



# MiaRec Call Recording

Supervisor + Administrator

USER MANUAL



JANUARY 2023

# TABLE OF CONTENTS

CLICK ON ANY PAGE NUMBER TO RETURN TO THE TABLE OF CONTENTS

<a href="#">WHAT IS MIAREC CALL RECORDING</a>	1
<a href="#">UNDERSTANDING ROLES AND PERMISSIONS</a>	2
<a href="#">ROLES</a>	3
<a href="#">CONFIGURE ACCESS SCOPE</a>	4
<a href="#">ADD ROLES</a>	6
<a href="#">GROUPS</a>	7
<a href="#">USERS</a>	9
<a href="#">CUSTOMIZATION</a>	13
<a href="#">EVALUATION FORM DESIGNER</a>	14
<a href="#">BRANDING</a>	17
<a href="#">CUSTOM FIELDS</a>	18
<a href="#">SPEECH ANALYTICS</a>	19
<a href="#">SCREEN RECORDING</a>	20
<a href="#">INSTALL CLIENT APPLICATION</a>	21
<a href="#">AUTHORIZE NEW WORK STATIONS</a>	22
<a href="#">LISTEN TO RECORDINGS</a>	23
<a href="#">SEARCH RECORDINGS</a>	25
<a href="#">ADD NOTES TO CALLS</a>	27
<a href="#">CATEGORIZE CALLS</a>	28
<a href="#">ASSIGN TO A CLIENT</a>	29
<a href="#">MULTI-PART CALLS</a>	30
<a href="#">ON-DEMAND RECORDING</a>	31
<a href="#">LIVE MONITOR</a>	32
<a href="#">VIEW + ADD AGENT EVALUATIONS</a>	34
<a href="#">REPORTS</a>	36
<a href="#">USER PROFILE</a>	38
<a href="#">AUDIT TRAIL</a>	39
<a href="#">MISCELLANEOUS</a>	40
<a href="#">IMPORTANT DISCLAIMER</a>	40

# WHAT IS MIAREC CALL RECORDING

MiaRec is a call recording and quality management solution for unified communications. MiaRec solutions portfolio offers advanced contact-center functionality such as call recording, live monitoring, reporting, screen capture, quality management and speech analytics. The functionality in your business group is based on the licenses that have been purchased.

Recording can be automatic for both inbound and outbound calls, outbound only, inbound only or recording can be done "on-demand". Screen recording is also available based on the licensing purchased.

Each Business Group that is licensed for Call Recording is known as the "Tenant". There are four levels of users within the MiaRec solution.

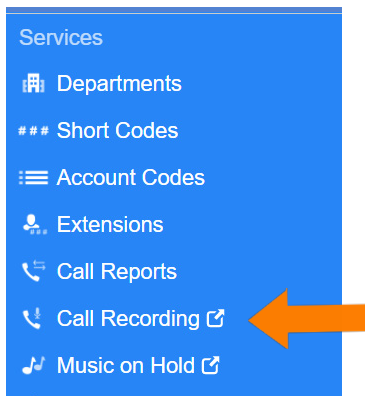
- + **Root Administrator:** Users of this role are the Northland technicians who have unlimited access to the system.
- + **Administrator:** Users of this role have a set of permissions as configured by the Root Administrator. By default users of type Administrator can create/edit other user accounts.
- + **Supervisor:** Supervisor has access to call recordings, which are associated with users in his/her managed group(s). They cannot create/edit other user accounts.
- + **Agent:** Agents have access to their own call recordings only.

## LOG IN

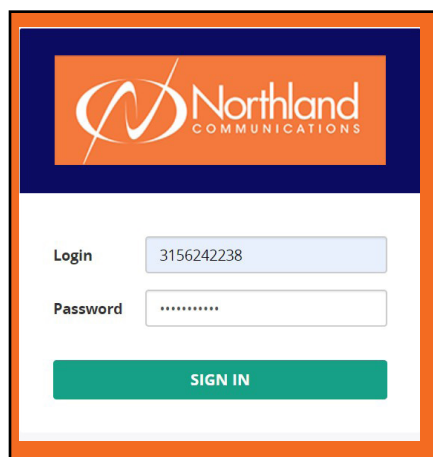
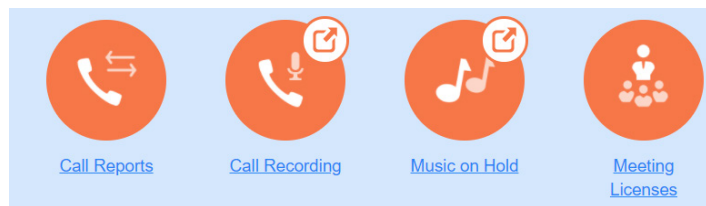
The MiaRec log in screen can be accessed through the Business Group Admin CommPortal:

<https://bucommportal.northland.net/bg>

### COMMPORTAL



- + From the Home Screen of the BG CommPortal Admin, in the menu on the left, go to the Services Section and select Call Recording.
- + You can also access the log in screen from the by selecting the Call Recording widget as shown below.



The log in screen is displayed. MiaRec uses a web-interface, your 10 digit Subscriber number and your CommPortal EAS password to log in.

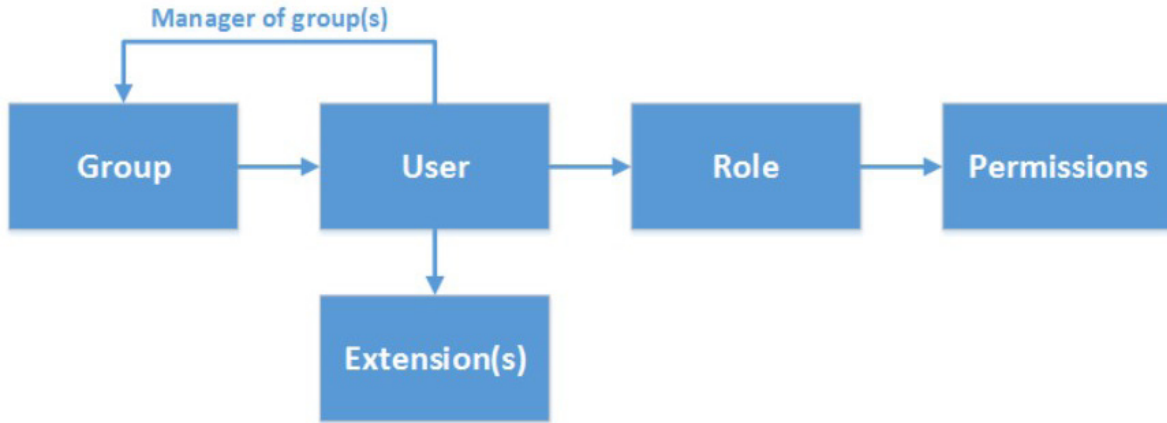
- + Enter your 10 digit Subscriber number.
- + Enter your CommPortal EAS password.
- + Select **SIGN IN**.  
This will bring you to your administrator dashboard. See [page 2](#).

**NOTE:** You can also access the log in screen through the direct link to MiaRec: <https://miarec-siprec.northland.net>.

# UNDERSTANDING USER ROLES AND PERMISSIONS

2

MiaRec software provides role-based access control feature with granular permissions. Each user account is associated with one role. And each role is configured with a set of permissions.



Each role is associated with a set of permissions, which are granted to users of this role. Permissions include such privileges like “Configure System”, “Configure Users”, “Playback calls”, “Delete calls” etc.

User management is located under the Administrative tab in the dashboard. This is where Roles can be viewed and edited.

Administration > User Management > Roles

Role «Administrator» Delete Role

Role Name: Administrator  
Access scope: Tenant

**ADMIN PERMISSIONS**

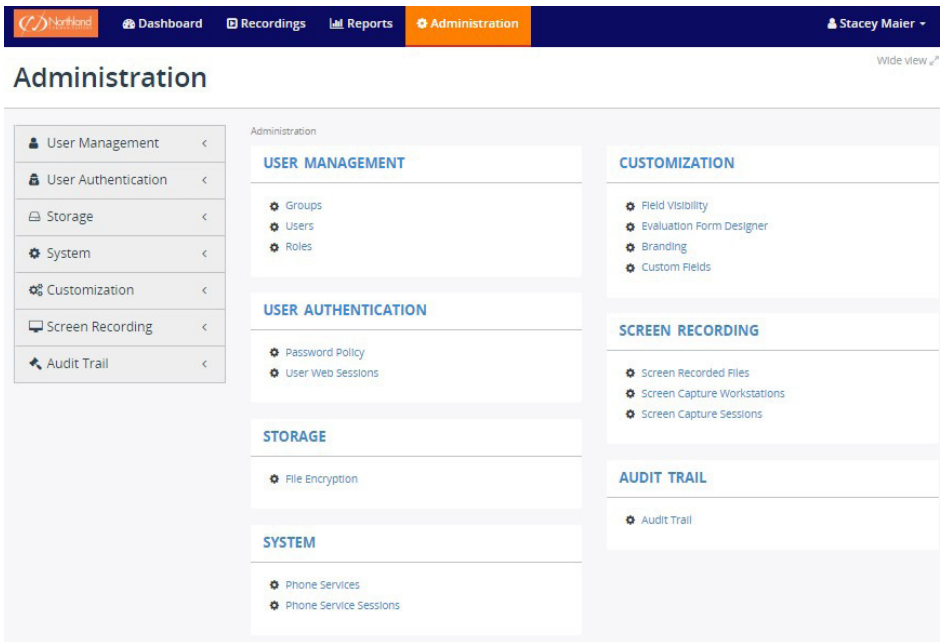
Phone services configuration	✓ View	✓ Edit		
Phone service sessions	✓ View	✓ Delete		
Screen recording clients	✓ View	✓ Edit	✓ Delete	
Custom fields designer	✓ View	✓ Edit	✓ Delete	
Branding	✓ View	✓ Edit		
Field visibility configuration	✓ View	✓ Edit		
Encryption keys	✓ View	✓ Export	✗ Edit	✗ Delete
Roles	✓ View	✗ Edit	✓ Delete	
Groups	✓ View	✓ Edit	✓ Delete	
Users	✓ View	✓ Edit	✓ Impersonate	✓ Delete

Need support? Connect with us at [www.northland.net/support](http://www.northland.net/support) or Dial 4357 (HELP) or 315-671-6262 to speak to a Northland Representative

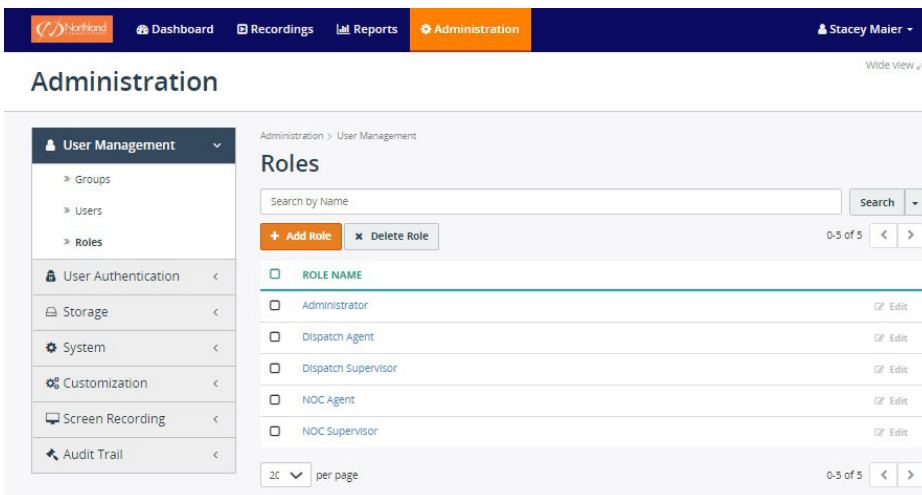
# ROLES

Each user in the MiaRec system should be assigned a role. The role defines what system resources are accessible by the user and what operations are permitted on these resources.

