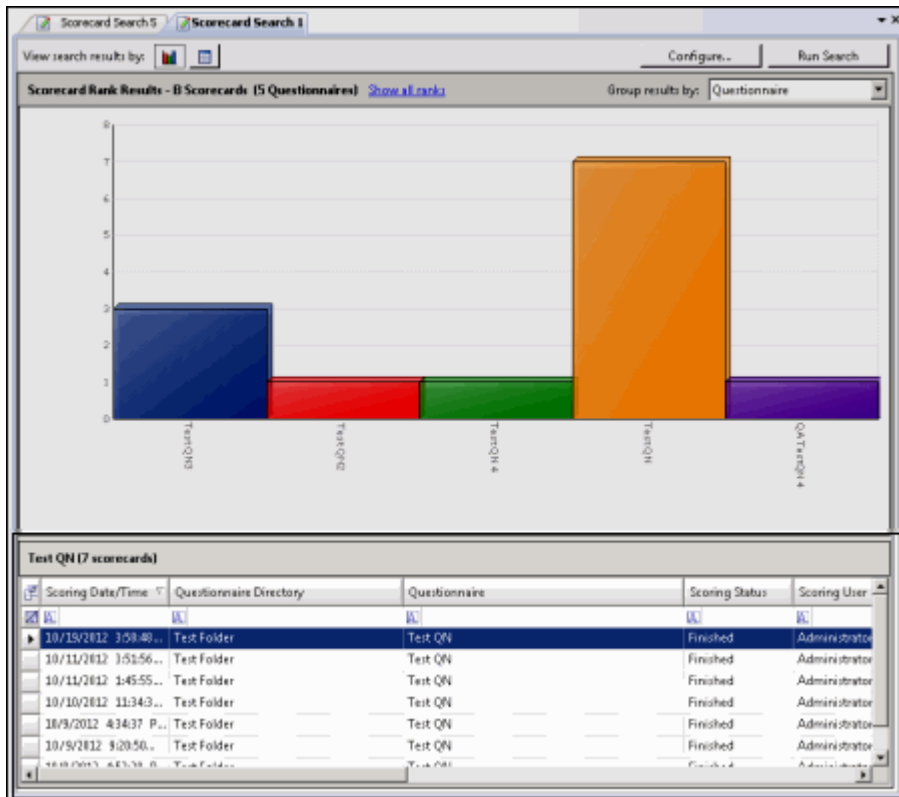
Show All link

From the bar graph view, to return to a pie chart view, click **Show All** in the graph title bar. For example, in a bar graph for **Scorecard Rank Results**, click **Show all Ranks** to return to the pie chart.
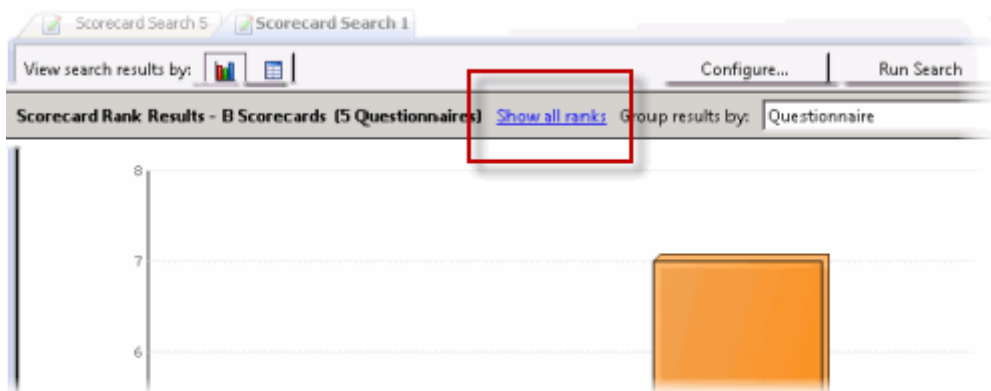
View All

From the bar graph view, to display all the scorecard information for the scorecard represented in the graph, in the **Group Results by** drop-down list, click **View All**. The scorecard information is displayed in a data grid.
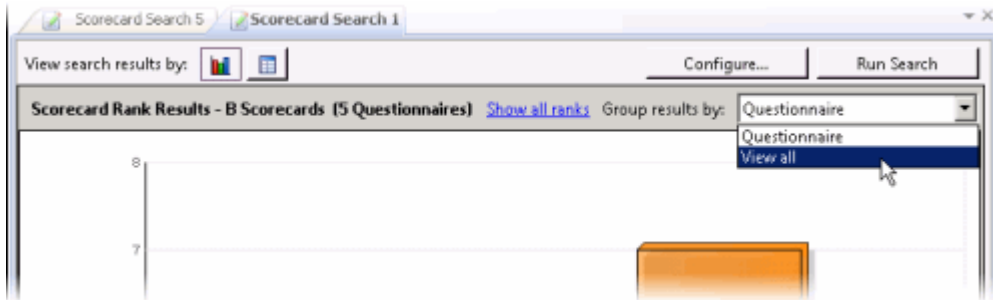
Scorecard Search Results Grid View

Click the **View search results by** grid button to view all scorecards returned within the search results in a grid in the workspace. Use the Search Results grid view to review the details of a scorecard listed in the grid, open a recording for playback, open a scorecard, or run the Quality Scorecard report.

Viewing Scorecard Details

The results of a scorecard search are displayed a grid in the workspace. The grid displays a list of scorecards, by **Scoring Date/Time** that are found for the search, in descending order (newest to oldest). The Scoring Date/Time field includes the date the scorecard was assigned to a recording or dates associated with a scorecard that is in progress or finished.

> **Note** The Scoring User column displays the names of the users that scored the individual recordings displayed in the Search Results grid. If the user, viewing the Search Results, has the **Can Score Recordings** Security Policy rights for a recording, the Scoring User name is displayed in the Scoring User column. If the user does *not* have the **Can Score Recordings** policy rights for the recording, the scorecard is not displayed in the search results.

To paste recording information into another application, use Ctrl+C in the grid to Copy an entire row, or multiple rows, to the clipboard.

Selecting Fields for the Grid

To change the Fields for the columns that are displayed in the grid, click the **Field Chooser** on the top left of the grid. The Show/Hide Columns dialog is displayed.

In the **Show/Hide Columns** dialog select the Fields to display in the grid.

Sorting Columns in the Grid

To sort a grid column in ascending or descending order, click the Field name.

Refining Search Results

To further refine the search results, use the Filter Criteria selection fields ▣ below each Field. To create a field filter for the search results displayed in the grid, select the field below the Field name. The field search filter is displayed. To select an operand for the search, click ▣. In the drop-down list, select the search criteria. Depending on the field and your selections, an additional dialog might be displayed. The search results are displayed according to your search filter. To clear the filter criteria, in the field click ▣. To clear *all* filter criteria, click ▣ at the left on the Filter Criteria selection fields grid row.

Scorecard Search Results Shortcut Menu

When a scorecard is selected in the Search Results grid, you can right-click on the scorecard to display a shortcut menu.
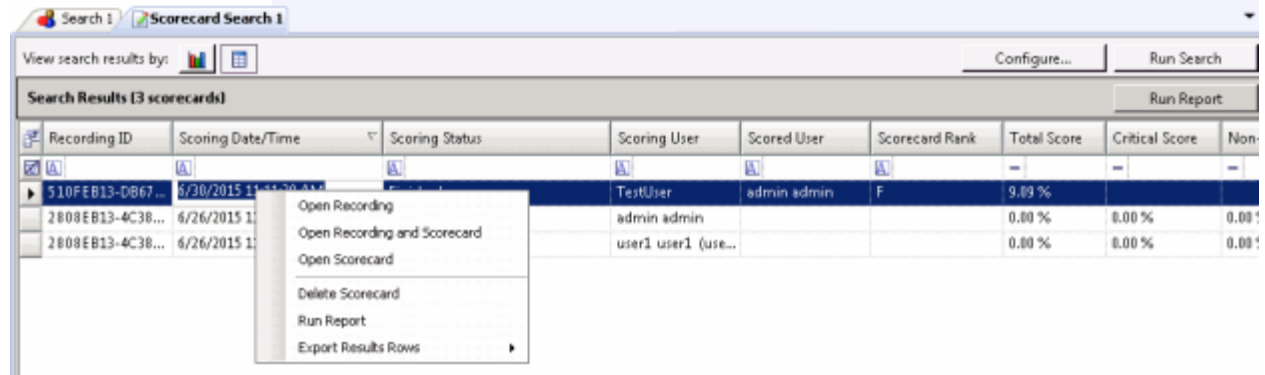
From the Shortcut menu, you can:

- Open a recording

- Open a recording and a scorecard

- Open a scorecard

- Delete a Scorecard

- Run a report

- Export Results Rows

Open a Recording

To open a recording associated with a scorecard, in the grid right-click on the scorecard and on the shortcut menu, click **Open Recording**. A media player displays the recording.

Open a Recording and a Scorecard

To open a scorecard and its associated recording, in the grid select the scorecard. Right-click on the scorecard, and on the shortcut menu click **Open Recording and Scorecard**. The scorecard is displayed and the media player displays the recording.

Open a Scorecard

To open a scorecard from the grid, double-click the scorecard in the list. The scorecard is displayed. You can also open the scorecard from the shortcut menu.

Note When multiple internal participants are associated with a scorecard's recordings, the **Select Agent** dialog is displayed.

Delete a Scorecard

To delete a scorecard from the grid, select the scorecard. Right-click on the scorecard, and on the shortcut menu click **Delete Scorecard**.

Run a Quality Scorecard Report

A Quality Scorecard Report includes the information contained in the current scorecard, displayed in a report format. Quality Scorecard reports can be generated from the scorecard results grid, from a scorecard, and can also be generated from the recording search results in the Details pane.

You can generate a report on a Finished Scorecard. To generate a report with the details for a scorecard, in the grid right-click on the scorecard and on the shortcut menu, click **Run Report**. The Quality Scorecard report is displayed in the workspace, and it includes all the details of the scorecard.
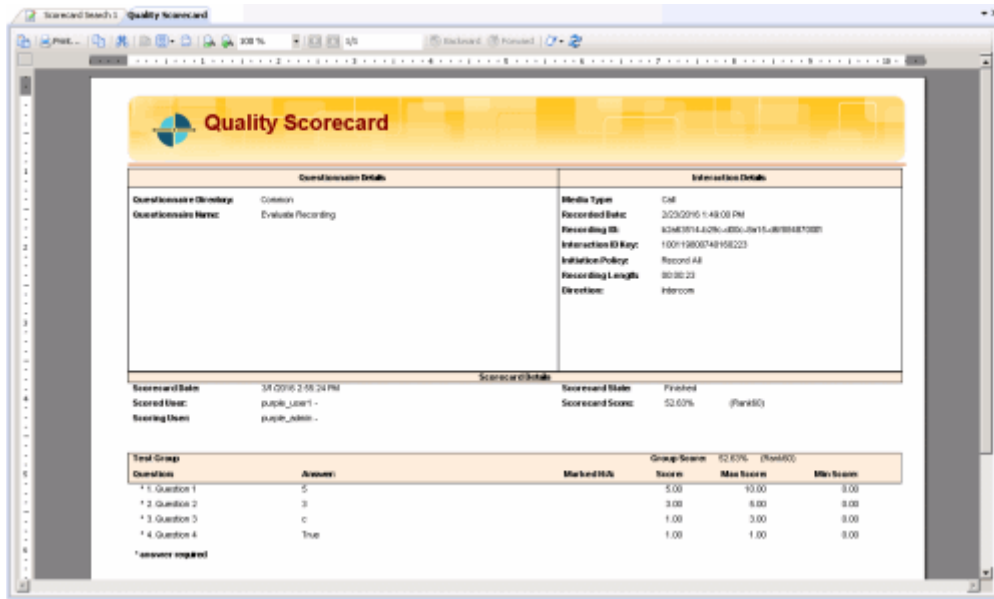
You can also generate a report from the current scorecard. When the scorecard is displayed, click **Run Report**.
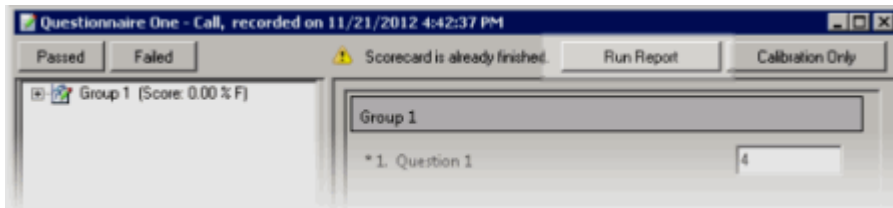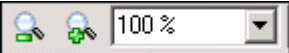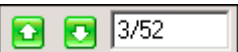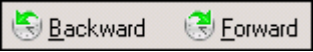
Report Toolbar

After generating a report, the report is displayed in a report viewer in the Workspace. The report includes a Report Viewer toolbar with features to assist you while viewing a report.

Here are the descriptions for the toolbar buttons.

Toolbar Button	Description
	Click this button to display the **Table of Contents**. The Table of Contents contains two tabs at the bottom of the pane: **Table Of Contents** and **Thumbnail View**.

Print...	To **Print** the displayed report, click this button.
	Use this button to **Copy** the data in a report from the current page to the clipboard.
	Use the **Find** button to search for text in a report. When you click the button, the Find dialog is displayed.
	Click this button to display a **Single Page View** of the report.
	To display multiple pages of your report in the Workspace, click the **Multiple Page View** button. A drop-down menu is displayed. Select the layout to display report pages in the Workspace. You can select up to six pages to display at a time.
	The **Continuous Scroll** button allows you to scroll through your report one page at a time.
100 %	Use these buttons to **Zoom Out** to see more of a report page or **Zoom In** to get a close-up view of the report page displayed in the Workspace. You can also enter a particular **Zoom Value** by typing a percentage or choosing a setting from the drop-down list.
3/52	Use the **Previous Page** and **Next Page** buttons to view pages of your report in consecutive order. You can also enter a specific page number in the **Page Index** field.
Backward Forward	Use these buttons to move **Backward** and **Forward** through the history of viewed report pages.
	Use the Annotations button to add text and graphics to a report displayed in the Workspace.
	To reload the report, click **Refresh.**

Export Results Rows

Export the contents of search results into a CSV, Excel, or PDF file. Export **All** search results rows, or **Selected Rows**.

