Northland
COMMUNICATIONS

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.

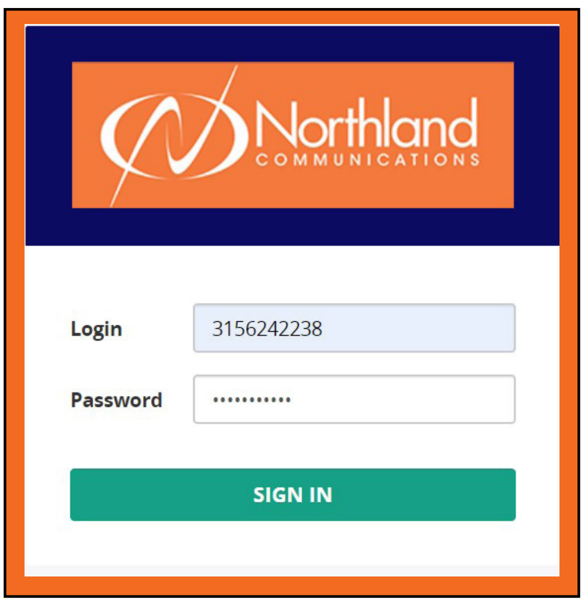
There are four levels of users within the MiaRec solution.

+ **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

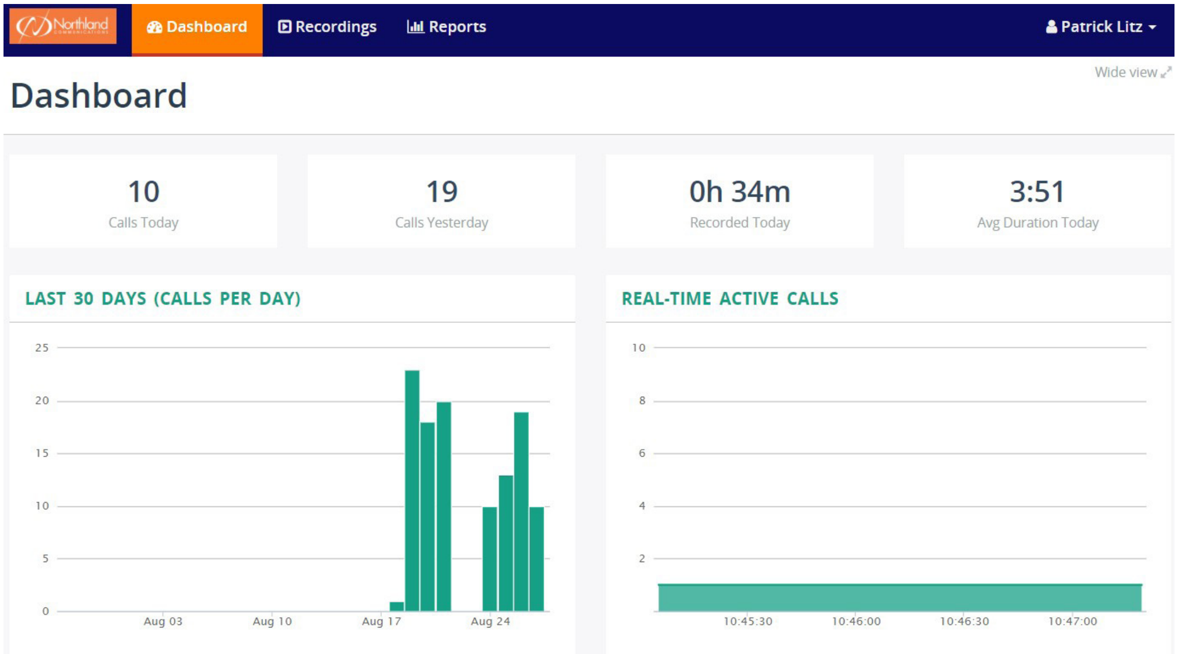


+ Enter your 10 digit Subscriber number.
+ Enter your CommPortal EAS password.
+ Select **SIGN IN**.
  This will bring you to your agent dashboard. See page 2.

AGENT DASHBOARD

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:

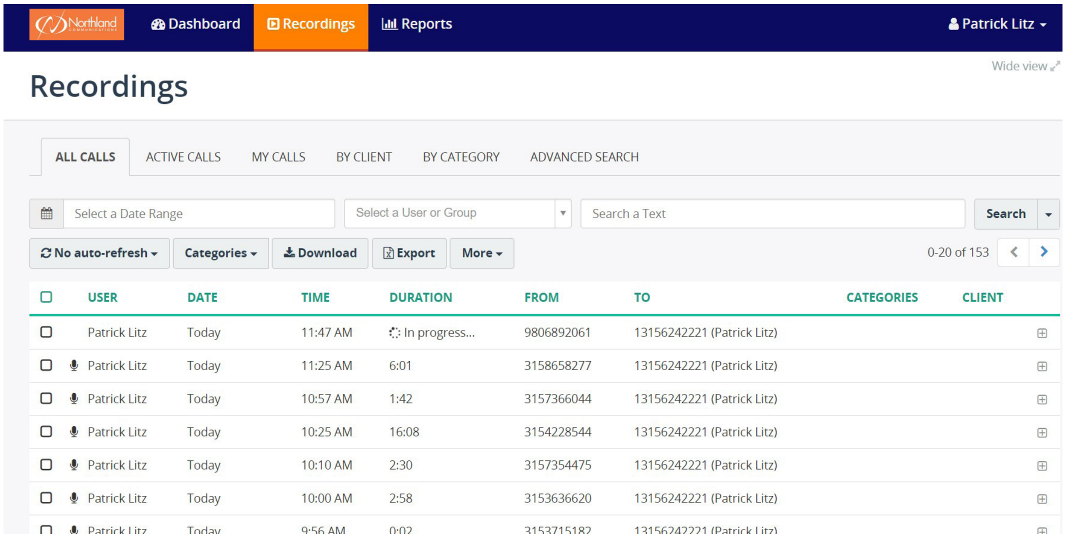
+ The number of calls for the current day.
+ The number of calls for the previous day.
+ The number of hours of call recordings for the current day (when call recording is automatic). See page 12 for more information on automatic and on demand call recording.
+ The average length of all calls for the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