In the menu go to **Administration > Users Management > Roles** to see a list of available roles. During installation MiaRec automatically pre-creates a few roles. The Root Administrator at Northland Communications can add roles based on programming needs. Tenant Administrators may create new roles or modify existing ones.



The roles that are available within the "Tenant" or Business Group are displayed. Here we see the roles for this Tenant. The Tenant Administrator can edit or add roles.



# CONFIGURE ACCESS SCOPE

Access scope settings specify which resources are accessible by the user of each role. The initial permissions are set by Northland Communications Root Administrators, but additional permissions and/or roles can be edited or added by the Tenant Administrator when permissions allow.

## EDIT ROLES



- + On the Administration tab, select **Edit** on the right.
- + A list of available Access Scope Permissions for the selected role is displayed.
- + Permissions are divided into **Admin permissions** and **Other permissions**.

## ADMIN PERMISSIONS

Edit Role «Dispatch Supervisor»

Name \*

Access scope \*  
 Tenant - Access is limited to tenant's data - permissions  
 Selected Groups - Access is limited to data of selected groups - permissions  
 User - Access is limited to own data only - permissions

Restrict edit of other users  The current role can create/edit/delete other users of particular roles only  
If the current role has rights to create/edit/delete other users, then this option specifies which roles are permitted to create/edit/delete (see "Managed roles")

Managed roles

ADMIN PERMISSIONS SET ALL | CLEAR ALL

Phone services configuration	Not allowed for this access scope
Phone service sessions	Not allowed for this access scope
Screen recording clients	Not allowed for this access scope
Custom fields designer	Not allowed for this access scope
Branding	Not allowed for this access scope
Field visibility configuration	Not allowed for this access scope
Encryption keys	Not allowed for this access scope
Roles	Not allowed for this access scope
Groups	<input checked="" type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Delete <span>set all   clear all</span>
Users	<input checked="" type="checkbox"/> View <input type="checkbox"/> Edit <input checked="" type="checkbox"/> Impersonate <input type="checkbox"/> Delete <span>set all   clear all</span>
User licensing settings	<input checked="" type="checkbox"/> View <input type="checkbox"/> Edit <span>set all   clear all</span>
User web access settings	<input checked="" type="checkbox"/> View <input type="checkbox"/> Edit <span>set all   clear all</span>
User 2.step verification settings	<input type="checkbox"/> View <input type="checkbox"/> Edit <input type="checkbox"/> Delete <span>set all   clear all</span>
User recording settings	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <span>set all   clear all</span>
User web sessions	Not allowed for this access scope
Password policy	Not allowed for this access scope
Evaluation forms	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete <span>set all   clear all</span>

**NOTES:** The example on the left is a partial display which shows the **Admin permissions** of the Role "Dispatch Supervisor". See [page 5](#) for **Other permissions** for the Role, "Dispatch Supervisor".

The permission options vary by the access scope assigned. In the example to the left, the first group of settings are grayed out as the access scope selected is "Groups", which does not have access to these Administrator level permissions. The permissions in this section relate to what the role can do in terms of administering their groups.

The first Admin item with permissions is **Groups**. In the example, the role, "Dispatch Supervisor" can **View** his/her own groups but cannot **Edit** or **Delete** them.

Looking at the permissions in the field, **Users**, the role, "Dispatch Supervisor" can **View** and **Impersonate** the user but cannot **Edit** or **Delete** it. **Impersonate** gives the ability to view the agent's dashboard as they view it.

# OTHER PERMISSIONS

OTHER PERMISSIONS		SET ALL   CLEAR ALL
Audit trail	<input type="checkbox"/> View	set all   clear all
Own call recordings	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Playback <input checked="" type="checkbox"/> Download <input checked="" type="checkbox"/> Trigger on-demand <input checked="" type="checkbox"/> Pause recording <input checked="" type="checkbox"/> Categorize <input checked="" type="checkbox"/> Add notes <input checked="" type="checkbox"/> Set confidential flag <input checked="" type="checkbox"/> Clear confidential flag <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	set all   clear all
Other users' call recordings	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Playback <input checked="" type="checkbox"/> Download <input checked="" type="checkbox"/> Trigger on-demand <input checked="" type="checkbox"/> Pause recording <input checked="" type="checkbox"/> Live monitor <input checked="" type="checkbox"/> Categorize <input checked="" type="checkbox"/> Add notes <input checked="" type="checkbox"/> Set confidential flag <input checked="" type="checkbox"/> Clear confidential flag <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete	set all   clear all
Cisco UCCE call details	<input type="checkbox"/> View	set all   clear all
Confidential calls	<input checked="" type="checkbox"/> View	set all   clear all
Own screen recordings	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Playback <input checked="" type="checkbox"/> Download <input type="checkbox"/> Delete	set all   clear all
Other users' screen recordings	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Playback <input checked="" type="checkbox"/> Download <input type="checkbox"/> Delete	set all   clear all
Phone services	<input checked="" type="checkbox"/> Allow	set all   clear all
Public categories	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete	set all   clear all
Clients	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Assign calls <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	set all   clear all
Public saved searches	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete	set all   clear all
Own notes	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Pin <input checked="" type="checkbox"/> Delete	set all   clear all
Other users' notes	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Pin <input type="checkbox"/> Delete	set all   clear all
Own evaluations of agents	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input checked="" type="checkbox"/> Delete	set all   clear all
Other managers' evaluations of agents	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	set all   clear all
Evaluations of self	<input checked="" type="checkbox"/> View	set all   clear all
REST API	<input checked="" type="checkbox"/> Allow	set all   clear all

[Save](#)

**NOTES:** The example on the left is a partial display which shows the **Other permissions** of the Role "Dispatch Supervisor". See [page 4](#) for Admin permissions for Role, "Dispatch Supervisor".

Some settings are restricted at the Tenant level and can only be changed by Northland Communications.

The settings in this section relate to what the role can do in terms of their own or others' recordings.

To edit any of the permissions, check or uncheck the appropriate permission in the list.

**Set all**, will choose all permissions in a row, **clear all** will clear all permissions in a row.

When finished editing permissions, select **Save**.

## ADD ROLES

The Tenant Administrator has the ability to add roles to existing groups. The following roles can be added by the Tenant Administrator.

- + **Tenant** - Access is limited to tenant's data + permissions.
- + **Selected Groups** - Access is limited to data of selected groups + permissions.
- + **User** - Access is limited to own data only + permissions.

In the example below, we want to add a Supervisor role that can manage roles Dispatch Agent and NOC Agent.



- + On the Administration tab, select **Add Role**.

### Administration

 The screenshot shows the 'Add Role' form in the Administration tab. The form has a left sidebar with navigation options: User Management (Groups, Users, Roles), User Authentication, Storage, System, Customization, Screen Recording, and Audit Trail. The main form area is titled 'Add Role' and contains the following fields:
 

- Name \***: A text input field containing 'NOC Dispatch Supervisor'.
- Access scope \***: A radio button selection with three options:
  - Tenant - Access is limited to tenant's data + permissions
  - Selected Groups - Access is limited to data of selected groups + permissions
  - User - Access is limited to own data only + permissions
- Restrict edit of other users**: A checkbox with the label 'The current role can create/edit/delete other users of particular roles only'. Below it, a note states: 'If the current role has rights to create/edit/delete other users, then this option specifies which roles are permitted to create/edit/delete (see "Managed roles")'.
- Managed roles**: A text input field containing 'Select one or more Roles'.
- ADMIN PERMISSIONS**: A section with a 'SET ALL | CLEAR ALL' link. Below it, a table shows 'Phone services configuration' with the status 'Not allowed for this access scope'.

- + Assign the new role a name. (NOC Dispatch Supervisor).
- + Select the Role type. (Selected Groups).
- + Do not use **Restrict edit of other users** or **Managed Roles**. This should be done at the user level.
- + Assign **Admin permissions** for the new role.
- + Assign **Other permissions** for the new role.
- + Select **Save**.



# GROUPS



Each user should belong to a group. Most users are just members of their group, but some users may be managers or supervisors of their group(s). A single user may be a manager/supervisor of multiple groups at the same time.

## LIST OF GROUPS

To view the list of available groups, go to **Administration > Users Management > Groups**. During installation Northland Communications automatically pre-creates any groups that were discussed during the information gathering phase of the installation. Administrators may create new groups or edit existing ones.

Administration > User Management > Groups

Search by Name  Search

+ Add Group x Delete Group 0-3 of 3

<input type="checkbox"/>	GROUP NAME	TOTAL USERS		
<input type="checkbox"/>	Administrator Group	24	+ Add User	Edit Group
<input type="checkbox"/>	Dispatch Group	2	+ Add User	Edit Group
<input type="checkbox"/>	NOC Group	7	+ Add User	Edit Group

20 per page 0-3 of 3

## VIEW GROUP

The group's profile page displays a list of all users who are a member of this group. Select the group to view it's users.

Administration > User Management > Groups

Group «NOC Group» Edit Group Delete Group

Group Name: NOC Group  
Timezone: default

Users

Search by Text  Search

+ Add User x Delete User Bulk Edit 0-7 of 7

<input type="checkbox"/>	NAME	ROLE	RECORDING	EXTENSION	
<input type="checkbox"/>	Adam Gardner	NOC Agent	Always Inbound only	-13156242133	Edit
<input type="checkbox"/>	Chip Green	NOC Agent	Always Inbound only	-13156242018	Edit
<input type="checkbox"/>	Claesen Wyckoff	NOC Agent	Always Inbound only	-13156242051	Edit
<input type="checkbox"/>	David Stewart	NOC Supervisor	Always Inbound only	-13156242099	Edit
<input type="checkbox"/>	Duane Polovick	NOC Agent	Always Inbound only	-13156242074	Edit
<input type="checkbox"/>	Patrick Litz	NOC Agent	Always Inbound only	-13156242221	Edit
<input type="checkbox"/>	Stacey House	NOC Agent	On-demand	-13156242021	Edit

20 per page 0-7 of 7

AUDIT TRAIL

Show

## EDIT GROUP SETTINGS

Select **Edit Group** to view and edit the configuration of groups which includes the following options:

- + **Group name**
- + **Time zone** which will be used by default for each user in this group.  
The time zone setting may be overridden on a user's profile page.

Administration > User Management > Groups

### Edit Group «NOC Group»

<b>Name *</b>	<input type="text" value="NOC Group"/>
<b>Timezone</b>	<div><input type="text" value="Select from list"/> <input type="text" value=""/> (UTC-12:00) Etc/GMT-12 (UTC-11:00) Etc/GMT-11 (UTC-11:00) Pacific/Apla (UTC-11:00) Pacific/Fakaofu (UTC-11:00) Pacific/Midway (UTC-11:00) Pacific/Niue (UTC-11:00) Pacific/Pago_Pago (UTC-11:00) Pacific/Pago_Pago</div>

# USERS

Each user should belong to a group. Most users are just members of their group, but some users may be managers or supervisors of groups. A single user may be a manager/supervisor of multiple groups at the same time.

## LIST OF USERS

To view the list of users, go to **Administration > User Management > Users**. You can search users by name, group, role or extension.

The screenshot shows the Northland Administration interface. The top navigation bar includes 'Northland', 'Dashboard', 'Recordings', 'Reports', 'Administration', and 'Stacey Maier'. The main content area is titled 'Administration' and shows the 'User Management' section. On the left is a sidebar menu with options like 'User Management', 'User Authentication', 'Storage', 'System', 'Customization', 'Screen Recording', and 'Audit Trail'. The main area displays a table of users with columns: NAME, GROUP, ROLE, RECORDING, and EXTENSION. The table lists 10 users with their respective details.