Follow these steps to export All rows from the search results grid:

1. Right-click on any search results row and on the shortcut menu point to **Export Results Rows**.

2. On the submenu, point to **All.**
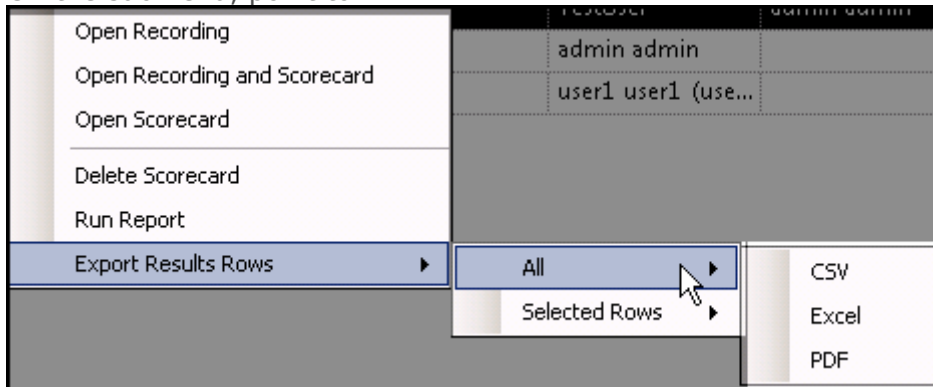
3. Select the file type for the exported file.

4. On the Save As dialog, select the folder to export the Results Rows to, and type a File name.

Follow these steps to export Selected Rows from the search results grid:

1. Select the search results rows to be exported.

2. Right-click on the selected rows, and on the shortcut menu point to **Export Results Rows**.

3. On the submenu, point to **Selected Rows**.
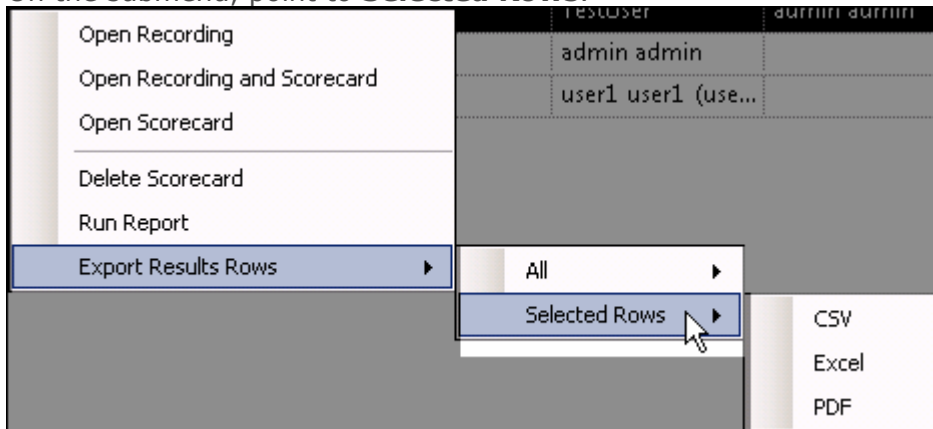
4. Select the file type for the exported file.

5. On the Save As dialog, select the folder to export the Results Rows to, and type a File name.

Saving a Search

Public and Private searches are automatically saved when they are run. If an invalid attribute field value is detected when running your search, an error message is displayed. Attribute data values are verified before a Search is run, and must contain valid data in order for the search to be saved.

When configuring a search in the SearchBuilder control, a search can be saved *before* running it by clicking **Save Search**. Using the Save Search button allows you to verify and save search attributes while building a search, before running it.

Related Topics

Running a Recording Search

Working with Recording Search Results

Editing a Search

Edit a search to modify existing attributes or configure new search attributes. Here are different ways you can edit the search configuration:

- From the **Searches** pane, right-click the search name, and on the shortcut menu click **Configure**. The properties of the search are displayed in the SearchBuilder control.

- From the **Searches** pane, click on the search name. The search is run and the results are displayed in the Workspace. On the Workspace, click **Configure**. The SearchBuilder control is displayed.

- You can also edit a search by selecting the search name in the Searches pane and clicking **Configure Search** on the toolbar.

Important Note If you have migrated Interaction Recorder from 3.0 to 2015 R1 or later, issues might have occurred with Searches during the migration process. As a result, a Migration Notes control might be displayed in a Search Configuration view. For more information, see Search Configuration Migration Notes control.

Related Topics

Running a Recording Search

Saving a Search

Recording Search Attributes

Recordings

Recordings

Recordings are displayed in the Search Results view in the Workspace. Recordings that are opened from the Search Results view are listed in the **Open Recordings** folder in the **Recordings** navigation pane. From the Search results view, you can Open and Playback a recording, Score, E-mail, Export, Archive, and Delete recordings. You can also monitor live call recordings that are in progress.

When the Details pane is displayed with the Search Results view in the Workspace, you can view Participant Data, view and modify recording Attributes, view an Audit Trail, Score a recording, and view and modify Tags.

Open Recordings

When you Playback a recorded interaction, and the recording is open in the Workspace, it is listed in the **Open Recordings** folder in the Recordings navigation pane. Use the Open Recordings list to navigate to a recording.
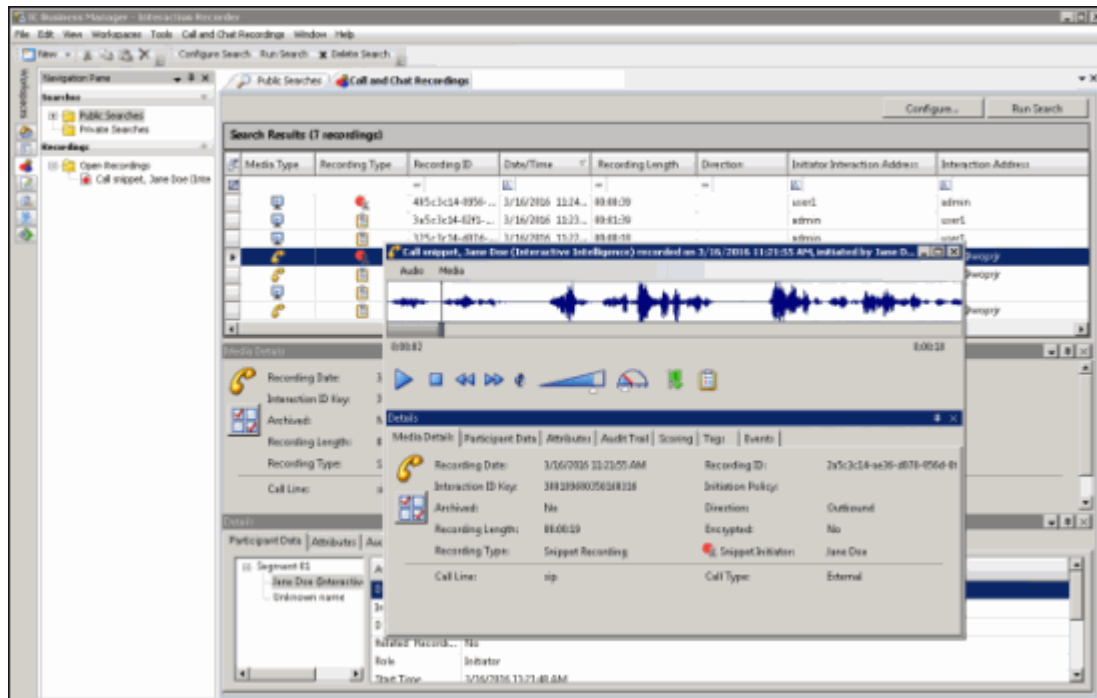
You can playback and review multiple recording Media Types at the same time. For example, you can listen to an audio recording while viewing a screen recording of the interaction.

See Open a Recording for opening a recording from a shortcut menu in the Search Results view. Delete a Recording

Related Topics

E-mail a Recording

Playback a Recording

Score a Recording

Playback a Recording

To Playback a recorded interaction, from the Search results view in the Workspace, in the list of recorded interactions, double-click an interaction.

A Playback window, showing the interaction, is displayed.

Playback forms vary according to the Media Type.

> **Note** If there is an associated recording with the interaction, the Related Recording Icon ⬤ is displayed. Click this icon to display a list of related recordings.

In this topic:

- Playback_a_Call
- Playback_a_Chat
- Playback_an_E-mail
- Playback_a_Social_Media_Conversation

- [Playback_a_Social_Direct_Message](#)

- [Playback_a_Screen_Recording](#)

Playback a Call

To playback a recorded Call, from the Search results view, in the list of recorded interactions, double-click a Call.

The Audio Playback window is displayed, and the recording begins to play.
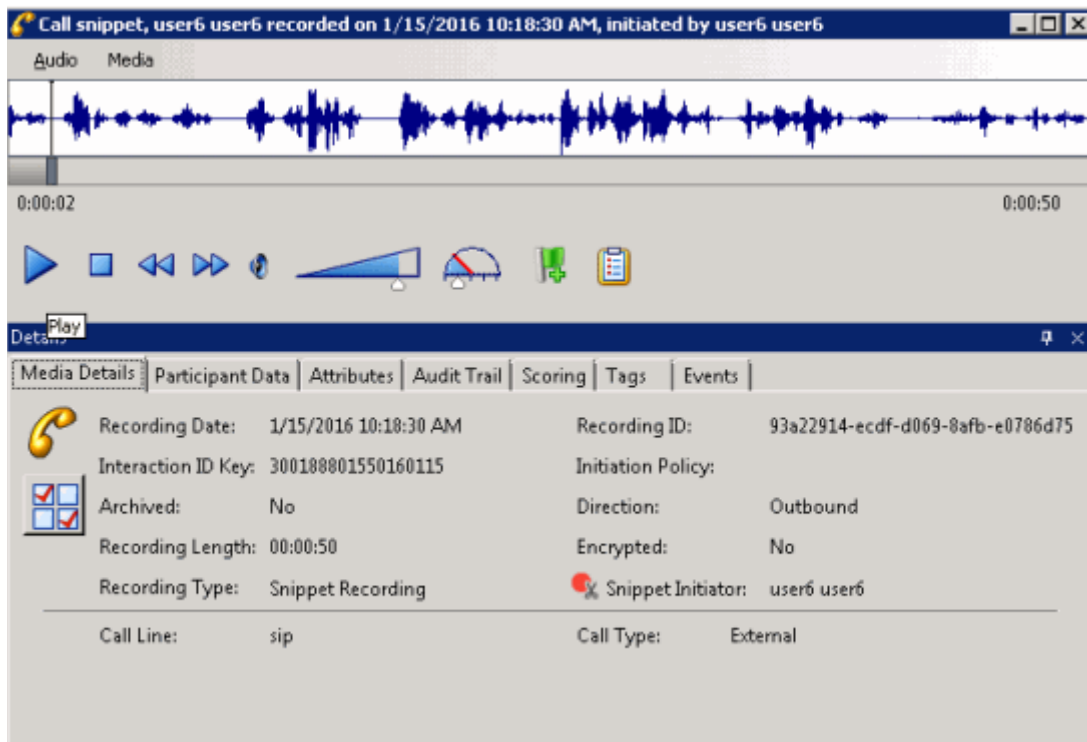
The waveform varies according to Mono or Dual-channel recordings.

Opus Dual-channel recordings

For Opus dual-channel recordings, the audio recording playback wave form displays the dual-channel audio as separate channels.
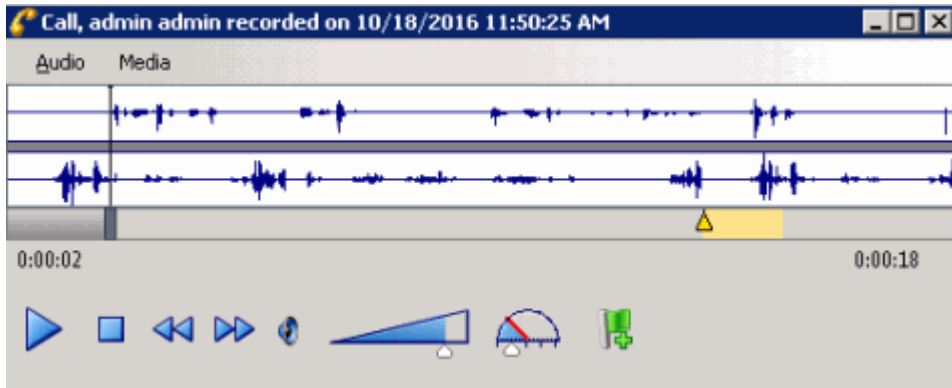
Left channel audio data is displayed in the top waveform, and Right channel audio data is displayed in the bottom waveform. The initiator of the call will always be on one of the channels, with all other participants on the audio call on the other channel. And the direction of the call will also determine which channel the participants and the initiator will be recorded on.

Important note
Support for the playback and management of Opus recordings within the CIC Interaction Desktop, Interaction Web Portal, and IC Business Manager applications requires CIC 2017 R2, or later. Opus recordings can be generated within CIC and Interaction Recorder starting with Media Servers at version CIC 2017 R1, or later.

For dual-channel recordings, a right-click shortcut menu allows you to switch between dual-channel and mono waveform data during playback.