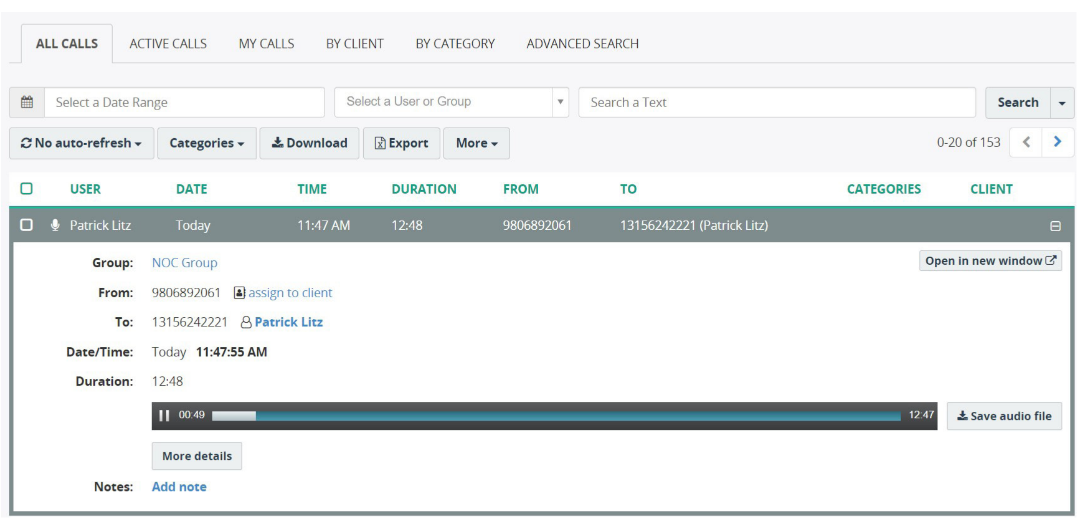


- **+ All calls** — Displays all call recording (including active calls).
- **+ Active calls** — Displays only active calls.
- **+ My calls** — Displays call recordings associated with the current logged in .
- **+ By client** — Displays call recordings, which are grouped by client and client group.
- **+ 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.

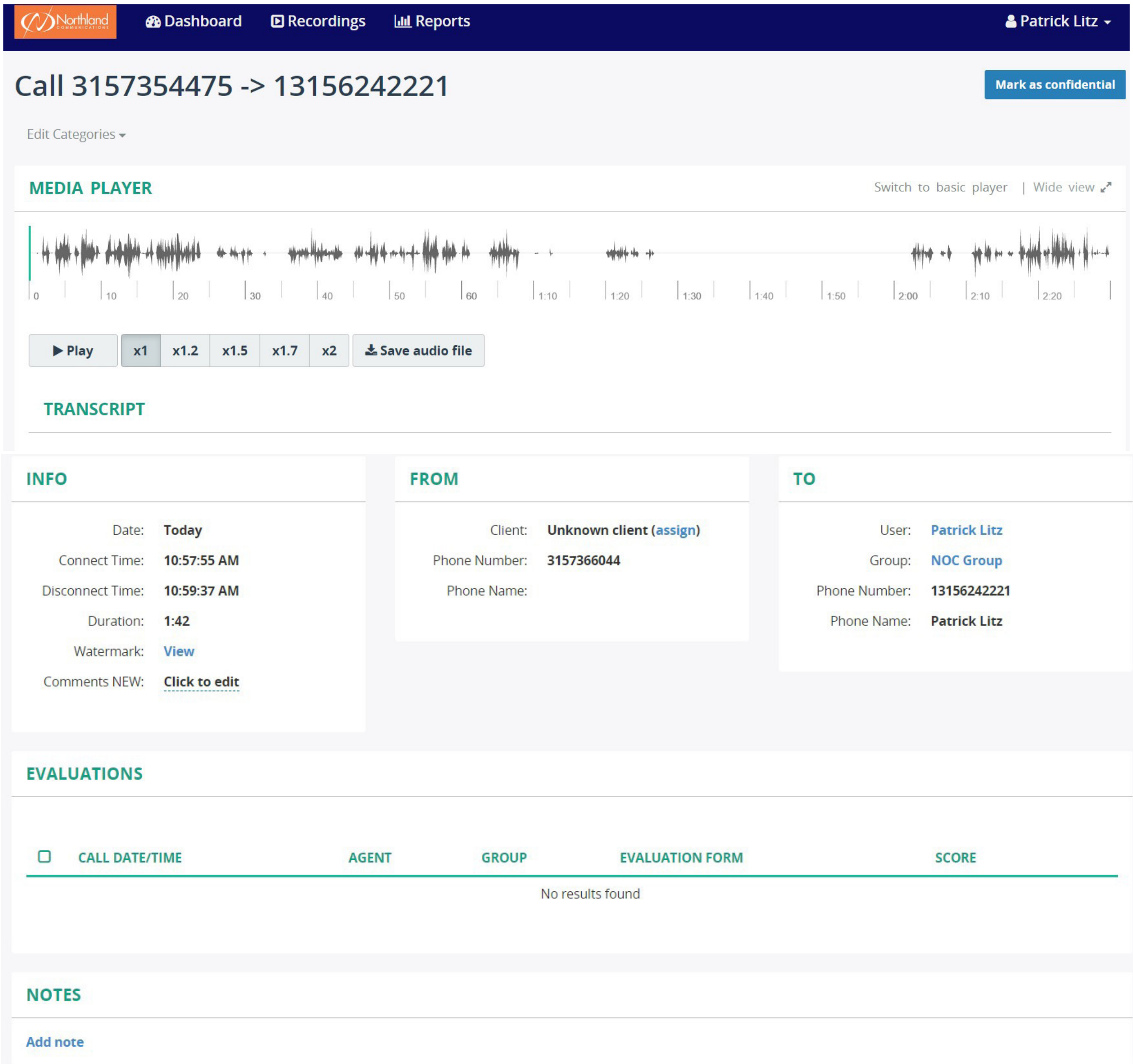


NOTE: By default, Auto Refresh is set to No Auto Refresh, select to change it to refresh automatically.