NAME	GROUP	ROLE	RECORDING	EXTENSION
Adam Gardner	NOC Group	NOC Agent	Always inbound only	-13156242133
Ashley DeSimone	Administrator Group	Administrator	Never	
Bart Holstein	Administrator Group	Administrator	Never	
Brian Healey	Administrator Group	Administrator	Never	
Chip Green	NOC Group	NOC Agent	Always inbound only	-13156242018
Claesen Wyckoff	NOC Group	NOC Agent	Always inbound only	-13156242051
Dan Amado	Administrator Group	Administrator	Never	
David Stewart	NOC Group	NOC Supervisor	Always inbound only	-13156242099
Duane Polovick	NOC Group	NOC Agent	Always inbound only	-13156242074

# VIEW USER

To view an individual user, select the user name. The user settings are displayed.

Administration > User Management > Users

## User «Patrick Litz»

[Edit User](#) [Impersonate](#) [Delete User](#)

User Info Security

Name: Patrick Litz  
 Status: **Active**  
 Role: NOC Agent  
 Group: NOC Group  
 Email:  
 Timezone: Default  
 Language: Default  
 Created Time: Aug 18, 2020, 1:09 PM

### RECORDING SETTINGS

Record: **always**  
 Record direction: **inbound only**  
 Extensions: +13156242221  
 Confidential: **no**  
 Screen Recording Login:

### WEB ACCESS SETTINGS

Login: 3156242221  
 Allow web access: **yes**  
 Authenticate with: Metaswitch CommPortal  
 Must change password: **no**  
 Valid till:  
 2-step verification: **Disabled** 2-step verification is not configured on this system  
 Last login time:

### LICENSING

Recording seat license: **yes**  
 Screen recording seat license: **no**  
 Monitoring seat license (as agent): **yes**  
 Evaluation seat license (as agent): **yes**  
 Speech analytics license: **yes**

### AUDIT TRAIL

Show

- + **Edit** to make changes to the user settings.
- + **Impersonate** to view the dashboard as the agent.
- + **Delete** to delete the user.

**NOTE:** Not all roles are permitted to delete users.

## EDIT USER

To edit a user, select **Edit User** on the right. Here is where the basic settings, recording, web access, phone settings and licensing are edited.

**NOTE:** Not all roles can edit all of the above.

### USER SETTINGS

Administration > User Management > Users

#### Edit User «David Stewart»

Name *	<input type="text" value="David Stewart"/>
Status	<input checked="" type="checkbox"/> Active
Role *	<input type="text" value="NOC Supervisor"/>
Group *	<input type="text" value="NOC Group"/>
Managed groups	<input type="text" value="NOC Group"/>
Email	<input type="text"/>
Timezone	<input type="text" value="Select from list"/> Leave empty for default
Language	<input type="text" value="Default"/>

- + Edit the basic user information such as name, role, managed groups, etc. in this section.
- + When the user's role has access level "Group Supervisor", the groups managed is configured here.
- + The group supervisor has access only to users and their call recordings, that belong to their managed groups.
- + One or more managed groups can be selected from the list.

### RECORDING SETTINGS

#### RECORDING SETTINGS

Record	<input checked="" type="radio"/> Always <input type="radio"/> On-demand <input type="radio"/> Never <input type="radio"/> Default
Record direction	<input checked="" type="checkbox"/> Inbound <input type="checkbox"/> Outbound
Extension	<input type="text" value="+13156242099"/> <input type="button" value="x"/> <input type="button" value="x"/>
	<a href="#">Add Extension</a>
Confidential calls	<input type="checkbox"/> Automatically mark all calls of this user as confidential
Screen Recording Login	<input type="text"/>
	<small>Supported formats: NETBIOS/login, DOMAIN/login, login</small>

- + Select how this user will be recorded: Always, on-demand, never, default (Record).
- + Select direction: Inbound, Outbound or both.
- + Specify the extensions assigned to this user. MiaRec uses the extensions configuration to automatically associate call recordings with users.
- + **Add Extension** is restricted by Northland Communications.
- + Users whose calls are marked confidential will not be heard when calling users that are being recorded unless the "role" of the person playing the recording has permissions to listen to confidential calls.
- + When using screen recording, enter the login which is the PC name.

### WEB ACCESS SETTINGS

#### WEB ACCESS SETTINGS

Login	<input type="text" value="3156242099"/>
Allow web access?	<input checked="" type="checkbox"/> Yes, user can login to web portal
Authenticate with	<input type="radio"/> Password <input type="radio"/> LDAP <input type="radio"/> Broadworks Web Portal <input checked="" type="radio"/> Metaswitch CommPortal <input type="radio"/> SAML 2.0
2-step verification	<input type="checkbox"/> Require 2-step verification for user login <small>Warning! 2-step verification is not enabled in the Administration -&gt; User Authentication -&gt; 2-Step Verification</small>
Valid till	<input type="text" value="yyyy-mm-dd"/>

- + When the user has access to MiaRec web portal, the login is their 10 digit subscriber number and their password will be the password they use to log into CommPortal.

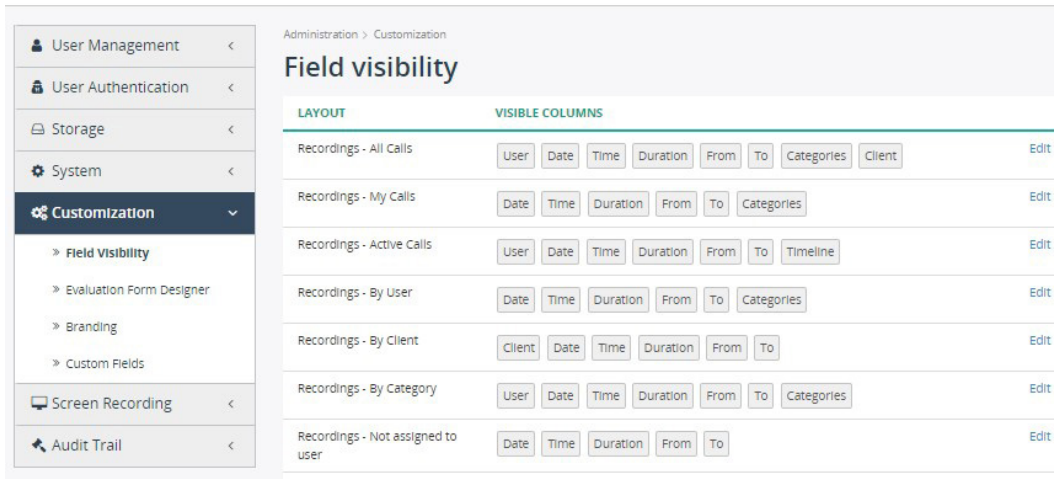
The screenshot shows a settings page with two main sections: 'PHONE SERVICES' and 'LICENSING'. Under 'PHONE SERVICES', there is a 'Phone services PIN' field with a 'Set/reset PIN' link and a note 'Digits only. Minimum 3 digits'. Under 'LICENSING', there are five checkboxes: 'Call recording seat license' (checked), 'Screen recording seat license' (unchecked), 'Monitoring seat license (as agent)' (checked), 'Evaluation seat license (as agent)' (checked), and 'Speech analytics license' (checked). A 'Save' button is located at the bottom right of the licensing section.

- + Set or reset the user Pin in the Phone Services Section.
- + Tenant administrators can move licenses from one agent to another.
- + Tenant administrators are restricted from adding or deleting licenses as this can affect pricing.

## CALL LIST LAYOUT

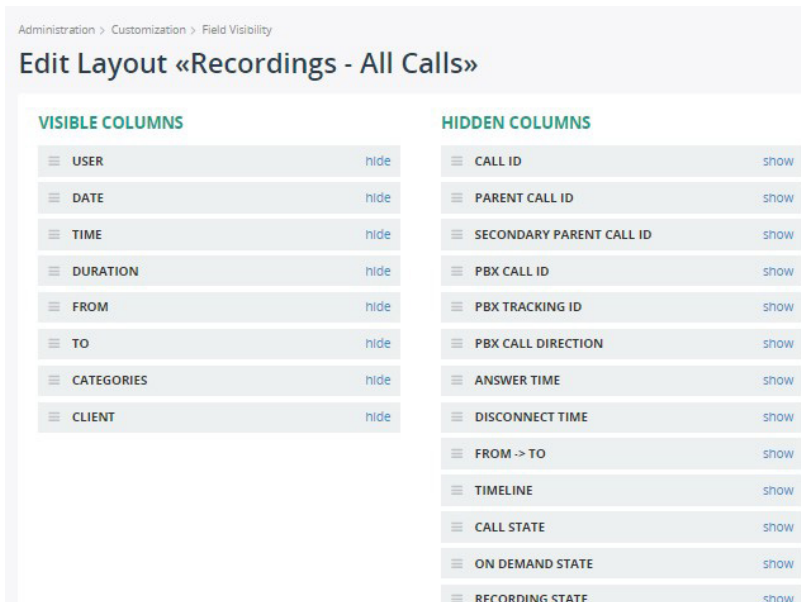
The list of visible columns is configurable. Navigate to **Administration > Customization > Field visibility** to specify which columns are visible or not visible.

### Administration



+ Select **Edit** for the list to change visible columns and their orders.

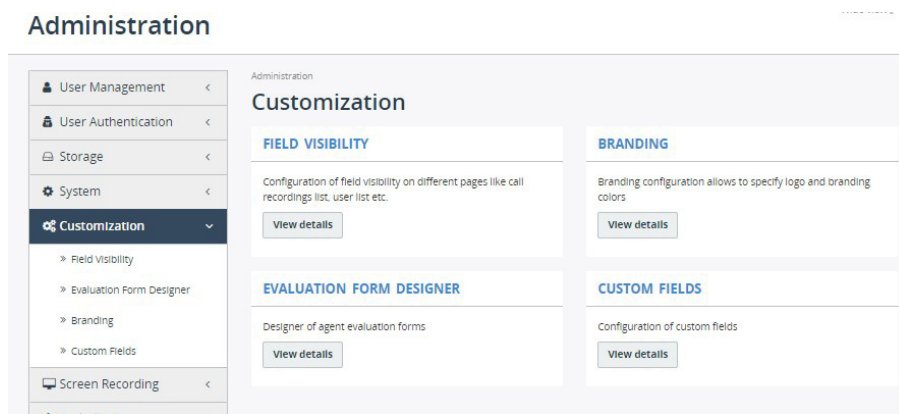
The left shows the columns that are currently visible in the specified list. The right shows all available columns.



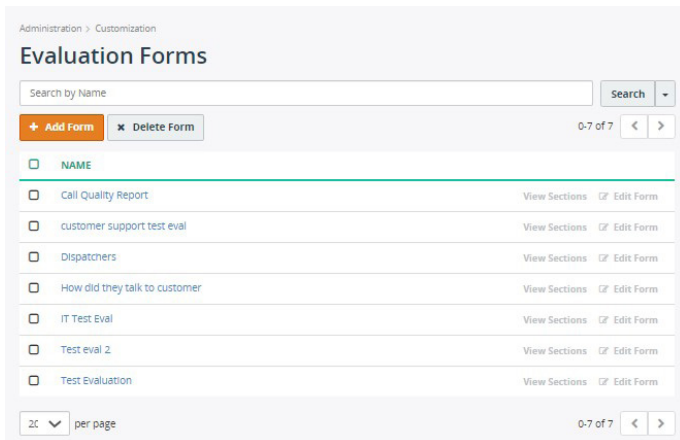
+ Select **Hide** to remove a column from the specified list.  
+ Select **Show** to add a column to the specified list.

# EVALUATION FORM DESIGNER

The MiaRec System provides an evaluation process for Managers and Supervisors to use when listening to their agents' recordings. Evaluation forms can be created ahead of time using the criteria management is looking for in a call. Navigate to **Administration > Customization > Evaluation Form Designer**



When evaluation forms have already been created, a list is displayed.



- + **View Sections** to see the sections + questions.
  - + **Edit Form** to make changes to the form.
  - + **Delete Form** to delete the form permanently.
  - + **Add Form** to create a new evaluation form.
- See [page 15](#).



## ADD EVALUATION FORM

Administrators and Supervisors can create new evaluation forms. Evaluations are divided into sections with questions and answers provided in each section.