Dual-channel Waveform to Mono
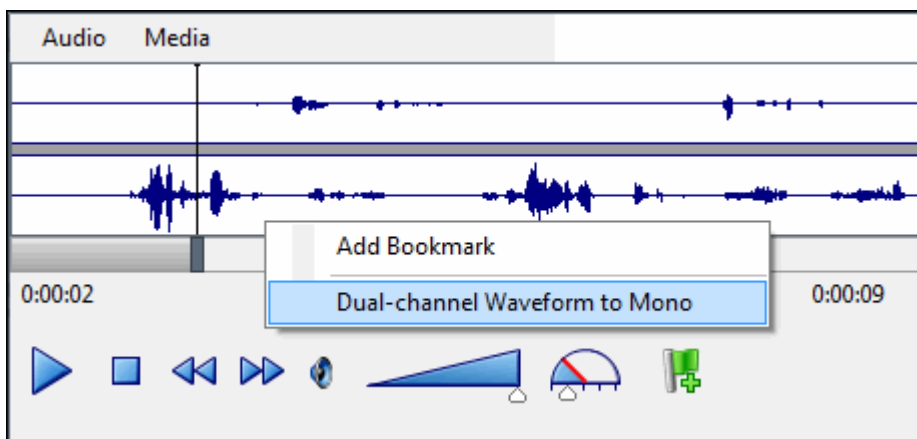
Mono waveform to Dual-channel
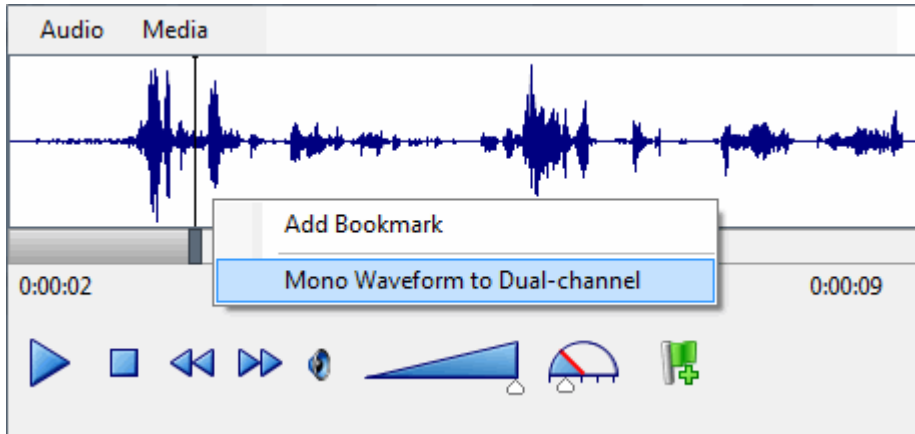
Note

Enabling the Opus (Mono) and Opus (Dual-channel) compression formats requires additional resources on the Media Servers. See the *Interaction Media Server Technical Reference* and the Interaction Media Server Sizing Calculator for details, specifically when using Dual-channel, as it requires 1 additional point on the Media Servers.

Enabling the Opus (Dual-channel) compression format requires additional disk space storage. See "Disk Space Requirements," in the *Interaction Recorder and Interaction Quality Manager Technical Reference* for Compression factors and Disk space Requirements when generating *Opus (Mono) and Opus (dual-channel) recordings.*

Related Recordings

When you are listening to a Snippet Recording, if there is a related Policy-based recording for this interaction, a related recording control is available.
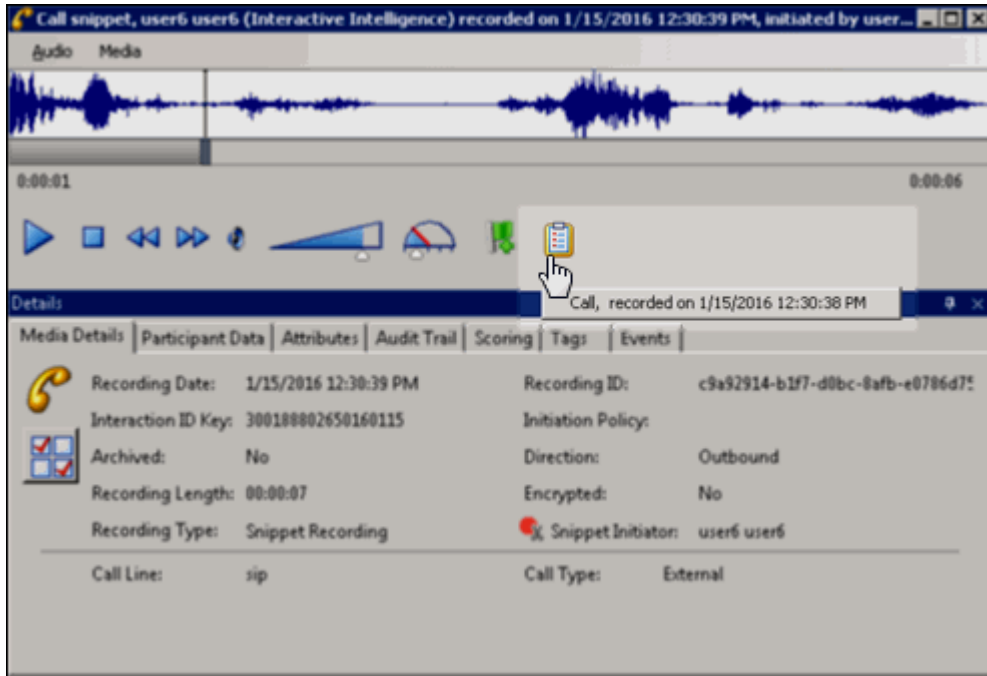
To display a list of Policy-based recordings related to the Snippet Recording, click the Policy control. To open a related recording, select a recording from the list.

Event Indicators

The playback feature automatically inserts annotations for events on the playback timeline. The timeline includes events that occurred during the call: placing the caller on Hold; transferring a call with Transfer, and transferring a call with Park.

A Hold event is indicated by a yellow triangle, a Transfer event is indicated by a purple triangle, and a Park event is indicated by a blue arrow. Text describing the event is displayed as the recording reaches the event indicator during playback.

Secure Recording Pause

When an agent has initiated a Secure Recording Pause during a recorded interaction, the recording is paused for a configured period of time. As a result, the final recording contains a beep to indicate a secure segment was executed. The secure segment is omitted and compressed from the recording. During playback the listener hears the beep and the pause is indicated by a lock icon on the timeline in the playback window.
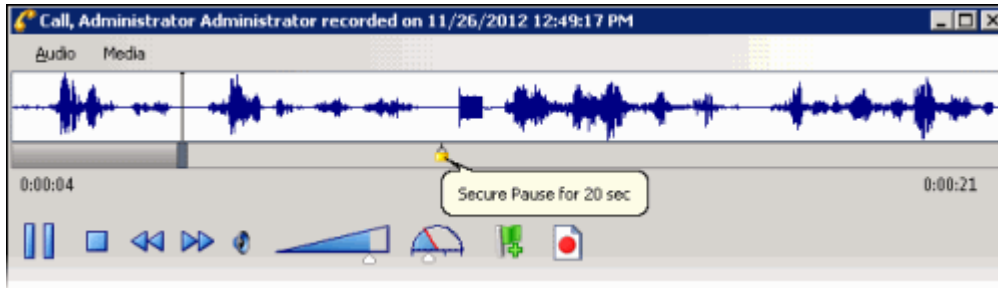
Interaction Analyzer Keywords

If a call contains Interaction Analyzer Keywords, they are listed on the Keywords page in the Details pane, and the keywords are indicated by an icon on the timeline in the playback window.
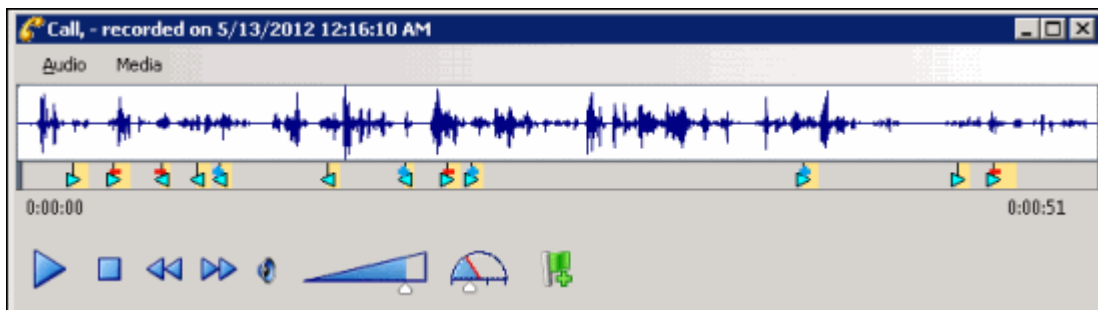
A tooltip with the spotted keyword pops up as the recording plays.

Keyword icons that point to the right are for the agent, and the icons that point to the left are for the customer. Here is a description of the Keyword Icons.

Keyword Icon	Description
	The indicated keyword has a zero score for the agent
	The indicated keyword has a negative score for the agent
	The indicated keyword has a positive score for the agent
	The indicated keyword has a zero score for the customer
	The indicated keyword has a negative score for the customer
	The indicated keyword has a positive score for the customer

For more information on setting Interaction Analyzer Keyword scores, see the *Interaction Analyzer Technical Reference* in the PureConnect Documentation Library.

89

Note If a call recording is in progress when the recording is opened, the Playback window is replaced with the message **This recording is currently in progress and cannot be retrieved at this time**. You can monitor a recording in process. For more information, see Monitor a Live Call.

Menu Bar

The menu bar allows you to control settings for **Audio** and view **Media** information properties.

Audio

Use the **Audio** menu to select the audio device for the playback. The options are **Primary Sound Driver** or **Telephone Handset**. The default audio device is displayed in the Audio menu in a bold font. The active (currently selected) Audio device menu item is selected (checked). You can also make the selected Audio device the default on this menu. Audio timing indicators display the current position in the recording and the total time of the recording.

Playback through Primary Sound Driver

Here are the playback controls that allow you to adjust the audio playback using your primary sound driver.

Playback Control	Function
▷	Play or pause the recording
◻	Stop the recording
◁◁ ▷▷	Reverse or fast forward the recording
🔊━━━	Volume slider for audio playback
🎚	Speed slider for audio playback The available speed settings are: 0.5x, l.0x, 1.1x, 1.2x, 1.3x, 1.4x, 1.5x, 2.0x, and 4.0x.

Playback through Telephone Handset

If you are playing back a recording through a telephone handset, use the telephone keypad to control the playback.

To control the playback:

Press	To

| 1	Slow down the recording
2	Speed up the recording
4	Decrease the volume
5	Increase the volume
7	Rewind ten seconds and continue playback
8	Fast forward ten seconds and continue playback

Note When playing back a recording through the telephone handset, the audio disconnects when the recording has finished playing or when the stop button is pressed.

Media

Use the **Media** menu to view Media Information properties, including Length, Audio format, and compression type. To view this information, click **Media**, and then click **About**. For example, the Media information for a Dual-channel Opus recording is:
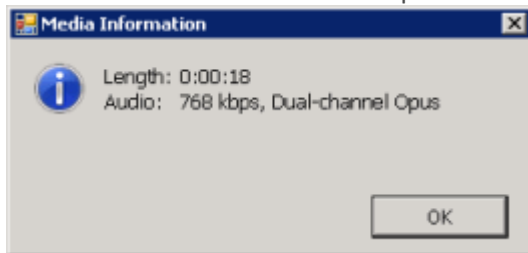
And the Media Information for a Mono Opus recording is:
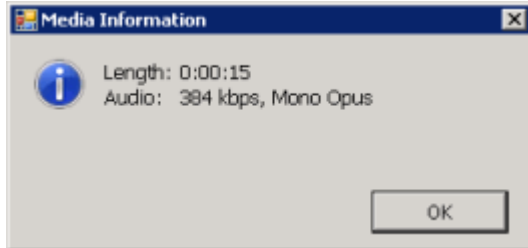
Waveform

The Waveform displays a graphic representation of the sound in the recording. The Waveform area includes a recording timeline that includes a position indicator and time, and the length of the recording. Bookmarks are displayed on the playback timeline.

Bookmarks

Bookmarks can be added to Audio recordings, in the Audio Playback window, to identify places in the recording that you can easily return to. You can add a Bookmark while the audio is playing, or you can pause the audio to add a Bookmark. Bookmarks are identified by a custom label you create. You can also indicate a Start and End time for your Bookmark. Bookmarks can be added using a shortcut menu or the Bookmark control.

Add a bookmark using a shortcut menu

To add a Bookmark using the shortcut menu, while the recording is playing, right-click in the waveform, and select Add Bookmark.
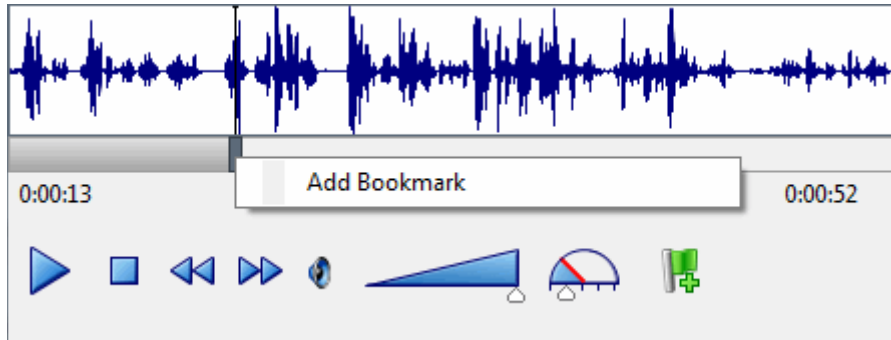
In the Add Bookmark dialog, type the label information, and click OK. The bookmark is inserted at the point where you right-clicked. You can also pause the recording while adding a Bookmark. To Bookmark a span of Time in a recording, use the Start Time and End Time fields.

Add a bookmark using the Bookmark control

To add a Bookmark, while the audio recording is playing, click the Bookmark control . In the Add Bookmark dialog, type the label information, and click OK. The Bookmark is inserted at the point where you clicked the Bookmark control. You can also pause the recording while adding a Bookmark. To Bookmark a span of Time in a recording, use the Start Time and End Time fields.

To Edit or Delete a Bookmark, right-click a Bookmark and on the shortcut menu select Edit or Delete.