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.



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

TRANSCRIPT

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

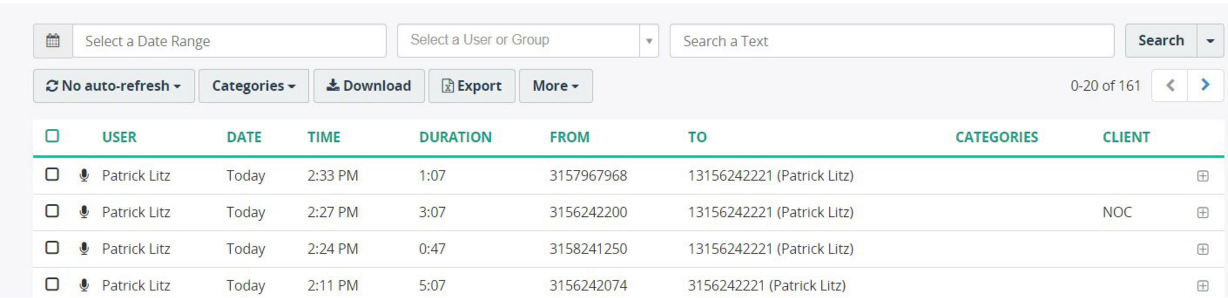
Speaker 2 [0:25]: Hi Patrick, this is Carlos. I'm calling to speak to someone regarding the excellent service we received today from your technician Jay.

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

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.



ADVANCED SEARCH

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

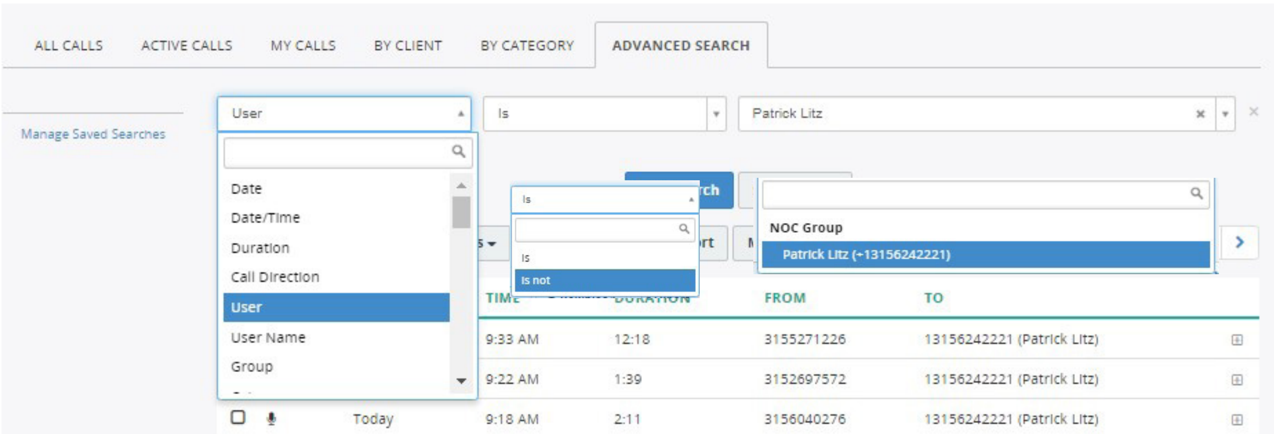
+ **User**
+ **Group**
+ **Call ID**
+ **Phone number (FROM and/or TO)**
+ **Date range**
+ **Call duration**

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.

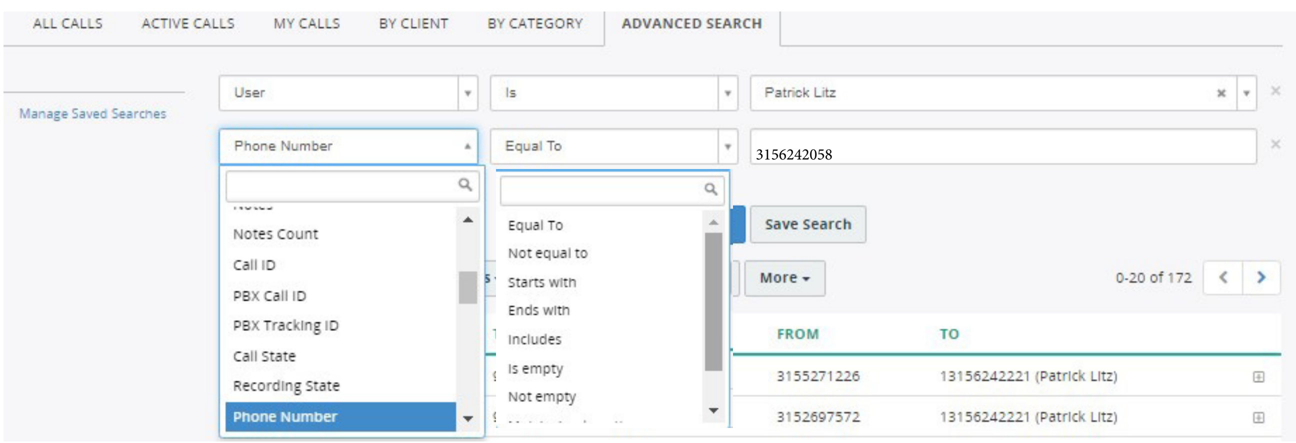
SAMPLE ADVANCED SEARCH

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.



+ 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.