+ Select **Add Form**. The form fields will be displayed.

+ Enter a name for the evaluation.

+ Enter a description.

+ Select **Save**. The new form has now been added to the forms list and the forms list is displayed.

+ Select **View Sections** to the right of the new form on the forms list. The form will display with no sections.

+ Select **Add Section**. A "New Section" form is displayed.

+ Enter a section name.

+ Enter a section description.

+ If the form will carry no weight for the evaluation, select **Display not applicable** option.

+ Assign a "weight" toward 100 points for this section of the evaluation form.

+ Assign the order this section should be in the evaluation.

+ Select **Save**. The sections page is displayed with no questions.

+ Repeat the process to add additional sections.

## Evaluation Form «Product Knowledge»

[Add Section](#) [Edit Form](#) [Clone Form](#) [Delete Form](#)

Name: **Product Knowledge**Description: **Is agent familiar with the new iACD features?**

## SECTIONS

[+ Add Section](#)

TITLE

▼ FEATURES AND BENEFITS [Edit](#) [Delete](#)

No questions in this section. [Add question](#)

+ Select **Add question**.

Administration > Customization > Evaluation Form Designer > Product Knowledge > Features and Benefits

## Add Question

**Question \***

**Description**

**Answer Type**  Multiple choice  Numeric value

**Display N/A option**  Allow to mark question N/A

**Choices \***

<input type="text" value="Yes"/>	<input type="text" value="10"/>	<input type="text" value="Points"/>	<input type="checkbox"/> default	<input type="text"/>
<input type="text" value="No"/>	<input type="text" value="0"/>	<input type="text" value="Points"/>	<input type="checkbox"/> default	<input type="text"/>
<input type="text" value="N/A"/>	<input type="text" value=""/>	<input type="text" value="N/A"/>	<input checked="" type="checkbox"/> default	<input type="text"/>

[Add Option](#)

**Display As**  Choice (multi-line)  Choice (single-line)  Select box

**Weight**

**Order**

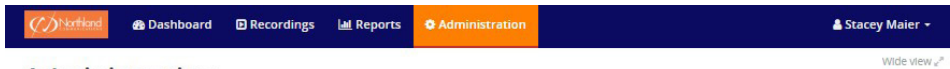
[Save](#)

- + Complete the **Add Question** information.
- + Enter the question.
- + Enter a description.
- + Select whether the answer will be multiple choice or numeric.
- + If the question can be “not applicable” to the call, check to allow it.
- + Enter the answers and assign a points value to them.
- + To add additional choices, select **Add Options**.
- + Select how the choices will appear.
- + Enter the total weight for the question.
- + Enter the order the question should appear in the section.
- + Select **Save**.
- + Repeat the process to add additional questions.

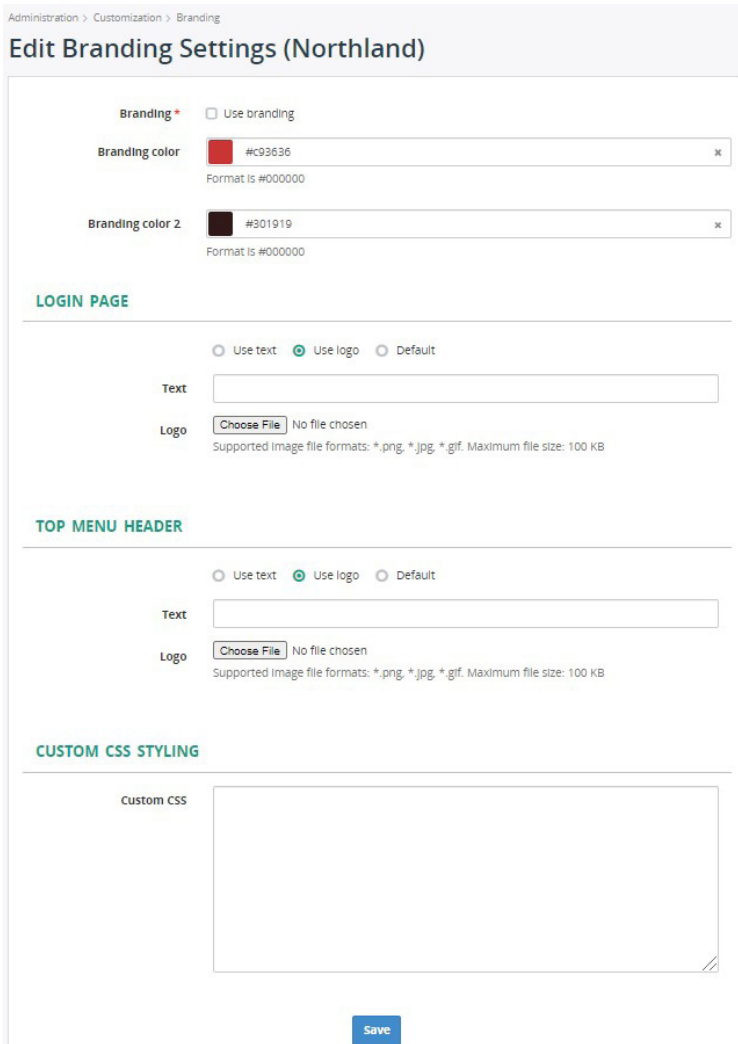
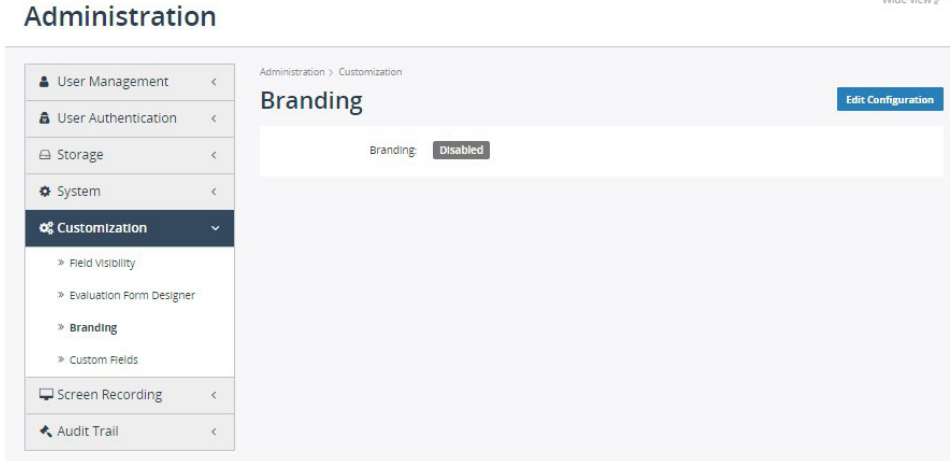
# BRANDING

17

MiaRec provides the ability for you to “brand” your call recording dashboards with your own colors and logo. The top header and the log in page can be branded. Navigate to **Administration > Customization > Branding**.



+ Select **Edit configuration**.



## FONTS AND BUTTONS

- + Select **Use Branding**.
- + Select the two primary colors for your branding. This will add the colors to fonts and buttons.

## LOGIN PAGE

- + Choose what will appear on the login page. Text, logo or the default (Northland logo).
- + When using a logo, upload the logo.

## TOP MENU PAGE

- + Choose what will appear on the login page. Text, logo or the default (Northland logo).
- + When using a logo, upload the logo.

## CUSTOM CSS STYLING (OPTIONAL)

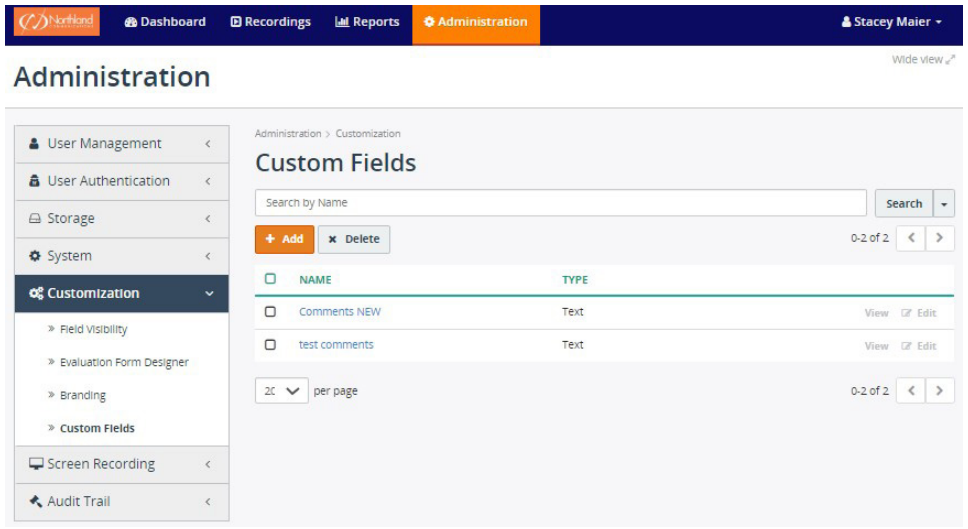
- + Enter the CSS code or markup.

## SAVE

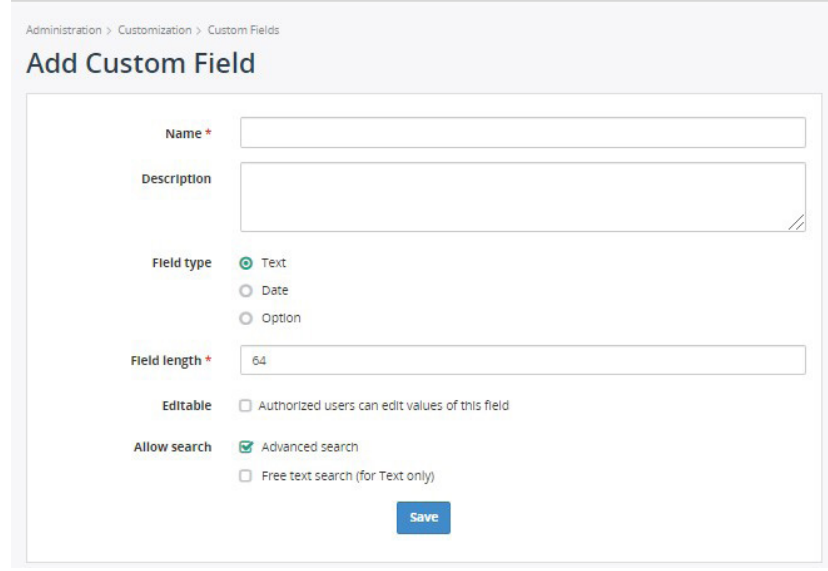
- + Select **Save**.

# CUSTOM FIELDS

MiaRec provides the ability for custom fields to be created for call lists. Navigate to **Administration > Customization > Custom Fields**.



+ Select Add.



- + Enter the name for the new field.
- + Enter a description. (Optional)
- + Select the Field type: Text, date or option.
- + Select the Field length.
- + Select whether this field can be edited by others.
- + Select whether this field can be searched.
- + Select **Save**.
- + Return to the **Field Visibility** section to add this field to the applicable lists. See [page 13](#).

# SPEECH ANALYTICS

MiaRec automatically uploads audio files to the Google Cloud Speech service for transcription.

Once transcription is completed, the results are shown in the call details.

The screenshot below shows transcription, a textual representation of the conversation.

When a recording is played back, the transcript is automatically highlighted at that position (see the yellow background in the following sample screenshot). Click on any word in the transcript and the audio player will fast forward to that location.

**MEDIA PLAYER** Switch to basic player | Wide view

0 | 2:00 | 4:00 | 6:00 | 8:00

Pause x1 x1.2 x1.5 x1.7 x2 Save audio file

**TRANSCRIPT**

Speaker 1 [0:04]: Northland Communications, this is Patrick.

Speaker 2 [0:39]: Hi Patrick, **this is Tammy** Hart of Eye Solutions, I just want to speak to someone about the agent that helped us when we were having trouble with our internet. She was extremely helpful.