Bookmark Audit Trail entries

When Bookmarks are added, edited, and deleted, the related modified recording audit trail entry contains formatted comments. The comments include Bookmark text and Start and End times. Bookmarks can be up to 1024 characters, but the Bookmark comment text displays the first 512 characters, followed by an ellipsis.
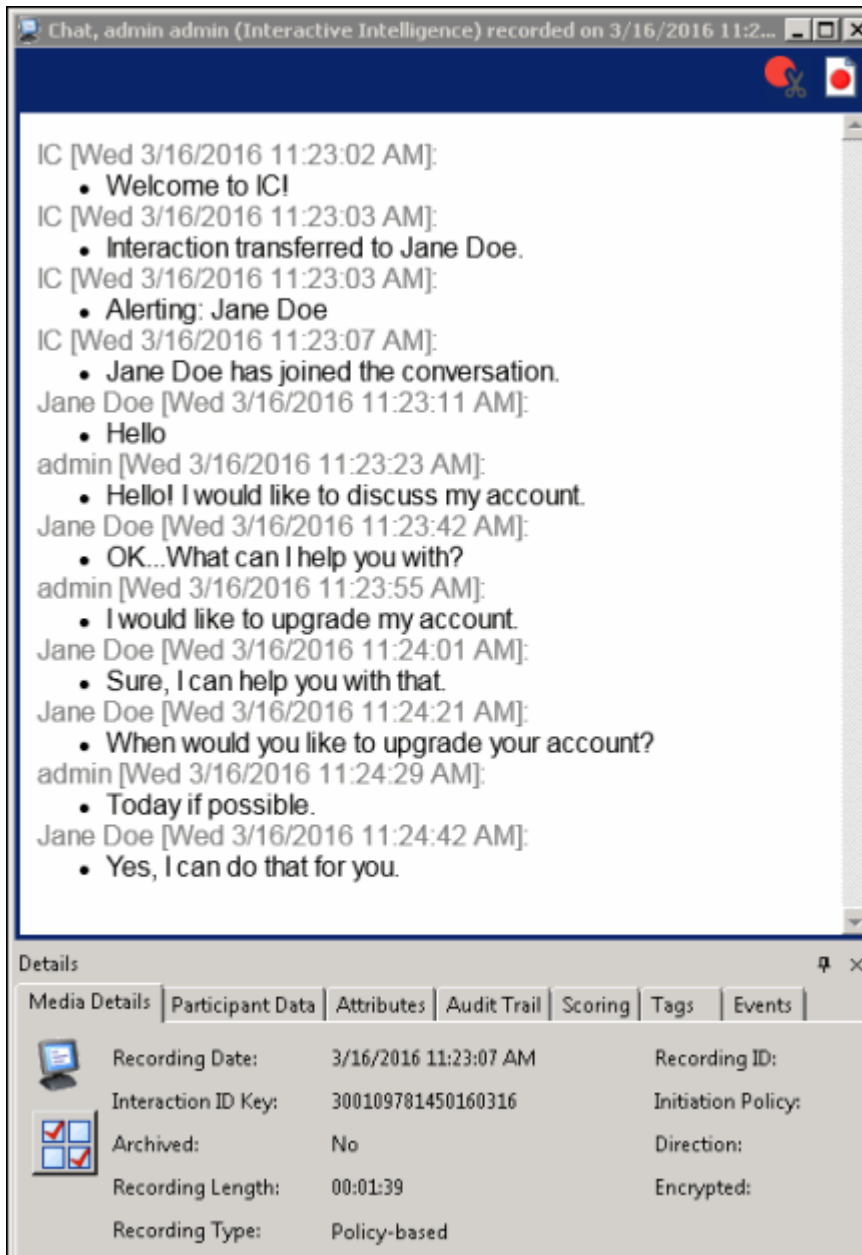

Details pane

The Details pane is included in the Audio Playback window for your reference. You can use the Scoring page to add a Questionnaire or to Score this recording. You can use the Tags page to Add or Edit tags for a recording.

Playback a Chat

To display a recorded Chat, from the Search results view, in the list of recorded interactions, double-click a Chat [icon].

The Chat Playback window is displayed. The interaction Details pages are displayed at the bottom of this window for your reference. You can use the Scoring page to add a Questionnaire or to Score this recording.

Playback an E-mail

To display a recorded E-mail, from the Search results view, in the list of recorded interactions, double-click an E-mail ▧.

The E-mail Playback window is displayed. The interaction Details pages are displayed at the bottom of this window for your reference. You can use the Scoring page to add a Questionnaire or to Score this recording.
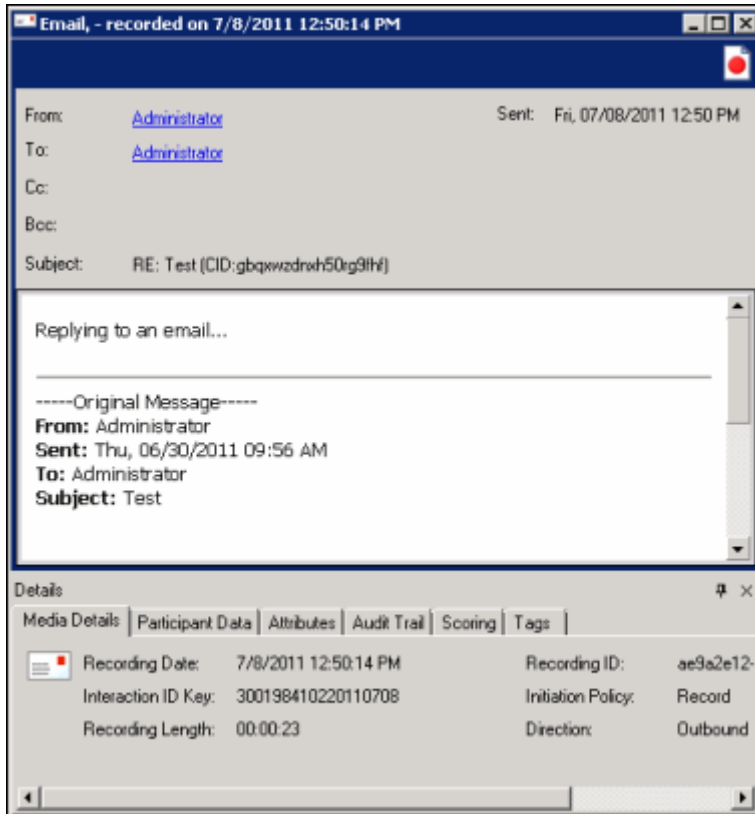

If an email has attachments that you want to save, right-click and select **Save As** or **Save All**. To do this, the user must have the **export/archive the recording** security right assigned in Interaction Recorder Policy Editor, in Interaction Administrator.

> **Note** ⦿ The Related Recordings list for an e-mail displays all related recordings including screen recordings associated with the interaction. The list also displays the original e-mail and all replies and forwards. The e-mail you are viewing is grayed-out in the list, so you can tell where you are in the e-mail thread.

Playback a Social Media Conversation

To display a recorded social media conversation, in the list of recorded interactions, double-click on a Social Conversation ▦.

The Social Conversation playback window is displayed. The interaction Details pages are displayed at the bottom of the window for your reference. You can use the Scoring page to add a Questionnaire or to Score the recording.
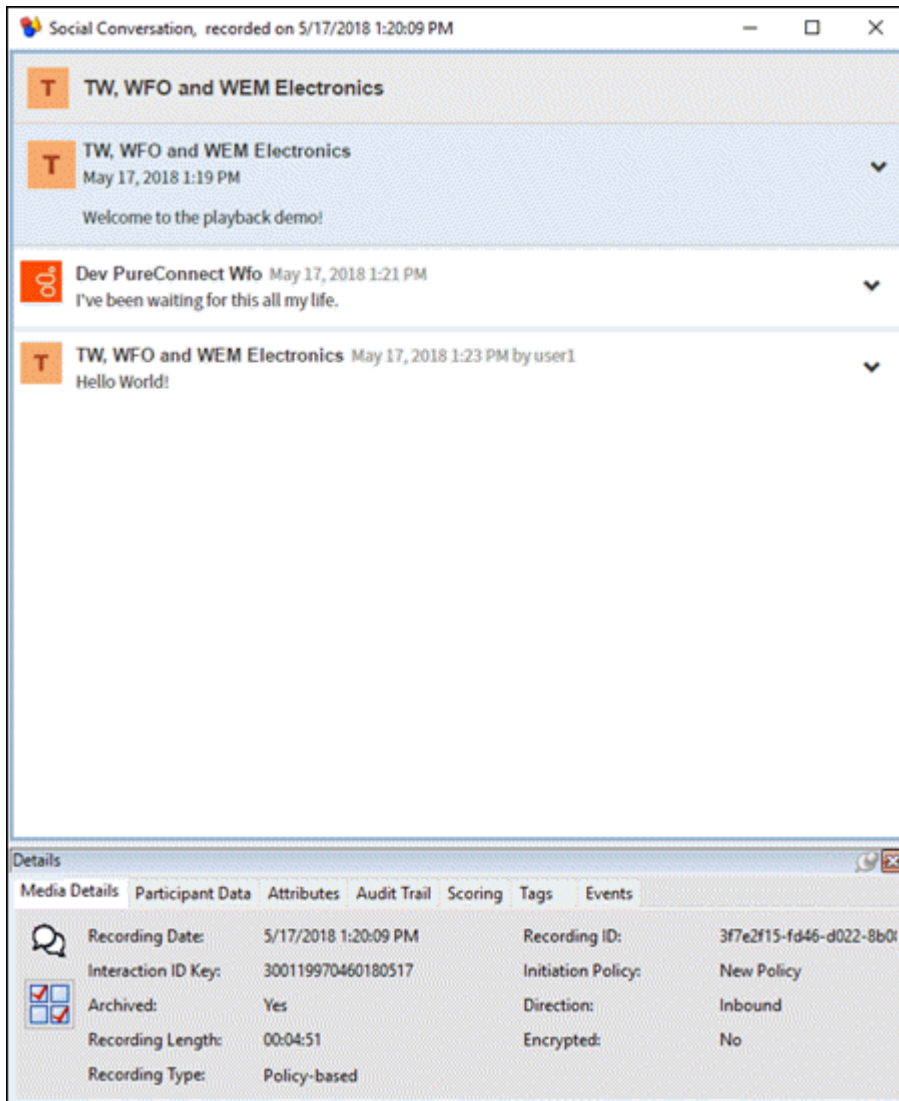
Playback a Social Direct Message

To display a recorded social direct message, in the list of recorded interactions, double-click on a social Direct Message .

The Social Direct Message playback window is displayed. The interaction Details pages are displayed at the bottom of the window for your reference. You can use the Scoring page to add a Questionnaire or to Score the recording.

Playback a Screen Recording

To only display a Screen Recording, from the Search results view, double-click a Screen Recording .
The Screen Recording Playback window is displayed.
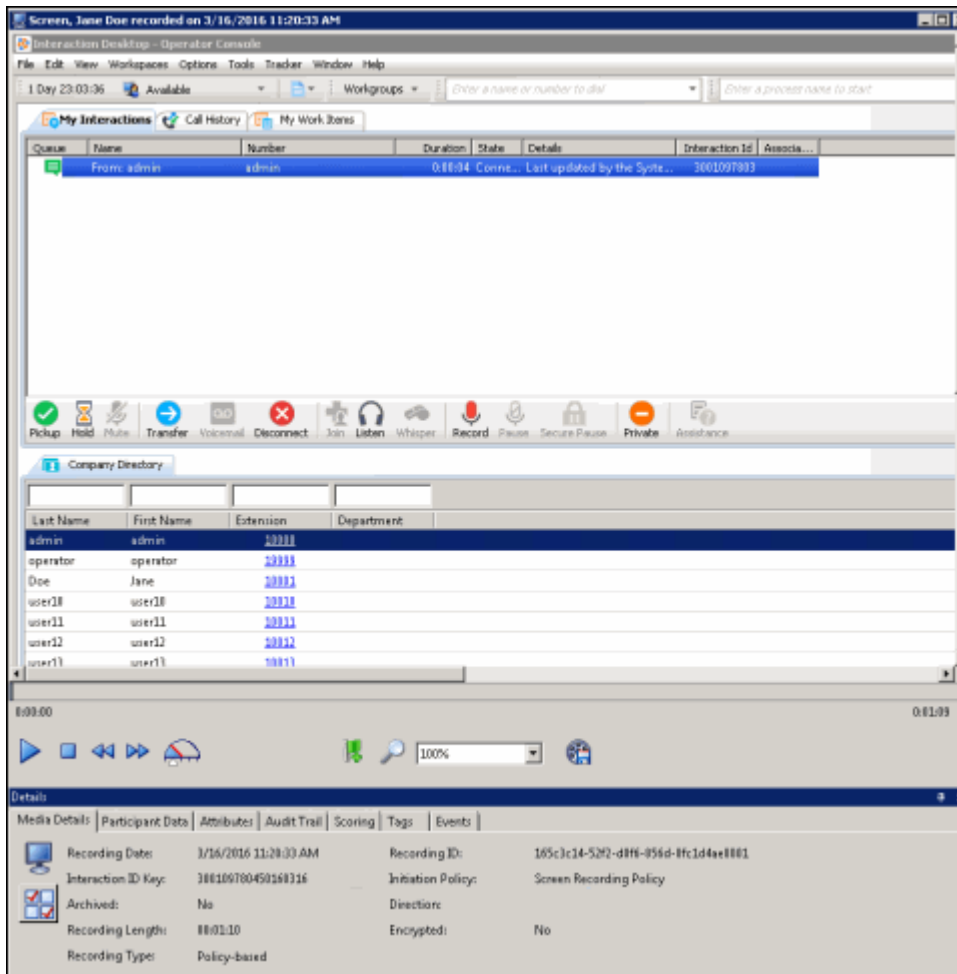
Playback a screen recording associated with a call

