Northland
COMMUNICATIONS

MiaRec Call Recording

Supervisor + Administator

USER MANUAL

JANUARY 2023

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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.

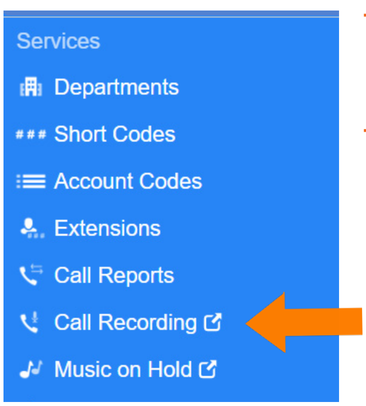
Each Business Group that is licensed for Call Recording is known as the "Tenant". There are four levels of users within the MiaRec solution.

+ **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

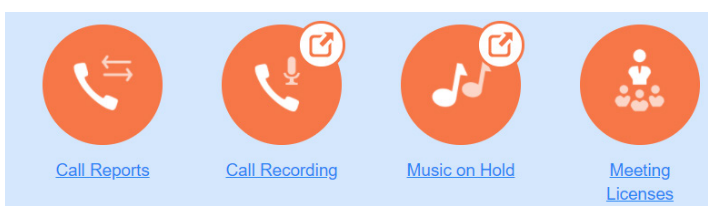
The MiaRec log in screen can be accessed through the Business Group Admin CommPortal: https://bucommportal.northland.net/bg

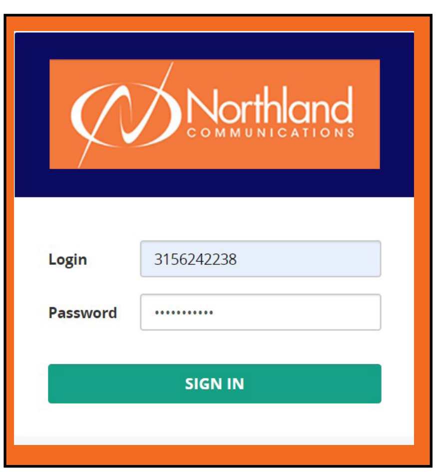
COMMPORTAL



+ 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.





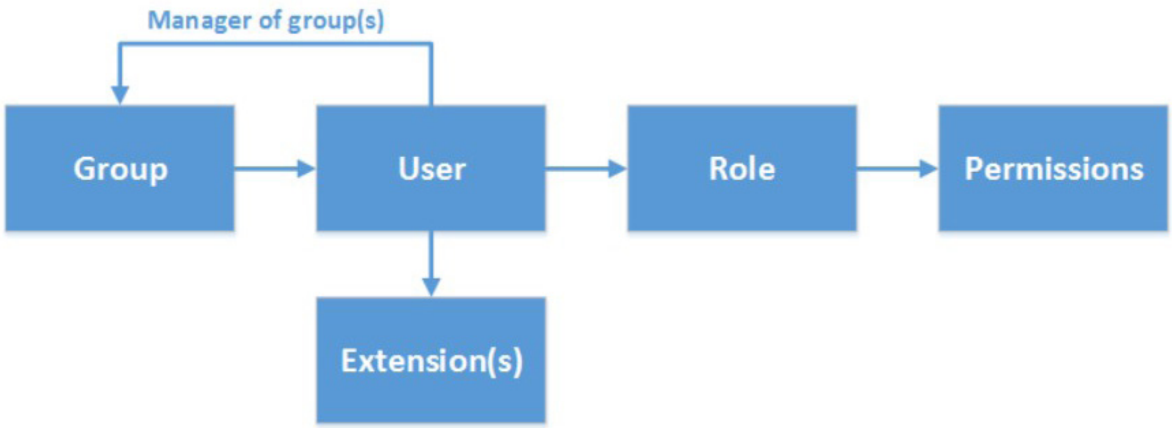
The log in screen is displayed. MiaRec uses a web-interface, your 10 digit Subscriber number and your CommPortal EAS password to log in.

+ 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.

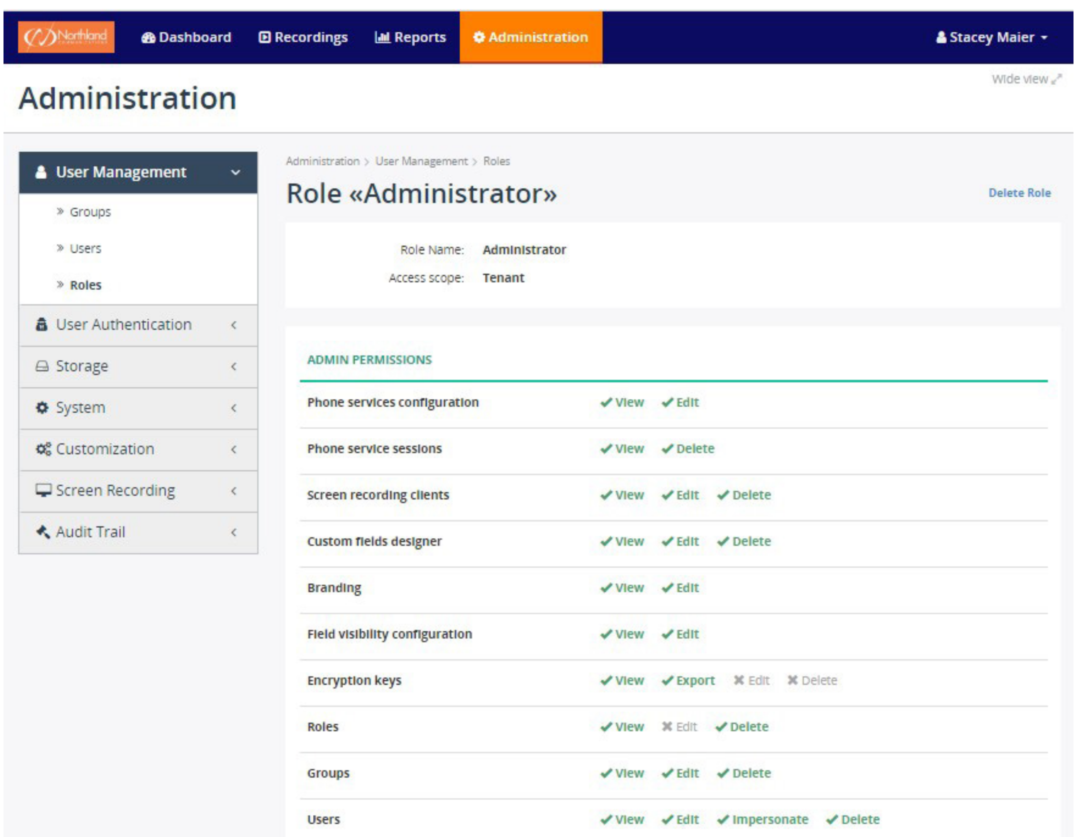
UNDERSTANDING USER ROLES AND PERMISSIONS

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.

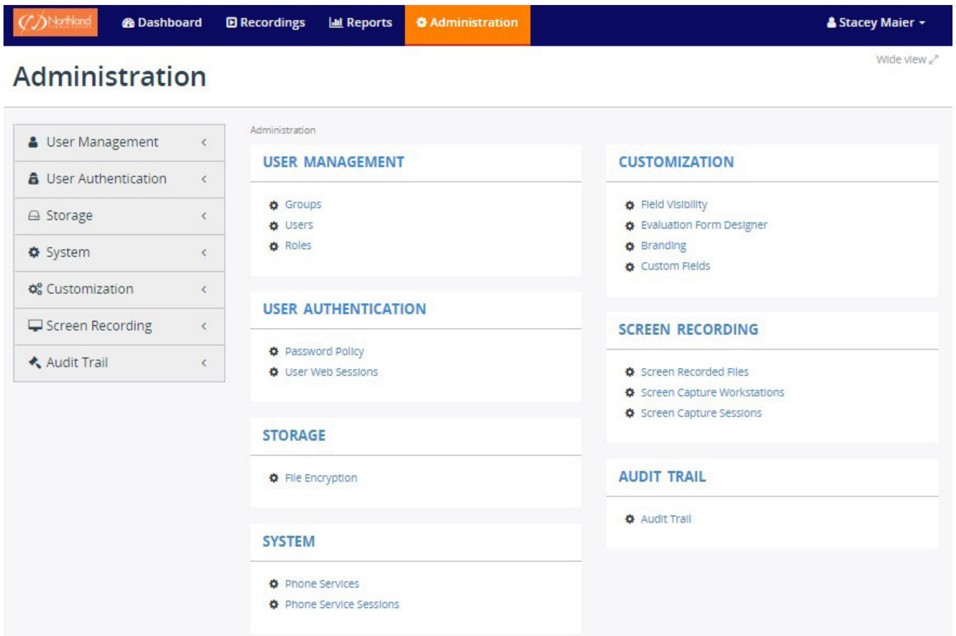
User management is located under the Administrative tab in the dashboard. This is where Roles can be viewed and edited.



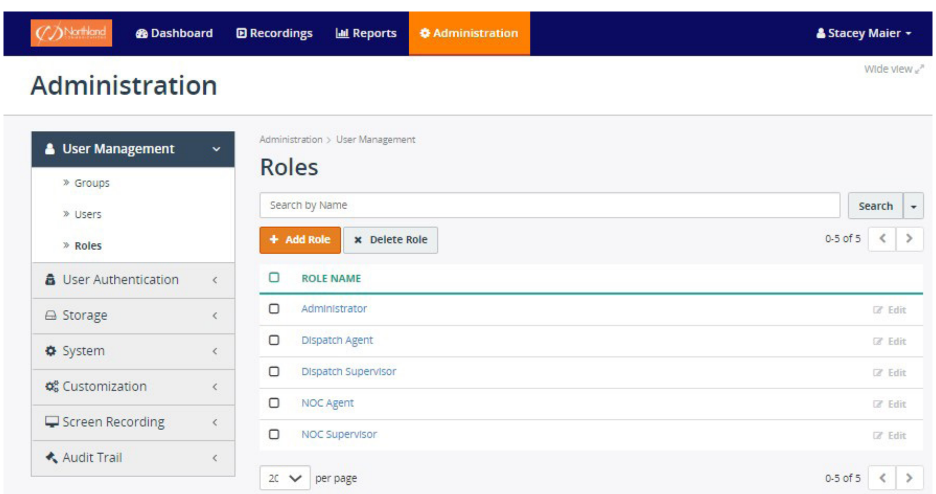
ROLES

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.



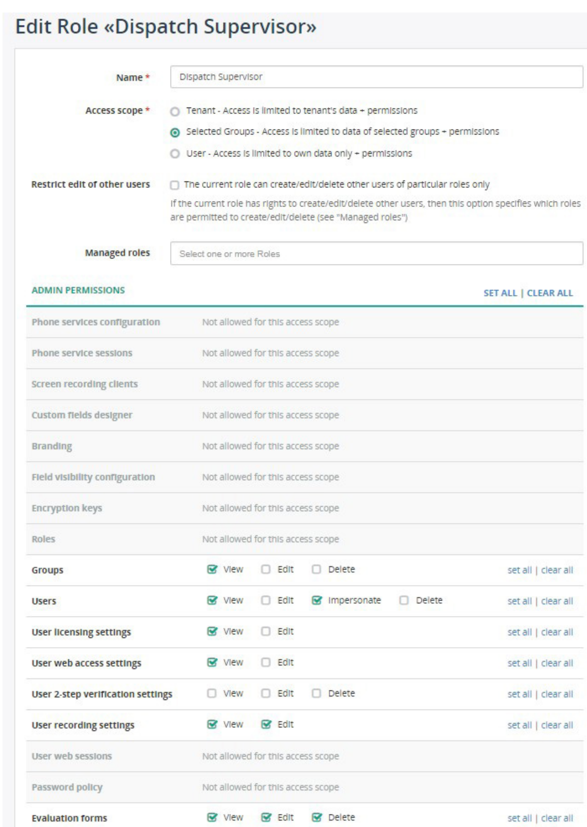
CONFIGURE ACCESS SCOPE

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



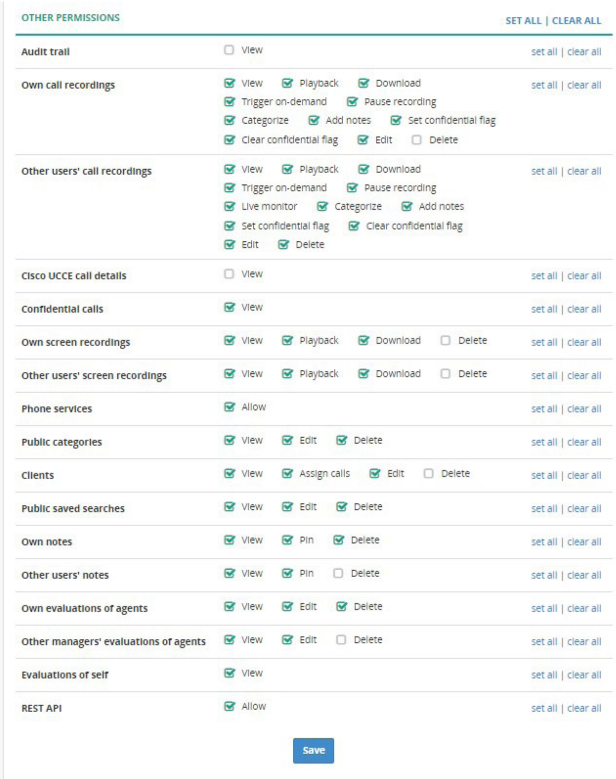
NOTES: The example on the left is a partial display which shows the **Admin permissions** of the Role "Dispatch Supervisor". See page 5 for **Other permissions** for the Role, "Dispatch Supervisor ".

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



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.

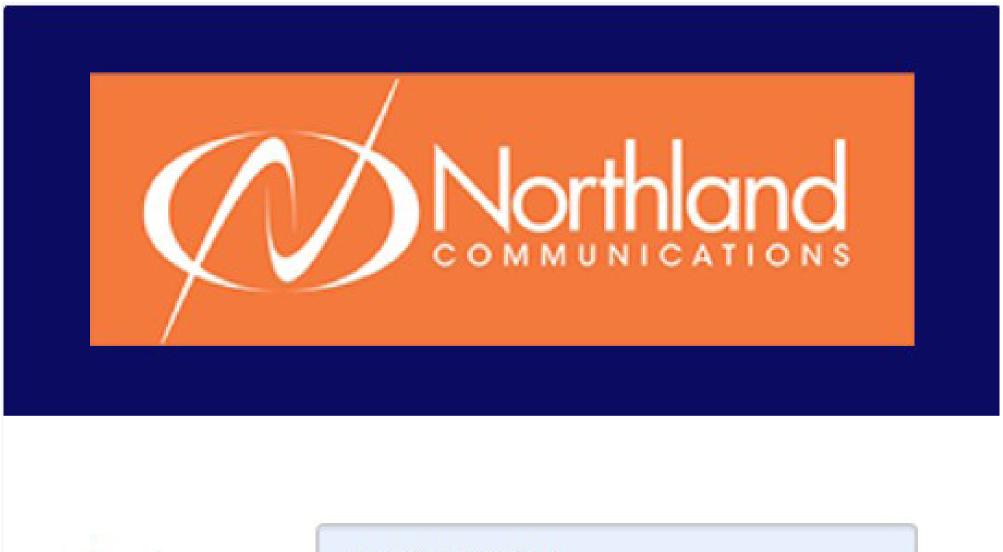
When finished editing permissions, select **Save**.

