NHC Call Recording

User Guide
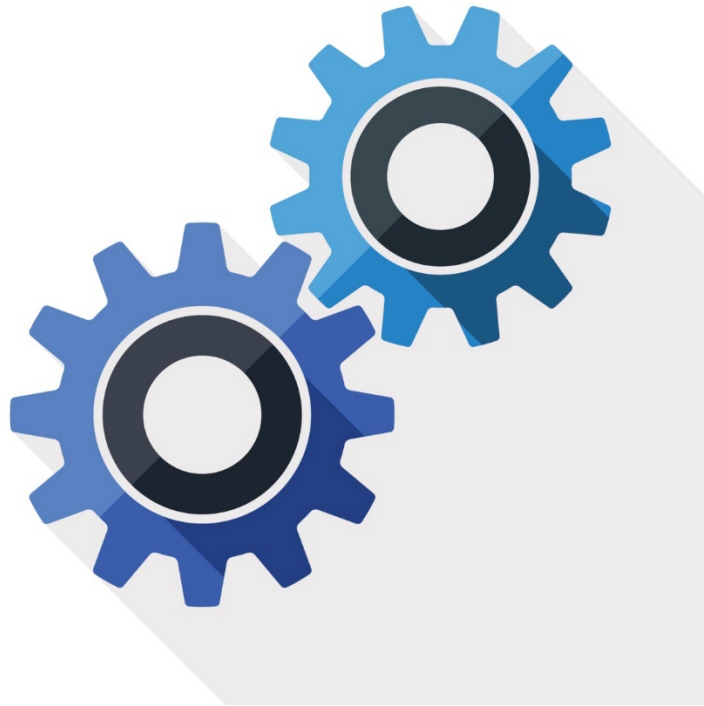
Version 1.0
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Call recording overview

NHC provides a Cloud Based Hosted Call Recording option, to easily record all incoming and outgoing telephone calls without the need for additional hardware or software.

Recorded calls are easily managed, cataloged, retrieved, and can be played back using web portal. All call recordings may also be downloaded and kept locally.

Accessing web portal

NHC Call Recording portal uses a web-interface, which can be accessed on any standard browser over your network or over the internet. The NHC Call Recording portal can be found at the following URL: https://nhcgrp.miarec.com/

Please enter your login credentials to access the portal.

Dashboard

NHC's dashboard provides an at-a-glance overview of calls-per-day, average call duration, current active calls and other details.

nhc. | 🕹 Dashboard | ▶ Recordings | ⅃ Reports | ⚙ Administration | 👤 admin.nhcgrp ▾

Dashboard

Wide view ⤢

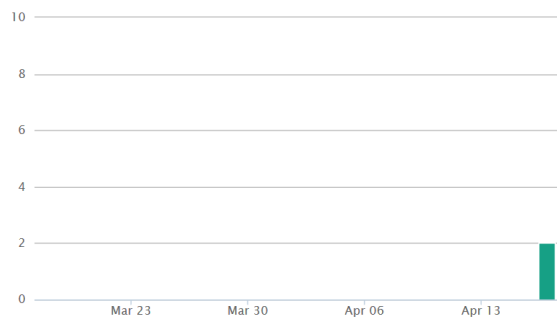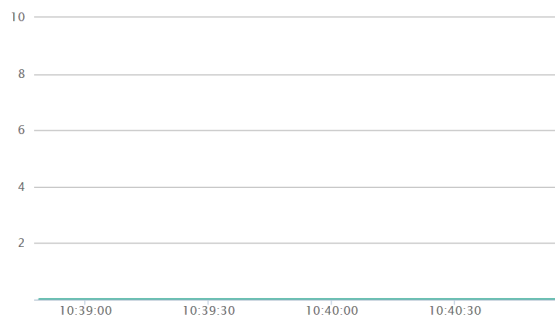| **2**	**0**	**0h 0m**	**0:17**
Calls Today	Calls Yesterday	Recorded Today	Avg Duration Today

LAST 30 DAYS (CALLS PER DAY)

REAL-TIME ACTIVE CALLS

Call recordings views

NHC supports the following call recording views as pictured:

Recordings

Available views:

View	Description
All calls	Displays all call recording (including active calls).
Active calls	Displays only active calls
My calls	Displays call recordings associated with the current logged in user
By user	Displays call recordings, which are grouped by user and user group
Not assigned to users	Displays call recordings, which were not assigned to any users; this view is visible to administrator accounts only
By category	Displays calls recordings grouped by category
Advanced search	Displays advanced search form

Search

NHC web portal provides two types of searching:

- **Quick search** by the most frequently used searching criteria date, user/group and text
- **Advanced search** by other attributes like call duration, call direction, etc.

Quick search

A Quick Search panel is displayed on all call view pages except the "Advanced Search" view. It includes the following searching criteria:

- Date Range
- User or Group
- Text

These are the most frequently used searching criteria available to user in one click.