To playback a screen recording associated with a call, from the call playback window, click the Related Recording Icon [image] to display the related recordings. Select a related screen recording to begin playback. The screen recording playback window with audio is displayed.
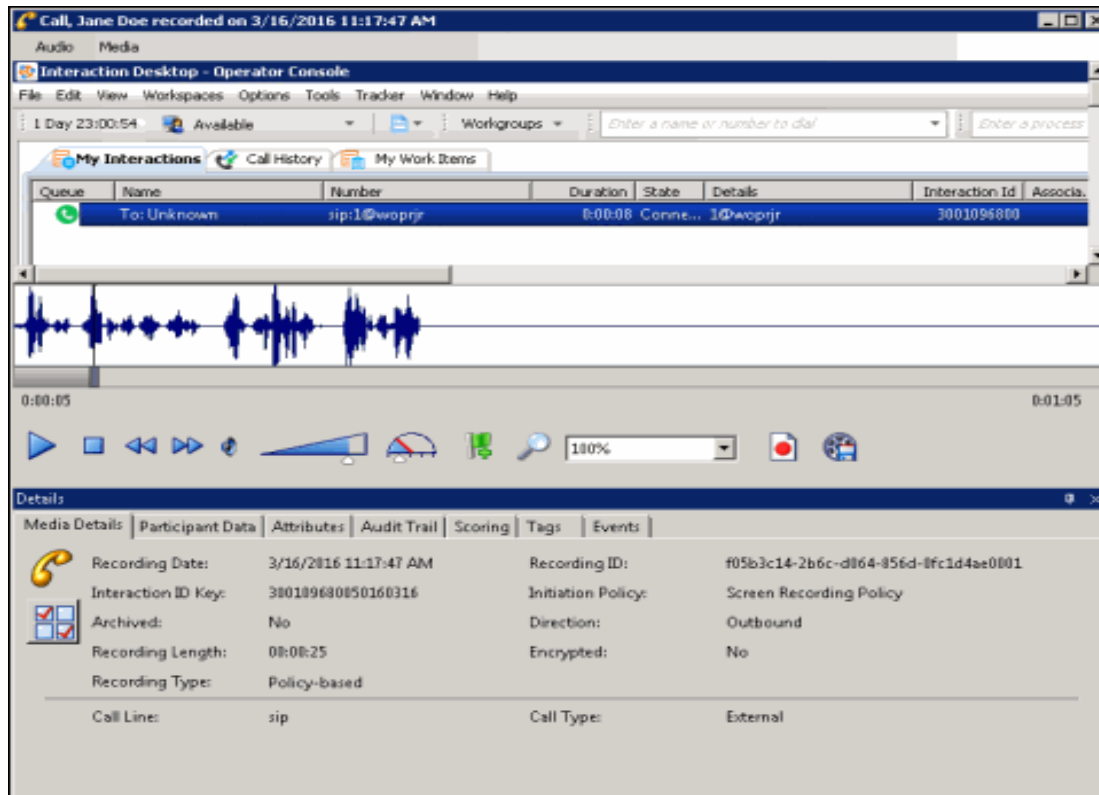
The audio controls for the recording are available. The Audio and Screen Recording stay in sync when played. If you are playing the audio through a station handset or headset and use the screen playback controls, such as forward or back, audio and video will go out of sync. To avoid audio and video going out of sync, use your computer speakers for audio playback.

The interaction Details pages are displayed at the bottom of this window for your reference. You can use the Scoring page to add a Questionnaire or to Score this recording.

> **Note** If a Screen Recording is selected for playback before the Store at Location has been completed, a message is displayed that the recording media is unavailable and to retry opening the recording again.

Secure Screen Recording Pause

When an agent has initiated a Secure Recording Pause during a recorded interaction, the screen recording is paused for a configured period of time. As a result, the final recording contains a beep to indicate a secure segment was executed. The secure segment is omitted and compressed from the recording. During playback the listener hears the beep and the pause is indicated by a lock icon on the timeline in the playback window.

Export a Screen Recording

Screen recordings can be exported from the screen recording playback window. The recording is exported to a Windows Media Video (WMV) format file for playback.

For IC Business Manager, there are specific requirements for **The Desktop Experience** feature on the following operating systems:

- **Windows 2008 Server**
  You must enable the Desktop Experience feature.

- **Windows 7**
  The Desktop Experience feature is already enabled on Windows 7 machines.

- **Windows Server 2016**
  The Desktop Experience feature on Windows Server 2016 is optionally installed during Windows Installation using the Setup wizard. You *must* choose **Windows Server (Server with Desktop Experience)** when you install Windows Server 2016. You *cannot* install Server with Desktop Experience after installation.

Follow these steps to export a screen recording.

1. From the screen recording playback window, click the **Export** screen recording icon . The **Select a folder for exported recordings** dialog is displayed.

2. Select a folder for the exported screen recording, and click **OK**.

3. The **Exporting the Screen capture** progress indicator is displayed.

If the Desktop Experience Feature is not enabled, the screen recording is not available for export, and the Export screen recording icon is disabled .

Related Topics

E-mail a Recording

Open Recordings

Score a Recording

Score a Recording

Accessing the Scoring page

Access the Scoring page from the Search Results view in the Workspace.
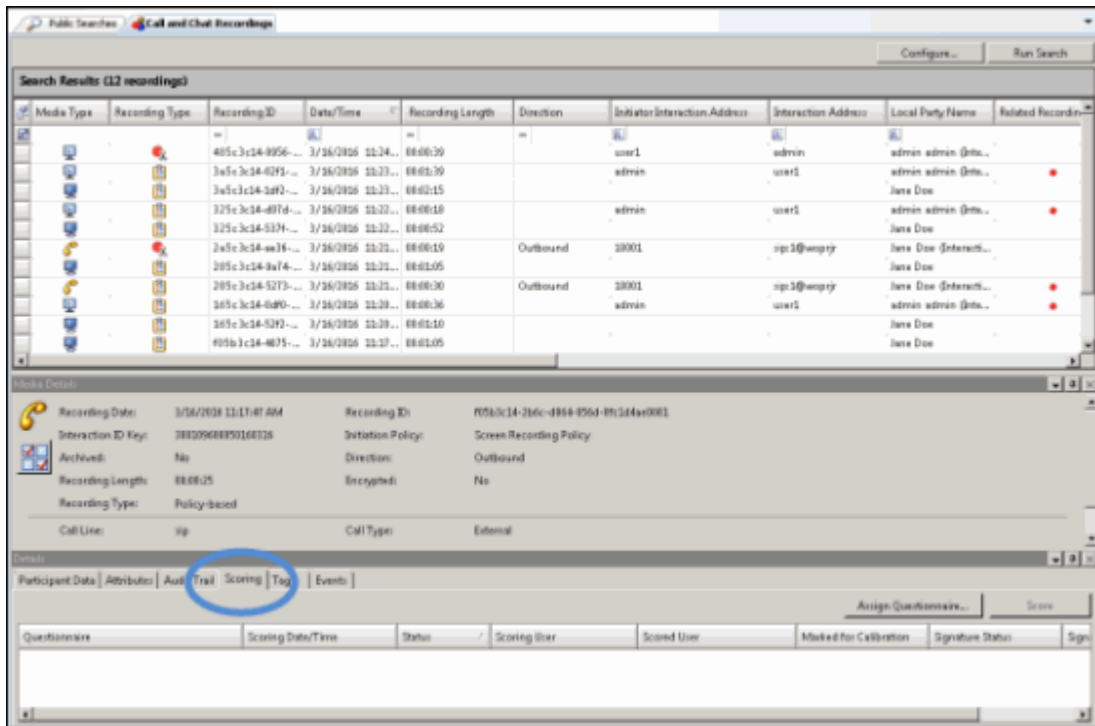
You can also access the Scoring page using a shortcut menu. In the Search Results grid, select a recording. Right-click, and on the shortcut menu, click Scoring. The Scoring page is displayed in the Details pane.

Use the Scoring page in the Details pane to access a Questionnaire and Score a recording.

Questionnaires that have previously been assigned to a recording are displayed on the Scoring page. Additional Questionnaires can be assigned to the recording on the Scoring page. Only Questionnaires that have been published are available for scoring.

Notes

- Non-admin users only see Questionnaire scorecards that they have scored. To allow users to see all scorecards for a recording, the CIC administrator can create a **Security Policy** so a user **can view scorecards**. This Security Policy can be applied to Agents or Roles. Questionnaire Directory Admin Access and other security rights will still apply. For non-admin users, in order to finish a scorecard that has already been scored by another user, the user must first save the scorecard to take ownership and then the user can finish the scorecard.

- When a scoring user does not have the **can view participant contact information** security right for a recording, for security purposes the scored agent's name is not displayed, and is replaced with asterisks. Also, in a recording that has multiple participants, the Select Participant dialog displays participants by number when the scoring user does not have the **can view participant contact information** security right.

Assigning a Questionnaire

To assign a questionnaire, click **Assign Questionnaire**, and select a questionnaire from the **Select Questionnaire** dialog. When you click **Assign Questionnaire** the **Select Questionnaire** dialog is displayed. To assign a user to score the recording, select the **Scoring user** from the drop-down list. To select the completed scorecard for calibration purposes, select the **Mark scorecard for calibration** check box. To require an agent signature on the completed scorecard, select the **Require scored agent signature** check box. To assign a questionnaire to a recording you must have the **Can Assign Questionnaires** security right, assigned in Policy Editor.

Scoring a recording

To score a recording, on the Scoring page, click **Score**. The Scorecard is displayed.

For detailed Scorecard information, from the Scorecard press F1 and the Scoring Dialog Help topic is displayed.

The media player, depending on the type of interaction, is launched displaying details of the recording. Here is an example of an Audio Playback. Details of the interaction are displayed in the Playback window.
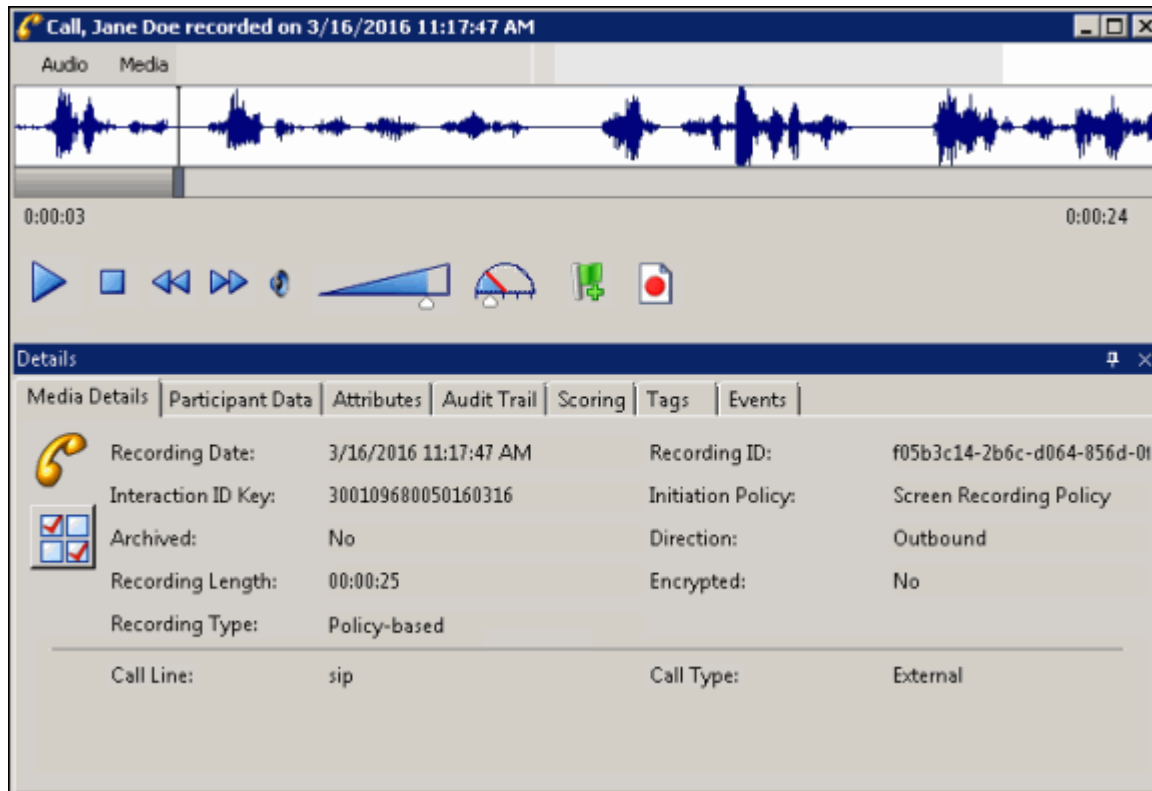
To save a scored interaction to be e-mailed or to finish scoring later, click **Save**.

When you have completed scoring the interaction, click **Finish**. If the Scorecard has been failed, the Finish button is labeled **Finish (Failed)**.

Finish a Scorecard

Finishing a scorecard makes it available for reporting. When the **Finish Scorecard** message is displayed, you can require the scored agent to sign the scorecard.
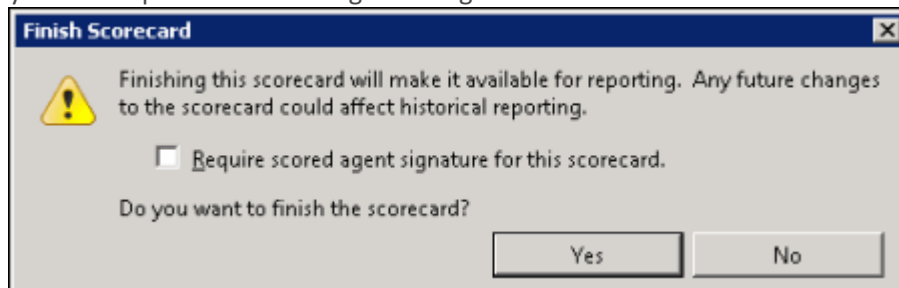
> **Note**
> Scored agents must have the **Can View Scorecards** security right, assigned in Policy Editor for the scored recording, in order to sign the scorecard and enter comments.

Scorecard Signature

Selecting the **Require scored agent signature for this scorecard** check box allows an agent to sign-off on a scorecard and enter comments. When a Finished Scorecard has been selected for sign-off, only the

Scored User (agent) and the Current User with the **Override Finished Scorecards** Security Right are allowed to modify the sign-off state and specify sign-off comments. Scored agents are always allowed to view signature comments.

> **Note** Non-scored users must have the **can view scorecard signature comments** security right, assigned in Policy Editor for the scored recording, in order to see the signature comments after the scorecard has been signed.

When an agent is viewing a scorecard that requires a signature, the **Sign Scorecard** button is available at the bottom of the scorecard. Clicking **Sign Scorecard** displays the **Scorecard Signature** dialog where comments can be made and the scorecard signed.

