



# **SEGRA CALL RECORDING**

## **User Guide**

Revision Jan 2019

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## **CALL RECORDING OVERVIEW**

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

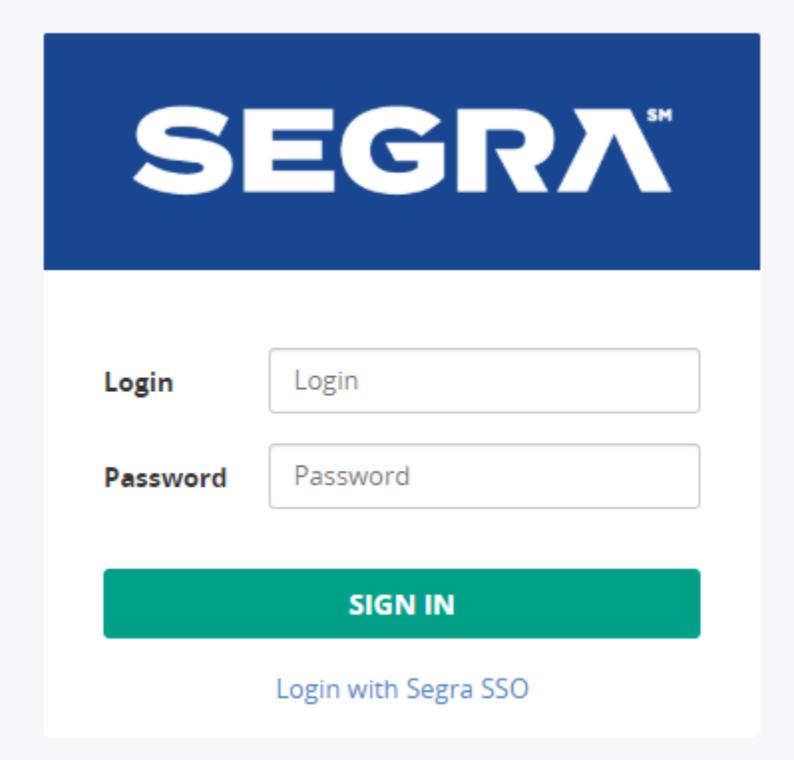
Recorded calls are easily managed, cataloged, retrieved, and can be played back using web portal. All call recordings may also be downloaded and kept locally.

## ACCESSING WEB PORTAL

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

<https://recording.segra.net>

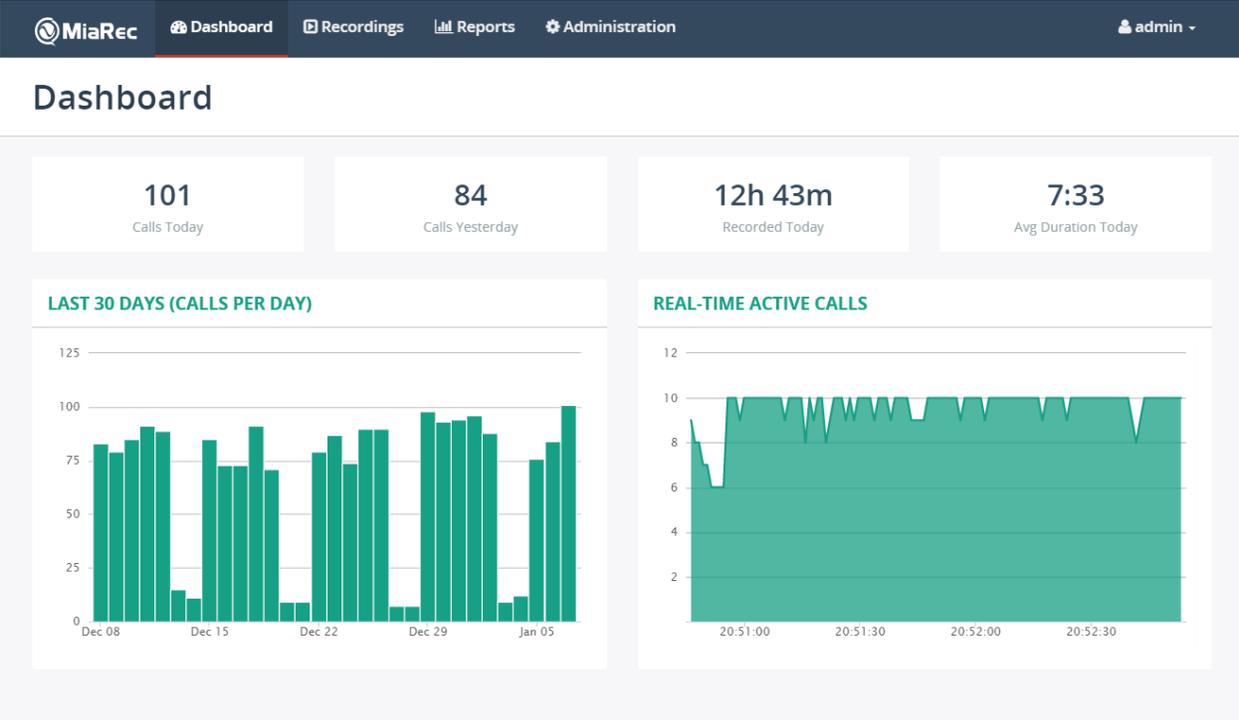
Please enter your login credentials to access the portal.