Quick search by date range

To search recordings by date range, click in the "**Select a Date Range**" field and choose from one of the available options:

- Today
- Yesterday
- Last 7 Days
- Last 30 Days
- This Month
- Last Month
- Custom Range

Quick search by user or group

To search recordings by user or group, click in the "**Select a User or Group**" field. To search recordings by group, choose a group name from the list. To search recordings by user, choose a user name from the list.

The drop-down list includes an inline search box, which you can use to quickly locate the user or group in the long list. The following example demonstrates how group "Flexus – Sales Department" is quickly located using an inline search by text "sales":

Quick search by text

The "**Search a Text**" field allows users to search within multiple call attributes, like phone number, user name, call notes, etc.

The search results are highlighted as shown in the following screenshot.

	USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES	
☐	Sierra Bowyer	Jan 29, 2018	1:47 PM	5:14	832821234**0**	21311005002 (Sierra Bowyer)		⊞
☐	Arianne Riner	Dec 6, 2017	4:39 PM	0:18	5**1234**41914	88811001006 (Arianne Riner)		⊞
☐	Sheryl Macbeth	Aug 30, 2017	8:20 AM	2:46	8**1234**87120	12444001004 (Sheryl Macbeth)		⊞
☐	Yahaira Leon	Aug 21, 2017	6:51 AM	0:32	159**1234**208	21311001008 (Yahaira Leon)		⊞
☐	Peg Acre	Aug 1, 2017	3:47 PM	0:59	21311001003 (Peg Acre)	60**1234**7869		⊞

The "Search a Text" field performs a search in the following call attributes:

- Caller and called-party phone number
- Caller and called-party name as provided by phone system
- Original caller number, when available
- Originally dialed digits, when available
- Custom fields, when "Free Text Search" is enabled for the custom field.
- Call notes

Resetting searching criteria

To reset searching criteria, click a drop-down arrow of the "**Search**" button and select "**Reset search**" from the list.

Advanced search

The Advanced Search page allows users to search recordings by many call attributes, like:

- Date and Time
- Duration
- Call direction
- Group
- User
- Category
- Notes
- Phone number
- and others

The following screenshot demonstrates an example of searching by Group and Call Duration.

It supports various comparison operators like:

- Is / is not
- Starts with / ends with / includes (contains)
- Is empty / not empty
- Match simple pattern / match regex pattern
- Date before / after / between
- Date older than __ days / newer than __ days
- and others.

Saving the search criteria

You can save the advanced search criteria for later quick reference. The following screenshot demonstrates the saved search "Long calls (>5m)" to quickly access recordings longer than 5 minutes.

Playback and download

Inline basic media player

Click on one of the call recordings in a list to display an inline basic audio player. From this screen, you can playback the recording and, optionally, download audio file.

Advanced media player

Click the "**Open in new window**" or "**More details**" button to access the detailed call information with the Advanced Media Player.

The Advanced Media Player displays an audio waveform, which presents an easy way to detect periods of silence and talk-over within the conversation.
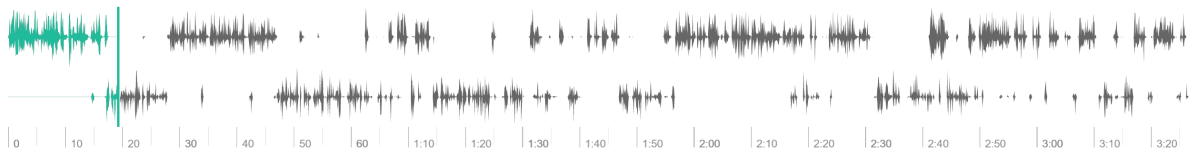
With the Advanced Media Player, you can easily control the playback speed from x1 to x2. Speeding up will allow you to listen to the recording faster, which saves time.

Call notes

You can add notes to call recording to save the related information. The following screenshot demonstrates notes in the inline call details view. The notes are shown on the extended call details page as well.

Notes are displayed from oldest to newest; additionally, it is possible to pin any notes on top (out of order).

Categories (tags)

NHC supports user-defined categories for call recordings.

To tag recordings with category, select one or more recordings, click the "**Categories**" button and choose the category from the list. You can assign multiple categories to the same call. To create new or edit the existing category, click "**New Category**" or "**Manage Categories**" button correspondingly.

Note, to categorize recordings and/or create/manage categories, your user role must have appropriate permissions.

To search recordings by category, you can use the "**Advanced Search**" page or navigate to the "**By category**" page, which displayed categories pane on the left:

Call flow reconstruction / multi-segment calls

NHC automatically recognizes multiple call segments of the longer interaction, for example, when a call has been transferred from one agent to another, or when a call has been put on hold, the agent made a consultative call to his/her supervisor and then resumed the initial call.

On the recordings page, you can see when the call segment is a part of longer interaction. The following screenshot shows three call segments, which belong to the same interaction.