ADD ROLES

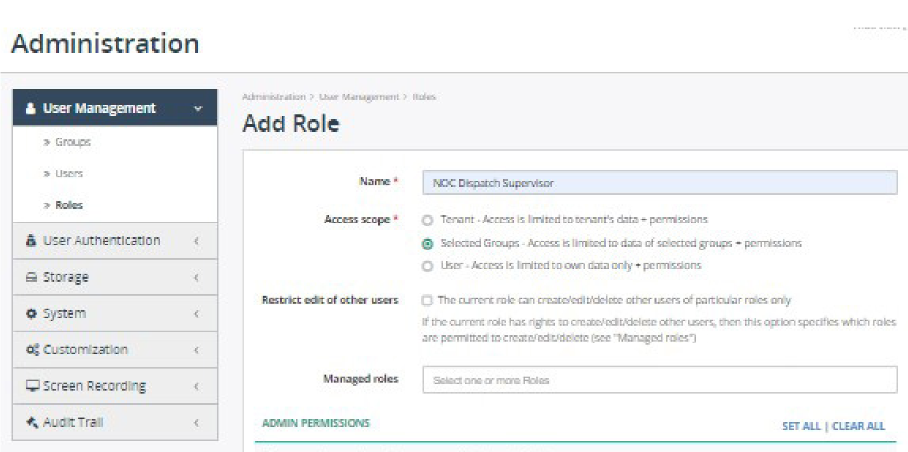
The Tenant Administrator has the ability to add roles to existing groups. The following roles can be added by the Tenant Administrator.

+ **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**.



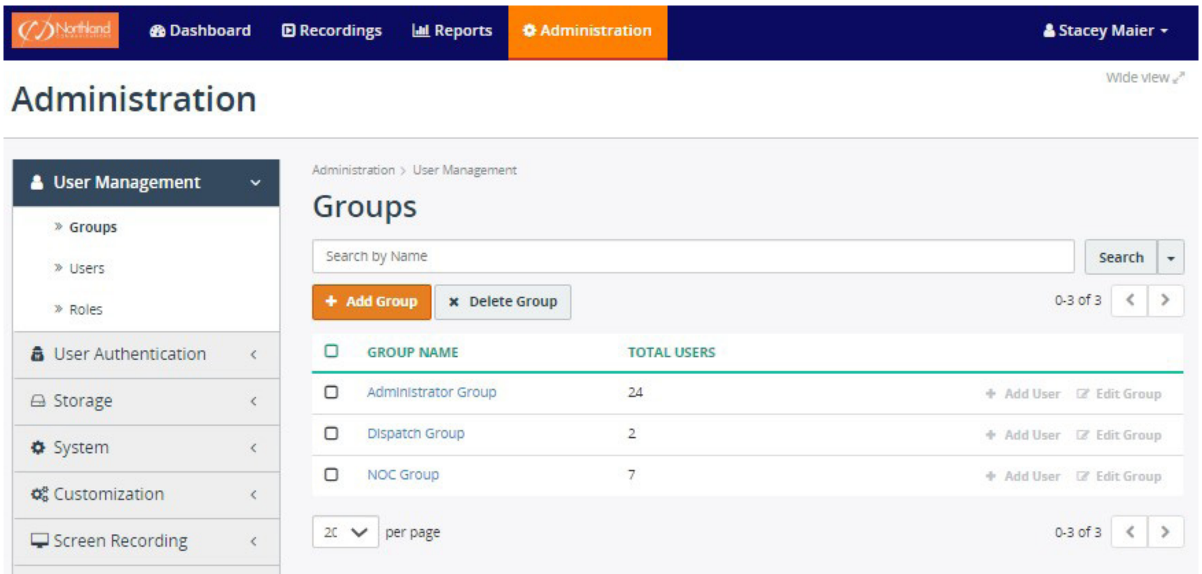
+ Assign the new role a name. (NOC Dispatch Supervisor).
+ Select the Role type. (Selected Groups).
+ Do not use **Restrict edit of other users** or **Managed Roles**. This should be done at the user level.
+ Assign **Admin permissions** for the new role.
+ Assign **Other permissions** for the new role.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

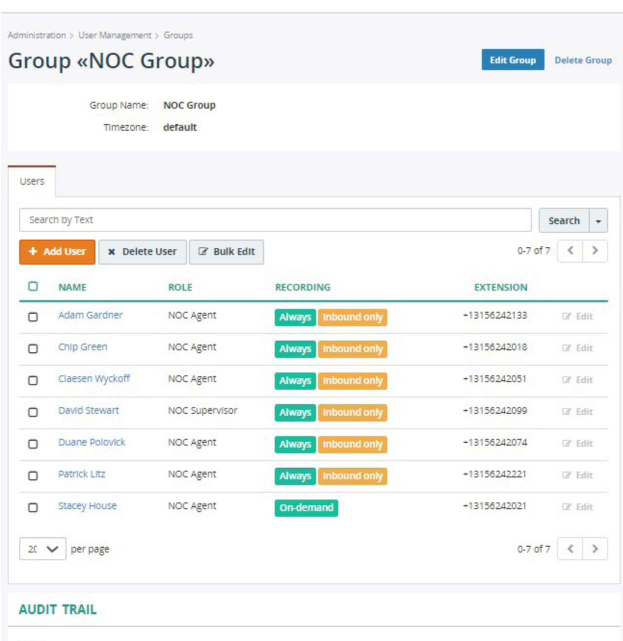
LIST OF GROUPS

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.



VIEW GROUP

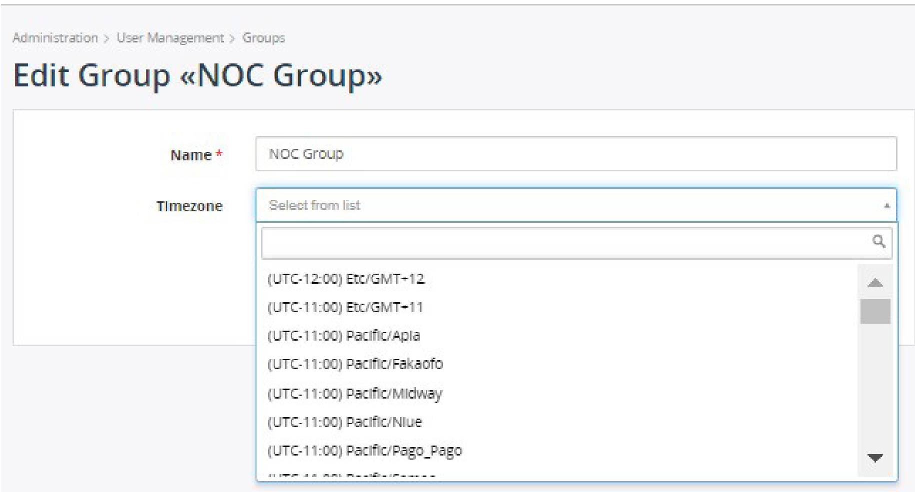
The group's profile page displays a list of all users who are a member of this group. Select the group to view it's users.



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.

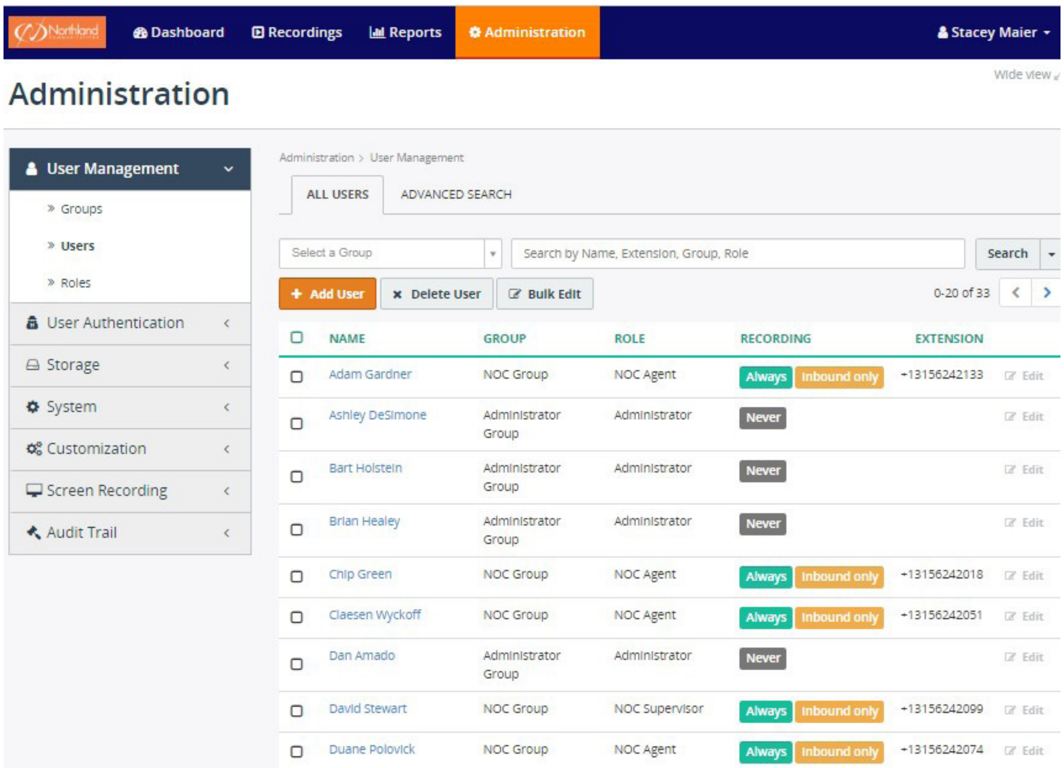


USERS

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.

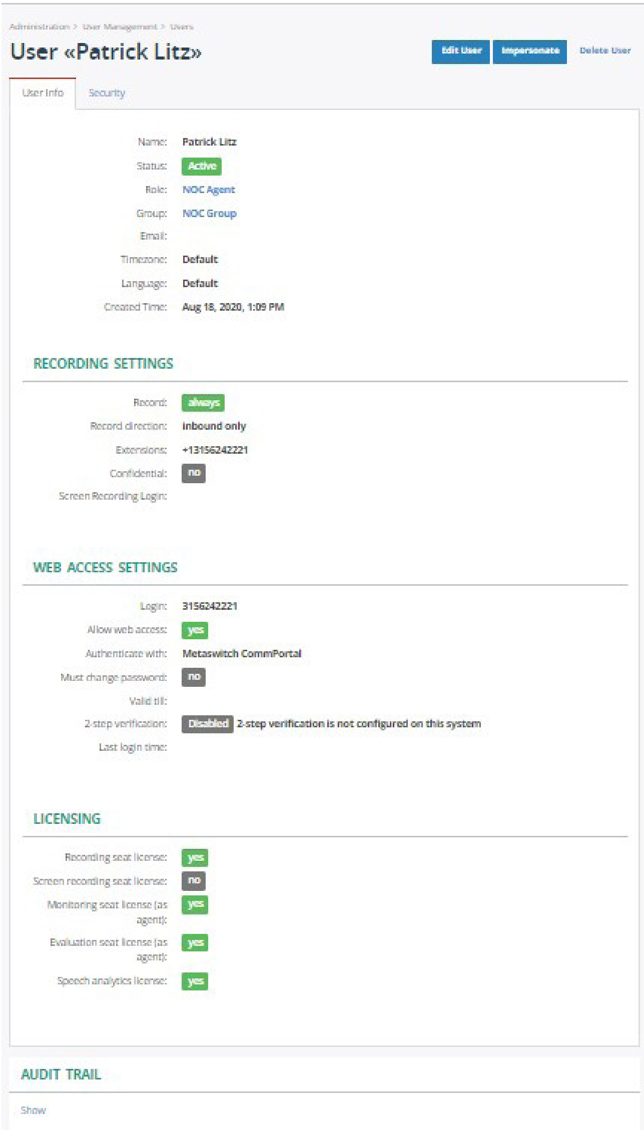
LIST OF USERS

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



VIEW USER

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



+ **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

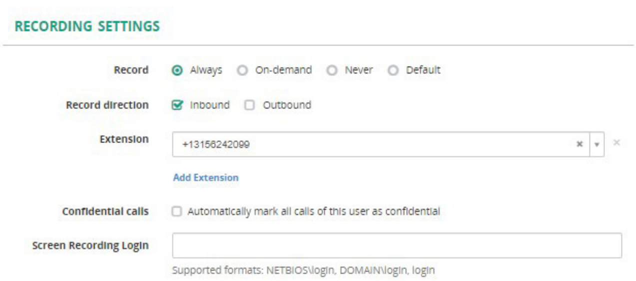
To edit a user, select **Edit User** on the right. Here is where the basic settings, recording, web access, phone settings and licensing are edited.

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

USER SETTINGS

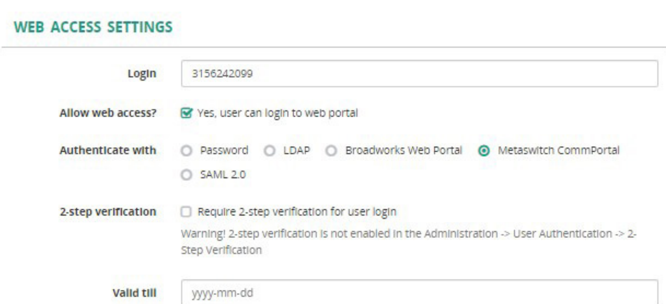
- Edit the basic user information such as name, role, managed groups, etc. in this section.
- When the user's role has access level "Group Supervisor", the groups managed is configured here.
- The group supervisor has access only to users and their call recordings, that belong to their managed groups.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

RECORDING SETTINGS

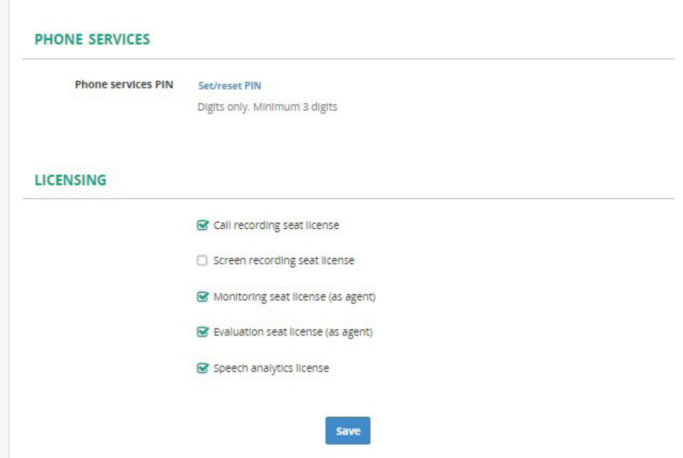


- Select how this user will be recorded: Always, on-demand, never, default (Record).
- Select direction: Inbound, Outbound or both.
- Specify the extensions assigned to this user. MiaRec uses the extensions configuration to automatically associate call recordings with users.
- **Add Extension** is restricted 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 confidentatial calls.
- When using screen recording, enter the login which is the PC name.

WEB ACCESS SETTINGS



- 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.



+ Set or reset the user Pin in the Phone Services Section.