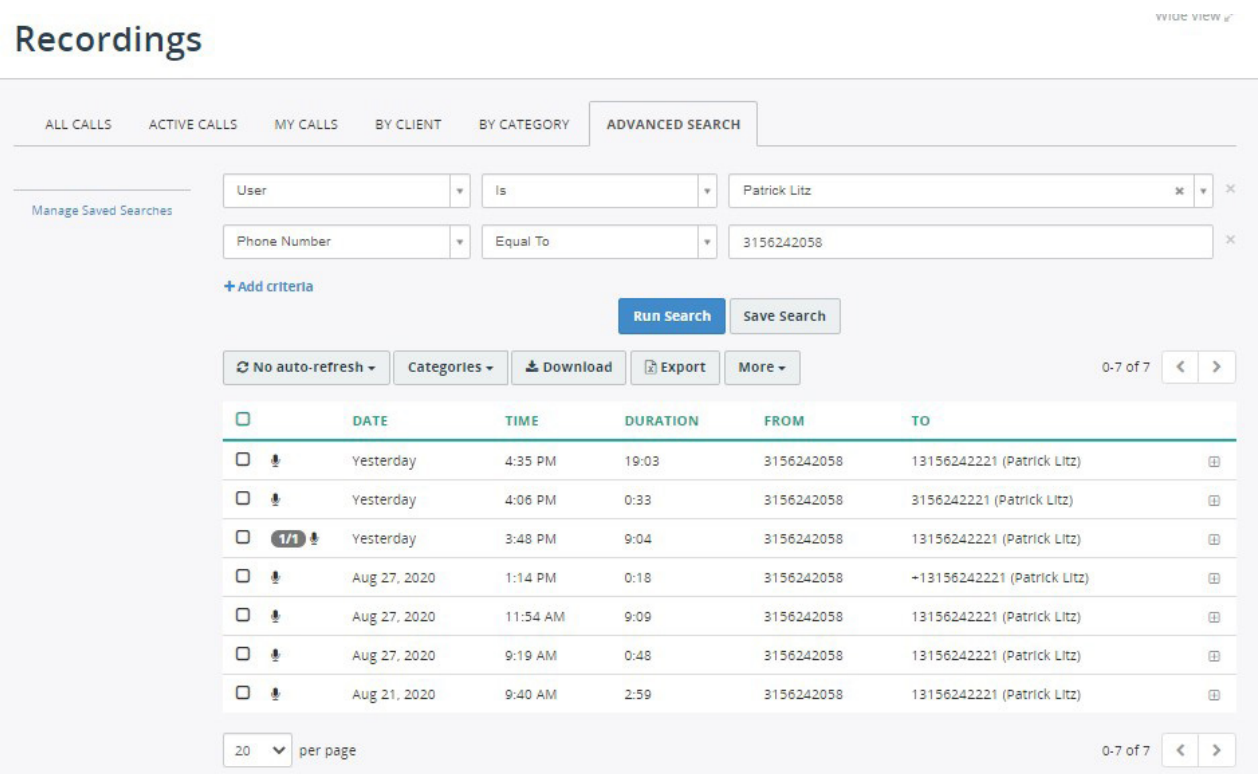


+ In the first field, select **Phone Number**.
+ In the next field, select the most appropriate criteria based on the information you have for the telephone number. In this case since the entire telephone number is known, select **Equal To**.
+ In the third field, enter the telephone number.
+ When finished,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

Sample Search Results

Below are the results of the search.

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



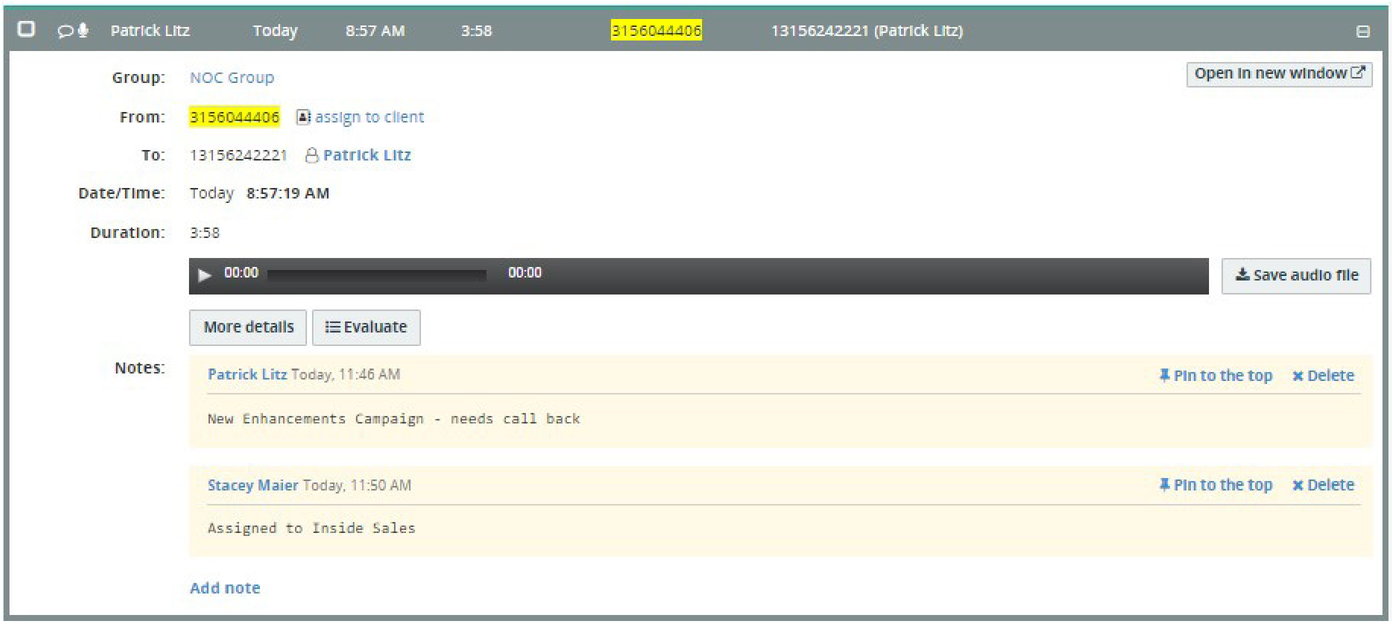
ADD NOTES TO CALLS

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.