	USER	DATE	TIME	DURATION	FROM	TO	
☐	3/3	Carrol Robards	Nov 20, 2017	6:59 PM	1:41	+1310_____	8088_____ (CSR 808_____)	⊕
☐	2/3	Carrol Robards	Nov 20, 2017	6:56 PM	2:52	8088_____ (CSR 808_____)	2056	⊕
☐	1/3	Carrol Robards	Nov 20, 2017	6:50 PM	5:40	+1310_____	808_____ (CSR 808_____)	⊕

Visualization of multi-segment calls

Each call segment is shown on a timeline. You can navigate easily to the next segment and playback it.

CALL [1]	CALL [2]	CALL [3]

MEDIA PLAYER   Switch to basic player | Wide view ⤢

```
|0  |10  20  |30  |40   |50  |60  |1:10  1:20  |1:30  1:40  |1:50  |2:00  2:10  2:20  |2:30  2:40  |2:50  |3:00  3:10  |3:20  3:30  3:40  |3:50  |4:00  4:10  |4:20  4:30  |4:40  |4:50  |5:00  |5:10  |5:20  5:30
```

▶ Play   ⬇ Save audio file

ALL CALLS IN THIS INTERACTION

TIME	DURATION	FROM -> TO	TIMELINE	
6:50 PM	5:40	+1310_____ -> 808_____ (CSR 808_____)		View
6:56 PM	2:52	808_____ (CSR 808_____) -> 2056		View
6:59 PM	1:41	+1310_____ -> 808_____ (CSR 808_____)		View

Supported call scenarios

NHC groups multiple call segment into a single interaction in the following call scenarios:

- An inbound call is transferred from one agent to another; in this case, both parts of the call will be added to the interaction.

- An agent puts the call on hold, makes an outbound consultative call, and then returns to their original call. In this case, all 3 calls will be added to the interaction.

- An agent has an active call occurring, and he/she receives a second incoming call. The agent places the first call on hold and proceeds to answer the new call. The agent then returns to their original call. In this scenario, the incoming call that occurs between the hold/resume event is treated as an outside interaction. Only the 1st and the 3rd call segments will be added to the interaction.

Agent evaluation

Agent Evaluation module provides contact center managers a tool to evaluate and monitor agent performance.

Prerequisites:

- Evaluator should have appropriate permissions to evaluate agents
- Agent should be assigned an Agent Evaluation license on user's profile page

To evaluate an agent, select a call recording and click "Evaluate" button in call details:
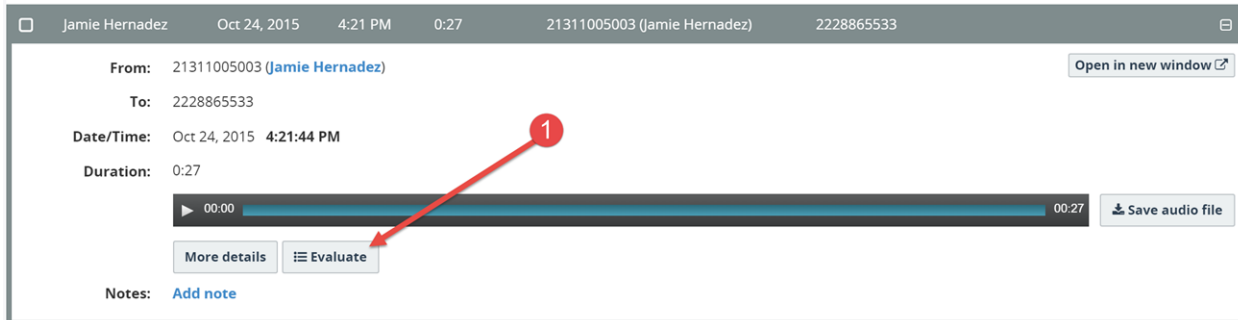
Select the evaluation form to use for this call:

Listen to the recording and answer questions in the evaluation form. Once all questions have been answered, the call will receive a score from 0 to 100 points.

Reports

To compare scores of multiple agents within a group, navigate to **Reports -> Evaluation Reports -> Group Reports**, select a group and date range for report.

This report shows the following statistics:

- Average, minimum and maximum agent's score for the period
- Total evaluations for agent