Speaker 1 [0:03]: Ok, let me open the ticket, do you know the Agent's name by any chance?

Speaker 2 [0:05]: I believe she said her name was Stacey.

You can use the "Advanced Search" page to locate a recording with a particular keyword or transcription text.

## Recordings

ALL CALLS ACTIVE CALLS MY CALLS **SEARCH** BY CLIENT NOT ASSIGNED TO USER BY CATEGORY **ADVANCED SEARCH**

Transcript Search query environmental

+ Add criteria Run Search Save Search

No auto-refresh Categories Download Export Delete More 0-7 of 7

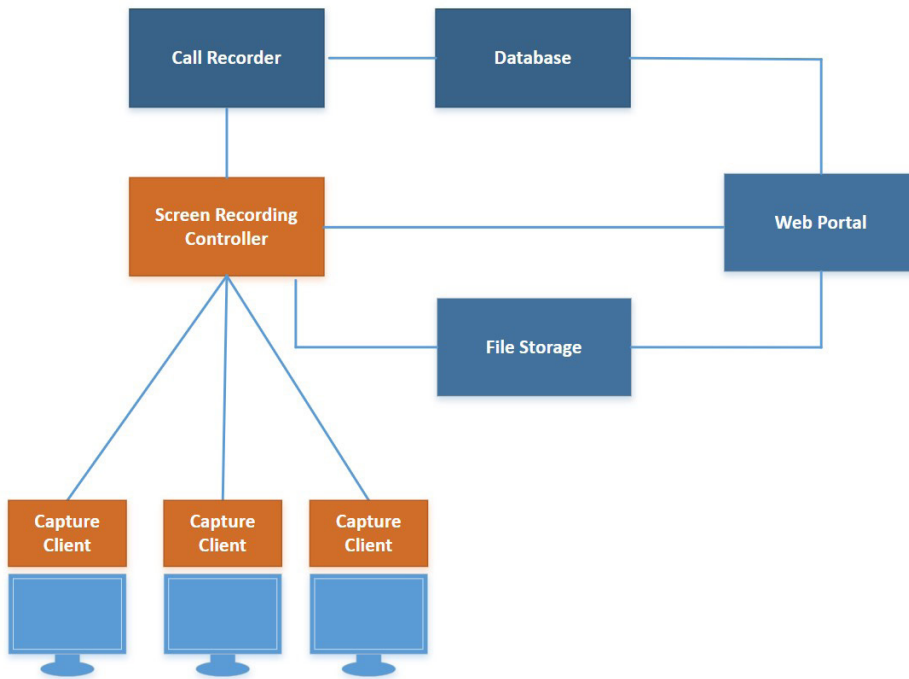
DATE	TIME	DURATION	FROM	TO
Sep 9, 2020	10:15 AM	39:01	3156242074	3156242133 (Adam Gardner)
midst of all that chaos and a ticket that they've had for. Covanta <b>Environmental</b> Solutions need to have the forwarding removed. So I did it. So I was in the process of doing that				
Aug 31, 2020	3:14 PM	24:09	3157942740	13156242133 (Adam Gardner)

# SCREEN RECORDING

MiaRec relies on a Screen Recording Client running on agent desktops to perform screen captures during a call.

The controller application is responsible for authentication of clients and initiating capture process when an agent handles a new call.

The following diagram illustrates a high-level architecture of the MiaRec screen recording solution.



- + The Screen Recording Client runs on the agent's workstations as a Windows Service.
- + The Screen Recording Controller authenticates all clients and controls a recording process, i.e. starts/stops screen capturing when agents receive or make calls.
- + When the call ends, the Client uploads the video file to the server for storage and playback.

# INSTALL THE CLIENT APPLICATION

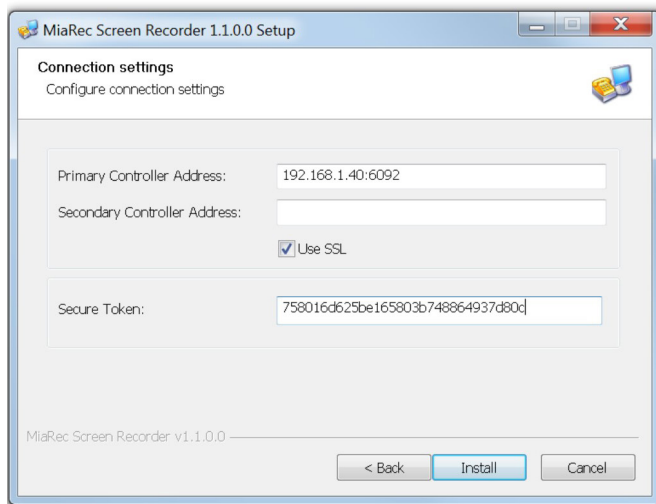
Download the **MiaRec Screen Capturing** application and install on agent desktops.

You will receive a copy of the download link from Northland Communications to ensure you get the latest version.

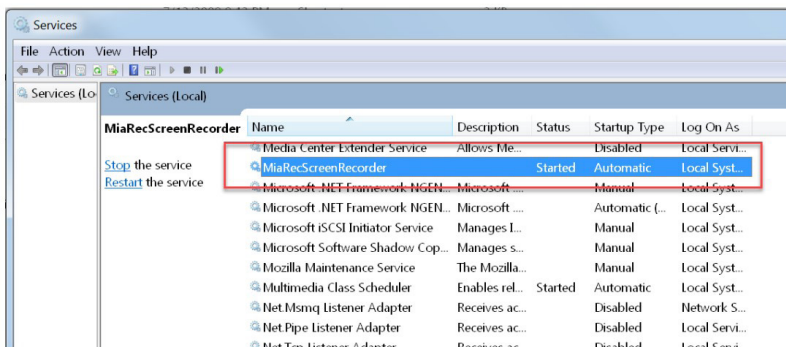
Supported operating systems: Windows 7, 8, 10, Server 2008/2012/2016 with the latest windows updates installed.

During installation, provide the address of the MiaRec Screen Controller server and "Secure Token". You will receive the Secure Token from Northland Communications at the time of installation.

Enter the IP-address or DNS name of the MiaRec server in the Primary Controller Address field. By default, port 6092 is used for SSL connection.

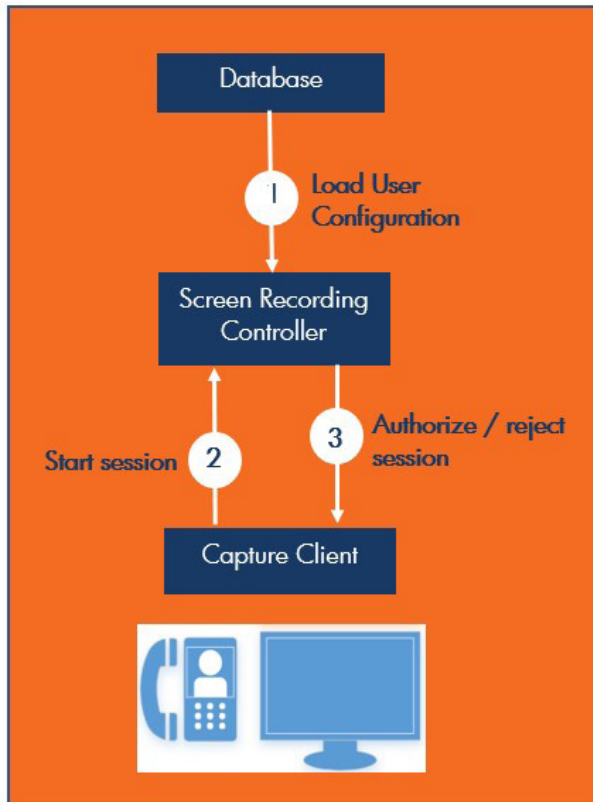


On the desktop, navigate to **Control Panel > Services** to verify the installation. The MiaRec Screen Recording Client silently works in background.



# AUTHORIZE NEW WORKSTATIONS

The capturing client application automatically establishes a network connection with the MiaRec screen recording controller. A new workstation requires authorization before it can record screen.



Every workstation is uniquely identified using the automatically generated secure workstation token. The administrator can authorize new workstations using the MiaRec Web UI.

Navigate to menu **Administration > Screen Recording > Screen Capture Workstations**.

New workstations are shown in the Pending authorization tab.

Select the corresponding workstation(s) and authorize them.

The screenshot shows the 'Screen Capture Workstations' page in the MiaRec Web UI. The page has a search bar and tabs for 'All Clients', 'Authorized', 'Pending Authorization', and 'Forbidden'. The 'Pending Authorization' tab is selected. Below the tabs, there are buttons for 'Authorize', 'Forbid', and 'Delete'. A table lists the pending workstations with columns for 'AUTHORIZATION', 'DOMAIN', 'COMPUTER NAME', and 'IP-ADDRESS'. The first three rows are checked and labeled 'Pending', while the fourth row is unchecked and also labeled 'Pending'. A red arrow points to the 'Authorize' button.

AUTHORIZATION	DOMAIN	COMPUTER NAME	IP-ADDRESS	
<input checked="" type="checkbox"/> Pending				View
<input checked="" type="checkbox"/> Pending				View
<input checked="" type="checkbox"/> Pending				View
<input type="checkbox"/> Pending				View



# LISTEN TO RECORDINGS

Agent call recordings are stored in the MiaRec server and are accessible through the dashboard. Agents can only see their own recordings. Supervisors can see recordings for the agents that are in the groups the Supervisor manages and Administrators can see recordings for the tenant.

The screenshot shows the 'Recordings' dashboard with a navigation bar at the top containing 'Dashboard', 'Recordings', 'Reports', and 'Administration'. The user 'Stacey Maier' is logged in. Below the navigation bar, there are tabs for 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY USER', 'BY CLIENT', 'NOT ASSIGNED TO USER', 'BY CATEGORY', and 'ADVANCED SEARCH'. A search bar is present with fields for 'Select a Date Range', 'Select a User or Group', and 'Search a Text'. Below the search bar, there are buttons for 'No auto-refresh', 'Categories', 'Download', 'Export', 'Delete', and 'More'. The main content is a table of call recordings with columns: USER, DATE, TIME, DURATION, FROM, TO, CATEGORIES, and CLIENT. The table lists several recordings, including one by David Stewart and Duane Polovick.

USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES	CLIENT
David Stewart	Today	2:39 PM	In progress...	3157173190	13156242099 (David Stewart)		
Duane Polovick	Today	2:34 PM	3:44	3154240790	13156242074 (Duane Polovick)		
Chip Green	Today	2:27 PM	3:12	3155257110	3156242018 (Chip Green)		
David Stewart	Today	2:10 PM	5:40	3156242289	3156242099 (David Stewart)		
Duane Polovick	Today	2:10 PM	10:33	3156242133	3156242074 (Duane Polovick)		
David Stewart	Today	1:57 PM	4:00	315997472	13156242099 (David Stewart)		
Duane Polovick	Today	1:52 PM	12:43	3154882520	13156242074 (Duane Polovick)		

MiaRec categorizes the calls as follows:

- + All calls Displays all call recording (including active calls).
- + Active calls Displays only active calls.
- + My calls Displays call recordings associated with the current agent logged in .
- + By client Displays call recordings, which are grouped by client and client group.
- + By category Displays call recordings grouped by category.
- + By client Displays call recordings that have been assigned to a client.

## PLAYBACK RECORDINGS

### Inline Basic Audio Player

Click on the call list to see call details within a basic media player that is inside the call list.