Group Icons

When you have finished the scorecard, different icons will be displayed for the Question Group node in the scorecard navigation tree based on whether the group is complete or not.

- Group is complete, that is, all required questions have been answered or marked as Not Applicable (N/A).

- Group is not complete.

Signed Scorecards

After scorecards have been signed, signature comments can be viewed. Signed comments can be viewed by users who have the **can view scorecard signature comments** security right, assigned in Policy Editor for the scored recording.

A signed scorecard displays the View Signature button. When you click **View Signature**, the **Scorecard Signature** window displays the **Scorecard Signature Comments**.

Modify Signed Scorecards

Users who have the **Override Finished Scorecards** Security Right are allowed to modify the sign-off state and specify sign-off comments. From the Override Scorecard Signature dialog, click **Additional Comments** to make comments.

Remove Scorecard Signature

Users who have the **Override Finished Scorecards** Security Right are also allowed to remove the scorecard signature. From the Scorecard, click **Remove Signature** to remove the signature from a scorecard. The agent will no longer be required to sign the scorecard.

Modify Finished Scorecards

Users with the **Override Finished Scorecards** security right can modify the answers on finished scorecards and re-save the finished scorecards in the database. Users are assigned the Recorder Policy Override Finished Scorecards Security Right in Interaction Administrator. Users without this security right can only view finished scorecards.

Related Topics

E-mail a Recording

Playback a Recording

E-mail a Recording

You can send a recording in an e-mail. From the Search Results View, select the recording to be sent in an e-mail. Right-click the recording, and on the shortcut menu click **Send as E-mail**.
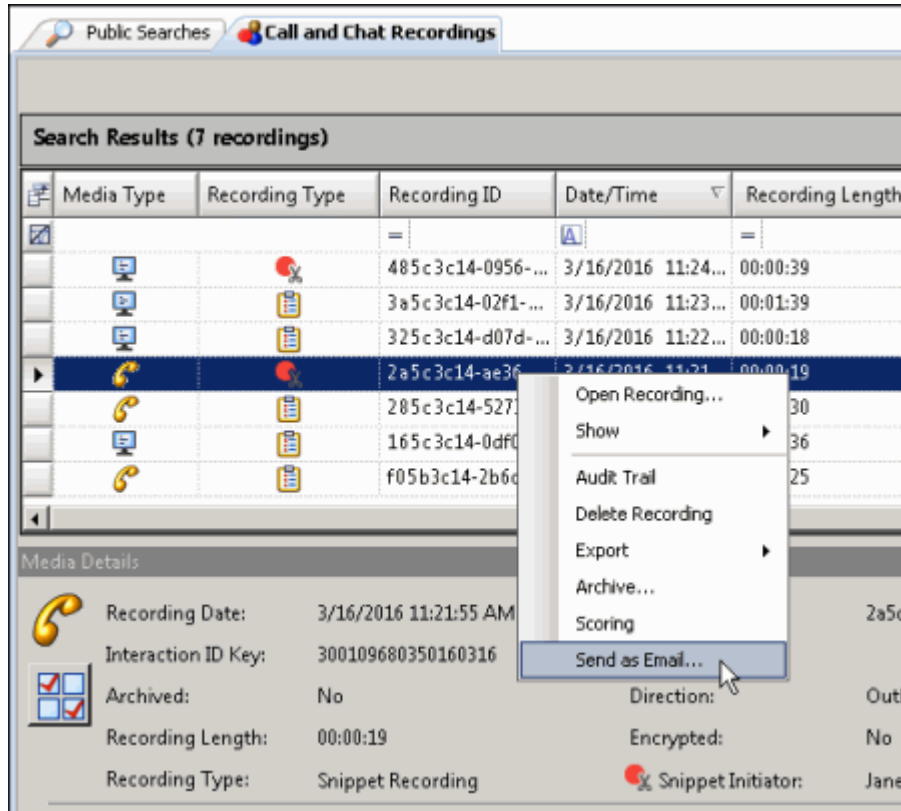
> **Note** You cannot e-mail a Screen Recording. If a Screen Recording is selected in the Search Results View, when you right-click, the shortcut menu does not have the Send as E-mail command.

On the Send Recording E-mail dialog, click **To** and in the **Search For** box type an e-mail address, and click **Add.** Add additional recipients, and when finished, click **OK**.
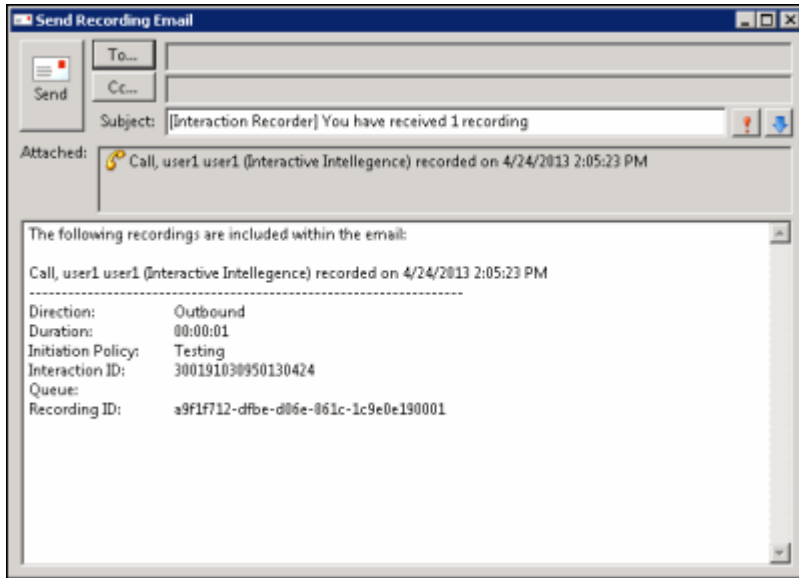
Click **Send** to send your recording.

> **Note** When sending an Opus recording in an email, the recording is sent as an **.opus** file attachment.

Related Topics

Score a Recording

Working with Scorecard Search Results

Delete a Recording

Use the Search Results View to delete a recording. When a search is run, a list of recorded interactions is displayed in a grid in the Search Results View in the Workspace.

To delete a recording:

1. From the Search Results View, select a recorded interaction in the Recordings grid.
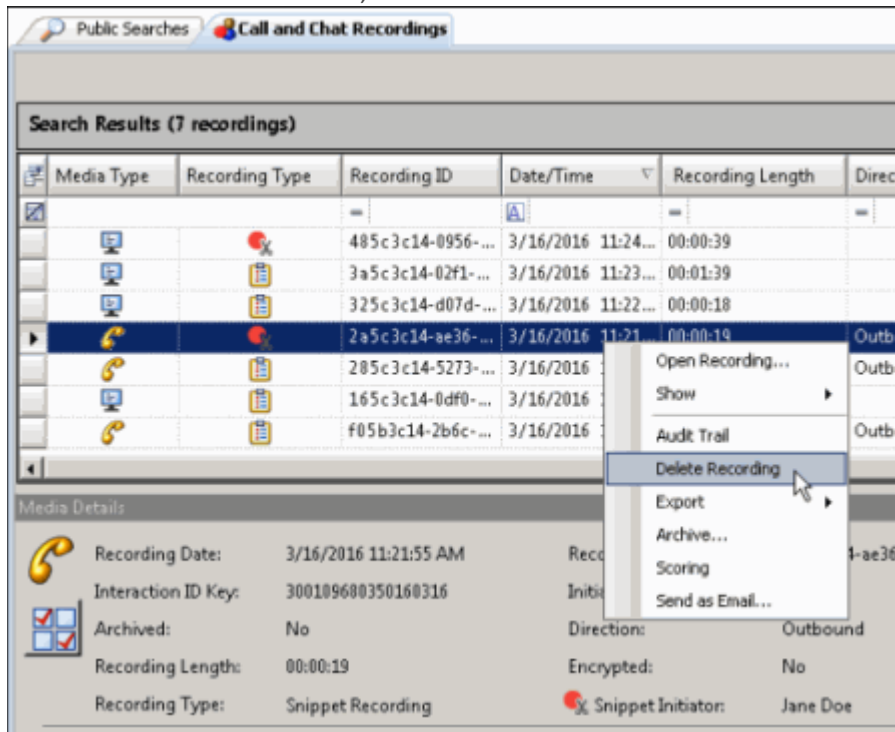
2. Right-click, and on the shortcut menu, click **Delete Recording**.

   Or

   After selecting the recorded interaction in the Recordings grid, press the **Delete** key.
3. A message is displayed, requesting your confirmation to delete the recording.
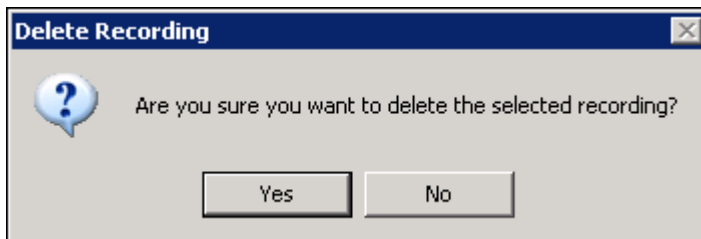
   To delete the recording, click **Yes**.

Note If there is a Screen Recording related to the recording you are deleting, you will be prompted to delete the related Screen Recording.

Export a Single Recording

You can Export a single recording, export multiple recordings. or export Results Rows. The following information is for exporting a single recording.

Note To export recordings in IC Business Manager, a user must have permission for the Security Policy __can__ **export/archive recordings**.

Export a Single Recording

To export a single recording, from the Search Results View, select the recording to be exported. Right-click the recording, and on the shortcut menu point to **Export**.

> **Note** Screen recordings are exported during Screen Recording Playback. If a screen recording is included in a recording selection, the Export menu item is not available.
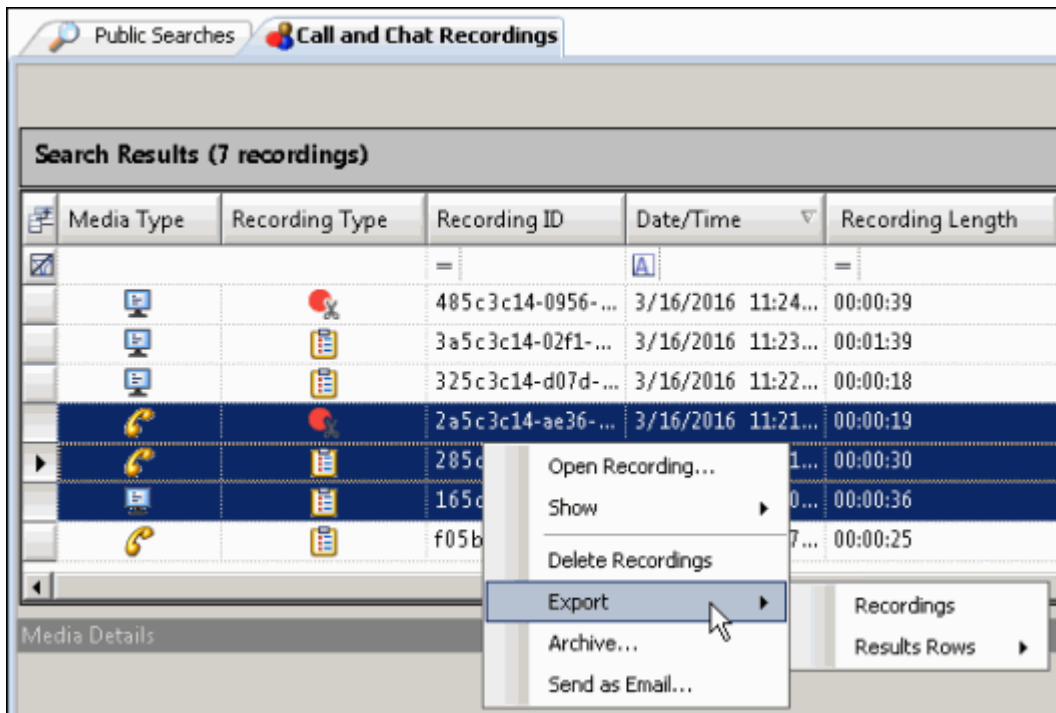
On the submenu, click **Recording.**
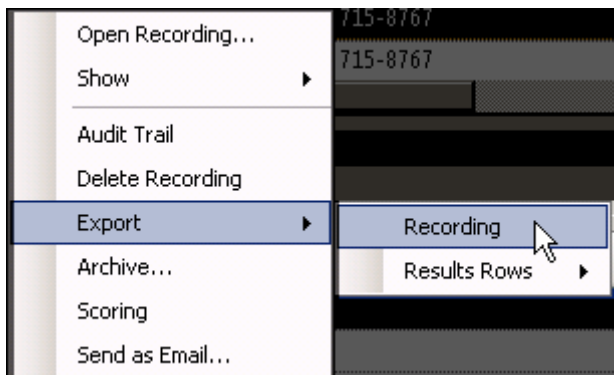
On the Export Recording As dialog, select the folder to export the recording to. You can also rename the file in the File name field.

When Opus recordings are exported from within the Interaction Recorder module in IC Business Manager, the extracted Opus audio data is extracted into an Opus, ogg-based audio file with the .opus file extension.
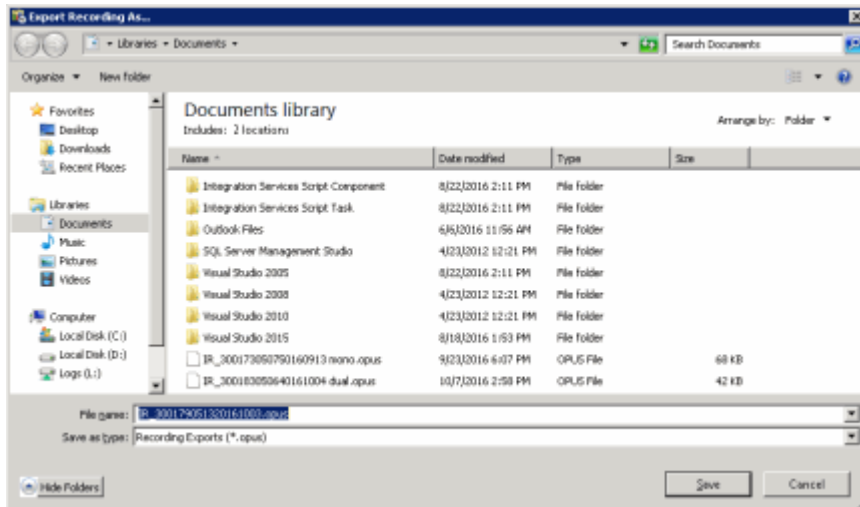
Notes

- When Social Media recordings are exported from Interaction Recorder in IC Business Manager, the files are exported in Zip format and contains the necessary files to view the recording. The playback website is included in the Zip file.