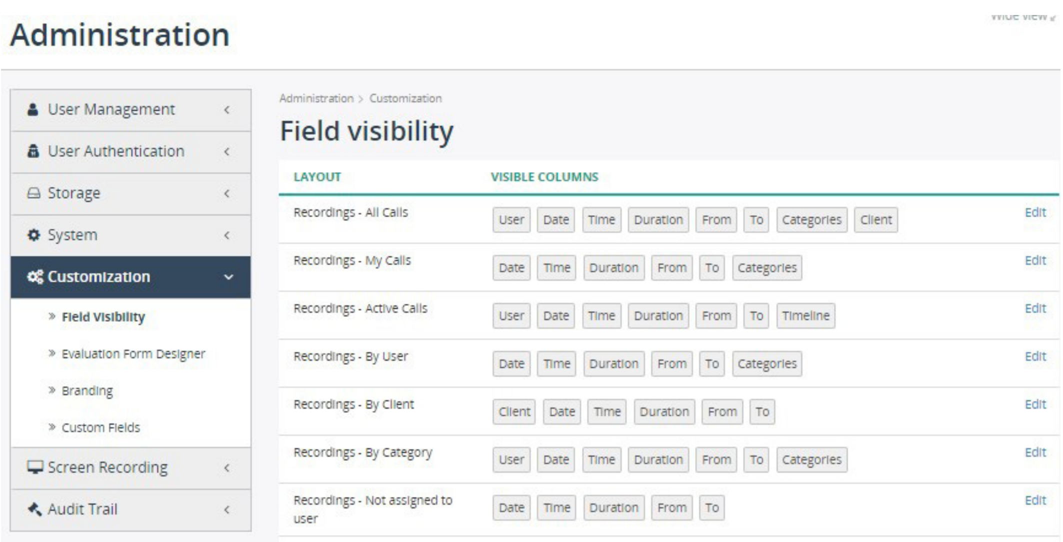
+ Tenant administrators can move licenses from one agent to another.

+ Tenant administrators are restricted from adding or deleting licenses as this can affect pricing.

CUSTOMIZATION

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.



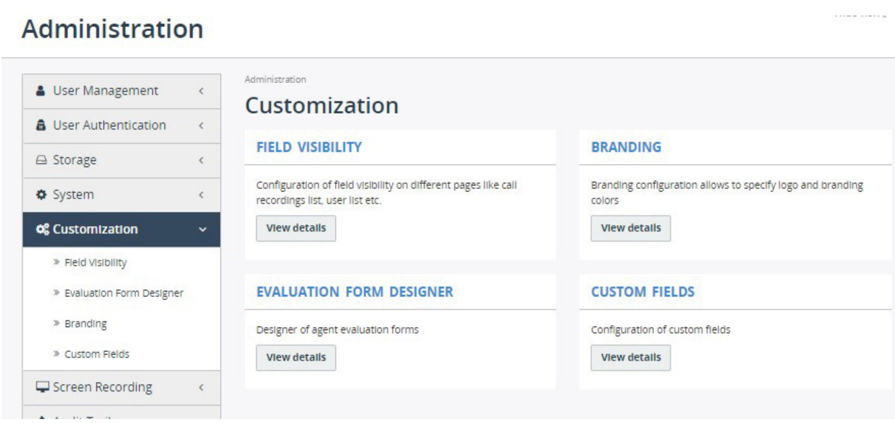
+ Select **Edit** for the list to change visible columns and their orders.

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

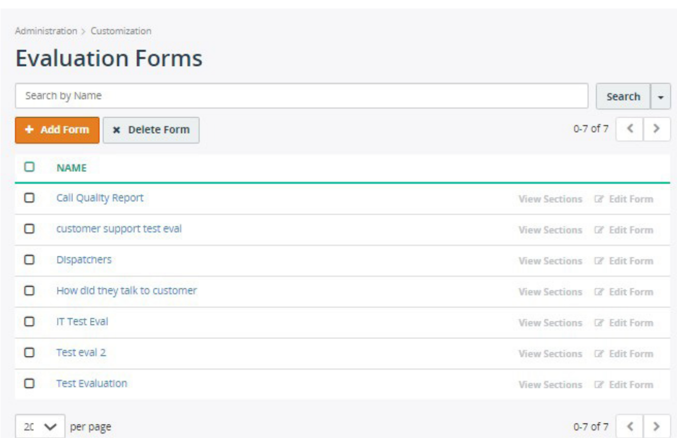
+ Select **Hide** to remove a column from the specified list.
+ Select **Show** to add a column to the specified list.

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**



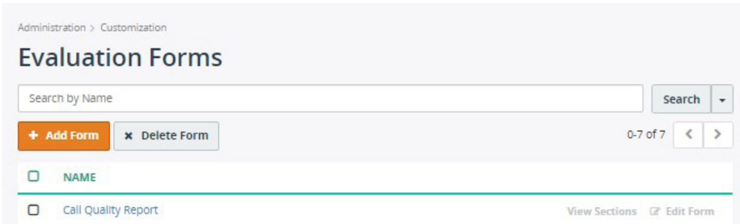
When evaluation forms have already been created, a list is displayed.



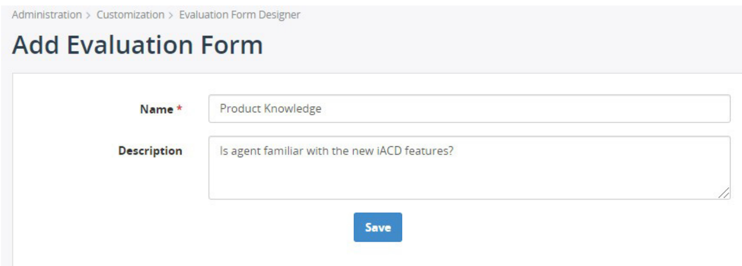
+ **View Sections** to see the sections + questions.
+ **Edit Form** to make changes to the form.
+ **Delete Form** to delete the form permanently.
+ **Add Form** to create a new evaluation form. See page 15.

ADD EVALUATION FORM

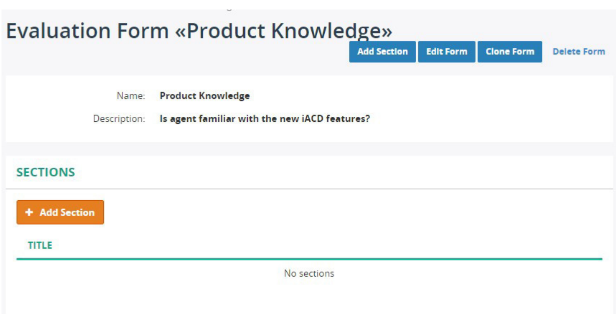
Administrators and Supervisors can create new evaluation forms. Evaluations are divided into sections with questions and answers provided in each section.



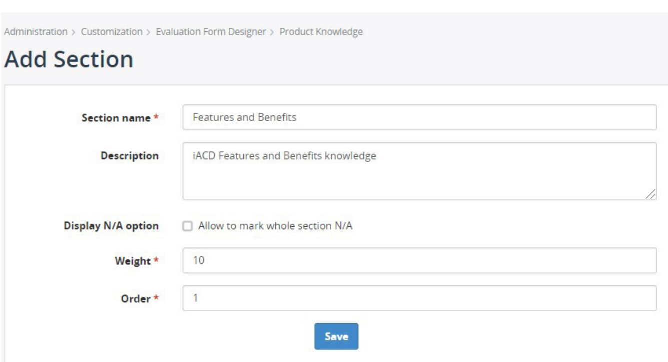
+ Select **Add Form**. The form fields will be displayed.



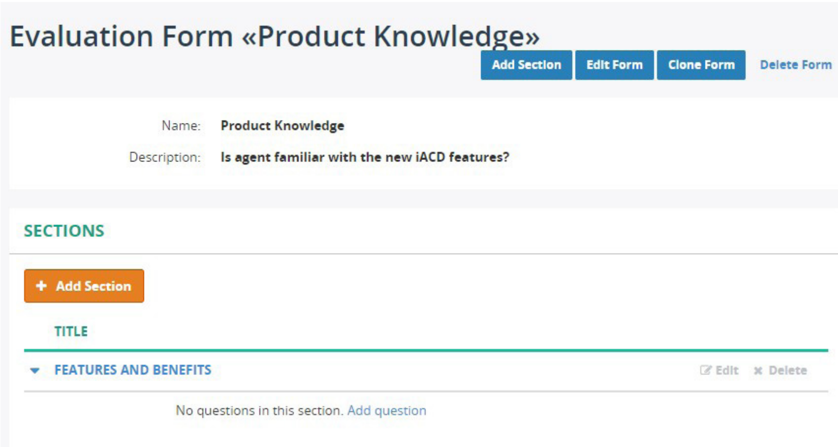
+ Enter a name for the evaluation.
+ Enter a description.
+ Select **Save**. The new form has now been added to the forms list and the forms list is displayed.
+ Select **View Sections** to the right of the new form on the forms list. The form will display with no sections.



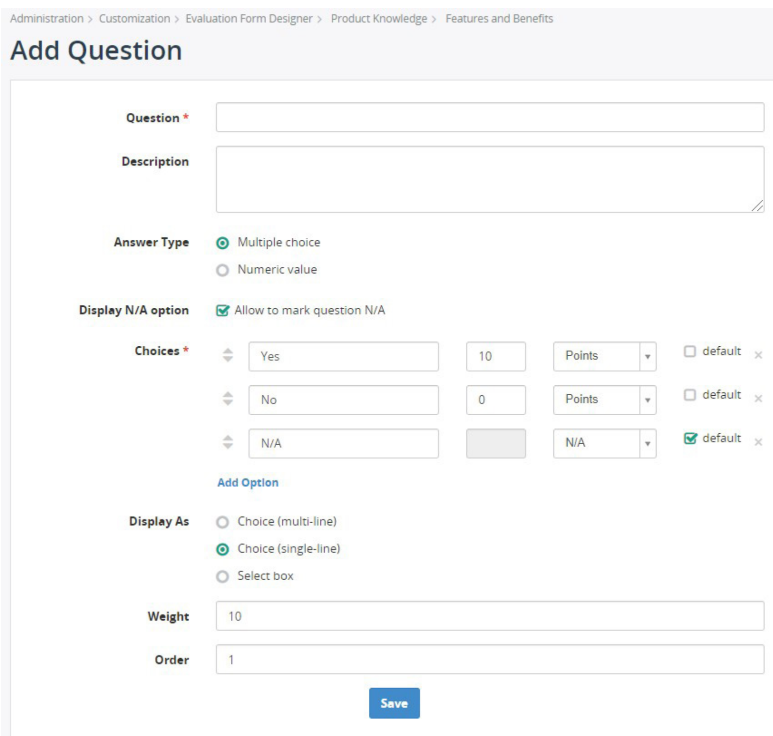
+ Select **Add Section**. A "New Section" form is displayed.



+ 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.



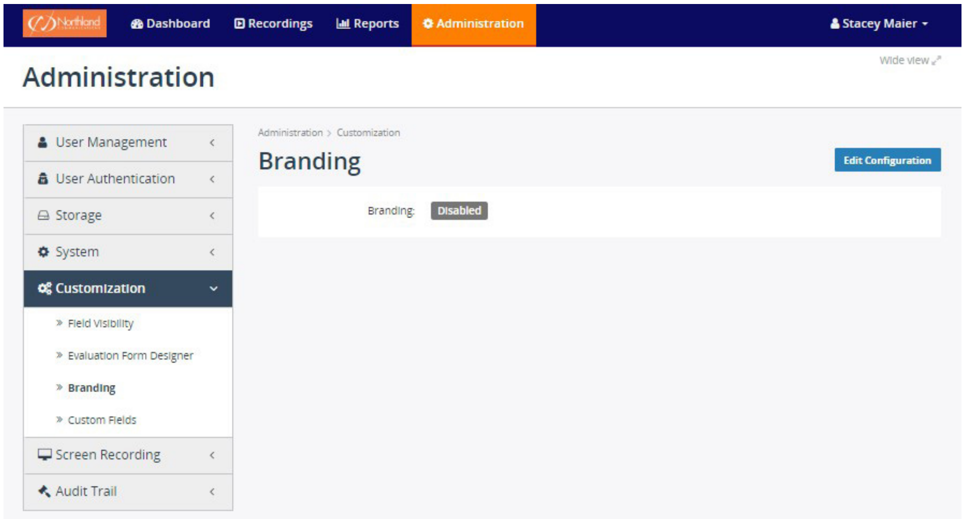
+ Select **Add question**.



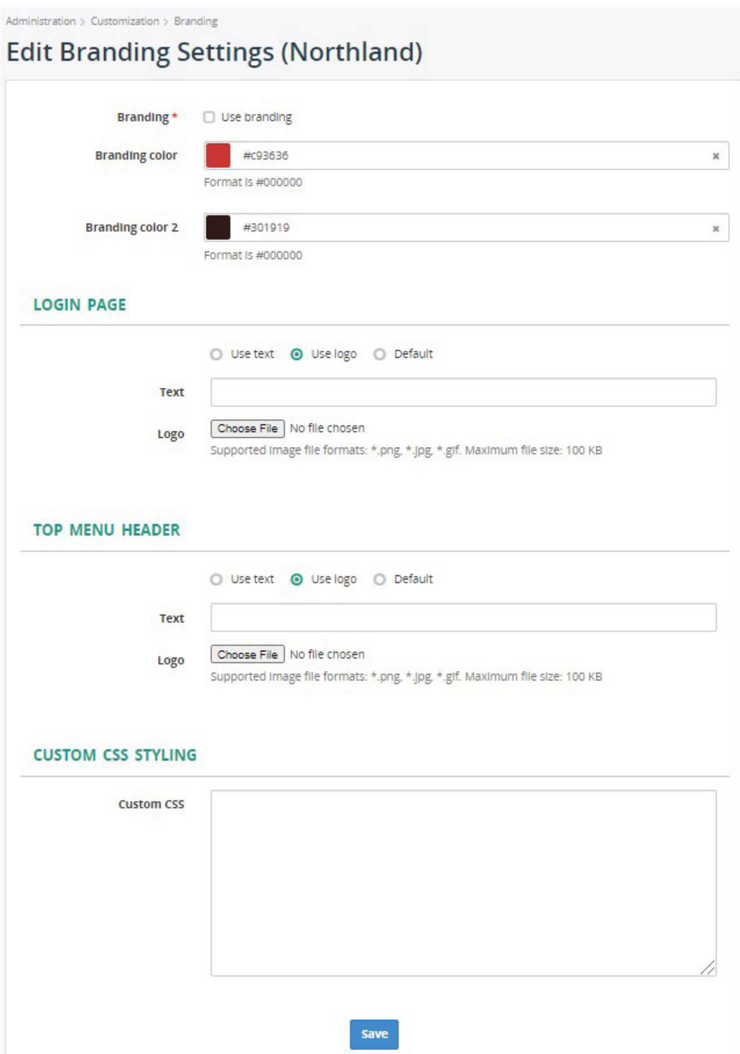
+ Complete the **Add Question** information.
+ Enter the question.
+ Enter a description.
+ Select whether the answer will be multiple choice or numeric.
+ If the question can be “not applicable” to the call, check to allow it.
+ Enter the answers and assign a points value to them.
+ To add additional 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

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)

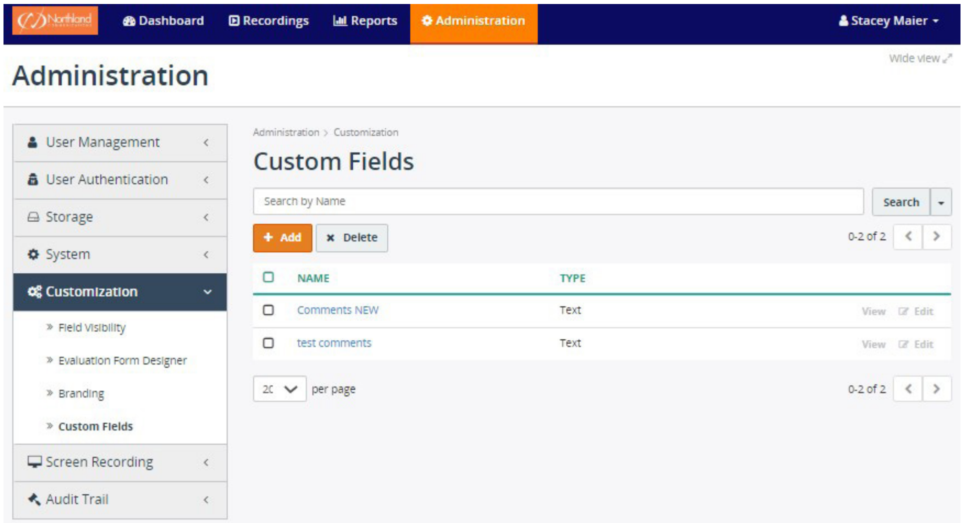
+ Enter the CSS code or markup.

