



MiaRec Call Recording

Agent

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". See [page 12](#) for on-demand recording information. Screen recording is also available based on the licensing purchased.

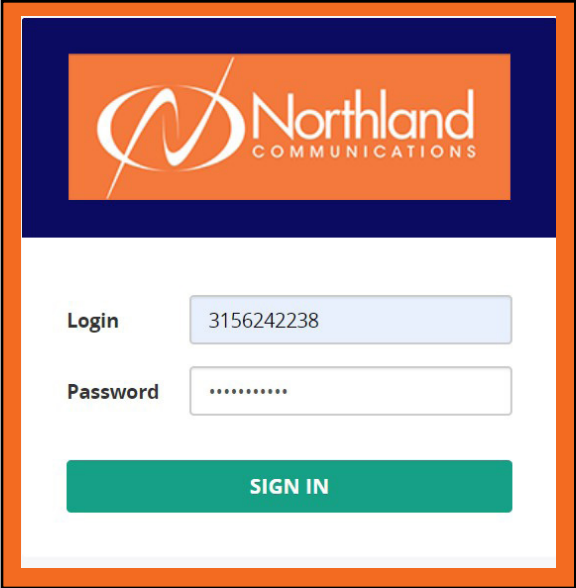
There are four levels of users within the MiaRec solution.

- + **Root Administrator:** Users of this role have unlimited access to system.
- + **Administrator:** Users of this role have a set of permissions as configured by 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 own call recordings only.

LOG IN

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

Go to: <https://miarec-siprec.northland.net>



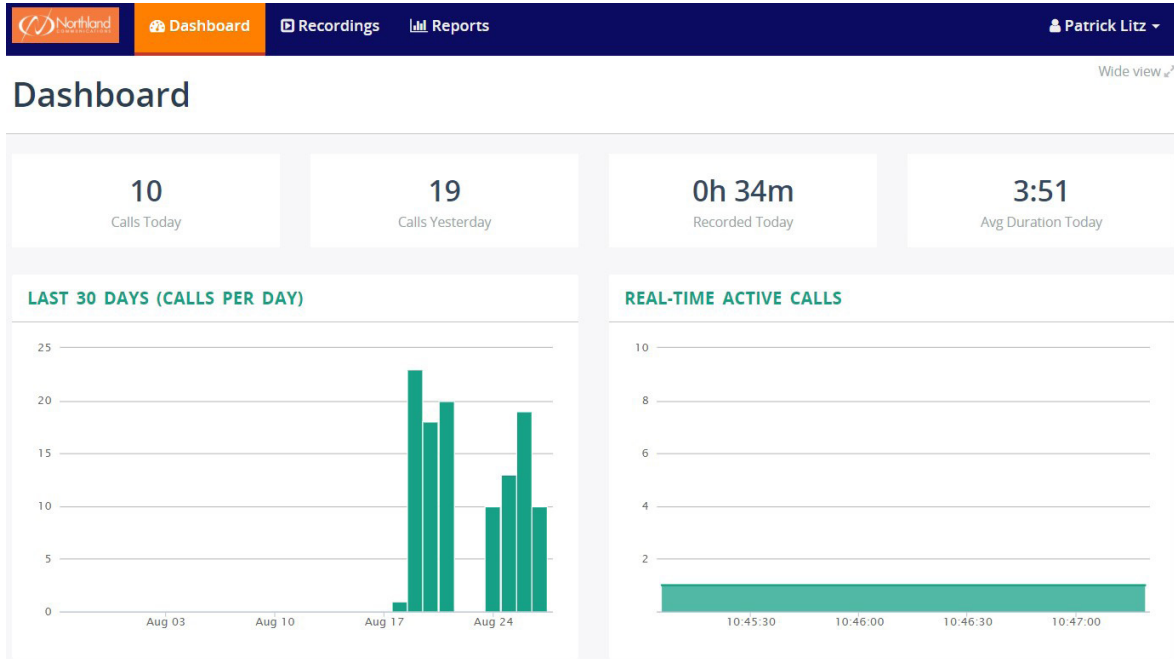
- + Enter your 10 digit Subscriber number.
- + Enter your CommPortal EAS password.
- + Select **SIGN IN**.
This will bring you to your agent dashboard. See [page 2](#).

AGENT DASHBOARD

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The Agent Dashboard provides a thorough overview of calls-per-day, average call duration, current active calls, etc. There are three tabs on the top of the agent dashboard.

DASHBOARD TAB



The dashboard displays the following:

- + The number of calls for the current day.
- + The number of calls for the previous day.
- + The number of hours of call recordings for the current day (when call recording is automatic). See [page 12](#) for more information on automatic and on demand call recording.
- + The average length of all calls for the current day.