AGENT	TOTAL EVALUATIONS	MIN SCORE	MAX SCORE	AVG SCORE
Brandon Thornburg	21	61	98	89
Cedrick Irons	14	32	98	87
Damion Rein	14	85	97	92
Donette Olds	28	60	98	90
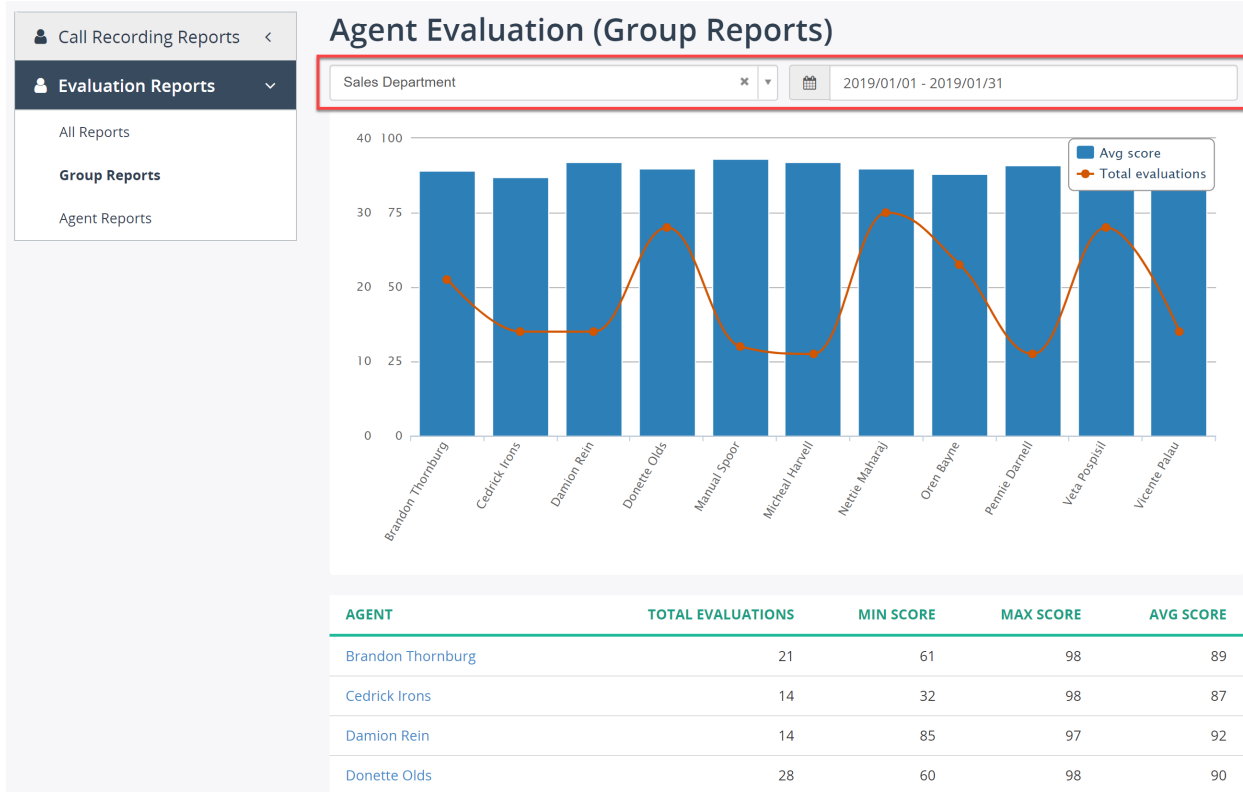
By clicking on agent's name in the Group Report, you can navigate to Agent's report:

Agent Evaluation (Agent Reports)

| Damion Rein | ✕ | ▼ | | 📅 | 2019/01/01 - 2019/01/31 |

14	85	97	92
Total evaluations	Min Score	Max Score	Avg Score
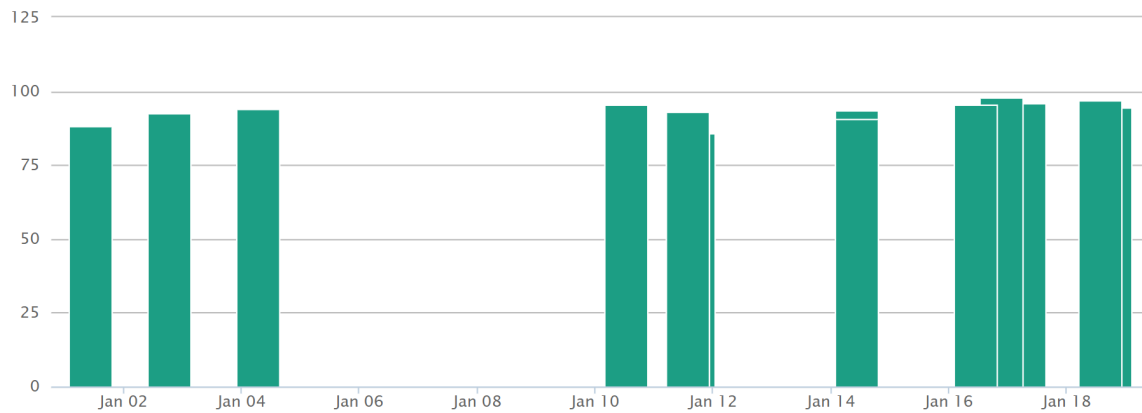
| ✕ Delete Evaluation | | | | 0-14 of 14 | ‹ › |