SAVE

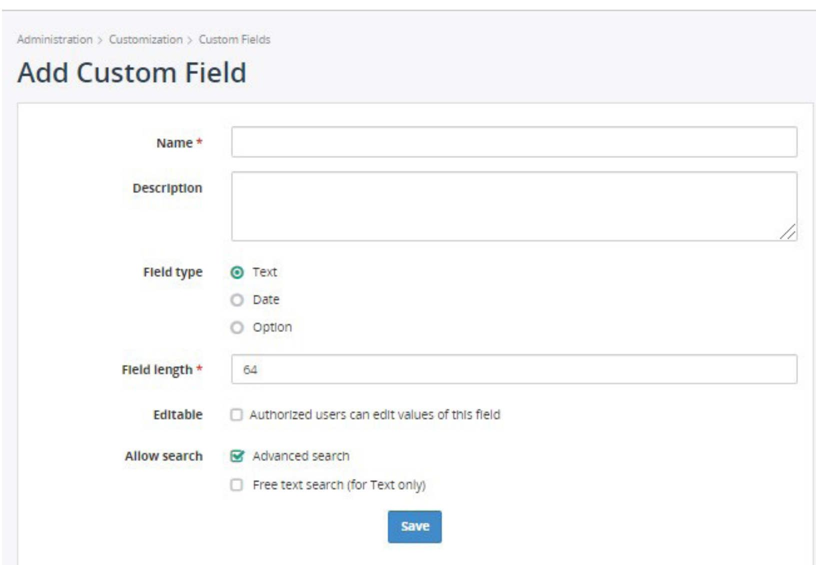
+ Select **Save**.

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.

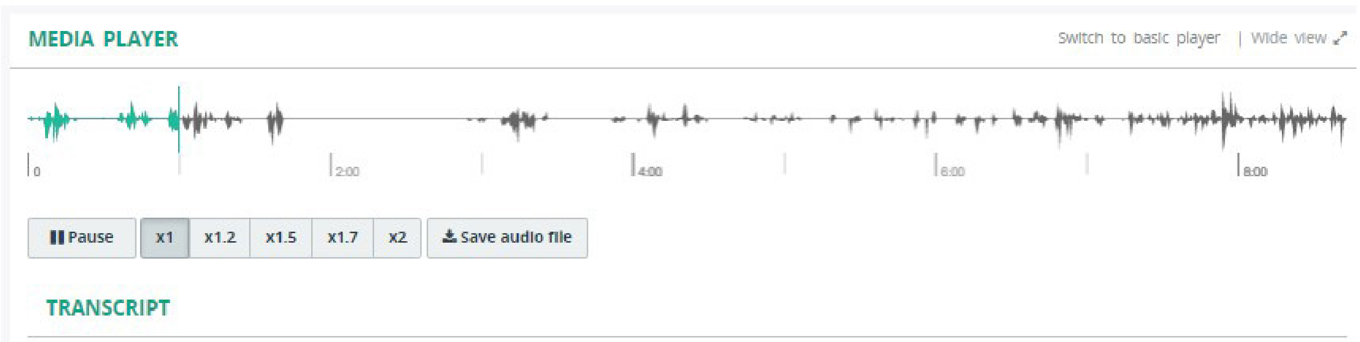
SPEECH ANALYTICS

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 transcription and the audio player will fast forward to that location.



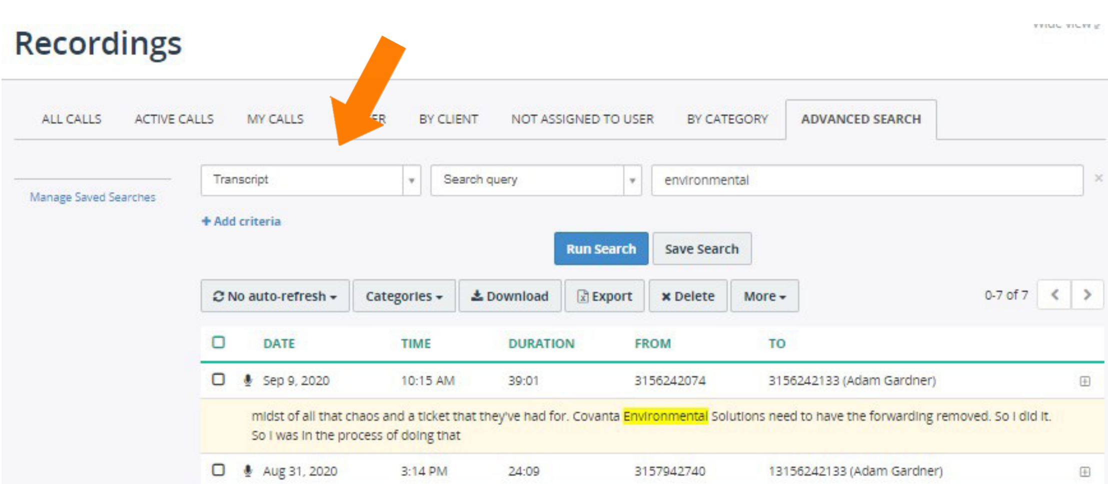
Speaker 1 [0:04]: Northland Communications, this is Patrick.

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.

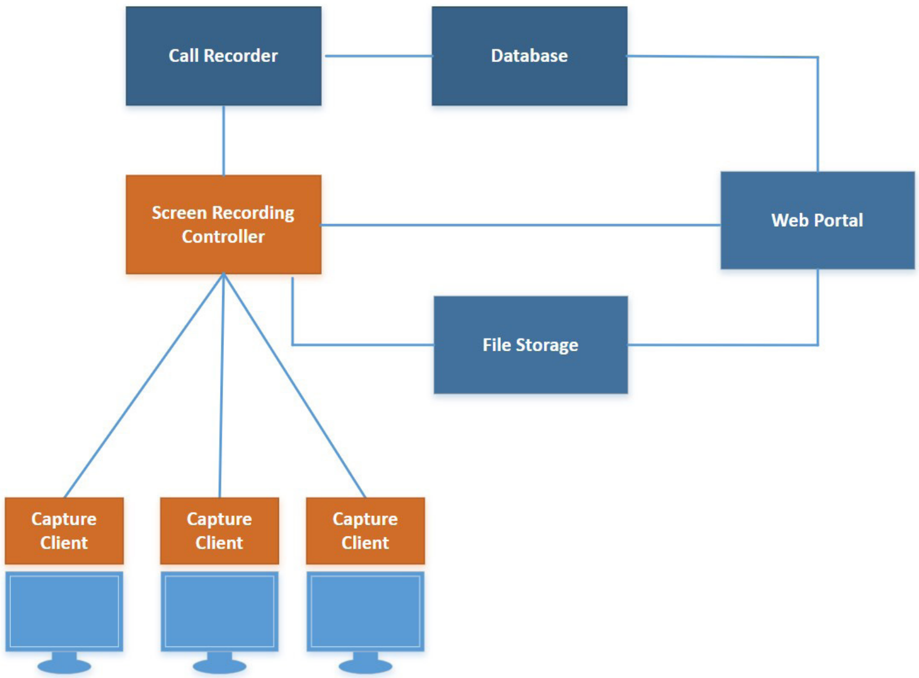


SCREEN RECORDING

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

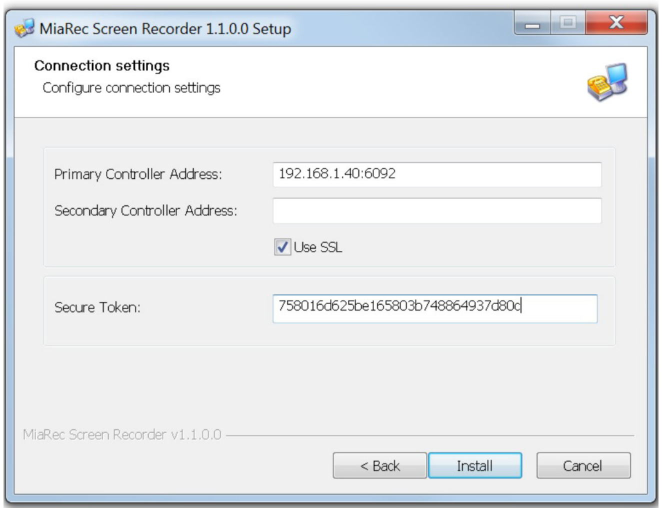
Download the **MiaRec Screen Capturing** application and install on agent desktops.

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

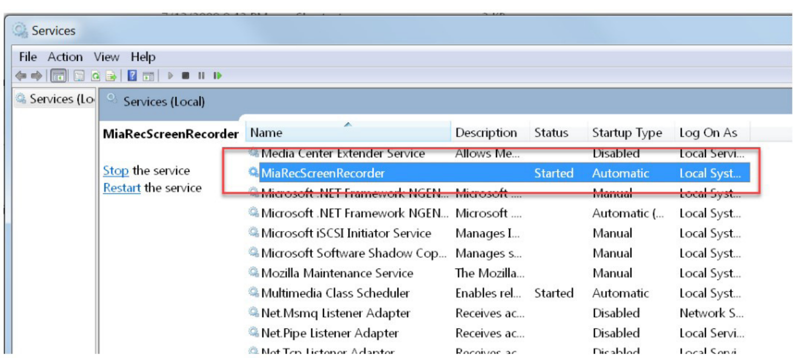
Supported operating systems: Windows 7, 8, 10, Server 2008/2012/2016 with the latest windows updates installed.

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.

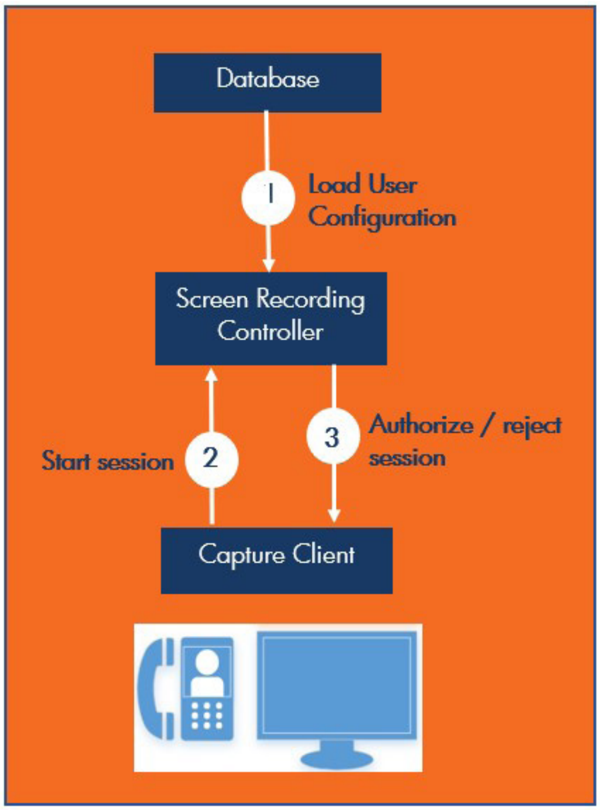


On the desktop, navigate to **Control Panel > Services** to verify the installation. The MiaRec Screen Recording Client silently works in background.



AUTHORIZE NEW WORKSTATIONS

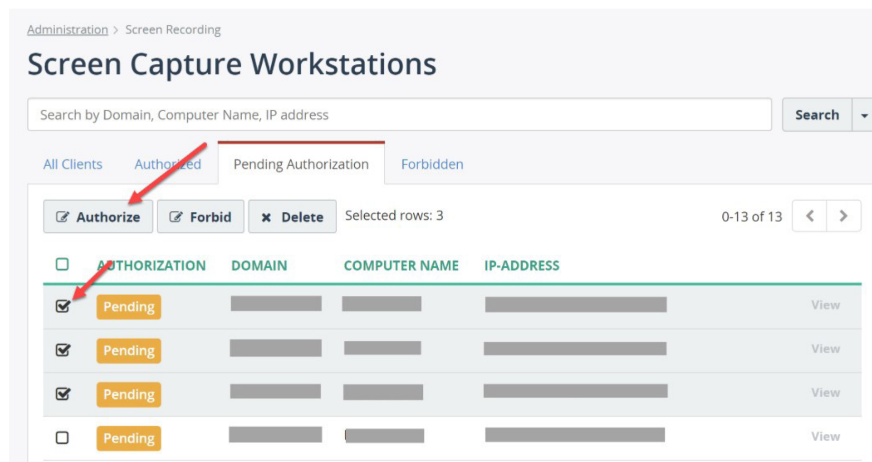
The capturing client application automatically establishes a network connection with the MiaRec screen recording controller. A new workstation requires authorization before it can record screen.



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**.

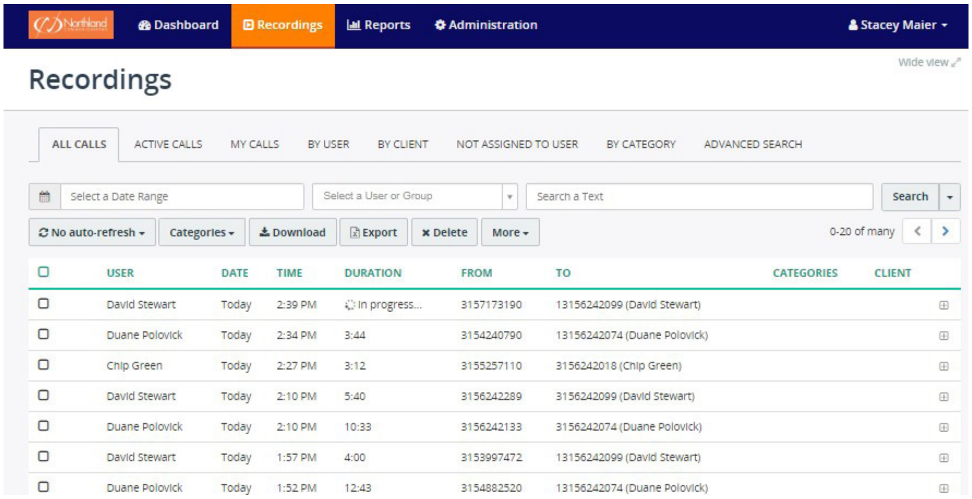
New workstations are shown in the Pending authorization tab.

Select the corresponding workstation(s) and authorize them.



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.