The graphs show the following:

- + The number of calls per day for the last 30 days. (in this case, calls were not being recorded prior to August 17).
- + Any active calls at the time the dashboard is displayed.

RECORDINGS

Agent call recordings are stored in the MiaRec server and are accessible through the dashboard. Agents can only see their own recordings. MiaRec supports the following call recording views as pictured:

The screenshot shows the 'Recordings' dashboard with a navigation bar at the top containing 'Dashboard', 'Recordings', and 'Reports'. The user 'Patrick Litz' is logged in. Below the navigation bar, there are tabs for 'ALL CALLS', 'ACTIVE CALLS', 'MY CALLS', 'BY CLIENT', '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 controls for 'No auto-refresh', 'Categories', 'Download', 'Export', and 'More'. The main area displays a table of recordings with columns: USER, DATE, TIME, DURATION, FROM, TO, CATEGORIES, and CLIENT. The table shows several recordings for Patrick Litz on 'Today' with various times and durations.

- + All calls Displays all call recording (including active calls).
- + Active calls Displays only active calls.
- + My calls Displays call recordings associated with the current logged in .
- + By client Displays call recordings, which are grouped by client and client group.
- + By category Displays calls recording grouped by category. See [Page 9](#).
- + 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 inline basic audio player for a call recording. It displays the call details for Patrick Litz on 'Today' at '11:47 AM' with a duration of '12:48'. The call is from '9806892061' to '13156242221 (Patrick Litz)'. The player includes a progress bar showing '00:49' out of '12:47' and a 'Save audio file' button. There are also buttons for 'More details' and 'Notes: Add note'.

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.

The screenshot displays the Northland Advanced Audio Player interface. At the top, there is a navigation bar with 'Dashboard', 'Recordings', and 'Reports' menus, and a user profile for 'Patrick Litz'. The main header shows the call ID 'Call 3157354475 -> 13156242221' and a 'Mark as confidential' button. Below this is a 'MEDIA PLAYER' section with a waveform and playback controls (Play, x1, x1.2, x1.5, x1.7, x2, Save audio file). The 'TRANSCRIPT' section is currently empty. Below the transcript are three columns of call information: 'INFO' (Date: Today, Connect Time: 10:57:55 AM, Disconnect Time: 10:59:37 AM, Duration: 1:42, Watermark: View, Comments NEW: Click to edit), 'FROM' (Client: Unknown client (assign), Phone Number: 3157366044, Phone Name:), and 'TO' (User: Patrick Litz, Group: NOC Group, Phone Number: 13156242221, Phone Name: Patrick Litz). At the bottom, there is an 'EVALUATIONS' section with a table header (CALL DATE/TIME, AGENT, GROUP, EVALUATION FORM, SCORE) and a message 'No results found'. A 'NOTES' section with an 'Add note' button is also present.

NOTE: If your business subscribes to **Transcription**, there will also be a transcription section in the advanced audio player.

The screenshot shows the 'TRANSCRIPT' section with three speaker segments:

- 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.

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. If you do not have Administrator or Supervisor capabilities, you will only be able to search your own calls.
- + **Any text** The entered text is searched within caller/called phone number, name fields, and call notes. See [page 8](#) for entering call notes.

<input type="checkbox"/>	USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES	CLIENT
<input type="checkbox"/>	Patrick Litz	Today	2:33 PM	1:07	3157967968	13156242221 (Patrick Litz)		
<input type="checkbox"/>	Patrick Litz	Today	2:27 PM	3:07	3156242200	13156242221 (Patrick Litz)	NOC	
<input type="checkbox"/>	Patrick Litz	Today	2:24 PM	0:47	3158241250	13156242221 (Patrick Litz)		
<input type="checkbox"/>	Patrick Litz	Today	2:11 PM	5:07	3156242074	3156242221 (Patrick Litz)		

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. See [page 6](#) for an example.

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

SAMPLE ADVANCED SEARCH

In the below example, the agent is looking for a recording from a specific telephone number. He is group member and can only search his own recordings.

The screenshot shows the 'ADVANCED SEARCH' tab in a call management system. The search criteria are set to 'User' is 'Patrick Litz'. A dropdown menu for 'User' is open, showing options like 'Date', 'Date/Time', 'Duration', 'Call Direction', 'User', 'User Name', and 'Group'. The 'User' option is selected. Below the search criteria, a table displays search results for calls made by 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. In this case since only information for the individual can be viewed, only the individual name is displayed.

Once the initial criteria is completed, select **+ Add criteria** to include additional search parameters that will narrow the search more, in this case the telephone number the call came from.