☐	CALL DATE/TIME	AGENT	GROUP	EVALUATION FORM	SCORE		
☐	Jan 18, 2019, 6:08 PM	Damion Rein	Sales Department	Inbound Tech Support	94	View	✎ Edit
☐	Jan 18, 2019, 2:10 PM	Damion Rein	Sales Department	Inbound Tech Support	97	View	✎ Edit
☐	Jan 17, 2019, 7:13 AM	Damion Rein	Sales Department	Inbound Tech Support	95	View	✎ Edit

Evaluation form designer

To customize the existing evaluation form or creating new one, navigate to **Administration -> Customization -> Evaluation Form Designer.** Here, you can add/edit/delete sections and questions respectively:

Evaluation Form «Inbound Tech Support»

Add Section   **Edit Form**   **Delete Form**

Name:	**Inbound Tech Support**
Tenant:	**Flexus**
Description:	**Sample evaluation form**

SECTIONS

+ Add Section

TITLE

▼ **GREETING**   ☑ Edit   ✖ Delete

Did the agent say "Thank you for calling"?   ☑ Edit   ✖ Delete

Did the agent mention his/her name?   ☑ Edit   ✖ Delete

Did the agent mention the company name?   ☑ Edit   ✖ Delete

If the call was transferred did the agent adapt the greeting accordingly?   ☑ Edit   ✖ Delete

Did the agent say "This call may be recorded..." (outbound only)?   ☑ Edit   ✖ Delete

+ Add question

▼ **VERIFICATION**   ☑ Edit   ✖ Delete

Did the agent ask for the caller's name?   ☑ Edit   ✖ Delete

Edit Question

Question *	Did the agent say "Thank you for calling"?
Description	
Answer Type	⦿ Multiple choice
	○ Numeric value
Display N/A option	☐ Allow to mark question N/A
Choices *	yes	5	Points ▾	☐ default ✕
	no	0	Points ▾	☑ default ✕

Add Option

Display As	○ Choice (multi-line)
	⦿ Choice (single-line)
	○ Select box
Weight	10
Order	1

Save

Live monitoring

Live monitoring feature allows the authorized users (supervisors) to listen to the active calls in real-time. Such feature helps monitor customer service in real-time, train new employees, and escalate problems as soon as possible.

To start live monitoring, open call details of the corresponding call in progress, and click "Live monitor this call" button. The Live Player application should pop-up allowing you to listen to the call in-progress. If the Live Player application doesn't pop-up, make sure it is installed on your computer. You can download it from: https://www.NHC.com/files/download/LivePlayerSetup.exe
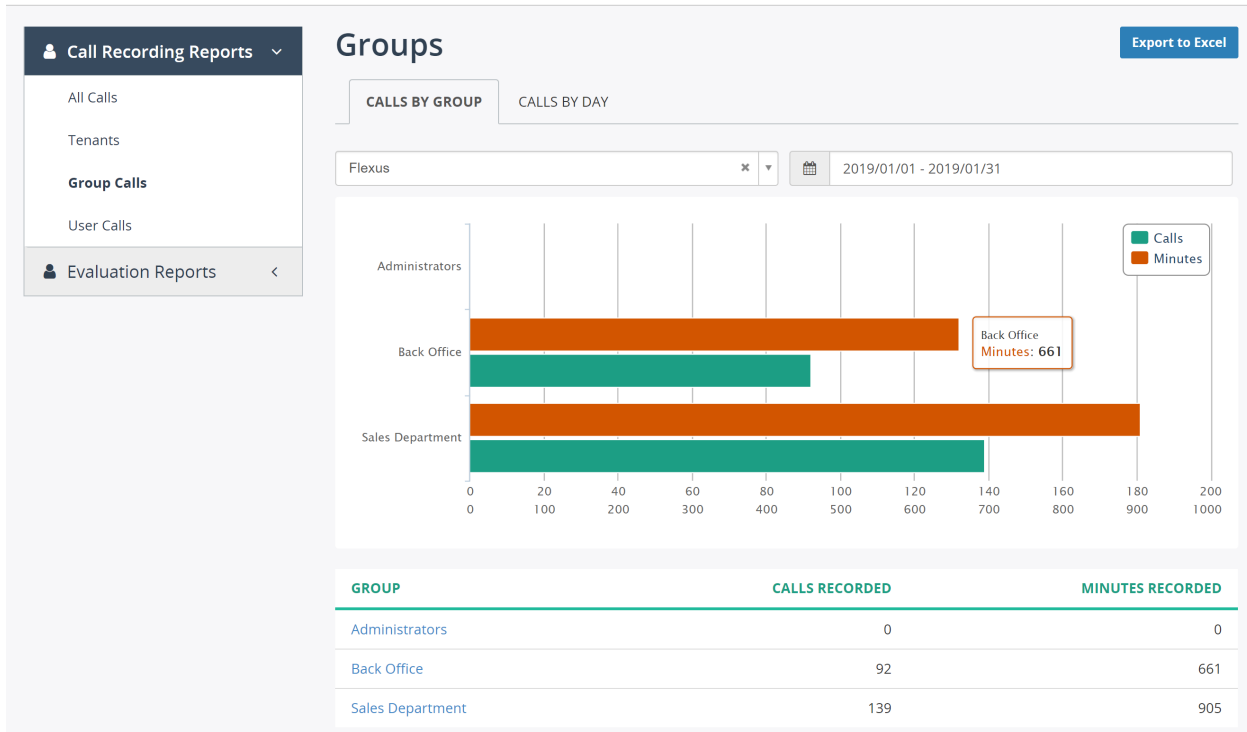
Reports