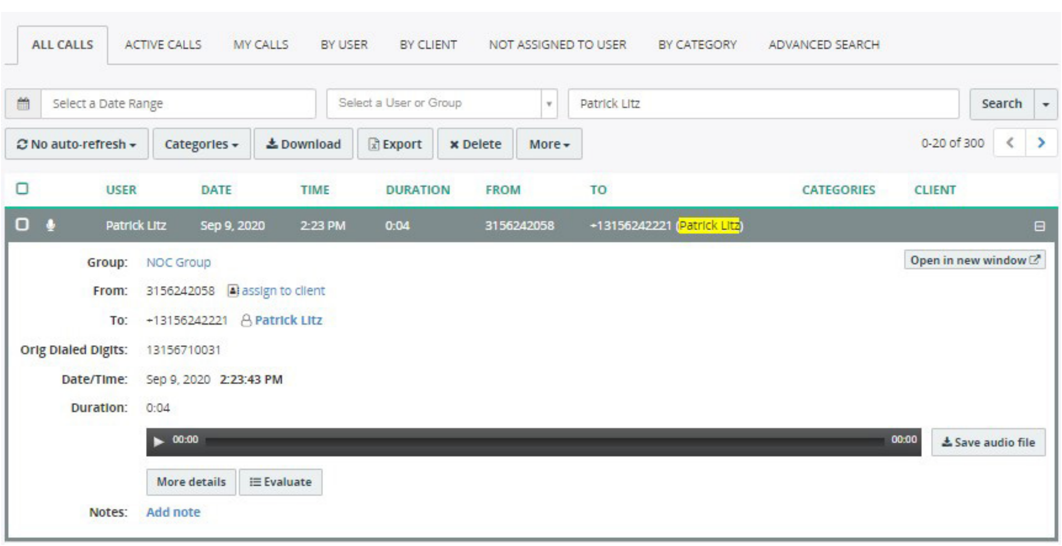
MiaRec categorizes the calls as follows:

- + **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.

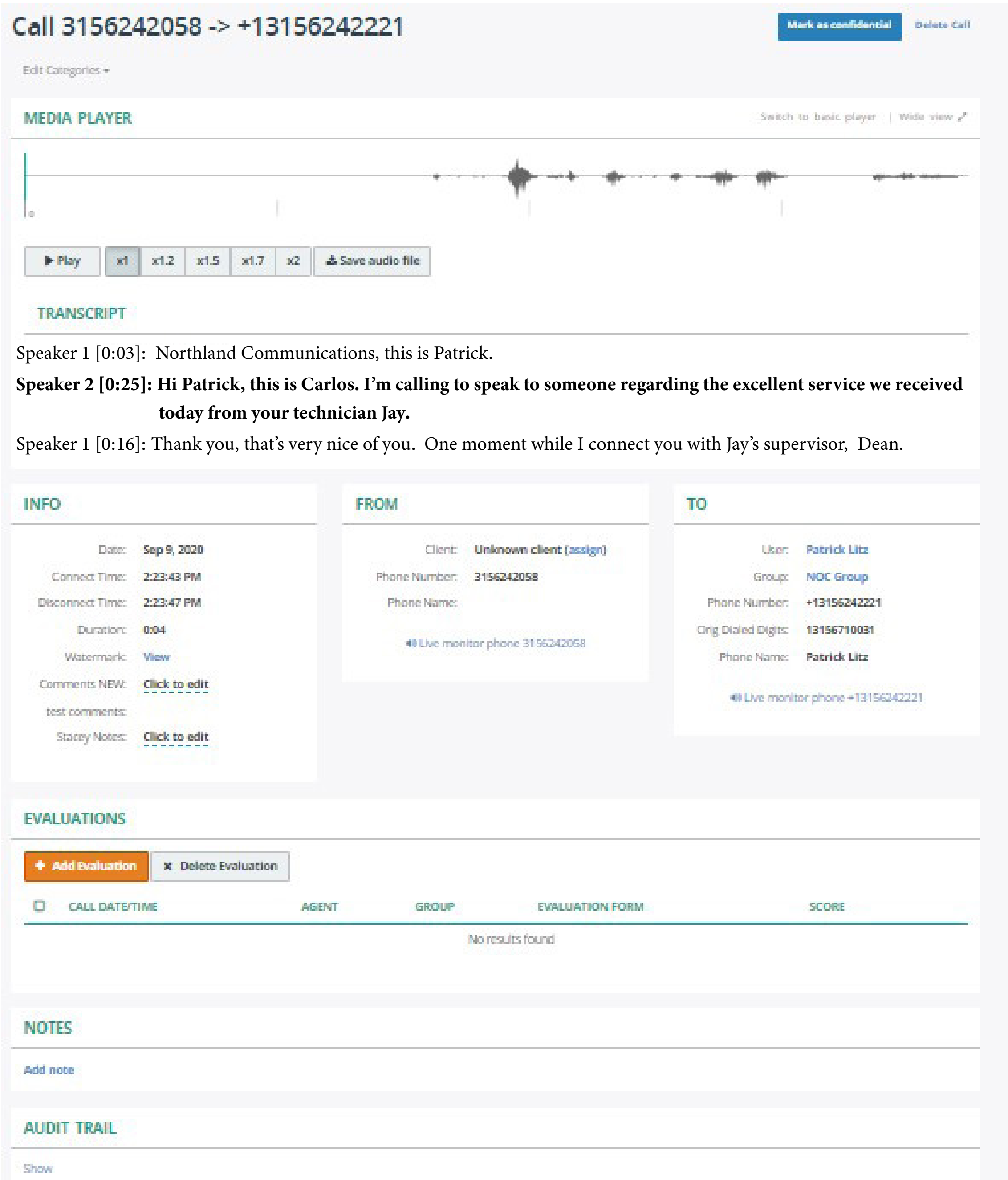


NOTE: By default, Auto Refresh is set to No Auto Refresh, select to change it to refresh automatically.

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.

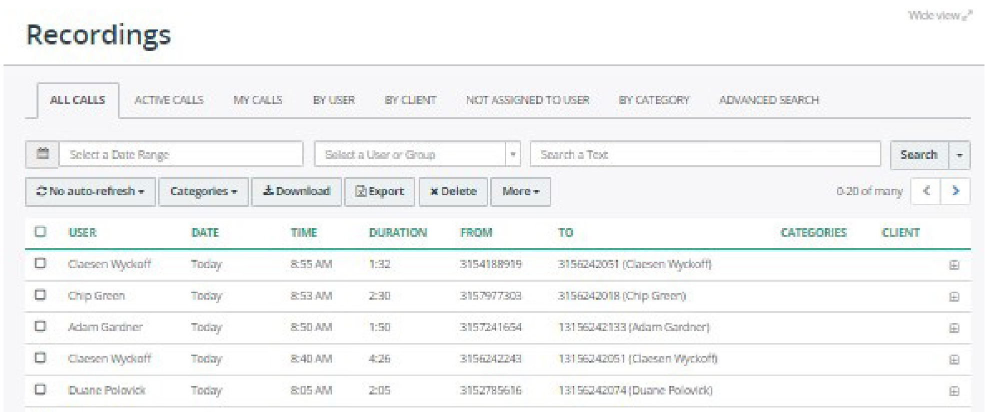
NOTE: The advanced audio player may appear differently depending on the options your business has chosen.



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.



ADVANCED SEARCH

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

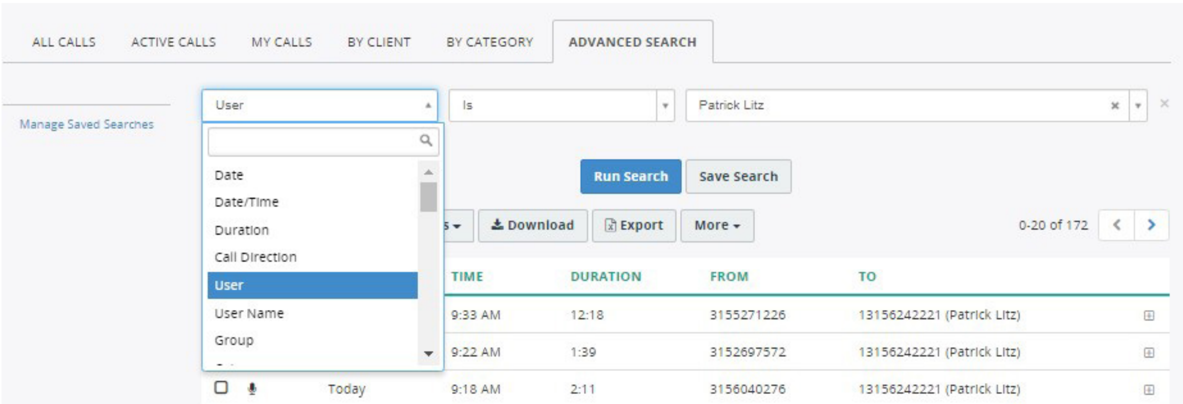
+ User
+ Group
+ Call ID
+ Phone number (FROM and/or TO)
+ Date range
+ Call duration

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.

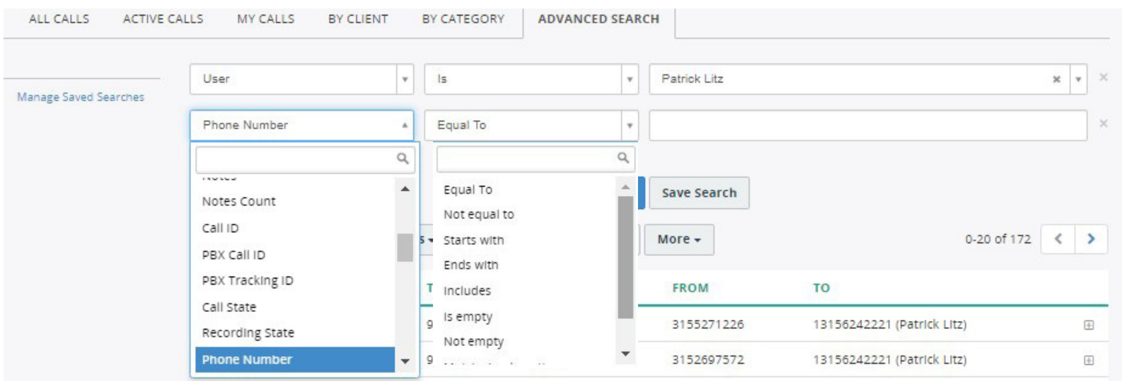
NOTE: Depending on your role permissions, you may only be able to search your own recordings.

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.



+ 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.



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

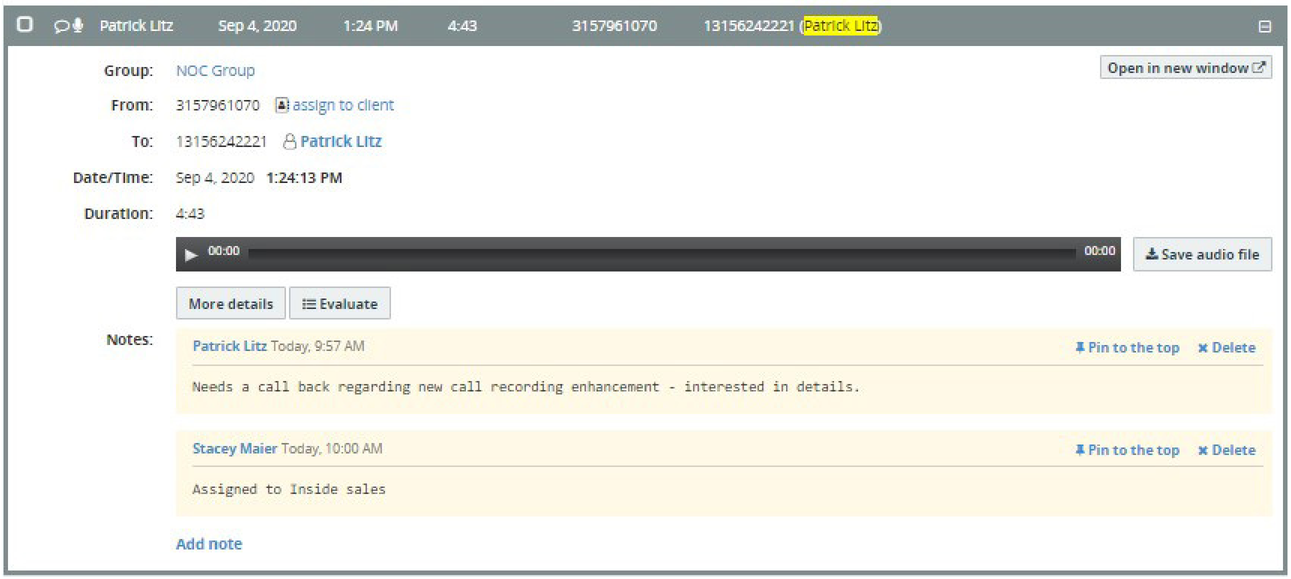
ADD NOTES TO CALLS

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.

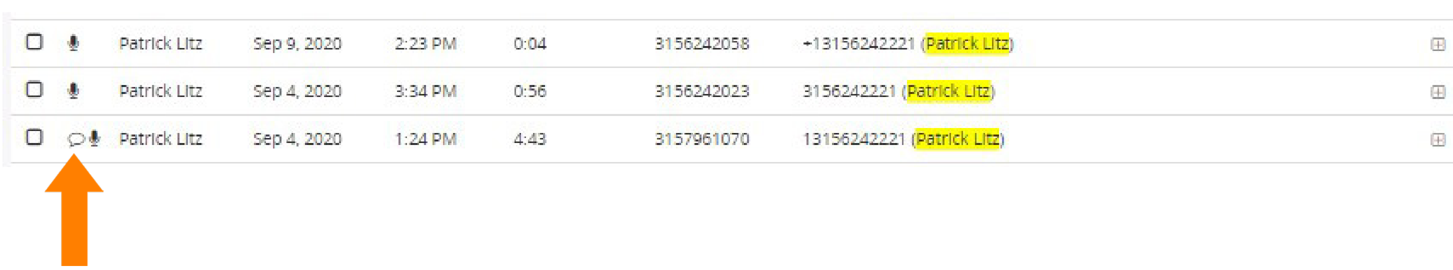
Notes can be added to recordings to tag the call for Supervisors and Administrators to pull reports based on the tags or to help with search criteria.