The screenshot shows the 'ADVANCED SEARCH' tab with two criteria. The first is 'User' is 'Patrick Litz'. The second is 'Phone Number' Equal To '3156242058'. A dropdown menu for 'Phone Number' is open, 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, a table displays search results for calls made by Patrick Litz from the specified phone number.

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

- + In the first field, select **Phone Number**.
- + In the next field, select the most appropriate criteria based on the information you have for the telephone number. In this case since the entire telephone number is known, select **Equal To**.
- + In the third field, enter the telephone number.
- + When finished, select **Run Search**. See [page 7](#) for search results.



Sample Search Results

Below are the results of the search.

+ To save the search criteria, select **Save Search**.

Recordings

Wide view

ALL CALLS ACTIVE CALLS MY CALLS BY CLIENT BY CATEGORY **ADVANCED SEARCH**

Manage Saved Searches

User Is Phone Number Equal To

+ Add criteria

Run Search Save Search

No auto-refresh Categories Download Export More

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<input type="checkbox"/>	DATE	TIME	DURATION	FROM	TO	
<input type="checkbox"/>	Yesterday	4:35 PM	19:03	3156242058	13156242221 (Patrick Litz)	<input type="checkbox"/>
<input type="checkbox"/>	Yesterday	4:06 PM	0:33	3156242058	3156242221 (Patrick Litz)	<input type="checkbox"/>
<input type="checkbox"/>	Yesterday	3:48 PM	9:04	3156242058	13156242221 (Patrick Litz)	<input type="checkbox"/>
<input type="checkbox"/>	Aug 27, 2020	1:14 PM	0:18	3156242058	+13156242221 (Patrick Litz)	<input type="checkbox"/>
<input type="checkbox"/>	Aug 27, 2020	11:54 AM	9:09	3156242058	13156242221 (Patrick Litz)	<input type="checkbox"/>
<input type="checkbox"/>	Aug 27, 2020	9:19 AM	0:48	3156242058	13156242221 (Patrick Litz)	<input type="checkbox"/>
<input type="checkbox"/>	Aug 21, 2020	9:40 AM	2:59	3156242058	13156242221 (Patrick Litz)	<input type="checkbox"/>

20 per page

0-7 of 7

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 displays a call recording interface for a call on 'Today' at 8:57 AM, lasting 3:58. The call ID is 3156044406. The call was made from 3156044406 to 13156242221 (Patrick Litz) by Patrick Litz. The interface includes a play button, a progress bar, and a 'Save audio file' button. Below the audio player are buttons for 'More details' and 'Evaluate'. The 'Notes' section shows two notes:

- Patrick Litz Today, 11:46 AM: New Enhancements Campaign - needs call back. (Pin to the top, Delete)
- Stacey Maier Today, 11:50 AM: Assigned to Inside Sales. (Pin to the top, Delete)

An 'Add note' button is located at the bottom left of the notes section. An 'Open in new window' button is in the top right corner.

- + 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	Today	9:18 AM	2:11	3156040276	13156242221 (Patrick Litz)	
<input type="checkbox"/>		Patrick Litz	Today	8:57 AM	3:58	3156044406	13156242221 (Patrick Litz)	
<input type="checkbox"/>		Patrick Litz	Today	8:31 AM	1:02	3152547960	13156242221 (Patrick Litz)	



CATEGORIZE CALLS

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

The screenshot shows the 'ALL CALLS' tab in the Call Recordings interface. A dropdown menu is open over the 'Categories' column, displaying options: Storm related call, Test 2, Test Category, New Category, and Manage Categories. The table below shows call records with columns: USER, DATE, TIME, DURATION, FROM, TO, CATEGORIES, and CLIENT.

USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES	CLIENT
Patrick Litz	Today	9:18 AM	2:11	3156040276	1315624221 (Patrick Litz)		NOC
Patrick Litz	Today	8:57 AM	3:58	3156044406	1315624221 (Patrick Litz)		
Patrick Litz	Today	8:31 AM	1:02	3152547960	1315624221 (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 'ALL CALLS' tab in the Call Recordings interface. The 'Categories' column is now populated with 'Storm related call' for two records. An orange arrow points to the 'Storm related call' text in the 'Categories' column of the second record.

USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES	CLIENT
Patrick Litz	Today	12:20 PM	3:32	3156242200	1315624221 (Patrick Litz)	Storm related call	NOC
Patrick Litz	Today	10:18 AM	1:41	3153459308	1315624221 (Patrick Litz)	Storm related call	
Patrick Litz	Today	9:33 AM	12:18	3155271226	1315624221 (Patrick Litz)		
Patrick Litz	Today	9:22 AM	1:39	3152697572	1315624221 (Patrick Litz)	Storm related call	
Patrick Litz	Today	9:18 AM	2:11	3156040276	1315624221 (Patrick Litz)		
Patrick Litz	Today	8:57 AM	3:58	3156044406	1315624221 (Patrick Litz)		

ASSIGN A CLIENT

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

- + 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 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**.
- + To create a new client, select **Create client**.
- + 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.