- When Opus recordings are exported from Interaction Recorder in IC Business Manager, the extracted Opus audio data is extracted into an Opus, ogg-based audio file with the .opus file extension.
  During export, the number of channels are maintained so that Opus Mono recordings are exported with 1 channel audio data, and Opus Dual-channel recordings are exported with 2 channel audio data.

- When μ-law, True Speech, and GSM 6.1 recording compression formats are exported from within the Recorder module in IC Business Manager, the audio data is exported as a WAV file.
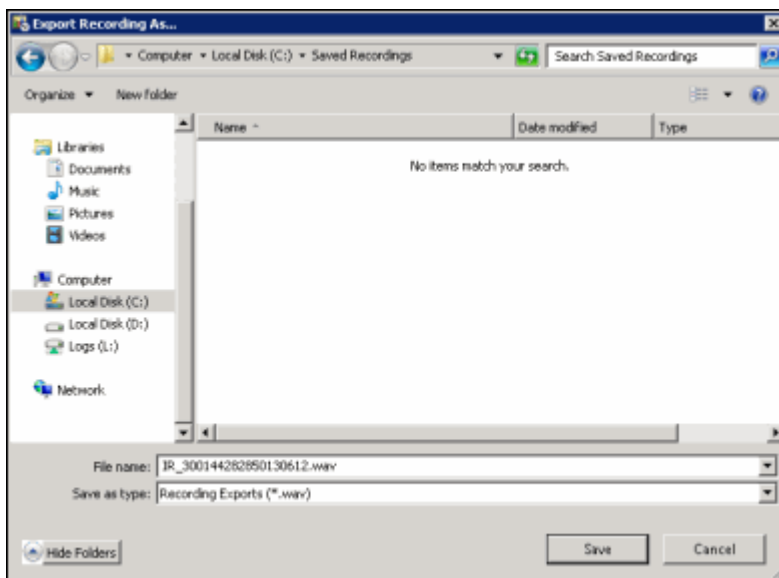
When you click **Save**, the recording is saved to the selected folder.

To export multiple recordings, see Export Multiple Recordings.

Export Multiple Recordings

Export multiple recordings using the **Export** dialog. Follow these steps to export multiple recordings to a folder.

> **Note** To export recordings in IC Business Manager, a user must have permission for the Security Policy **can export/archive recordings**.

To export multiple recordings from the Search Results View, Select the recordings to be exported. Right-click the selection, and on the shortcut menu point to **Export**.

> **Note** Screen recordings are exported during Screen Recording Playback. If a screen recording is included in a recording selection, the Export menu item is not available.
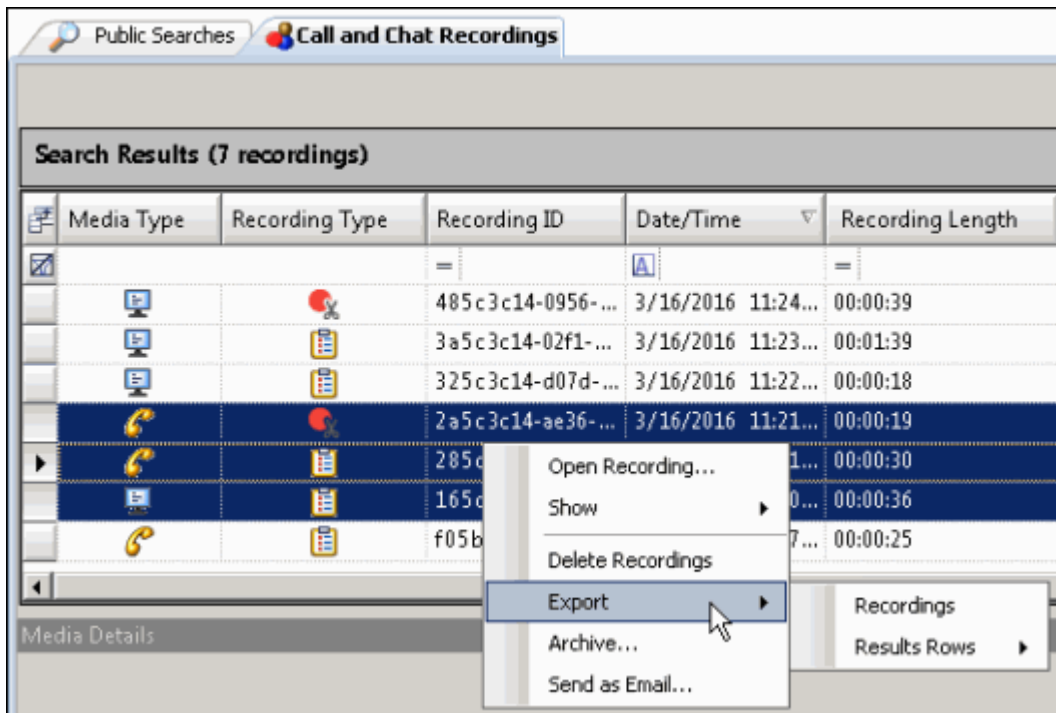

On the submenu, click **Recording.**
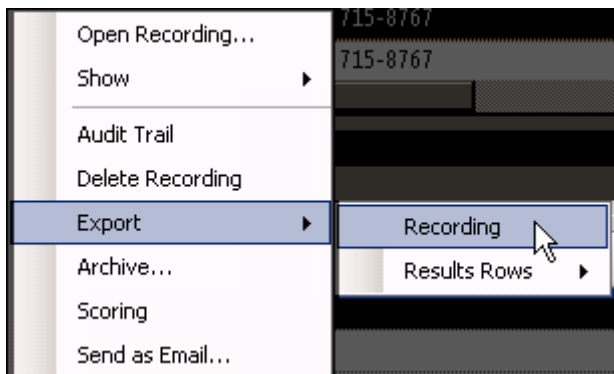
The Export Recordings dialog is displayed.
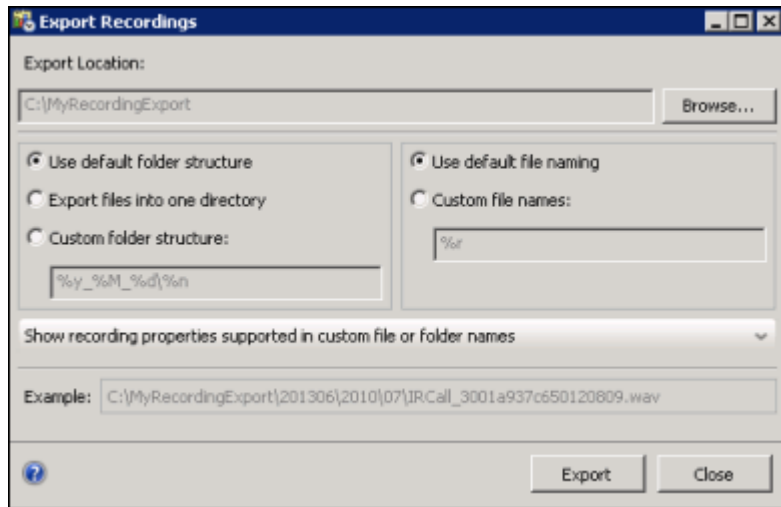
Use the Export Recordings dialog to specify the folder and the file names when exporting multiple recordings.

Note When Social Media recordings are exported from Interaction Recorder in IC Business Manager, the files are exported in Zip format and contains the necessary files to view the recording. The playback website is included in the Zip file.

Specify the Folder Structure

First, use **Browse** to specify an **Export Location** for the root folder.

Next, select a button to specify one relative location for the exported recordings. The choices are:

- **Use default folder structure**
- **Export files into one directory**
- **Custom folder structure**

Use default folder structure

Select **Use default folder structure** to export the selected recordings to the specified **Export Location**. The recordings are saved in a directory structure in the form **YYYYMM/DDHH/MM**, where:

- **YYYYMM** is the year and month of the recording
- **DDHH** is the day and hour of the recording
- **MM** is the minute of the recording

Export files into one directory

Select **Export files into one directory** to export the selected recordings to the root folder.

Custom folder structure

Select **Custom folder structure** to export the selected recordings to directories defined by a directory template. The directory template is created using the properties of the exported recordings.

After you select **Custom folder structure**, use the default template displayed in the Custom folder structure field, or use the Custom folder structure field to specify a new folder template. Use the **Show**

recording properties supported in custom file or folder names drop-down list to display a description of the **Key** and **Value** properties.

The **Example** field displays an example of the folder structure that is created using the template in the Custom folder structure field.

Specify the file names

After the relative location for the exported recordings is selected and configured, specify how the recordings files are named. The choices are:

- **Use default file naming**
- **Custom file names**

Use default file naming

Select **Use default file naming** to name the recording files by using the default naming convention.

The recordings are named in the form IR[*type of interaction*]_[*interaction ID*].wav. For example, IRCall_300144281850130611.wav.

Custom file names

Select **Custom file names** to name the recording files using a file name template. After you select **Custom file names**, use the default template displayed in the Custom file names field or use the Custom file names field to specify a new file name template. Use the **Show recording properties supported in custom file or folder names** drop-down list to display a description of the **Key** and **Value** properties.

The **Example** field displays an example of the file name that is created using the template in the Custom file name field.

Export recordings

When the Export Recordings dialog is complete, click **Export** to export recordings to the specified directory.

Export Results Rows

Export the contents of search results into a CSV, Excel, or PDF file. Export **All** search results rows, or **Selected Rows**.

Follow these steps to export All rows from the search results grid:

1. Right-click on any search results row and on the shortcut menu point to **Export**.

2. On the submenu, point to **Results Rows**, and then point to **All**.

3. Select the file type for the exported file.

4. On the Save As dialog, select the folder to export the Results Rows to, and type a File name.

Follow these steps to export Selected Rows from the search results grid:

1. Select the search result rows to be exported.

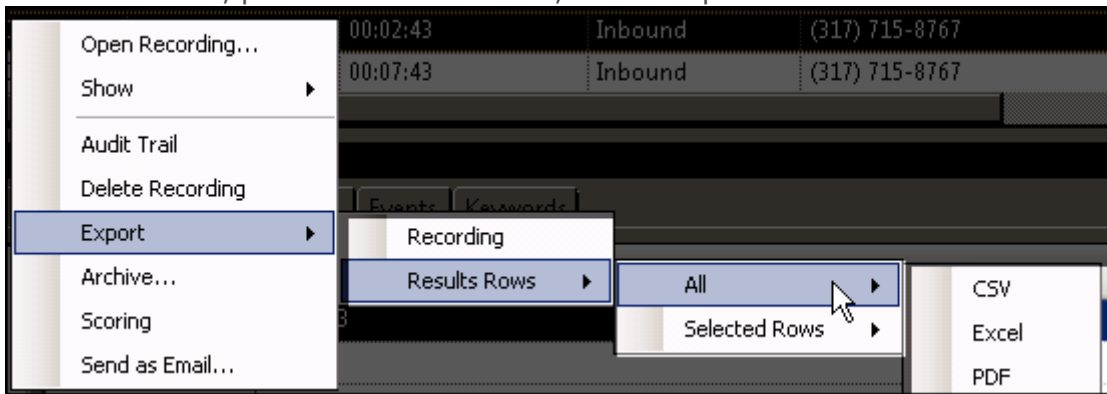2. Right-click on the selected rows, and on the shortcut menu point to **Export**.

3. On the submenu, point to **Results Rows**, and then point to **Selected Rows**.
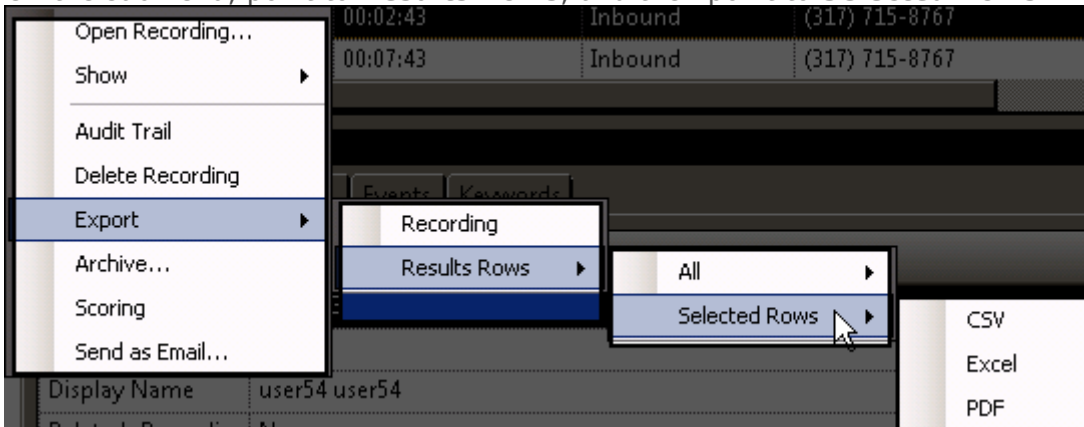
7. Select the file type for the exported file.

4. On the Save As dialog, select the folder to export the Selected Rows to, and type a File name.

Archive a Recording

You can archive a recording from the Search Results View.

> **Note** To archive recordings in IC Business Manager, a user must have permission for the Security Policy **can export/archive recordings**.