CALL NOTES INLINE



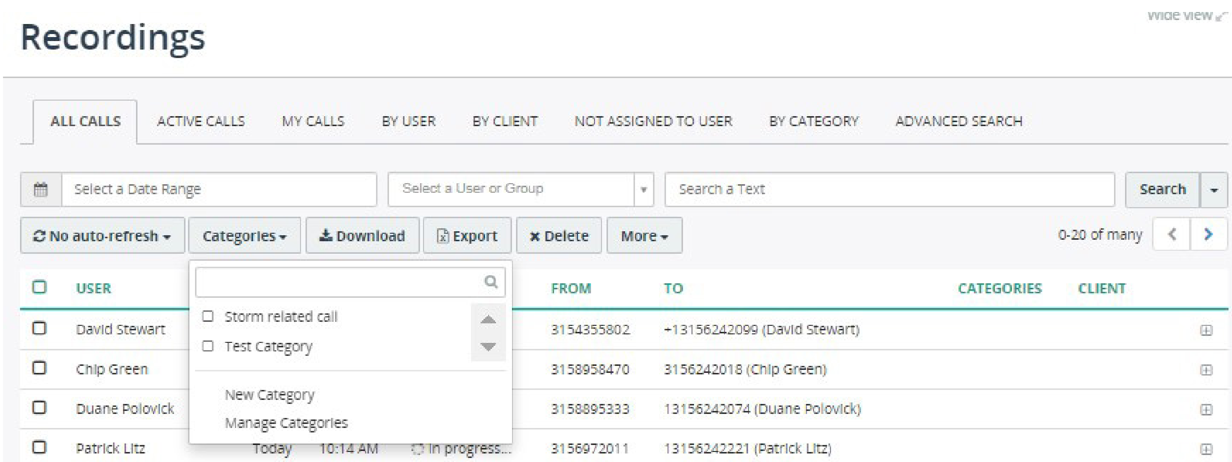
+ To view notes inline, select the recording.
+ To add a note, select **Add note**.
+ To pin a note to the top (out of order), select **Pin to the top**.
+ To delete a note, select **Delete**.
+ To view in new window, select **Open in new window**. This will show the additional details including transcription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

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



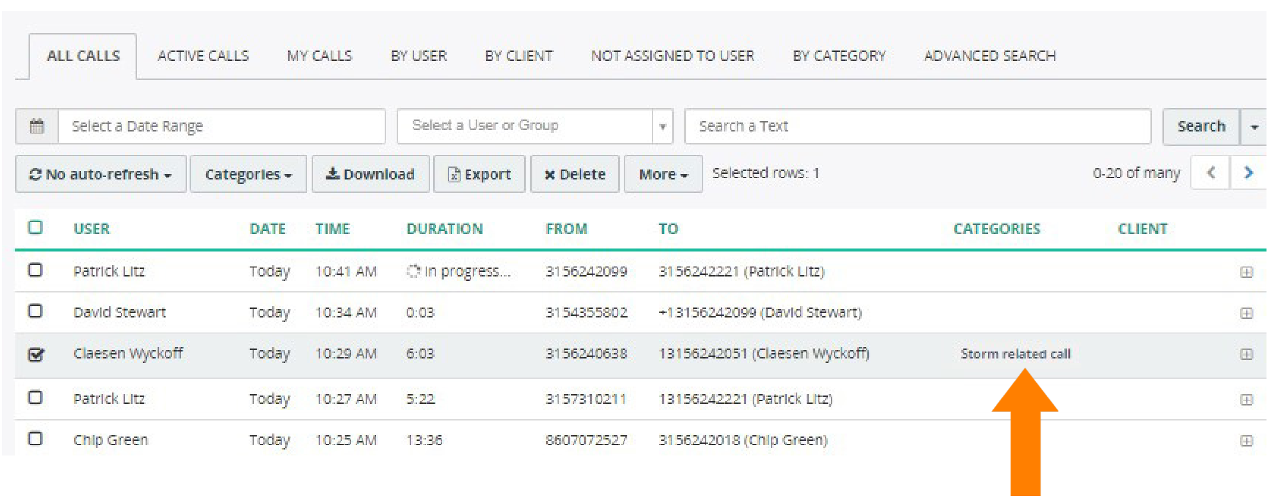
CATEGORIZE CALLS

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.



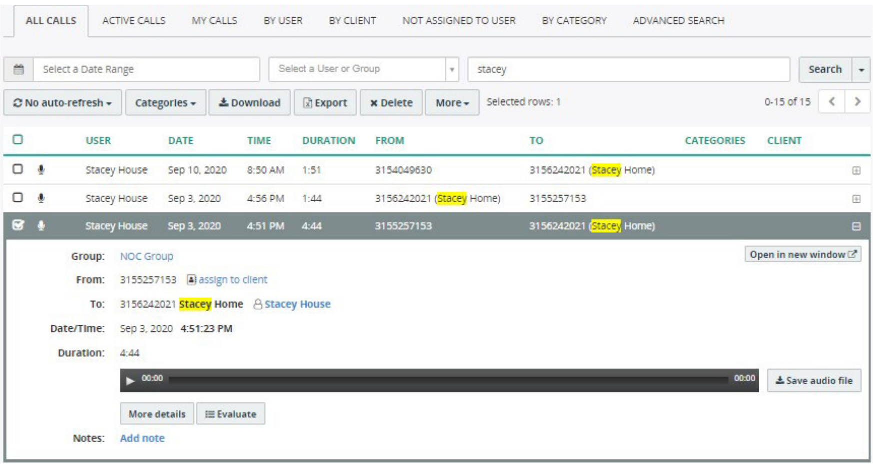
+ Select one or more calls from the Recordings page.
+ Select the **Categories** dropdown.
+ Select a category for the calls.
+ To add a category, select **New Category**.
+ To work with existing categories, select **Manage Categories**. Here you can add sub-categories, delete or edit existing categories.

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

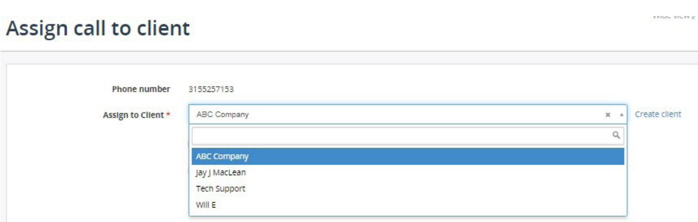


ASSIGN TO A CLIENT

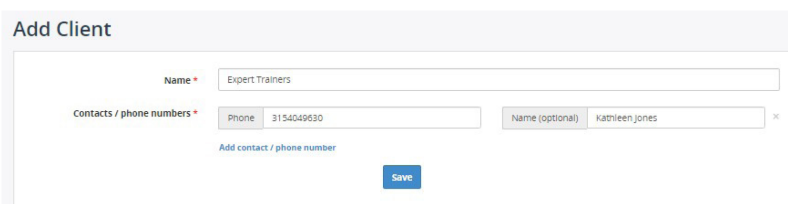
To help with grouping calls and searching for specific calls, you can assign the recording to a client or customer.



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

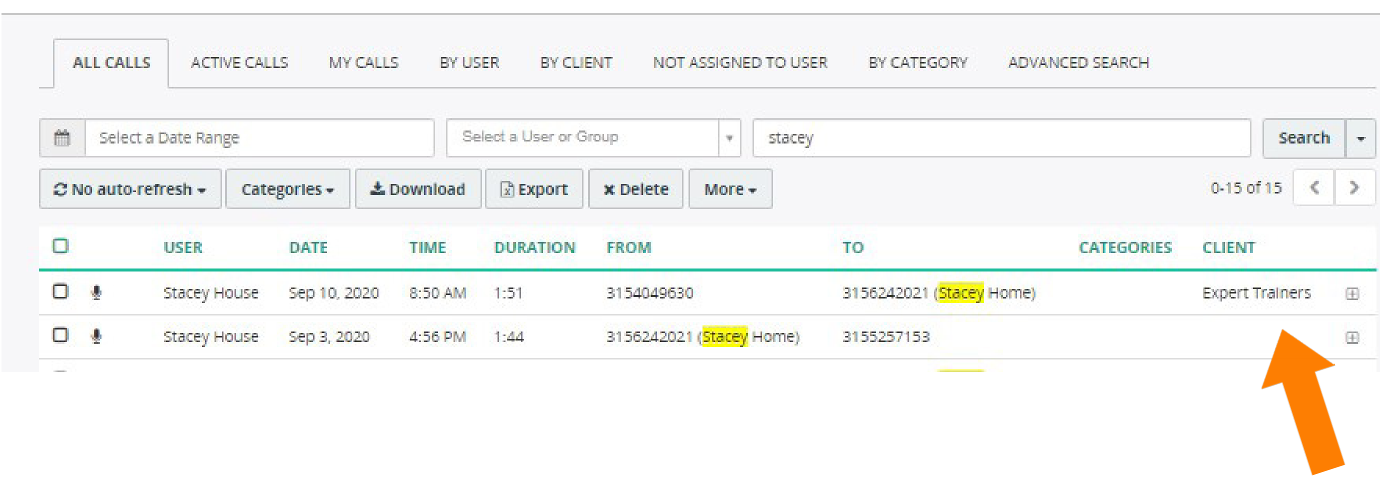


+ Select a client from the dropdown.
+ To assign this client to similar calls, select **Apply this rule to all similar calls.**
+ To create a new client, select **Create client**.



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

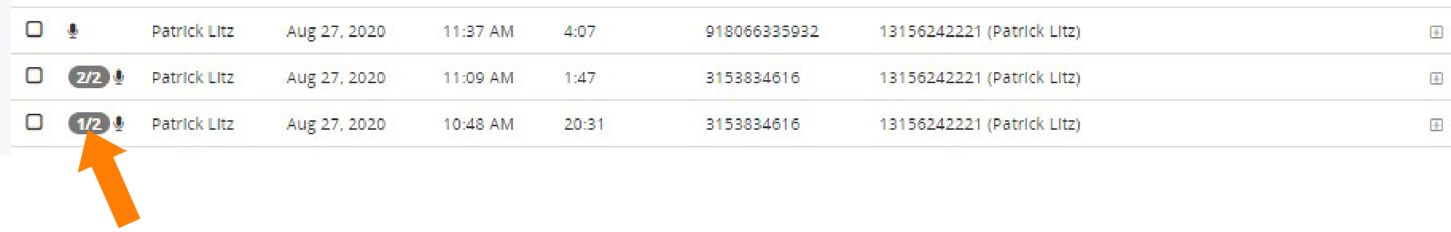
The client name will appear in the Recordings list and is searchable by client name.



MULTI-PART CALLS

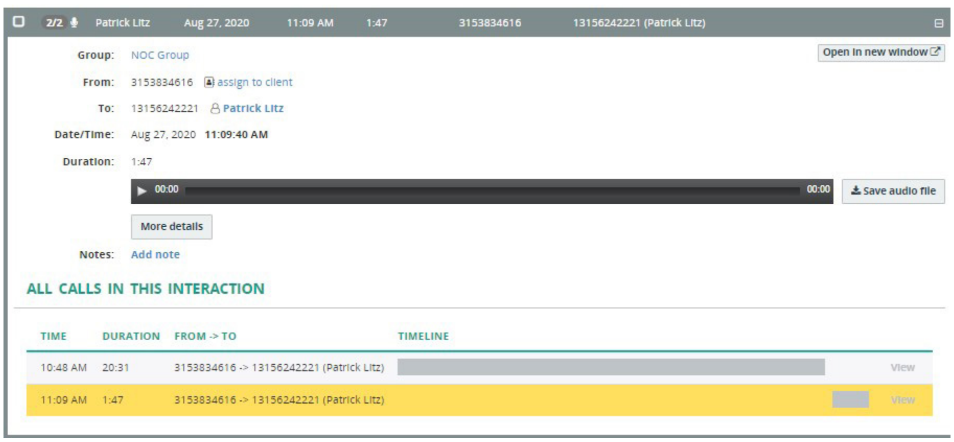
The system automatically recognizes "multiple part calls", for example, when a call has been transferred from one agent to another, or when a call has been placed on hold, the agent made a consultative call to his/her supervisor and then resumed the initial call.

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

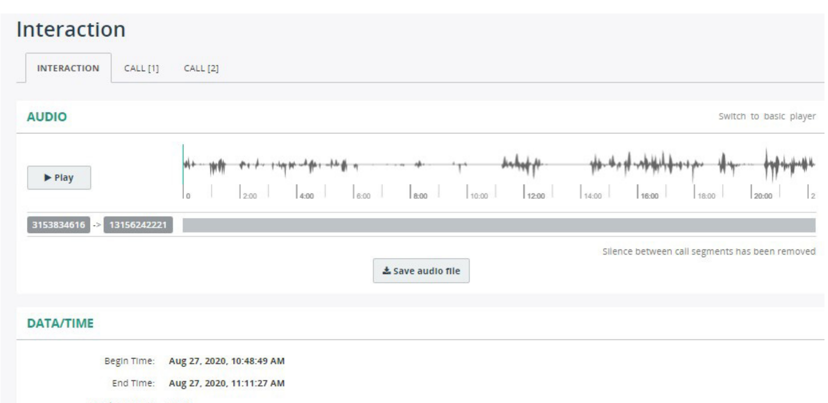


VIEW MULTI-PART CALLS

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



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.

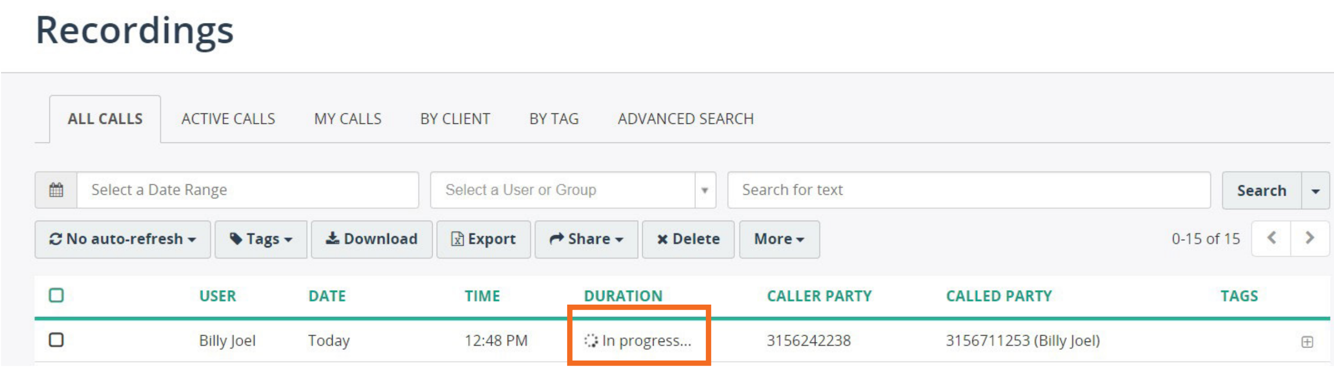


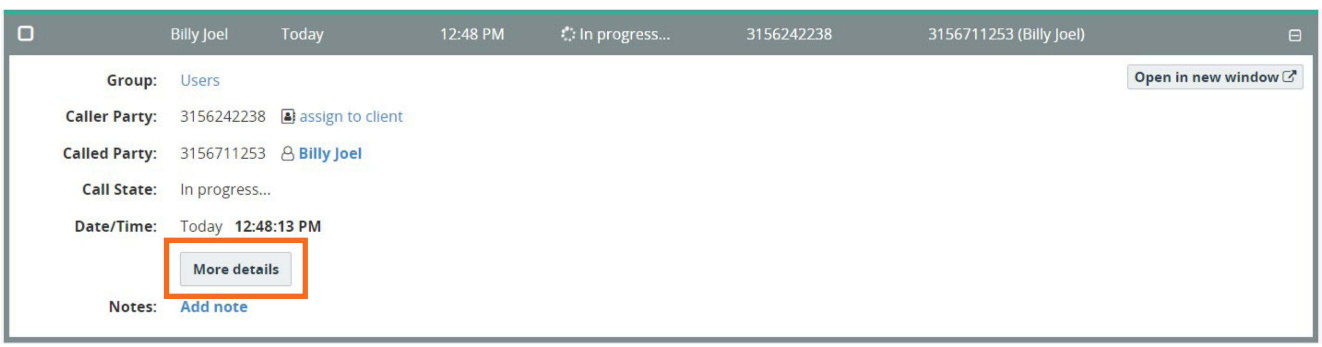
NOTE: If an agent places an active call on hold to answer another incoming call and then returns to the held call, the second call is not considered part of the interaction and will not be included in the timeline.

ON DEMAND RECORDING

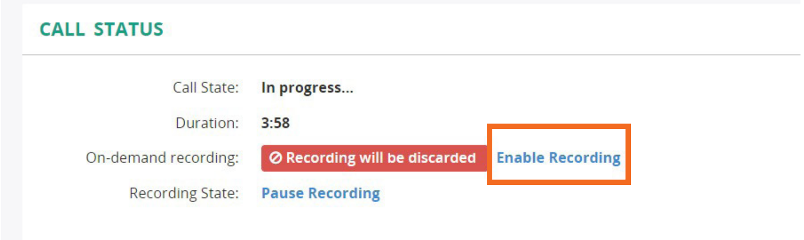
When using the on-demand recording option, the Agent selects which calls to record through the MiaRec Agent Dashboard. From the dashboard, the agent can activate, pause and stop the recording. On-demand call recording is also known as "look back recording" because even if the Agent chooses to record 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.