Patrick Litz	Aug 27, 2020	11:37 AM	4:07	918066335932	13156242221 (Patrick Litz)
Patrick Litz	Aug 27, 2020	11:09 AM	1:47	3153834616	13156242221 (Patrick Litz)
Patrick Litz	Aug 27, 2020	10:48 AM	20:31	3153834616	13156242221 (Patrick Litz)

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)	View
11:09 AM	1:47	3153834616 -> 13156242221 (Patrick Litz)	View

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

0 2:00 4:00 6:00 8:00 10:00 12:00 14:00 16:00 18:00 20:00 22:00

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

	USER	DATE	TIME	DURATION	CALLER PARTY	CALLED PARTY	TAGS
<input type="checkbox"/>	Billy Joel	Today	12:48 PM	In progress...	3156242238	3156711253 (Billy Joel)	

+ Select the **More Details** button.

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

More details

Notes: [Add note](#)

+ 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.

REPORTS

Reports are available in the top menu under the Reports tab. MiaRec supports multiple reports such as:

- + Per day
- + Per group
- + Per user
- + Per tenant
- + Agent evaluation reports

Supervisors and Administrators have the ability to create custom evaluation forms and use them when they monitor or play back recordings. Agents can view their own evaluation reports. From the **Reports** tab, select **Evaluation Reports** and then select the call.

The screenshot shows the MiaRec Reports interface. At the top, there is a navigation bar with the Northland logo and tabs for Dashboard, Recordings, and Reports. The Reports tab is active. Below the navigation bar, the page title is "Reports" and the user name "Patrick Litz" is displayed. The main content area is titled "Evaluation Reports" and features a search bar, a table of reports, and pagination controls. The table has columns for CALL DATE/TIME, AGENT, GROUP, EVALUATION FORM, and SCORE. A single report is listed: "Today, 10:00 AM" by "Patrick Litz" for the "NOC Group" using the "Call Quality Report" form, with a score of 100. The interface also shows "0-1 of 1" reports and "20 per page" pagination.

The evaluation report is displayed as part of the call history.

The screenshot displays the details of an evaluation report for a call. It is divided into two main sections: "EVALUATION REPORT" and "CALL DETAILS".

EVALUATION REPORT

- Agent: Patrick Litz
- Group: NOC Group
- Evaluator: Stacey Maier
- Evaluation Form: Call Quality Report
- Report Date: Today
- Report Status: Completed
- Score: **100 %**

CALL DETAILS

- Call Date/Time: Today, 10:00:16 AM
- Call Duration: 3:11
- From: 8334840404
- To: 13156242221 (Patrick Litz)
- [View call details](#)

GREETING (200/200)

- Did agent ask for callers name and callback number? **Yes (10 of 10)**
- Did agent use full company name and agent name in greeting? **Yes (10 of 10)**

BODY OF CALL (500/500)

- Did agent exhibit empathy. **Yes (10 of 10)**
- Did agent use appropriate probing questions to get the right information from caller. **Yes (10 of 10)**
- Did agent use industry jargon? **No (10 of 10)**
- Did the agent use proper etiquette when placing the caller on hold? **Yes (10 of 10)**
- Was a solution reached that satisfied the customer? **Yes (10 of 10)**

A text box contains the following feedback: "I like the way you asked if you could put them on a "brief" hold. Services were up by the end of the call."

USER PROFILE

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



MY PROFILE

My Profile displays your account settings within MiaRec.

My Profile Wide view

Personal Info ▾

- » Info
- 🔒 Security <

My Profile > Personal info

Personal Info

Name: **Patrick Litz**
 Role: **NOC User**
 Group: **NOC Group**
 Email:
 Timezone: **Default**
 Language: **Default**

RECORDING SETTINGS

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

WEB ACCESS SETTINGS

Login: **3156242221**
 Authenticate with: **Metaswitch CommPortal**
 2-step verification: **Disabled** 2-step verification is not configured on this system
 Last login time:

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

Edit Language Settings

Language

- Default
- Default
- English
- French
- Portuguese (Brazil)**
- Russian
- Spanish

Sign out signs out of the MiaRec dashboard.

MISCELLANEOUS

CUSTOM FIELDS

Custom fields can be added for things such as storing data such as an order number, support ticket number, product name, etc. Custom fields will appear in the call list.

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.