To archive a recording, select one or more recordings to be archived. Right-click the recording, and on the shortcut menu click **Archive**.
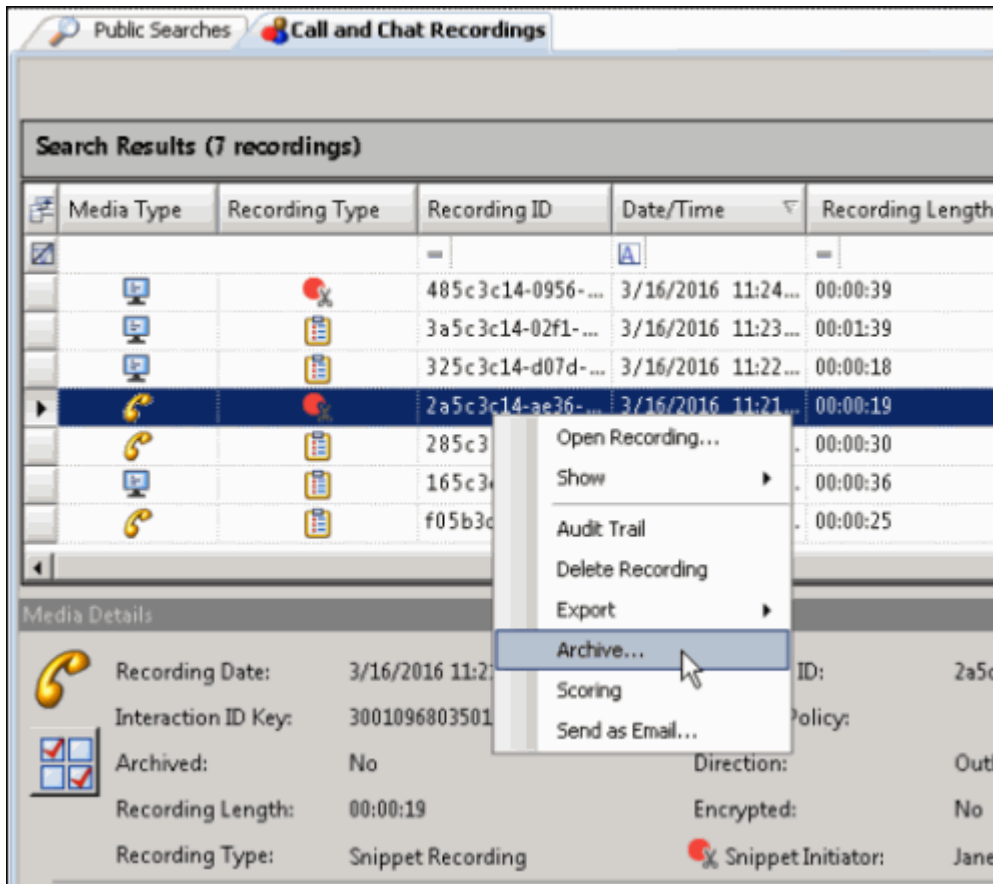
On the **Archive Recording** dialog, select a location to archive the recording from a retention policy or enter an archive storage location.
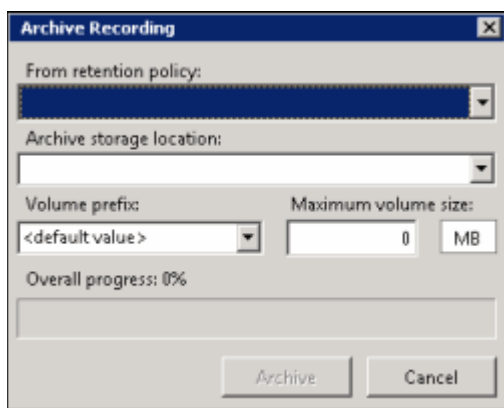
From retention policy
Use this drop-down list to select a Retention Policy. This list includes the 10 most recently created policies with the Archive action. The policies are listed in order, with the most recent policy displayed first.

When you select a retention policy, the fields **Archive storage location**, **Volume prefix**, and **Maximum volume size** are populated from the retention policy. These fields can be modified for your archive.

Archive storage location

All storage locations from Archive Retention Policies are listed in the drop-down list. You can select a storage location from the list or type a valid non-local shared UNC path for the storage location. In the **Volume prefix** field, you can: accept the default value for a prefix, or select a prefix from the drop-down list, or type a new volume prefix. In the **Maximum volume** size field, type the maximum storage size for each archive volume folder, and then click the **MB** box to toggle between **MB** and **GB**.

N**ote** When you select a **Social Media** recording to archive, the Social Media recording files are archived in a Zip format that contains the necessary files to view the recording. The playback website is also included in the Zip file.

When you have configured the Archive Recording dialog, click **Archive**. The **Overall progress** indicator displays the percentage of the archive process that has been completed.

For additional information on the archiving process, including Automatically Archiving Recordings and Working With Archived Content, see "Appendix D: Archive Recordings" in the *Interaction Recorder Technical Reference* in the PureConnect Documentation Library.

Related Topics

Export a Single Recording

Working with Recording Search Results

View the Audit Trail

Use the **Audit Trail** command on the shortcut menu to display information on audit events, including: Date/Time, Audit Event, User, and Comments on the event.

Use the Search Results View to display the Audit Trail for a recording. When a search is run, a list of recorded interactions is displayed in a grid in the Search Results View in the Workspace.

To display the Audit Trail for a recording:

1. From the Search Results View, select a recorded interaction in the Recordings grid.
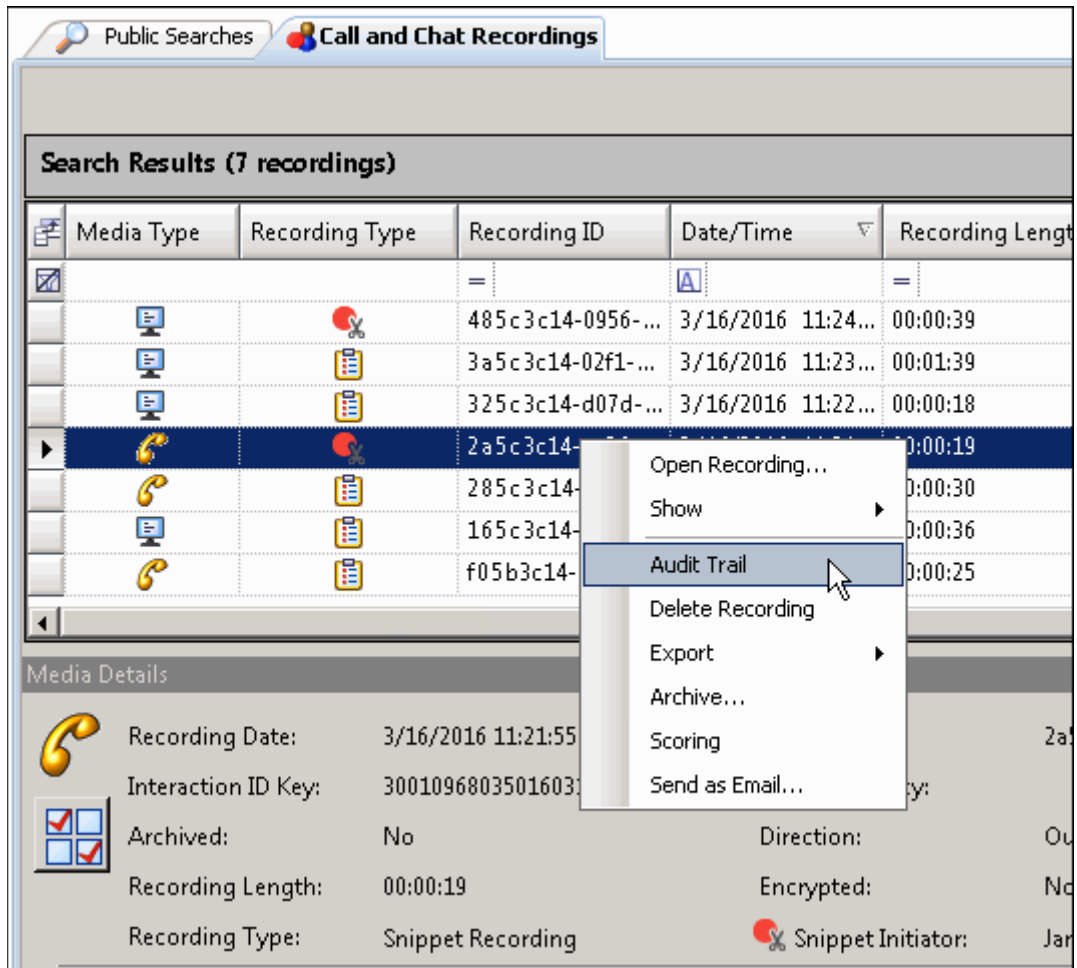
2. Right-click, and on the shortcut menu, click **Audit Trail**. The Audit Trail page is displayed in the Details pane. The Audit Trail can be refreshed using the shortcut menu on the Audit Trail page.

Related Topics

Archive a Recording

Delete a Recording

E-mail a Recording

Export a Single Recording

Open a Recording

Score a Recording

Show or Hide the Details Pane

Working with Recording Search Results

Monitor a Live Call

A live call that is in the process of being recorded can be monitored. As the call is being recorded, you can **Join** the call, **Listen** to the call, or **Coach** the agent during the call.

Assigning Security Rights

To monitor a live call, the monitoring user must have the Security Rights to **Coach**, **Join**, or **Listen** to a call. In the Security Rights **Category: User** under **Interaction Command Rights**, select **Coach**, **Join**, or **Listen**.

The monitoring user also needs Access Rights to **View**, **Modify**, and **Monitor** the call initiator's queues, such as Station Queues, User Queues, or Workgroup Queues, assigned under Access Control **Category: Queues**.

Note For Intercom calls, the monitoring user needs Access Rights for the initiator's queue *and* the respondent's queue to monitor a live intercom call.

Monitoring a Live Call

To monitor a live call recording in progress, follow these steps.

1. Run a recording search with search attributes that match the on-going call.

2. In the search results view double-click the call recording in progress. The recording playback window opens.
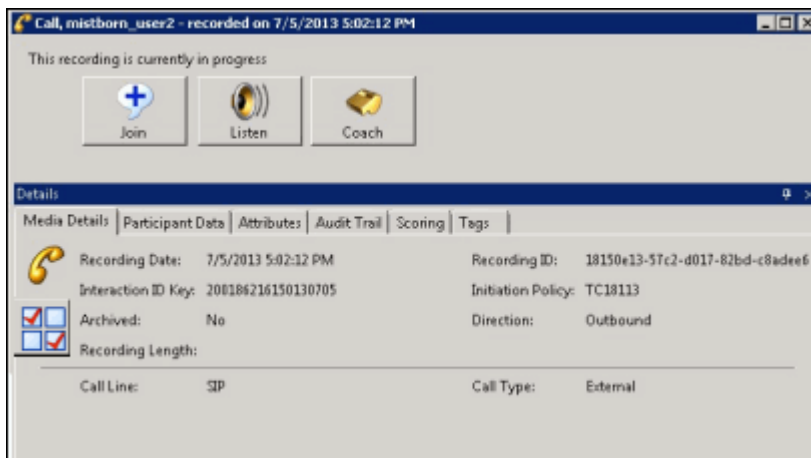
3. The dialog displays a live monitoring button bar that includes **Join**, **Listen**, and **Coach** options. To monitor the live call, click a button.

Live Monitoring Options

The following is a description of the live monitoring button bar options. The buttons are not available if the monitoring user does not have Security Rights to join, listen, or coach an interaction, or does not have Access Rights for any of the call initiator's queues.

Live Monitoring Options	
Option	**Description**

Join	Click this button to join the call in progress.
Listen	Click this button to listen to the call in progress.
Coach	Click this button to listen to the call and speak only to the agent on the call.

The live monitoring buttons are not available while processing a click for any of the buttons on the bar and also not available if the monitoring user does not have a station or is already a participant on the call.

Note Live Monitoring is not available for conference calls. When a conference call is in progress, the Join, Listen, and Coach options are not available. A message is displayed indicating the call is part of a conference and still in progress, and the recording is not available.

Tools Menu

Tools Menu

Interaction Recorder has a Tools menu on the menu bar. The Interaction Recorder Tools menu has the Manage Interaction Recorder Settings command.

Manage Interaction Recorder Settings

Access **Manage Interaction Recorder Settings** from the **Tools** menu.

Use Manage Interaction Recorder Settings to control the playback of Recorded Calls and to configure the Master Key Password.

To control the playback of Recorded Calls:

1. From the **Tools** menu, click **Manage Interaction Recorder Settings**. The Manage Interaction Recorder Settings dialog is displayed.

2. To have a recording playback immediately when the Detailed Results window is opened in the Search Results view, select the check box **Automatically begin playback of recorded calls**.

3. By default, Audio recordings are played back through your computer speakers. To playback recordings through your telephone handset, select the check box **Play recorded calls using the handset**.

To configure the Master Key Password:

Use the Master Key Password box to password protect the Master Key File and securely encrypt master key data. To create, change, or deactivate a Master Key Password, the user must be assigned the

Security Right Master Key Password Administrator. To configure the Master Key Password, from the **Tools** menu, click **Manage Interaction Recorder Settings**. The Manage Interaction Recorder Settings dialog is displayed.

To create a new Master Key Password or to change the current password, click **Change password**.

When you create a new Master key password or change the password, the password is Activated, and the Deactivate password button is displayed. To deactivate the password, click **Deactive password**. To activate the password, click **Activate Password**, and on the Activate Password dialog, type the password and click Activate.

> **Important Note**
> PureConnect Customer Care cannot recover encrypted recordings if a Master Key Password is lost.

Interaction Recorder Reports

Interaction Recorder Client Reports

Interaction Recorder client reporting is available in Interaction Reporter in IC Business Manager. For more information see Interaction Recorder Client Reporting.

Interaction Recorder Reporting

Interaction Recorder reporting is available in Interaction Reporter in IC Business Manager.

Interaction Recorder reports are listed under the Interaction Quality Manager Reports, and include:

- Calibration Details
- Calibration Question Group Details
- Calibration Recording Summary
- Quality Scoring Details
- Deleted Recording Audit by Date
- Deleted Recording Audit by User
- Recorder Questionnaire Detail
- Recorder Scoring Summary
- Recorder User Scoring Summary

For detailed information on running these reports, see the Interaction Reporter Help.

> **Note**
> You can also run a Quality Scorecard Report from Scorecard Search Results.

Index