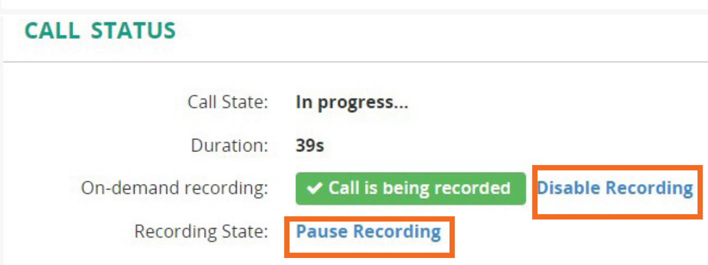
+ From the Agent Dashboard, select the **Recordings** tab and click on the call "In progess".





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





+ 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.

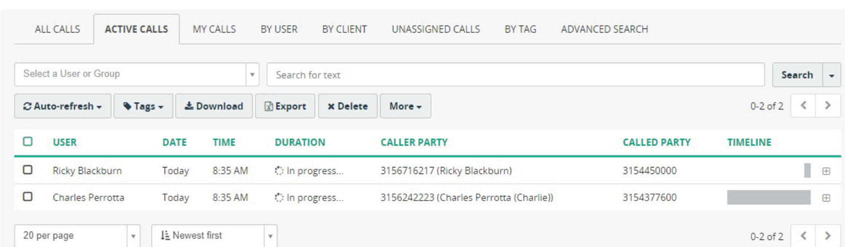
In the second case, a monitoring session is automatically restored when the monitored agent makes or receives a new call. The supervisor then initiates a live monitoring session and keeps automatically listening to the consecutive calls the particular agent is making

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

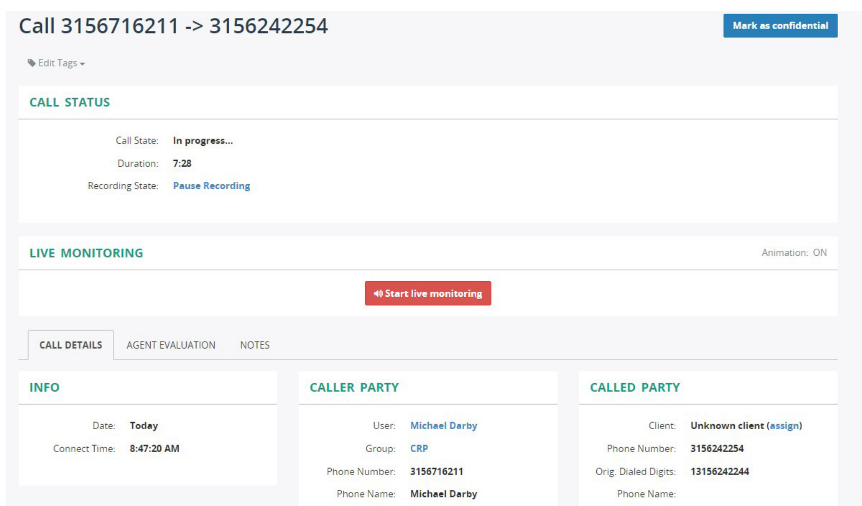
To start monitor a single call in real-time:

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



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

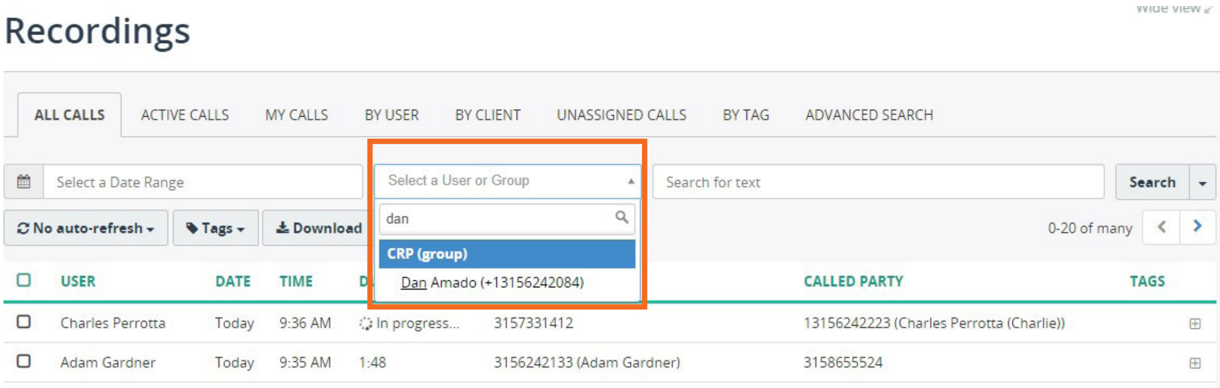
+ **To begin monitoring:** Select **Start live monitoring.** MiaRec will instantly load and playback a call recording in real-time.
+ **To disconnect from a recorded call:** Select **Stop live monitoring.**



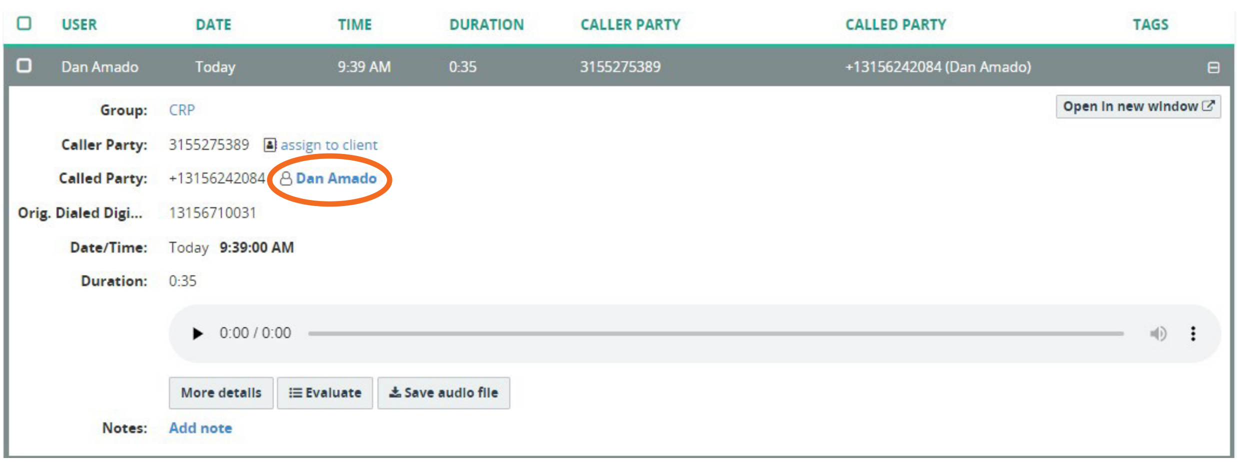
MONITOR CONSECUTIVE CALLS

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.

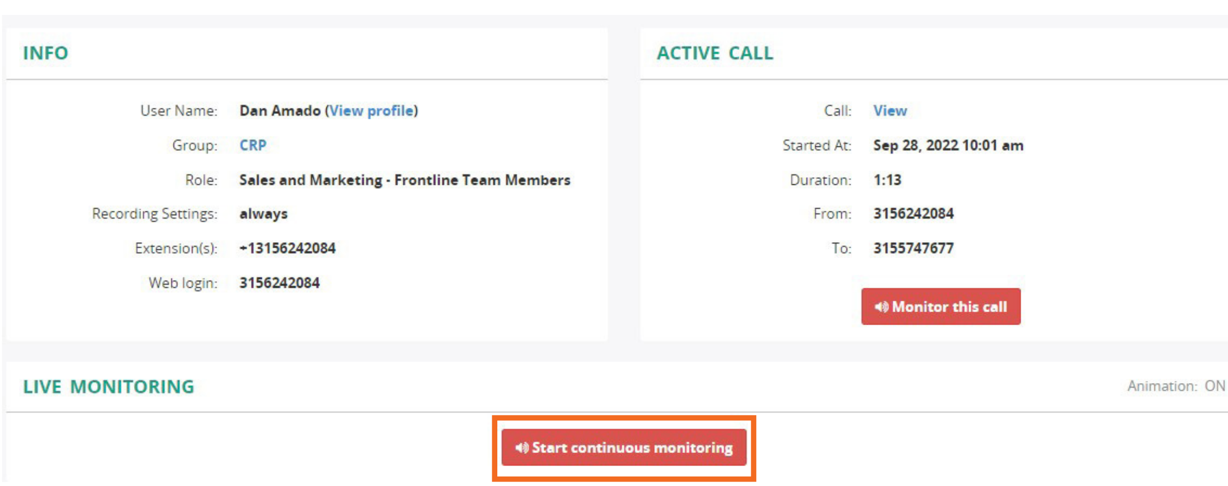


+ Select any call in this user's list to view recording details.
+ Click the user name to view more details of all call recordings assigned to this user.



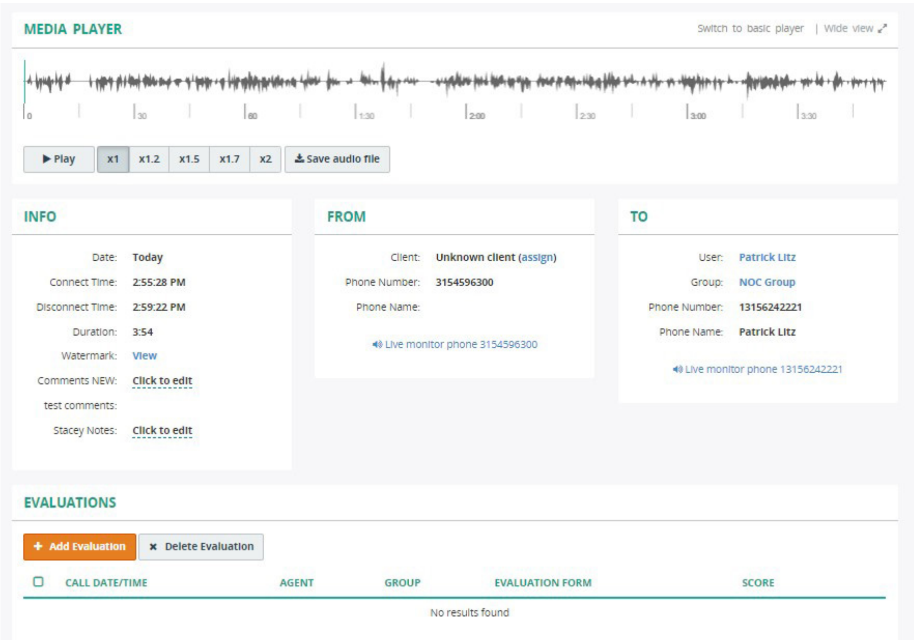
+ Select **Start continuous monitoring** to monitor all calls of this user. Clicking Monitor this call will monitor only the active call.

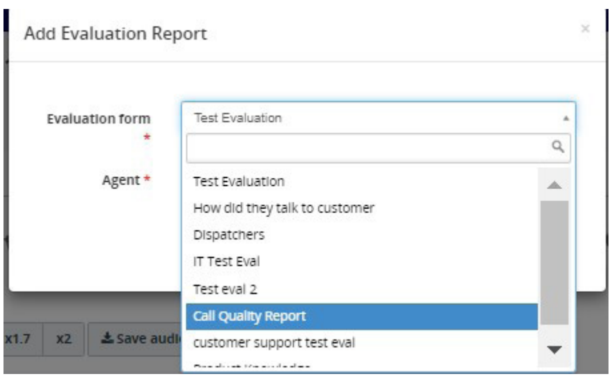
NOTE: If the user has multiple active calls at the same time, MiaRec will always switch to the most recent call.



VIEW + ADD AGENT EVALUATION

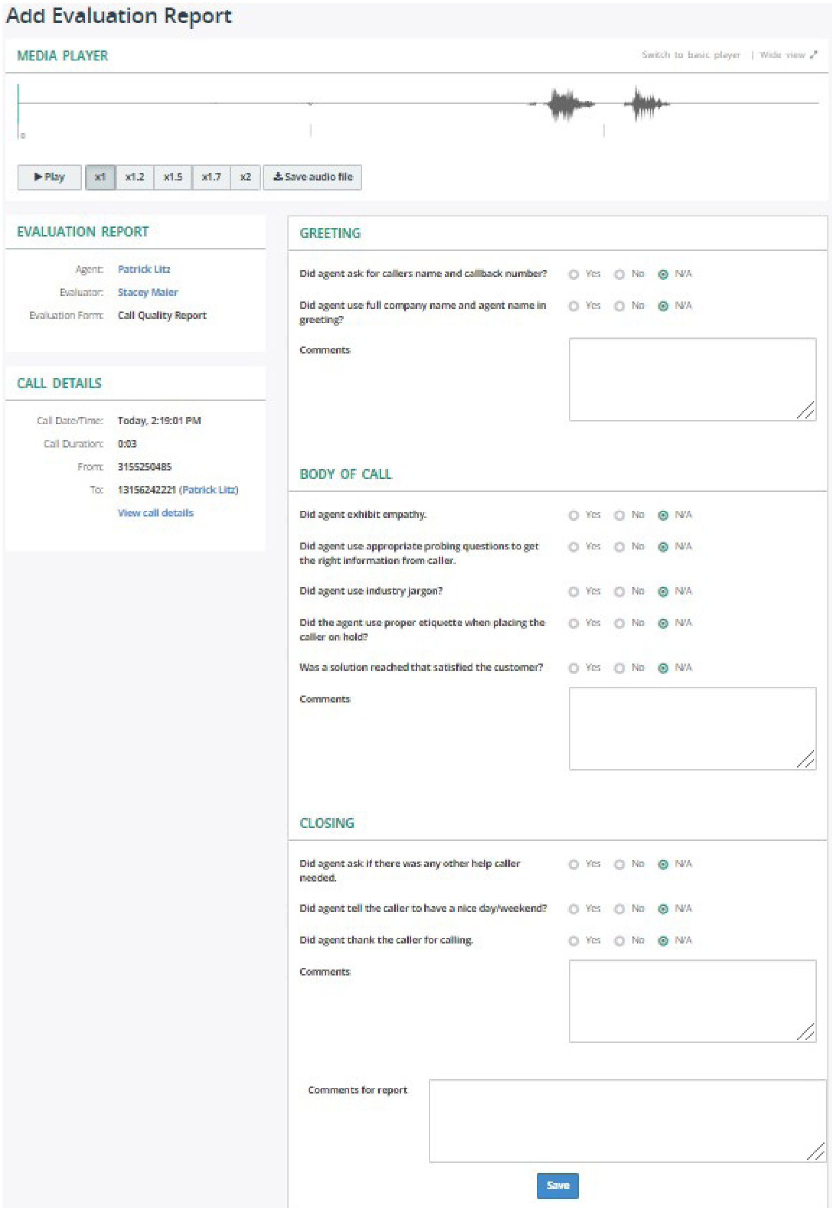
To view or add an agent evaluation go to the "Advanced Media Player". If an evaluation was already completed, it will appear in the Evaluation window.



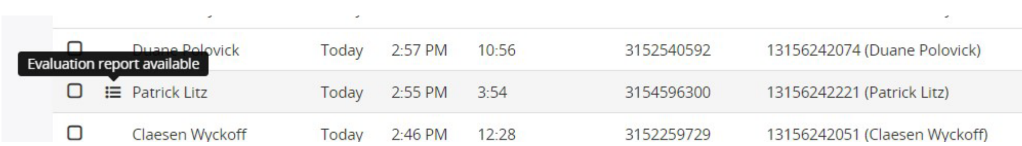


+ To add an evaluation of the call, select **Add Evaluation**.
+ Select an existing evaluation from the dropdown. If there is no applicable evaluation, it will need to be created. See page 15.