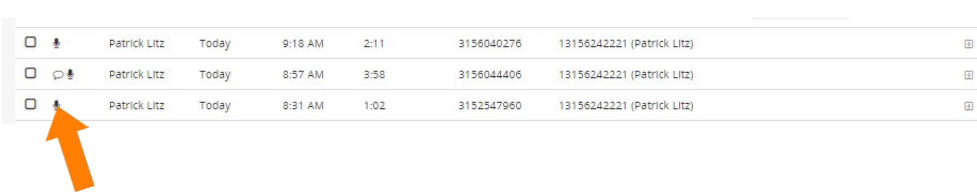
Notes can be added to recordings to tag the call for Supervisors and Administrators to pull reports based on the tags or to help with search criteria.

CALL NOTES INLINE



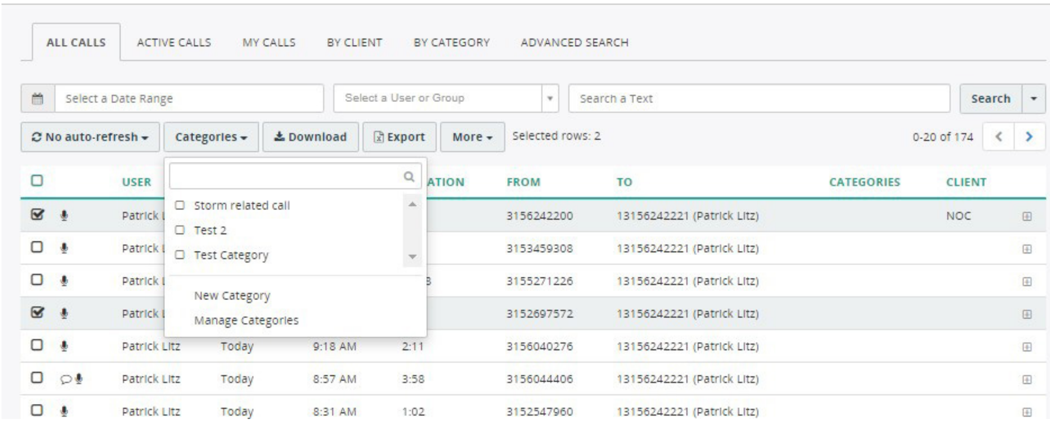
+ To view notes inline, select the recording.
+ To add a note, select **Add note**.
+ To pin a note to the top (out of order), select **Pin to the top**.
+ To delete a note, select **Delete**.
+ To view in new window, select **Open in new window**. This will show the additional details including transcription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

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



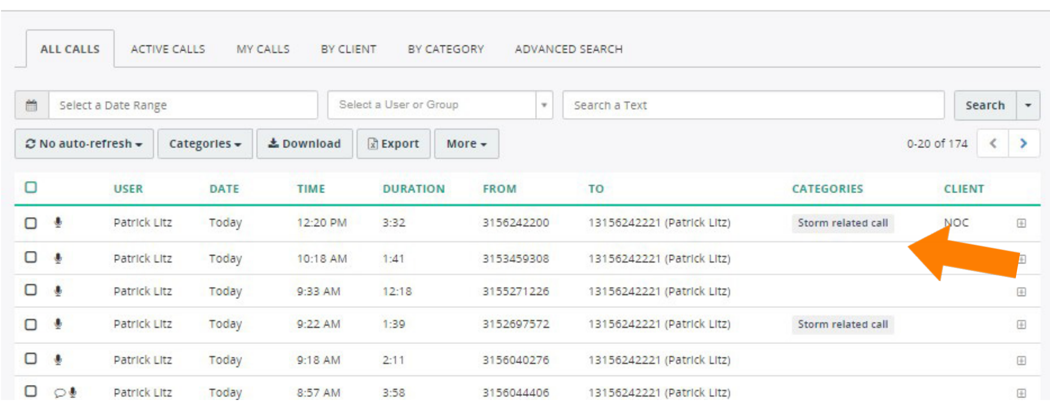
CATEGORIZE CALLS

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



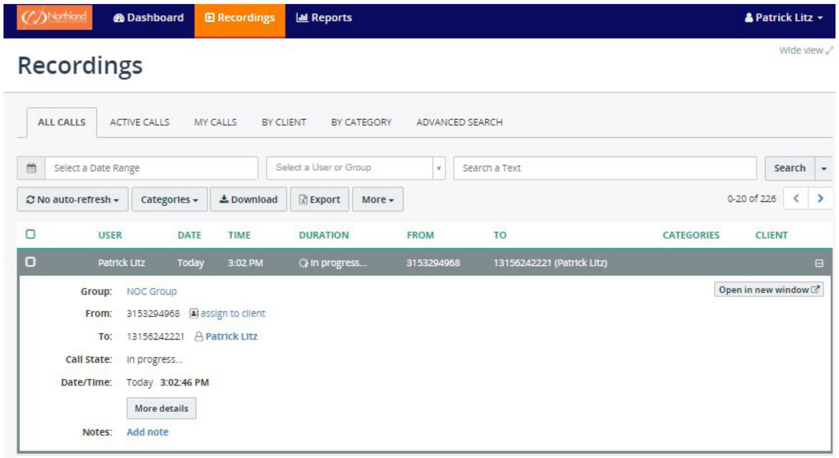
+ Select one or more calls from the Recordings page.
+ Select the **Categories** dropdown.
+ Select a category for the calls.
+ To add a category, select **New Category**.
+ To work with existing categories, select **Manage Categories**. Here you can add sub-categories, delete or edit existing categories.

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

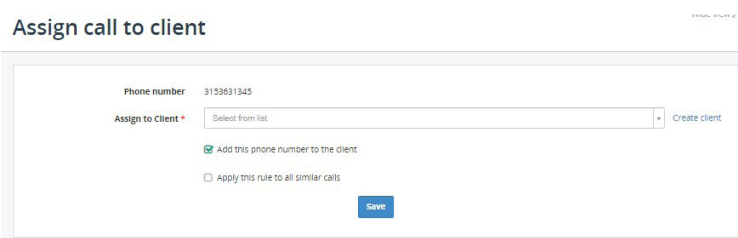


ASSIGN A CLIENT

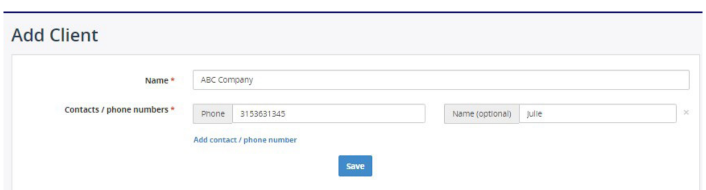
To help with grouping calls and searching for specific calls, you can assign a client or customer name to a call.