The screenshot shows the 'Recordings' dashboard with the 'ALL CALLS' tab selected. The search bar is set to 'Patrick Litz'. Below the search bar, there are buttons for 'No auto-refresh', 'Categories', 'Download', 'Export', 'Delete', and 'More'. The main content is a table of call recordings. The first row is highlighted, showing a recording by Patrick Litz on Sep 9, 2020 at 2:23 PM with a duration of 0:04. Below the table, there is a detailed view of the selected recording. The details include: Group: NOC Group, From: 3156242058, To: +13156242221 (Patrick Litz), Orig Dialed Digits: 13156710031, Date/Time: Sep 9, 2020 2:23:43 PM, Duration: 0:04. There is a media player with a play button, a progress bar, and a 'Save audio file' button. Below the media player, there are buttons for 'More details' and 'Evaluate'. At the bottom, there is a 'Notes' section with an 'Add note' button.

**NOTE:** By default, Auto Refresh is set to No Auto Refresh, select to change it to refresh automatically.

## Advanced Audio Player

Click on **Open in new window** to see detailed call information with an advanced audio player. This visual audio presents an easy way to detect periods of silence and talk-over within the conversation.


**NOTE:** The advanced audio player may appear differently depending on the options your business has chosen.

**Call 3156242058 -> +13156242221** Mark as confidential Delete Call

Edit Categories -

### MEDIA PLAYER

Switch to basic player | Wide view



▶ Play x1 x1.2 x1.5 x1.7 x2 Save audio file

### TRANSCRIPT

Speaker 1 [0:03]: Northland Communications, this is Patrick.

Speaker 2 [0:25]: **Hi Patrick, this is Carlos. I'm calling to speak to someone regarding the excellent service we received today from your technician Jay.**

Speaker 1 [0:16]: Thank you, that's very nice of you. One moment while I connect you with Jay's supervisor, Dean.

#### INFO

Date: Sep 9, 2020  
 Connect Time: 2:23:43 PM  
 Disconnect Time: 2:23:47 PM  
 Duration: 0:04  
 Watermark: View  
 Comments NEW: [Click to edit](#)  
 test comments:  
 Stacey Notes: [Click to edit](#)

#### FROM

Client: Unknown client (assign)  
 Phone Number: 3156242058  
 Phone Name:  
 Live monitor phone 3156242058

#### TO

User: Patrick Litz  
 Group: NOC Group  
 Phone Number: +13156242221  
 Orig Dialed Digits: 13156710031  
 Phone Name: Patrick Litz  
 Live monitor phone +13156242221

### EVALUATIONS

+ Add Evaluation x Delete Evaluation

CALL DATE/TIME	AGENT	GROUP	EVALUATION FORM	SCORE
No results found				

### NOTES

Add note

### AUDIT TRAIL

Show

# SEARCH RECORDINGS

MiaRec allows for an easy search of calls by utilizing different parameters, such as:

- + **Date range** Select the calendar in the date range window to search by date range.
- + **Group name** Select the drop down in this window to select a group. Agents who do not have Administrator or Supervisor capabilities, can only search their own calls.
- + **Any text** The entered text is searched within caller/called phone number, name fields, and call notes. See [page 27](#) for entering call notes.

Recordings Wide view <sup>2</sup>

ALL CALLS ACTIVE CALLS MY CALLS BY USER BY CLIENT NOT ASSIGNED TO USER BY CATEGORY ADVANCED SEARCH

Select a Date Range  Select a User or Group  Search a Text  Search

No auto-refresh      0-20 of many

<input type="checkbox"/>	USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES	CLIENT
<input type="checkbox"/>	Claesen Wyckoff	Today	8:55 AM	1:32	3154188919	3156242051 (Claesen Wyckoff)		
<input type="checkbox"/>	Chip Green	Today	8:53 AM	2:30	3157977303	3156242018 (Chip Green)		
<input type="checkbox"/>	Adam Gardner	Today	8:50 AM	1:50	3157241654	13156242133 (Adam Gardner)		
<input type="checkbox"/>	Claesen Wyckoff	Today	8:40 AM	4:26	3156242243	13156242051 (Claesen Wyckoff)		
<input type="checkbox"/>	Duane Polovick	Today	8:05 AM	2:05	3152789616	13156242074 (Duane Polovick)		

## ADVANCED SEARCH

The advanced search tab provides the ability to search call recordings utilizing multiple criteria in the search, such as:

- + **User**
- + **Group**
- + **Call ID**
- + **Phone number (FROM and/or TO)**
- + **Date range**
- + **Call duration**

Each of these criteria supports different comparison options like Equal To, Not equal to, Starts with, Ends with, Includes, Is empty, Not empty, Match simple pattern, Match regex pattern, Before, After, Between, Older than \_\_ days, Newer than \_\_ days.

**NOTE:** Depending on your role permissions, you may only be able to search your own recordings.

## SAMPLE ADVANCED SEARCH

In the below example, the supervisor is looking for a recording to a specific agent. He is a group supervisor and can only search his own managed groups.

The screenshot shows the 'ADVANCED SEARCH' tab selected. The search criteria are: 'User' is 'Patrick Litz'. A dropdown menu is open for the 'User' field, showing options like 'Date', 'Duration', 'Call Direction', 'User', 'User Name', and 'Group'. The 'User' option is selected. Below the search criteria, there are buttons for 'Run Search' and 'Save Search'. A table of results is displayed below, showing call records for Patrick Litz.

TIME	DURATION	FROM	TO
9:33 AM	12:18	3155271226	13156242221 (Patrick Litz)
9:22 AM	1:39	3152697572	13156242221 (Patrick Litz)
9:18 AM	2:11	3156040276	13156242221 (Patrick Litz)

- + In the first field, select **User**.
- + In the next field, select **is**. This field will be different depending on the criteria chosen in the first field.
- + In the third field, select the agent name.
- + Once the initial criteria is complete, select **+ Add criteria** to include additional search parameters that will narrow the search more, for example the telephone number the call came from.

The screenshot shows the 'ADVANCED SEARCH' tab with two criteria: 'User is Patrick Litz' and 'Phone Number Equal To'. A dropdown menu is open for the 'Phone Number' field, showing options like 'Notes Count', 'Call ID', 'PBX Call ID', 'PBX Tracking ID', 'Call State', 'Recording State', and 'Phone Number'. The 'Phone Number' option is selected. Below the search criteria, there are buttons for 'Save Search' and 'More'. A table of results is displayed below, showing call records for Patrick Litz.

FROM	TO
3155271226	13156242221 (Patrick Litz)
3152697572	13156242221 (Patrick Litz)

- + When all criteria is complete, select **Run Search**.
- + To save the search criteria, select **Save Search**.

# ADD NOTES TO CALLS

Agents can view and add notes to call recordings when permissions have been allowed by the Administrator. Supervisors and Administrators also have the ability to add notes to an agent’s call.

Call notes are displayed inline and in a new window. Notes are displayed from oldest to newest. It is possible to pin notes (out of order) to the top.

Notes can be added to recordings to tag the call for Supervisors and Administrators to pull reports based on the tags or to help with search criteria.

## CALL NOTES INLINE

The screenshot shows a call recording interface for a call by Patrick Litz on Sep 4, 2020, at 1:24 PM, with a duration of 4:43. The call ID is 3157961070 and the contact ID is 13156242221. The interface includes a 'Group' field (NOC Group), 'From' and 'To' fields, and a 'Date/Time' field. Below this is a 'Duration' field and a video player showing 00:00. There are buttons for 'More details', 'Evaluate', and 'Save audio file'. A 'Notes' section contains two entries: one from Patrick Litz at 9:57 AM with the text 'Needs a call back regarding new call recording enhancement - interested in details.', and one from Stacey Maier at 10:00 AM with the text 'Assigned to Inside sales'. Each note has 'Pin to the top' and 'Delete' options. An 'Add note' button is at the bottom.

- + To view notes inline, select the recording.
- + To add a note, select **Add note**.
- + To pin a note to the top (out of order), select **Pin to the top**.
- + To delete a note, select **Delete**.
- + To view in new window, select **Open in new window**. This will show the additional details including transcription when available.

When Notes are available in a recording, you will see a “conversation bubble” next to the recording.

<input type="checkbox"/>		Patrick Litz	Sep 9, 2020	2:23 PM	0:04	3156242058	+13156242221 (Patrick Litz)	
<input type="checkbox"/>		Patrick Litz	Sep 4, 2020	3:34 PM	0:56	3156242023	3156242221 (Patrick Litz)	
<input type="checkbox"/>		Patrick Litz	Sep 4, 2020	1:24 PM	4:43	3157961070	13156242221 (Patrick Litz)	



# CATEGORIZE CALLS

Agents can view and assign categories to call recordings when permissions have been allowed by the Administrator. Supervisors and Administrators also have the ability to assign categories to an agent's recordings.

## Recordings

wide view

The screenshot shows the Recordings page interface. At the top, there are tabs for filtering: ALL CALLS, ACTIVE CALLS, MY CALLS, BY USER, BY CLIENT, NOT ASSIGNED TO USER, BY CATEGORY, and ADVANCED SEARCH. Below the tabs are search filters: Select a Date Range, Select a User or Group, and Search a Text. A search button is on the right. Below the filters are action buttons: No auto-refresh, Categories (dropdown), Download, Export, Delete, and More. A table of recordings is visible with columns: USER, FROM, TO, CATEGORIES, and CLIENT. A dropdown menu is open over the Categories column, showing options: Storm related call, Test Category, New Category, and Manage Categories.

USER	FROM	TO	CATEGORIES	CLIENT
David Stewart	3154355802	+13156242099 (David Stewart)		
Chip Green	3158958470	3156242018 (Chip Green)		
Duane Polovick	3158895333	13156242074 (Duane Polovick)		
Patrick Litz	3156972011	13156242221 (Patrick Litz)		

- + Select one or more calls from the Recordings page.
- + Select the **Categories** dropdown.
- + Select a category for the calls.
- + To add a category, select **New Category**.
- + To work with existing categories, select **Manage Categories**. Here you can add sub-categories, delete or edit existing categories.

Assigned categories will appear on the Recordings page in the **Categories** column.

The screenshot shows the Recordings page with a table of recordings. The Categories column now shows 'Storm related call' for the call by Claesen Wyckoff. An orange arrow points to this category. The table has columns: USER, DATE, TIME, DURATION, FROM, TO, CATEGORIES, and CLIENT.

USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES	CLIENT
Patrick Litz	Today	10:41 AM	In progress...	3156242099	3156242221 (Patrick Litz)		
David Stewart	Today	10:34 AM	0:03	3154355802	+13156242099 (David Stewart)		
<input checked="" type="checkbox"/> Claesen Wyckoff	Today	10:29 AM	6:03	3156240638	13156242051 (Claesen Wyckoff)	Storm related call	
Patrick Litz	Today	10:27 AM	5:22	3157310211	13156242221 (Patrick Litz)		
Chip Green	Today	10:25 AM	13:36	8607072527	3156242018 (Chip Green)		

# ASSIGN TO A CLIENT

To help with grouping calls and searching for specific calls, you can assign the recording to a client or customer.

- + From the **Recordings** tab, select the call to assign to a client.
- + Select **Assign to client**.

## Assign call to client

- + Select a client from the dropdown.
- + To assign this client to similar calls, select **Apply this rule to all similar calls**.
- + To create a new client, select **Create client**.

## Add Client

- + Complete the client information.
- + To add additional contact information for the same client, select **Add contact / phone number**.
- + When finished, select **Save**.

The client name will appear in the Recordings list and is searchable by client name.

## MULTI-PART CALLS

The system automatically recognizes “multiple part calls”, for example, when a call has been transferred from one agent to another, or when a call has been placed on hold, the agent made a consultative call to his/her supervisor and then resumed the initial call.

When a call segment is part of a longer interaction, it will be indicated on the recordings page.

<input type="checkbox"/>		Patrick Litz	Aug 27, 2020	11:37 AM	4:07	918066335932	13156242221 (Patrick Litz)	<input type="checkbox"/>
<input type="checkbox"/>		Patrick Litz	Aug 27, 2020	11:09 AM	1:47	3153834616	13156242221 (Patrick Litz)	<input type="checkbox"/>
<input type="checkbox"/>		Patrick Litz	Aug 27, 2020	10:48 AM	20:31	3153834616	13156242221 (Patrick Litz)	<input type="checkbox"/>

## VIEW MULTI-PART CALLS

When the call is viewed, all segments of the interaction appear in the timeline.