Complete the evaluation and select **Save**.

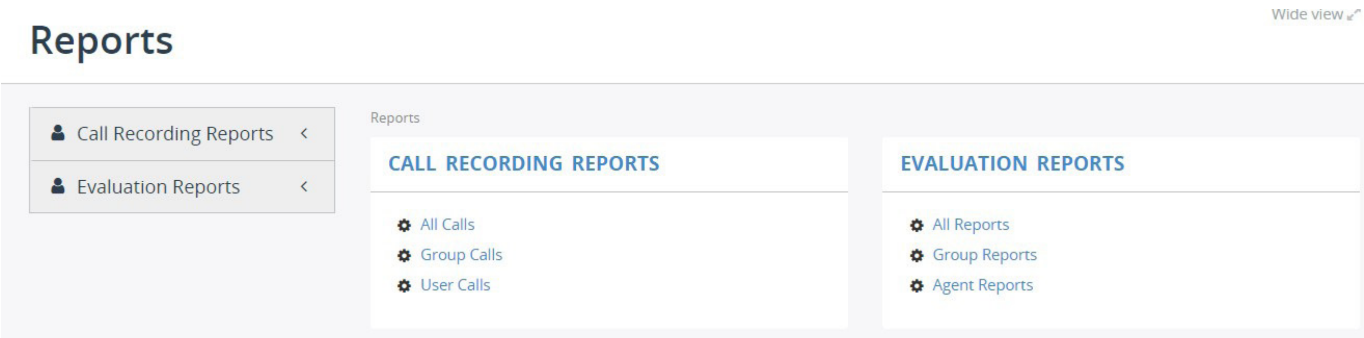


The Recordings list will display that an evaluation is available and the evaluation will be accessible to the supervisor and agent in the recording.



REPORTS

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

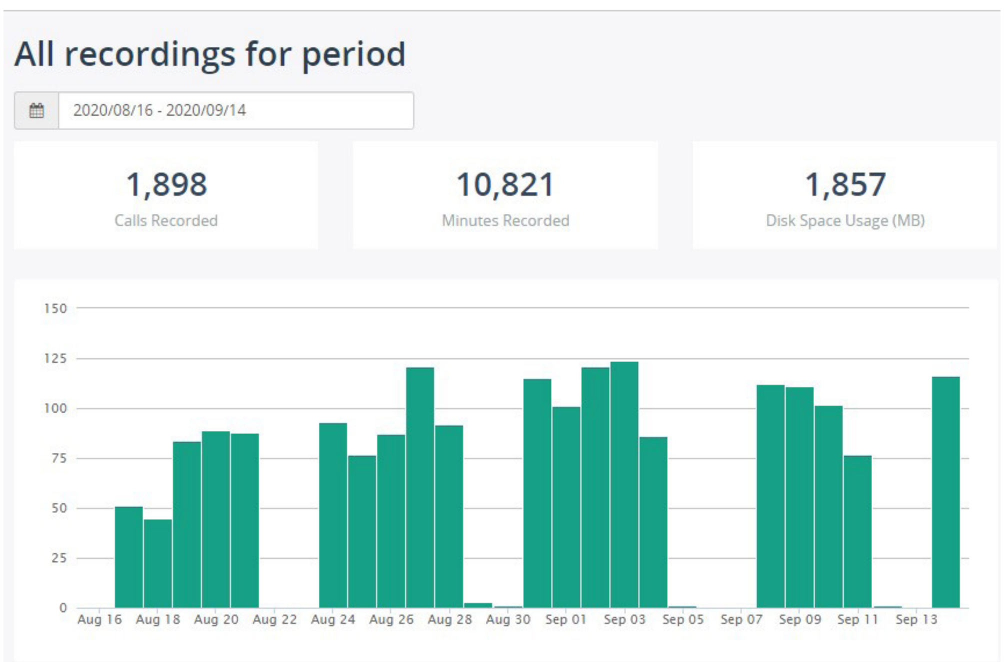


CALL RECORDING REPORTS

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.

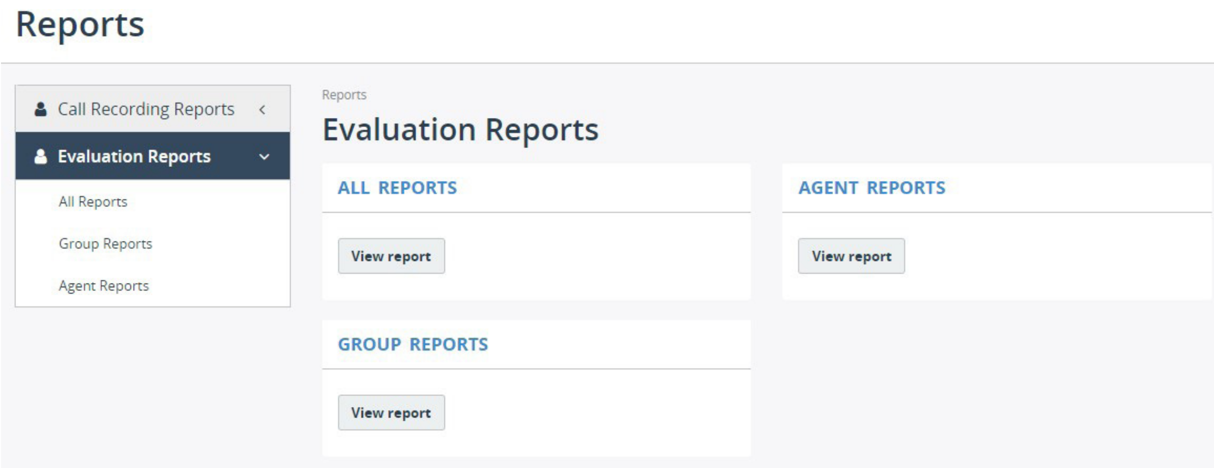


DAY	CALLS RECORDED	MINUTES RECORDED
Sunday, August 16, 2020	0	0
Monday, August 17, 2020	51	449
Tuesday, August 18, 2020	45	387
Wednesday, August 19, 2020	84	531

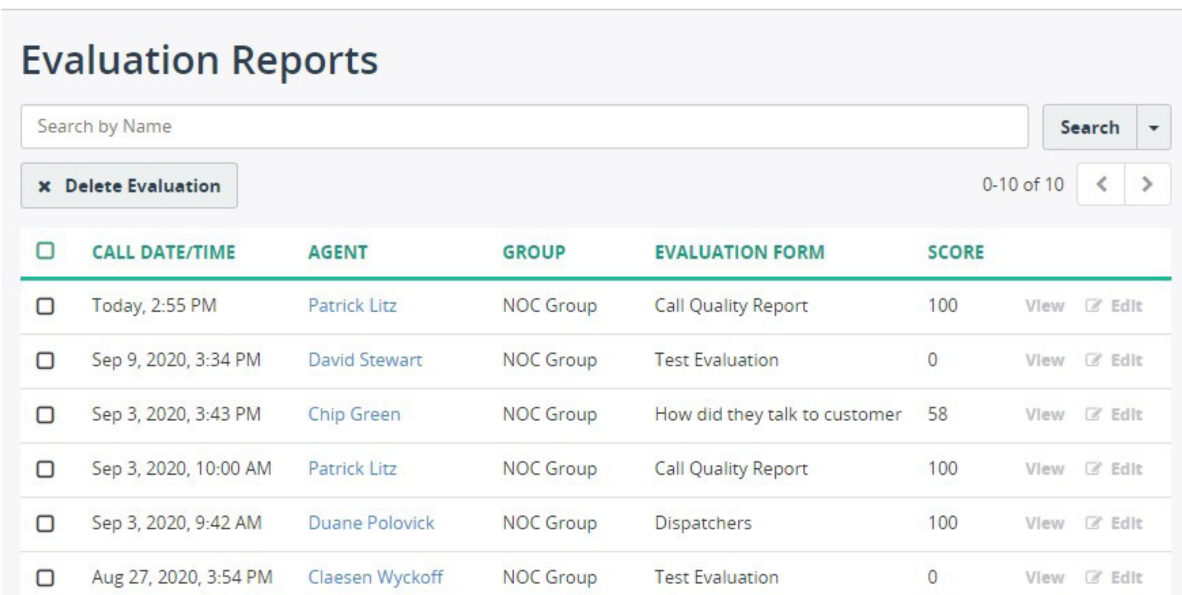
EVALUATION REPORTS

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



Below is a sample Evaluation Report.



Evaluation Reports

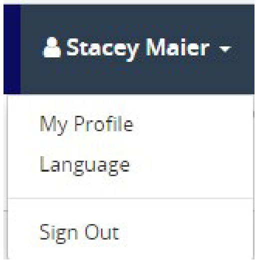
Search by Name | Search

× Delete Evaluation | 0-10 of 10

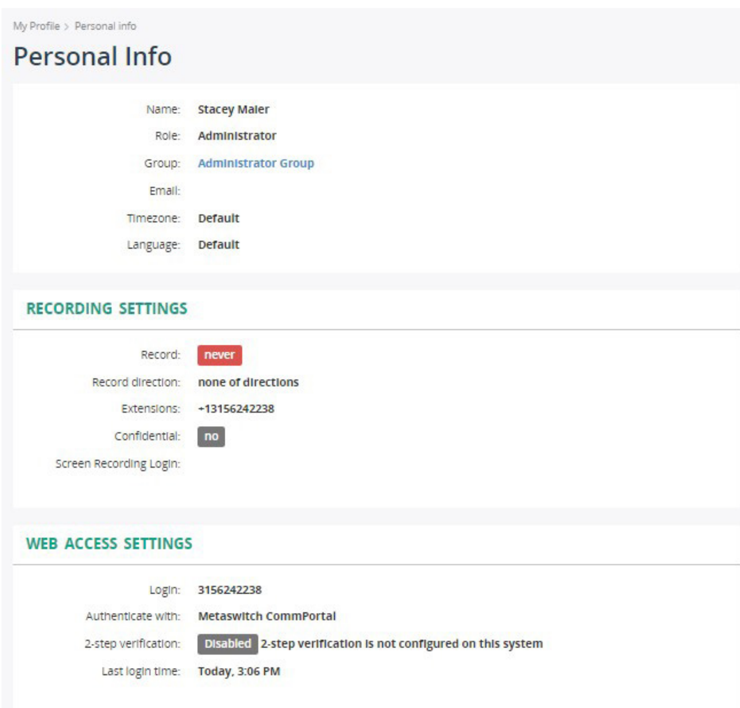
CALL DATE/TIME	AGENT	GROUP	EVALUATION FORM	SCORE	
Today, 2:55 PM	Patrick Litz	NOC Group	Call Quality Report	100	View Edit
Sep 9, 2020, 3:34 PM	David Stewart	NOC Group	Test Evaluation	0	View Edit
Sep 3, 2020, 3:43 PM	Chip Green	NOC Group	How did they talk to customer	58	View Edit
Sep 3, 2020, 10:00 AM	Patrick Litz	NOC Group	Call Quality Report	100	View Edit
Sep 3, 2020, 9:42 AM	Duane Polovick	NOC Group	Dispatchers	100	View Edit
Aug 27, 2020, 3:54 PM	Claesen Wyckoff	NOC Group	Test Evaluation	0	View Edit

USER PROFILE

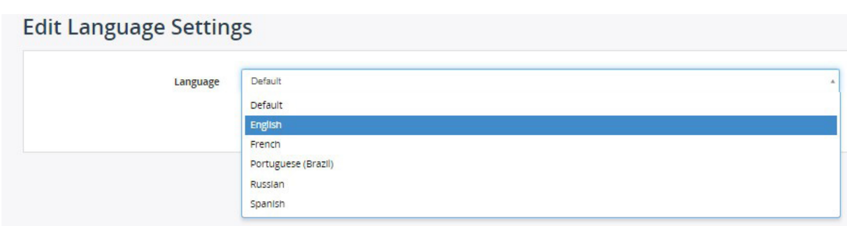
To view the User Profile, language options and log out, select the drop down next to the name.



My Profile displays your account settings within MiaRec.



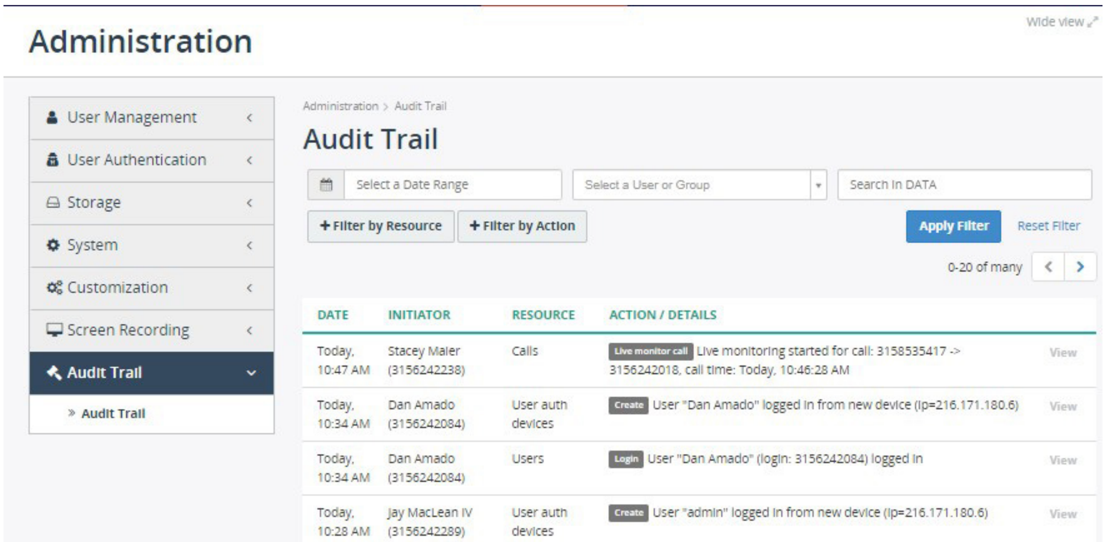
Language changes the language from the default setting to another available one.



Sign out signs out of the MiaRec dashboard.

AUDIT TRAIL

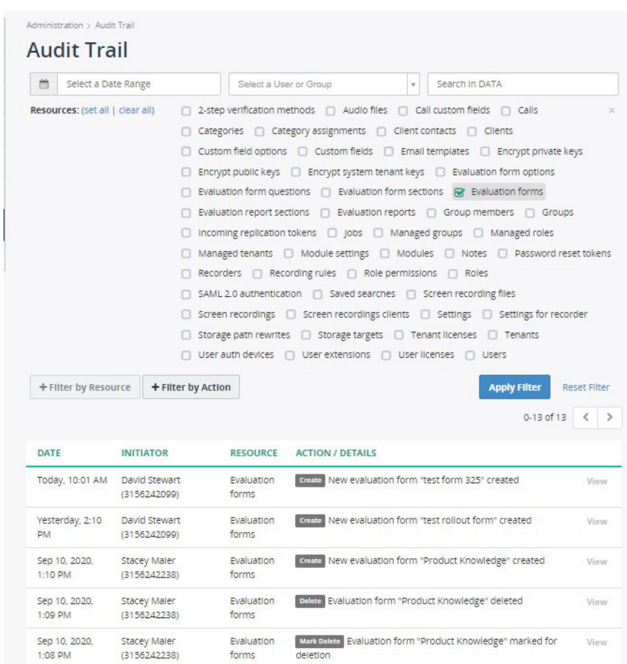
The Audit Trail is a detailed list of all changes made in the MiaRec application within your tenant. It can be searched in a variety of ways.



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



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.