NHC provides a number of pre-configured reports:

- All calls report (calls per day)

- Tenants report (calls per tenant)

- Group Calls report (calls per group)

- User Calls report (calls per user)

The following screenshot demonstrates a "Group Calls" report.

Wide view ⤢

Reports

| Call Recording Reports ⌄ | | | |

Groups   Export to Excel

CALLS BY GROUP | CALLS BY DAY

| Group | Flexus | ✕ ▾ | 📅 2019/01/01 - 2019/01/31 |

Legend: Calls (teal), Minutes (orange). Tooltip: Back Office — Minutes: 661

GROUP	CALLS RECORDED	MINUTES RECORDED
Administrators	0	0
Back Office	92	661
Sales Department	139	905

Sidebar navigation:
- Call Recording Reports
  - All Calls
  - Tenants
  - **Group Calls**
  - User Calls
- Evaluation Reports

Speech-to-text transcription

NHC Speech-to-text transcription addon feature allows users to search for keywords and phrases in call recordings, providing more insights into customer interactions and helping uncover new opportunities for improving customer service. With NHC Speech-to-text transcription you will be able to transform voice data into critical business asset and identify trends and root causes of customer experiences.

MEDIA PLAYER   Switch to basic player | Wide view ⤢

|0 |10 |20 |30 |40 |50 |60 |1:10 |1:20 |1:30 |1:40 |1:50 |2:00 |2:10 |2:20 |2:30 |2:40 |2:50 |3:00 |3:10 |3:20 |3:30 |3:40 |3:50 |4:00 |4:1

[⏸ Pause] [⬇ Save audio file]

TRANSCRIPT

Side 1 [0:00]:   Lesley

Side 2 [0:00]:   Looks good .

Side 1 [0:01]:   thank you for holding . I do apologize for the wait . We have this new tool that I'm trying to do a search and to find more information about the lamp itself , and I'm not quite sure how to use it yet , so I'm kind of experimenting with it here that I can find the information that we're looking for but supposedly it has the information we're looking for so bear .

Side 2 [0:25]:   Well , okay cool now . I'm fine . I'm calling at lunch . You're fine .

Side 1 [0:29]:   Bear with me here , and hopefully we'll be able to find out the information .

Side 2 [0:34]:   Okay , terrific .

Side 1 [0:35]:   Maybe I need to do a test okay . There's a lamp for came up .

Alright .

To search recordings using text, navigate to "**Advanced Search**" page and select "**Transcript**" from the searching criteria, type in the text to search and hit "**Search**" button.

Custom fields

NHC supports custom fields, which may be used for storing any data, like order number, support ticket number, product name, call campaign, etc.

The custom fields may be displayed in a call list (see the screenshot below):

Additionally, customer field values are displayed in call details:

Users may use quick search or advanced search capability to find recordings by value in custom field:

Authorized users can edit custom field values on the call details page:

Role-based access control

Access to NHC Call Recording portal is controlled by role permissions, the default supported roles are (other roles can be created if necessary):

- **Administrators** – Read and Write permissions to create Administrators, Supervisors, and Users who need web access for reviewing their call recordings, along with disabling web access for any person.
- **Supervisor** – Read-only permission access to the call recordings of the Users they need to monitor.
- **User** – Read-only permission to their call recordings only if the user is allowed access to the portal (Default is no access to call recording portal).

The following diagram shows the user hierarchy, particularly:

- User can be a member of one or multiple groups
- User can be a manager of one or multiple groups
- User is assigned exactly one role
- User may have multiple extensions
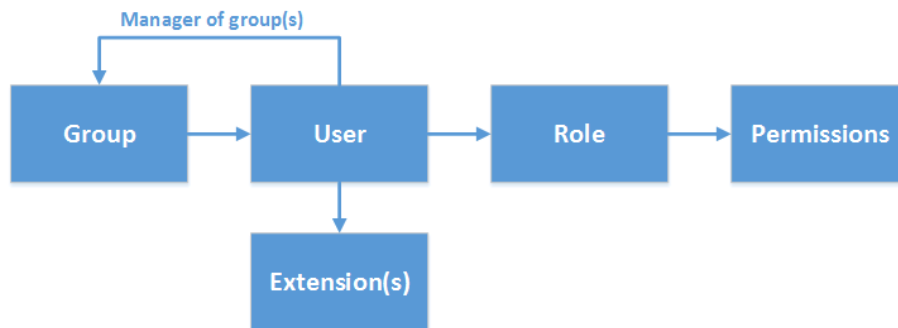
The role is associated with a set of granted permissions. Permissions include such privileges as "Configure System", "Configure Users", "Playback call recordings", "Delete recording", etc.
The following screenshot shows the example of permissions configuration.