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

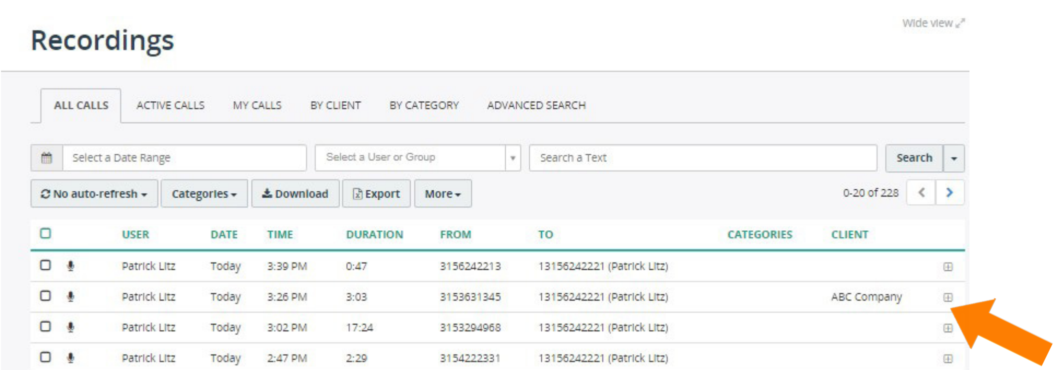


+ Select a client from the the dropdown.
+ To assign this client to similar calls, select **Apply this rule to all similar calls.**
+ To create a new client, select **Create client**.



+ 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**.

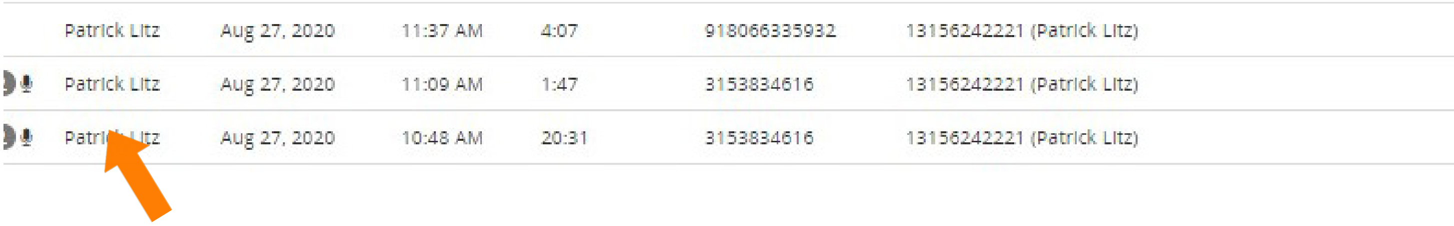
The client name will appear in the Recordings list and is searchable by client name.



MULTI-PART CALLS

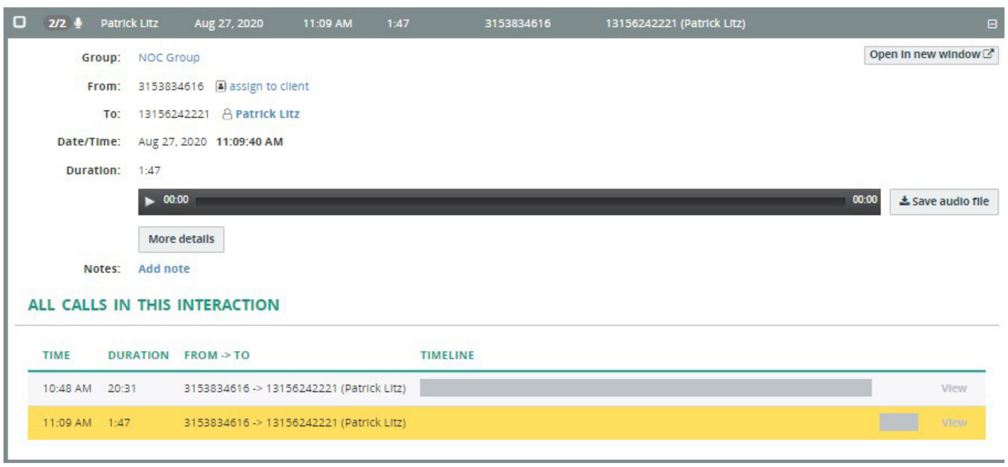
The system automatically recognizes “multiple part calls”, for example, when a call has been transferred from one agent to another, or when a call has been placed on hold, the agent made a consultative call to his/her supervisor and then resumed the initial call.

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

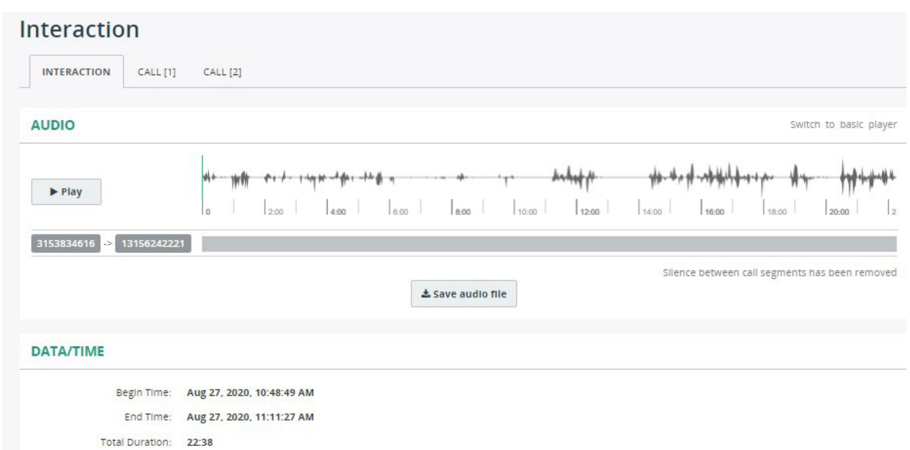


VIEW MULTI-PART CALLS

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



Agents can navigate to 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.