Group: NOC Group Open in new window

From: 3153834616 assign to client

To: 13156242221 Patrick Litz

Date/Time: Aug 27, 2020 11:09:40 AM

Duration: 1:47

▶ 00:00 00:00 Save audio file

More details

Notes: Add note

### ALL CALLS IN THIS INTERACTION

TIME	DURATION	FROM -> TO	TIMELINE	
10:48 AM	20:31	3153834616 -> 13156242221 (Patrick Litz)		<span>View</span>
11:09 AM	1:47	3153834616 -> 13156242221 (Patrick Litz)		<span>View</span>

Agents can navigate to the next segment easily to play it back. Open the call in a new window to see the entire interaction and tabs for each part of the interaction.

### Interaction

INTERACTION CALL [1] CALL [2]

#### AUDIO

Switch to basic player

▶ Play

3153834616 -> 13156242221

Save audio file

Silence between call segments has been removed

#### DATA/TIME

Begin Time: Aug 27, 2020, 10:48:49 AM

End Time: Aug 27, 2020, 11:11:27 AM

Total Duration: 22:38

**NOTE:** If an agent places an active call on hold to answer another incoming call and then returns to the held call, the second call is not considered part of the interaction and will not be included in the timeline.



# ON DEMAND RECORDING

When using the on-demand recording option, the Agent selects which calls to record through the MiaRec Agent Dashboard. From the dashboard, the agent can activate, pause and stop the recording. On-demand call recording is also known as “look back recording” because even if the Agent chooses to record at any point during the call, the call is recorded from the beginning. If the agent doesn’t choose to record the call, the recording is not kept.

+ From the Agent Dashboard, select the **Recordings** tab and click on the call “In progress”.

## Recordings

ALL CALLS	ACTIVE CALLS	MY CALLS	BY CLIENT	BY TAG	ADVANCED SEARCH		
Select a Date Range	Select a User or Group	Search for text	Search				
No auto-refresh	Tags	Download	Export	Share	Delete	More	0-15 of 15
USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS	
Billy Joel	Today	12:48 PM	In progress...	3156242238	3156711253 (Billy Joel)		

Group: Users Open in new window

Caller Party: 3156242238 assign to client

Called Party: 3156711253 Billy Joel

Call State: In progress...

Date/Time: Today 12:48:13 PM

Notes: Add note

More details

+ Select **Enable Recording**. Audible beeps, if configured, are heard by all parties and recording begins.

CALL STATUS

Call State: In progress...

Duration: 3:58

On-demand recording: Recording will be discarded Enable Recording

Recording State: Pause Recording

CALL STATUS

Call State: In progress...

Duration: 39s

On-demand recording: Call is being recorded Disable Recording

Recording State: Pause Recording

- + Select **Disable Recording** to stop the recording.
- + Select **Pause Recording** to temporarily pause the recording.

**IMPORTANT NOTE:** When using MaX UC, if the agent selects Call Record Radio button on MaX UC, the recording is saved to the local PC.

# LIVE MONITOR

The live monitoring feature allows authorized users (Administrators/Supervisors) to listen to the active calls in real-time. This feature helps monitor customer service in real-time, train new employees, and alleviate problems as soon as possible.

Live monitoring is built-in to the MiaRec recording core. It doesn't depend on a phone system, and works with any recording method, whether it is passive (port-spanning) or active one (integration with PBX).

The live monitoring feature supports two modes, which are:

- + Monitoring of a single call.
- + Monitoring of consecutive calls of a particular agent.

In the first case, a monitoring session automatically terminates when the call ends.

In the second case, a monitoring session is automatically restored when the monitored agent makes or receives a new call. The supervisor then initiates a live monitoring session and keeps automatically listening to the consecutive calls the particular agent is making

In order to start monitoring of the consecutive calls, the supervisor needs to select one of the agents' old calls, and then click on "Open in new window" button to see a Live monitor phone XXX-XXX-XXXX link.

## MONITOR A SINGLE CALL

To start monitor a single call in real-time:

- + On the Recordings page, locate the call that is currently in progress.
- + Click it to view the recording details.

USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TIMELINE
<input type="checkbox"/> Ricky Blackburn	Today	8:35 AM	In progress...	3156716217 (Ricky Blackburn)	3154450000	
<input type="checkbox"/> Charles Perrotta	Today	8:35 AM	In progress...	3156242223 (Charles Perrotta (Charlie))	3154377600	

- + Click the More details button to switch to an advanced media player view.

- + **To begin monitoring:** Select **Start live monitoring**. MiaRec will instantly load and playback a call recording in real-time.
- + **To disconnect from a recorded call:** Select **Stop live monitoring**.

Call 3156716211 -> 3156242254 Mark as confidential

CALL STATUS

Call State: **In progress...**  
Duration: **7:28**  
Recording State: **Pause Recording**

LIVE MONITORING Animation: ON

**Start live monitoring**

CALL DETAILS | AGENT EVALUATION | NOTES

INFO	CALLER PARTY	CALLED PARTY
Date: <b>Today</b> Connect Time: <b>8:47:20 AM</b>	User: <b>Michael Darby</b> Group: <b>CRP</b> Phone Number: <b>3156716211</b> Phone Name: <b>Michael Darby</b>	Client: <b>Unknown client (assign)</b> Phone Number: <b>3156242254</b> Orig. Dialed Digits: <b>13156242244</b> Phone Name:

## MONITOR CONSECUTIVE CALLS

To monitor consecutive calls of a particular user:

- + Filter call recordings associated with the user. Use the **Search a User** field at the top of the list to search.

### Recordings

The screenshot shows the 'Recordings' interface with a search filter applied to the 'USER' column. The search results table is as follows:

USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
Charles Perrotta	Today	9:36 AM	In progress...	3157331412	13156242223 (Charles Perrotta (Charlie))	
Adam Gardner	Today	9:35 AM	1:48	3156242133 (Adam Gardner)	3158655524	

- + Select any call in this user's list to view recording details.
- + Click the user name to view more details of all call recordings assigned to this user.

The screenshot shows the recording details for a call by Dan Amado. The details include:

- Group: CRP
- Caller Party: 3155275389
- Called Party: +13156242084 (Dan Amado)
- Orig. Dialed Digi...: 13156710031
- Date/Time: Today 9:39:00 AM
- Duration: 0:35

Below the details is an audio player with a progress bar at 0:00 / 0:00 and buttons for 'More details', 'Evaluate', and 'Save audio file'. There is also a 'Notes' section with an 'Add note' link.

- + Select **Start continuous monitoring** to monitor all calls of this user. Clicking Monitor this call will monitor only the active call.

**NOTE:** If the user has multiple active calls at the same time, MiaRec will always switch to the most recent call.

The screenshot shows the user profile and active call monitoring interface. The 'INFO' section displays user details for Dan Amado, and the 'ACTIVE CALL' section shows a call in progress with a 'Monitor this call' button. At the bottom, there is a 'LIVE MONITORING' section with a 'Start continuous monitoring' button highlighted in a red box.

# VIEW + ADD AGENT EVALUATION

To view or add an agent evaluation go to the “Advanced Media Player”. If an evaluation was already completed, it will appear in the Evaluation window.

The screenshot displays the 'Advanced Media Player' interface. At the top, there is a 'MEDIA PLAYER' section with a waveform and a timeline from 0 to 3:30. Below the waveform are playback controls: a play button, volume sliders for x1, x1.2, x1.5, x1.7, and x2, and a 'Save audio file' button. The interface is divided into three main sections: 'INFO', 'FROM', and 'TO'. The 'INFO' section includes call details like Date (Today), Connect/Disconnect Times (2:55:28 PM / 2:59:22 PM), Duration (3:54), Watermark (View), and Comments (Click to edit). The 'FROM' section shows Client (Unknown client (assign)), Phone Number (3154596300), and Phone Name (Live monitor phone 3154596300). The 'TO' section shows User (Patrick Litz), Group (NOC Group), Phone Number (13156242221), and Phone Name (Patrick Litz). Below these is an 'EVALUATIONS' section with '+ Add evaluation' and 'x Delete Evaluation' buttons. A table with columns 'CALL DATE/TIME', 'AGENT', 'GROUP', 'EVALUATION FORM', and 'SCORE' is shown, with the message 'No results found' below it.

The screenshot shows the 'Add Evaluation Report' dialog box. It has a title bar with a close button. Inside, there are two required fields: 'Evaluation form' and 'Agent'. A dropdown menu is open for the 'Evaluation form' field, showing a search bar and a list of options: 'Test Evaluation', 'How did they talk to customer', 'Dispatchers', 'IT Test Eval', 'Test eval 2', 'Call Quality Report' (highlighted in blue), and 'customer support test eval'. At the bottom of the dialog, there are volume sliders for x1.7 and x2, and a 'Save audio' button.

- + To add an evaluation of the call, select **Add Evaluation**.
- + Select an existing evaluation from the dropdown. If there is no applicable evaluation, it will need to be created. See [page 15](#).

Complete the evaluation and select **Save**.

### Add Evaluation Report

MEDIA PLAYER Switch to basic player | Wide view

#### EVALUATION REPORT

Agent: Patrick Litz  
 Evaluator: Stacey Maier  
 Evaluation Form: Call Quality Report

#### CALL DETAILS

Call Date/Time: Today, 2:19:01 PM  
 Call Duration: 0:03  
 From: 3155250485  
 To: 13156242221 (Patrick Litz)  
[View call details](#)

#### GREETING

Did agent ask for callers name and callback number?  Yes  No  N/A

Did agent use full company name and agent name in greeting?  Yes  No  N/A

Comments:

#### BODY OF CALL

Did agent exhibit empathy.  Yes  No  N/A

Did agent use appropriate probing questions to get the right information from caller.  Yes  No  N/A

Did agent use industry jargon?  Yes  No  N/A

Did the agent use proper etiquette when placing the caller on hold?  Yes  No  N/A

Was a solution reached that satisfied the customer?  Yes  No  N/A

Comments:

#### CLOSING

Did agent ask if there was any other help caller needed.  Yes  No  N/A

Did agent tell the caller to have a nice day/weekend?  Yes  No  N/A

Did agent thank the caller for calling.  Yes  No  N/A

Comments:

Comments for report:

**Save**

The Recordings list will display that an evaluation is available and the evaluation will be accessible to the supervisor and agent in the recording.

<input type="checkbox"/>	Duane Polovick	Today	2:57 PM	10:56	3152540592	13156242074 (Duane Polovick)
<input type="checkbox"/>	Patrick Litz	Today	2:55 PM	3:54	3154596300	13156242221 (Patrick Litz)
<input type="checkbox"/>	Claesen Wyckoff	Today	2:46 PM	12:28	3152259729	13156242051 (Claesen Wyckoff)

#### EVALUATIONS

[+ Add Evaluation](#) [x Delete Evaluation](#)

<input type="checkbox"/>	CALL DATE/TIME	AGENT	GROUP	EVALUATION FORM	SCORE	<a href="#">View</a> <a href="#">Edit</a>
<input type="checkbox"/>	Today, 2:55 PM	Patrick Litz	NDC Group	Call Quality Report	100	<a href="#">View</a> <a href="#">Edit</a>

# REPORTS

Reports are available in the top menu under the **Reports** tab. MiaRec supports both Call Recording Reports and Evaluation Reports.