Name *	Supervisor

Access scope *
- ○ Unrestricted
- ● System - Access is limited by permissions
- ○ Group - Access is limited to data within managed groups + permissions
- ○ User - Access is limited to own data only + permissions

Allow edit users of role

Select one or more Roles

If the current role has rights to create/edit/delete other users, then this option specifies which roles are permitted to create/edit/delete
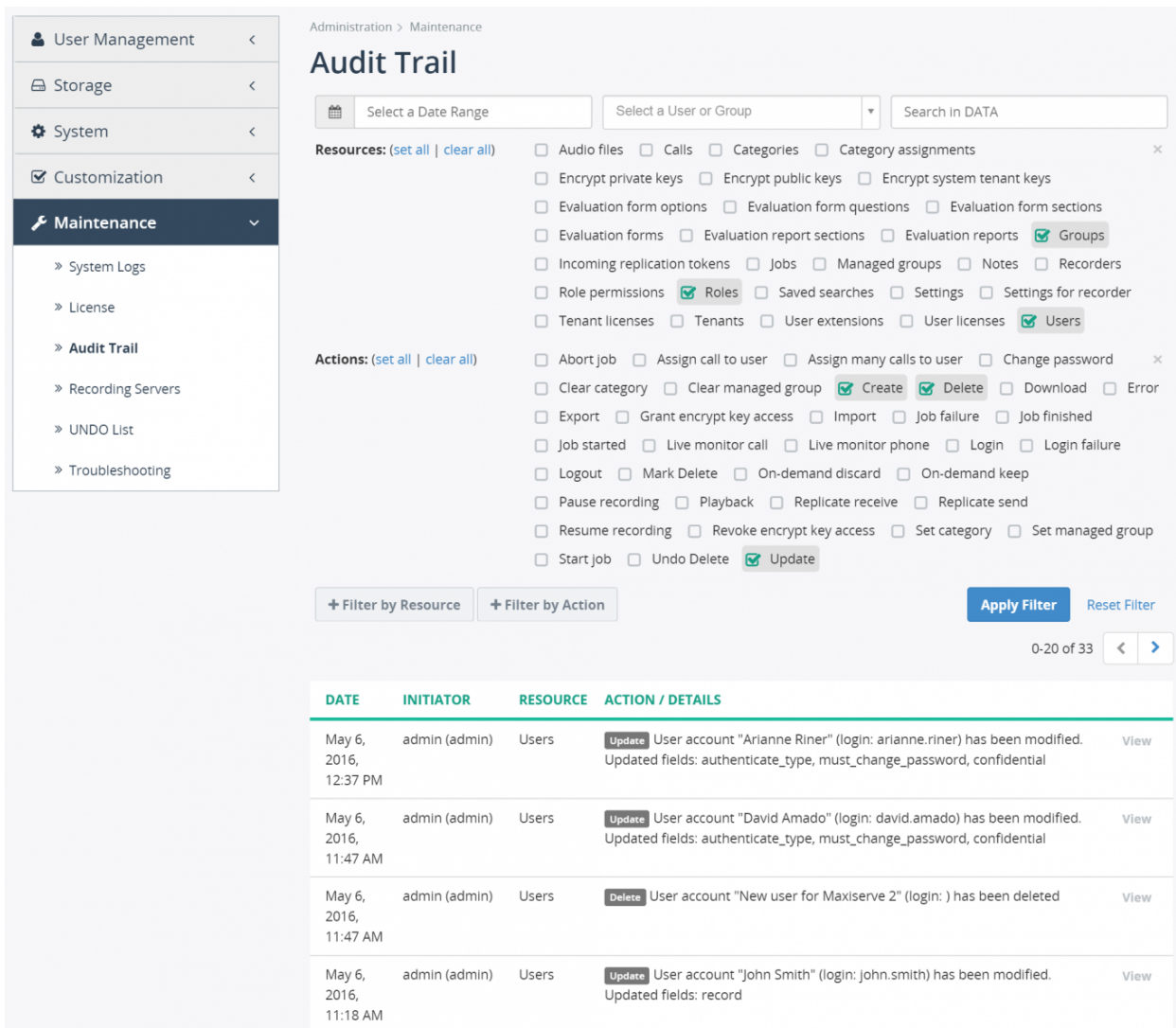