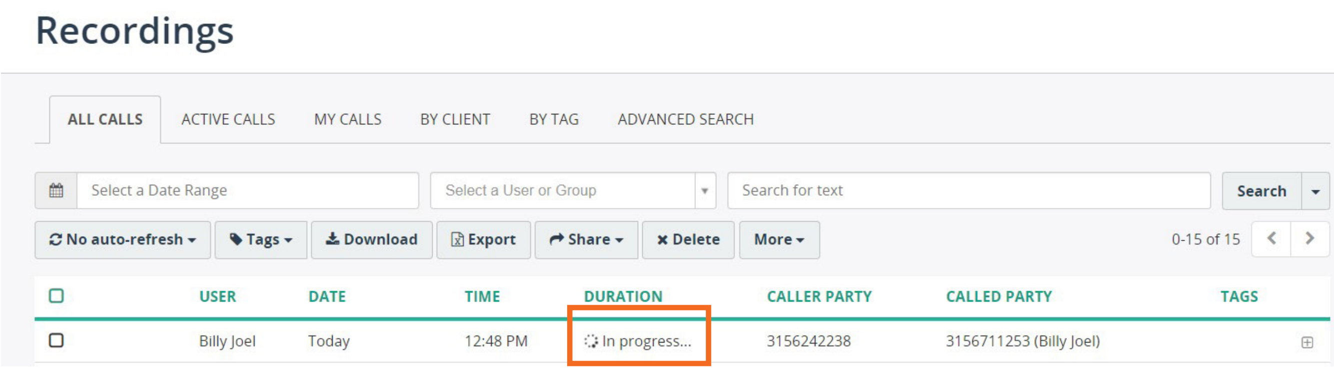


NOTE: If an agent places an active call on hold to answer another incoming call and then returns to the held call, the second call is not considered part of the interaction and will not be included in the timeline.

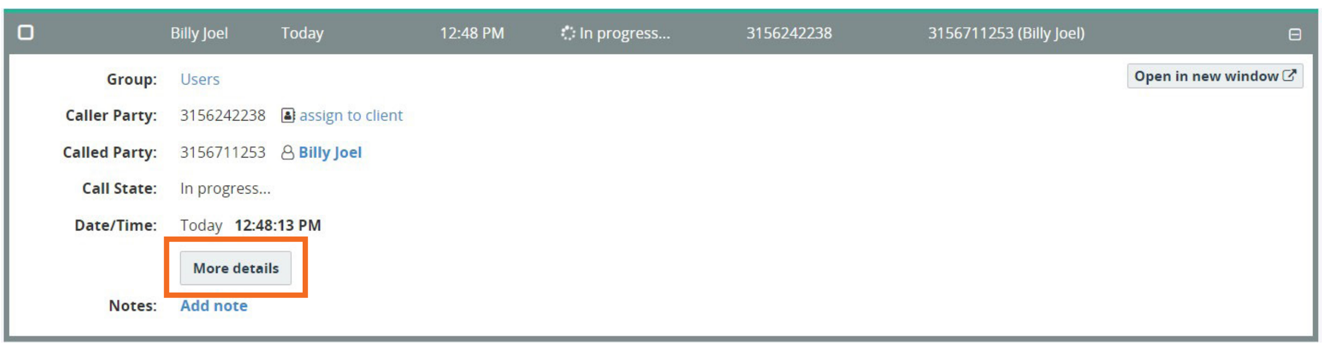
ON DEMAND RECORDING

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.

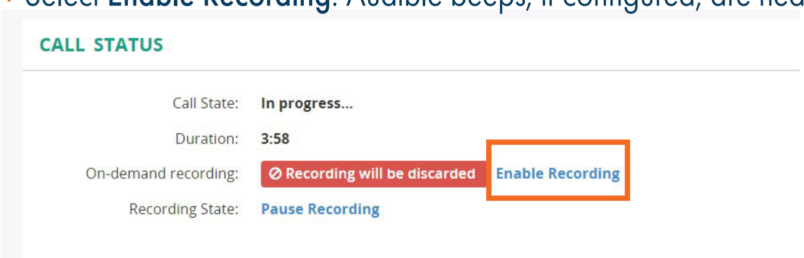
+ From the Agent Dashboard, select the **Recordings** tab and click on the call "In progess".

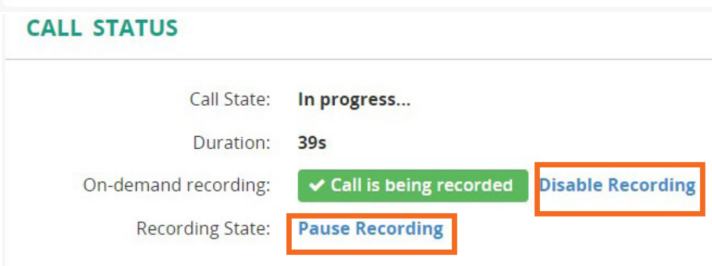


+ Select the **More Details** button.



+ 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.