## Reports

Wide view

- Call Recording Reports <
- Evaluation Reports <

Reports

**CALL RECORDING REPORTS**

- All Calls
- Group Calls
- User Calls

**EVALUATION REPORTS**

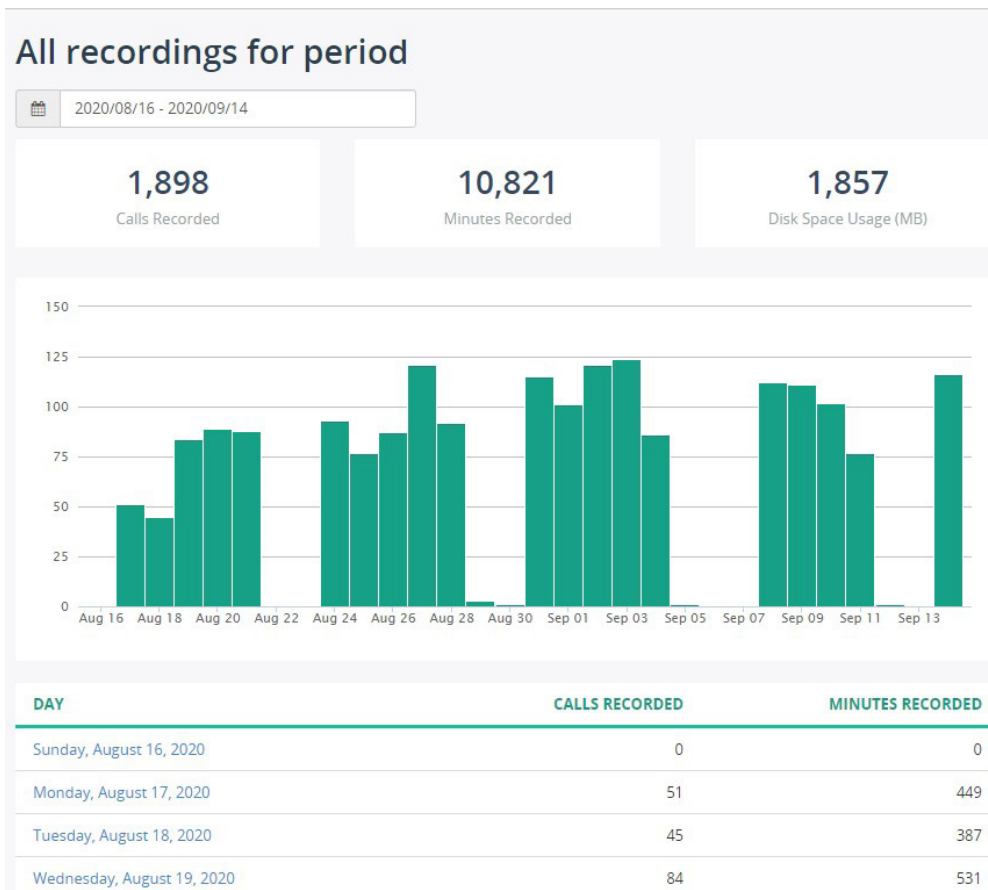
- All Reports
- Group Reports
- Agent Reports

## CALL RECORDING REPORTS

Call Recording Reports show the number of calls recorded for a specified time period and can be exported to Excel. They are broken into:

- + All Calls
- + Group Calls
- + User Calls

Below is a sample Call Recording Report.



# EVALUATION REPORTS

Evaluation Reports show a list of completed evaluations per call for a specified time period. Evaluations can be accessed from the Reports display. Evaluation Reports are broken into the following:

- + All Reports
- + Group Reports
- + Agent Reports

## Reports

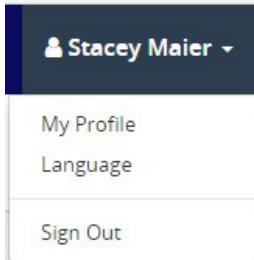
The screenshot shows a sidebar menu with 'Call Recording Reports' and 'Evaluation Reports' (selected). The 'Evaluation Reports' dropdown includes 'All Reports', 'Group Reports', and 'Agent Reports'. The main content area is titled 'Reports Evaluation Reports' and contains three sections: 'ALL REPORTS', 'AGENT REPORTS', and 'GROUP REPORTS', each with a 'View report' button.

Below is a sample Evaluation Report.

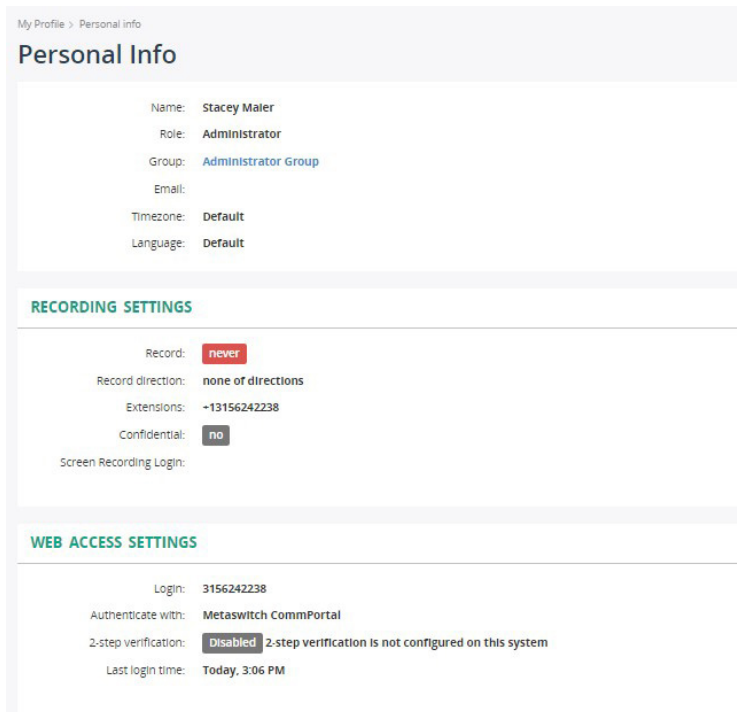
Evaluation Reports						
Search by Name						Search
x Delete Evaluation						0-10 of 10
<input type="checkbox"/>	CALL DATE/TIME	AGENT	GROUP	EVALUATION FORM	SCORE	
<input type="checkbox"/>	Today, 2:55 PM	Patrick Litz	NOC Group	Call Quality Report	100	View Edit
<input type="checkbox"/>	Sep 9, 2020, 3:34 PM	David Stewart	NOC Group	Test Evaluation	0	View Edit
<input type="checkbox"/>	Sep 3, 2020, 3:43 PM	Chip Green	NOC Group	How did they talk to customer	58	View Edit
<input type="checkbox"/>	Sep 3, 2020, 10:00 AM	Patrick Litz	NOC Group	Call Quality Report	100	View Edit
<input type="checkbox"/>	Sep 3, 2020, 9:42 AM	Duane Polovick	NOC Group	Dispatchers	100	View Edit
<input type="checkbox"/>	Aug 27, 2020, 3:54 PM	Claesen Wyckoff	NOC Group	Test Evaluation	0	View Edit

# USER PROFILE

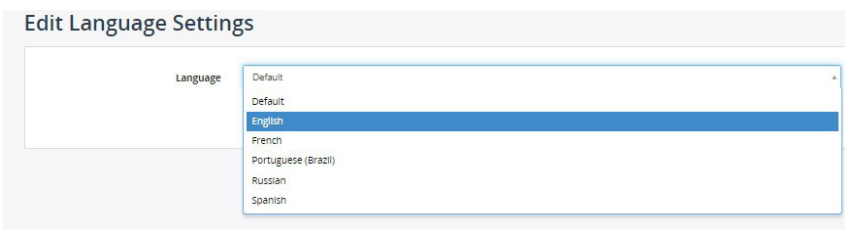
To view the User Profile, language options and log out, select the drop down next to the name.



**My Profile** displays your account settings within MiaRec.



**Language** changes the language from the default setting to another available one.



**Sign out** signs out of the MiaRec dashboard.



# AUDIT TRAIL

The Audit Trail is a detailed list of all changes made in the MiaRec application within your tenant. It can be searched in a variety of ways.

Administration > Audit Trail

### Audit Trail

Select a Date Range | Select a User or Group | Search In DATA

+ Filter by Resource | + Filter by Action | Apply Filter | Reset Filter

0-20 of many

DATE	INITIATOR	RESOURCE	ACTION / DETAILS	
Today, 10:47 AM	Stacey Maier (3156242238)	Calls	<b>Live monitor call</b> Live monitoring started for call: 3158335417 -> 3156242018, call time: Today, 10:46:28 AM	View
Today, 10:34 AM	Dan Amado (3156242084)	User auth devices	<b>Create</b> User "Dan Amado" logged in from new device (ip=216.171.180.6)	View
Today, 10:34 AM	Dan Amado (3156242084)	Users	<b>Login</b> User "Dan Amado" (login: 3156242084) logged in	View
Today, 10:28 AM	Jay MacLean IV (3156242289)	User auth devices	<b>Create</b> User "admin" logged in from new device (ip=216.171.180.6)	View

The following search types are available:

- + Date Range
- + User or Group (select the dropdown to view a list)
- + Search in DATA (enter key words or phrases)
- + By Resource (Filter)
- + By Action (Filter)

## SEARCH BY FILTERS

Administration > Audit Trail

### Audit Trail

Select a Date Range | Select a User or Group | Search In DATA

Resources: (set all | clear all)

- 2-step verification methods
- Audio files
- Call custom fields
- Calls
- Categories
- Category assignments
- Client contacts
- Clients
- Custom field options
- Custom fields
- Email templates
- Encrypt private keys
- Encrypt public keys
- Encrypt system tenant keys
- Evaluation form options
- Evaluation form questions
- Evaluation form sections
- Evaluation forms
- Evaluation report sections
- Evaluation reports
- Group members
- Groups
- Incoming replication tokens
- Jobs
- Managed groups
- Managed roles
- Managed tenants
- Module settings
- Modules
- Notes
- Password reset tokens
- Recorders
- Recording rules
- Role permissions
- Roles
- SAML 2.0 authentication
- Saved searches
- Screen recording files
- Screen recordings
- Screen recordings clients
- Settings
- Settings for recorder
- Storage path rewrites
- Storage targets
- Tenant licenses
- Tenants
- User auth devices
- User extensions
- User licenses
- Users

+ Filter by Resource | + Filter by Action | Apply Filter | Reset Filter

0-13 of 13

DATE	INITIATOR	RESOURCE	ACTION / DETAILS	
Today, 10:01 AM	David Stewart (3156242099)	Evaluation forms	<b>Create</b> new evaluation form "test form 325" created	View
Yesterday, 2:10 PM	David Stewart (3156242099)	Evaluation forms	<b>Create</b> new evaluation form "test rollout form" created	View
Sep 10, 2020, 1:10 PM	Stacey Maier (3156242238)	Evaluation forms	<b>Create</b> new evaluation form "Product knowledge" created	View
Sep 10, 2020, 1:09 PM	Stacey Maier (3156242238)	Evaluation forms	<b>Delete</b> Evaluation form "Product knowledge" deleted	View
Sep 10, 2020, 1:08 PM	Stacey Maier (3156242238)	Evaluation forms	<b>Mark deleted</b> Evaluation form "Product knowledge" marked for deletion	View

In the example to the left, we are searching for any resource that includes evaluation forms.

- + Select Filter by Resource. A list of all available resources is displayed.
- + To narrow the search, select **clear all**.
- + Check the resource(s) to search by. (In this example, **Evaluation Form**).
- + Select Apply Filter.

## MISCELLANEOUS

### CUSTOM FIELDS

Custom fields can be added for things such as storing data like an order number, support ticket number, product name, etc. Custom fields will appear in the call list. See [page 18](#).

### CONFIDENTIAL CALLS

Some call recordings may be marked as confidential. This feature is used in the following scenario:

- + The supervisor is a manager of a group of agents. He/she has access to all call recordings of this group. The company executive makes a call to one these agents. If the executive's calls are not logged as confidential in the system, this call would be visible to the supervisor. When a call is marked as "confidential", then the call recording is hidden from the supervisor. A call can be marked as confidential either manually or automatically.

### IMPORTANT DISCLAIMER

Call recording laws from each state and country will differ from one another. They will require either One-Party consent or All-Party consent. Northland does not offer legal advice, you should consult your legal counsel for guidance on the compliance activities that are appropriate for your organization.