Permissions

SET ALL | CLEAR ALL

System configuration	☑ View ☐ Edit		set all | clear all
System log	☑ View ☐ Delete		set all | clear all
Audit trail	☑ View		set all | clear all
Custom fields designer	☑ View ☑ Edit ☐ Delete		set all | clear all
Tenants	☑ View ☑ Edit ☐ Delete		set all | clear all
Encryption keys	☑ View ☑ Export ☑ Edit ☐ Delete		set all | clear all
Roles	☑ View ☑ Edit ☐ Delete		set all | clear all
Groups	☑ View ☑ Edit ☐ Delete		set all | clear all
Users	☑ View ☑ Edit ☐ Delete		set all | clear all
Own calls	☑ View ☑ Playback ☑ Download ☑ Trigger on-demand ☑ Pause recording ☑ Categorize ☑ Add notes ☑ Set confidential flag ☑ Clear confidential flag ☑ Edit ☐ Delete		set all | clear all

Audit trail

NHC provides a comprehensive, detailed audit trail solution that is designed to meet corporate and regulatory needs. Audit Trail enables organizations to verify and demonstrate adherence to security policies and compliance imperatives by providing a complete solution encompassing all data and all applications contained in NHC.

Every function performed by every user is logged to Audit Trail. The log message includes such data as:

- Initiator of action
- Date/time
- Ip-address, from which the web portal has been accessed
- Resource and operation that was performed by initiator, like create, update, delete
- Additional info, like modified fields, previous and new values, etc.

Advanced search functionality allows to filter data by date, user, group or any internal data logged into message:

Additionally, when you view call details, user profile, or any other resource, you will be able to see all audit log messages associated with that object. The following screenshot shows sample call recording

![nhc. logo]

with the associated audit trail messages.

INFO		FROM		TO	
Date:	**Apr 7, 2016**	User:		User:	**Kim Skinner**
Connect Time:	**3:22:57 PM**	Phone Number:	**252503727**	Group:	**MiaRec Users**
Disconnect Time:	**3:25:37 PM**	Phone Name:		Phone Number:	**300**
Duration:	**2:40**	Phone Id:	**252503727**	Phone Name:	
Watermark:	**View**	Ip-address:	**127.0.0.1 (3001)**	Phone Id:	**300**
				Ip-address:	**127.0.0.1 (5080)**
		🔊 Live monitor phone 252503727		🔊 Live monitor phone 300	

Audit Trail

DATE	INITIATOR	RESOURCE	ACTION / DETAILS	
Today, 9:06 AM	admin (admin)	Calls	`Playback` User starts playback of call recording: 252503727 -> 300 , call time: Apr 7, 2016, 3:22:57 PM	View
Apr 29, 2016, 11:00 AM	admin (admin)	Calls	`Download` User downloaded call recording: 252503727 -> 300 , call time: Apr 7, 2016, 3:22:57 PM	View
Apr 29, 2016, 10:56 AM	admin (admin)	Calls	`Playback` User starts playback of call recording: 252503727 -> 300 , call time: Apr 7, 2016, 3:22:57 PM	View
Apr 28, 2016, 4:45 PM	admin (admin)	Category assignments	`Clear category` Category "Order" is removed from call with id e03f497d-bdff-1019-123a-cacf86657b83	View
Apr 28, 2016, 4:44 PM	admin (admin)	Category assignments	`Set category` Category "Refund" is assigned to call with id e03f497d-bdff-1019-123a-cacf86657b83	View

Change own password

In order to change your own password, click on your login name on the top right corner of the menu bar and select Change password from the drop-down menu.
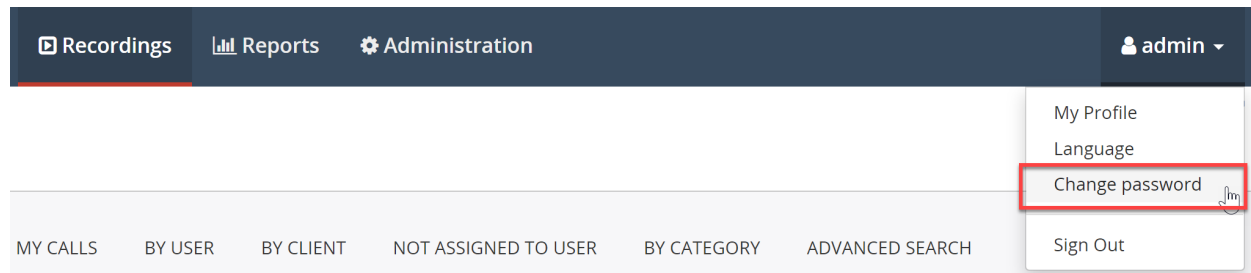
Reset password by email

To reset your own password by email, click the "**Forgot your password?**" link in the login page.

Provide your login name and email on the next screen. A password reset link will be emailed to you.

nhc.

Note, a password reset by email may be not available for your account if:

- Email is not configured on your user profile. Contact your system administrator to fix that.

- A Single Sign-On is activated for your user profile, i.e. the same credentials are used to NHC web portal Metaswitch CommPortal. In this case, you need to reset the password in the corresponding portal rather than in the NHC call Recording portal.