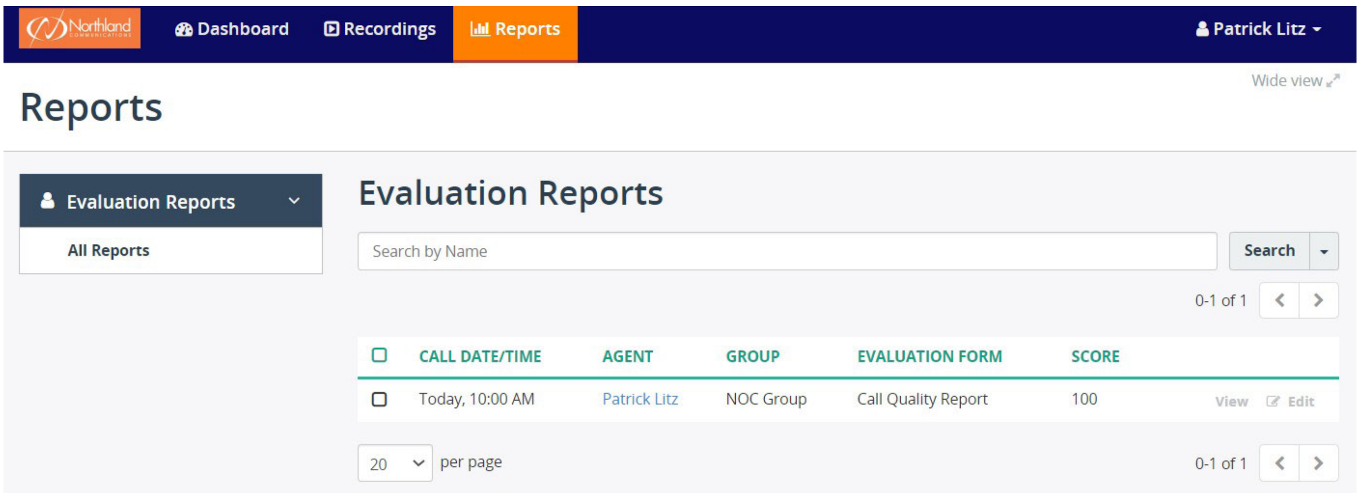
IMPORTANT NOTE: When using MaX UC, if the agent selects Call Record Radio button on MaX UC, the recording is saved to the local PC.

REPORTS

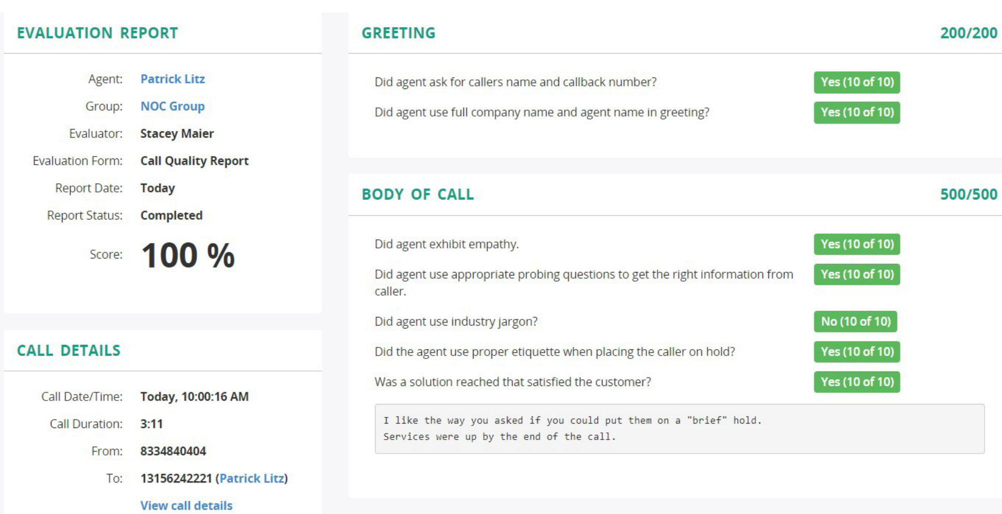
Reports are available in the top menu under the Reports tab. MiaRec supports multiple reports such as:

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

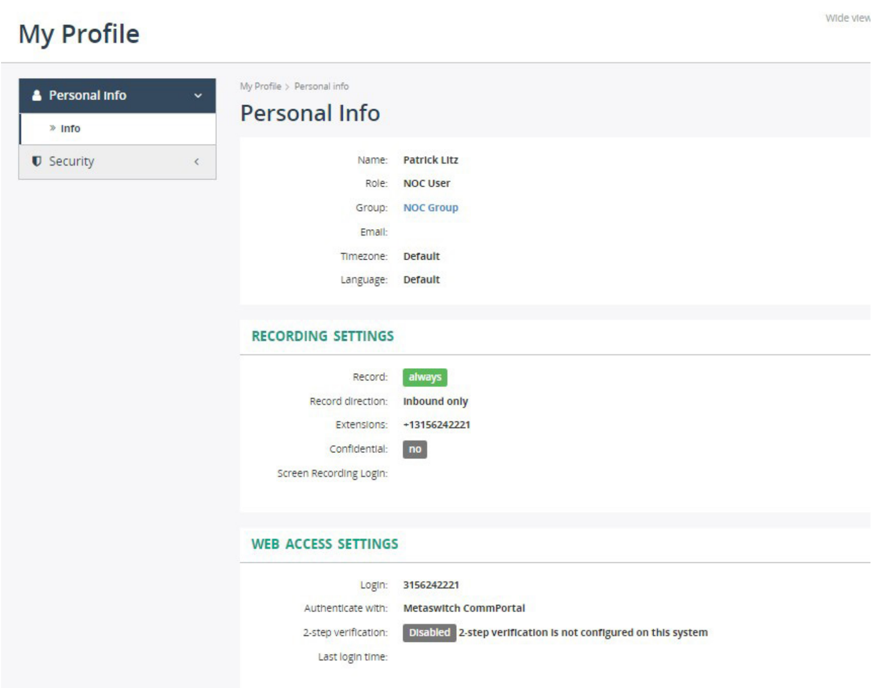


USER PROFILE

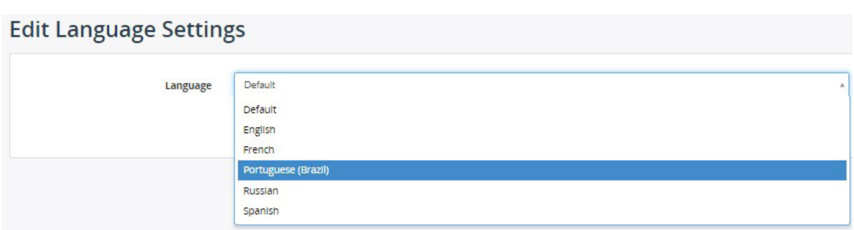
To view the User Profile, language options and log out, select the drop down next to the name.

MY PROFILE

My Profile displays your account settings within MiaRec.



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



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.