The image shows a login portal for Segra. At the top, there is a dark blue header with the "SEGRA<sup>SM</sup>" logo in white. Below the header, the login form is centered on a white background. It consists of two input fields: "Login" and "Password", each with a corresponding label to its left. Below these fields is a prominent green button with the text "SIGN IN" in white. Underneath the button, there is a link that says "Login with Segra SSO" in a smaller, blue font.

# DASHBOARD

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



# CALL RECORDINGS VIEWS

Segra supports the following call recording views as pictured:

Recordings Wide view <sup>⌵</sup>

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

Select a Date Range  Select a User or Group  Search a Text  Search <sup>⌵</sup>

No auto-refresh <sup>⌵</sup> Categories <sup>⌵</sup> Download Export More <sup>⌵</sup> 0-20 of many < >

<input type="checkbox"/>	USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES
<input type="checkbox"/>	Shelley Massaro	Feb 13, 2018	9:43 PM	55:47	88811001008 (Shelley Massaro)	5734309702	<input type="text"/>
<input type="checkbox"/>	Gwyn Brace	Feb 13, 2018	9:33 PM	0:14	21311005100 (Gwyn Brace)	8049723422	<input type="text"/>
<input type="checkbox"/>	Shelli Abee	Feb 13, 2018	9:30 PM	3:22	88811001009 (Shelli Abee)	8026903422	<input type="text"/>

Available views:

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

# SEARCH

Segra web portal provides two types of searching:

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

## Quick search

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

- Date Range
- User or Group
- Text

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

## Recordings

Wide view ↗

The screenshot shows the 'Recordings' interface. At the top, there are navigation tabs: ALL CALLS, ACTIVE CALLS, MY CALLS, BY USER, NOT ASSIGNED TO USER, BY CATEGORY, and ADVANCED SEARCH. Below these is a search panel with three input fields: 'Select a Date Range', 'Select a User or Group', and 'Search a Text'. A red box highlights these three fields and the 'Search' button. Below the search panel are action buttons: 'No auto-refresh', 'Categories', 'Download', 'Export', and 'More'. A pagination indicator shows '0-20 of many' with navigation arrows. The main content is a table with columns: USER, DATE, TIME, DURATION, FROM, TO, and CATEGORIES. The table contains three rows of call data.

	USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES
<input type="checkbox"/>	Shelley Massaro	Feb 13, 2018	9:43 PM	55:47	88811001008 (Shelley Massaro)	5734309702	⊕
<input type="checkbox"/>	Gwyn Brace	Feb 13, 2018	9:33 PM	0:14	21311005100 (Gwyn Brace)	8049723422	⊕
<input type="checkbox"/>	Shelli Abee	Feb 13, 2018	9:30 PM	3:22	88811001009 (Shelli Abee)	8026903422	⊕

## Quick search by date range

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

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

The screenshot shows the search interface with the date range selection menu open. The menu is highlighted with a red box and contains the following options: Today, Yesterday, Last 7 Days, Last 30 Days, This Month, Last Month, and Custom Range. The Custom Range option is selected, and the date range 2019/03/13 - 2019/04/26 is displayed in the search field. The interface also shows a calendar for March and April 2019, with the dates 13 and 26 highlighted. The search field contains the text "2019/03/13 - 2019/04/26".

## Quick search by user or group

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

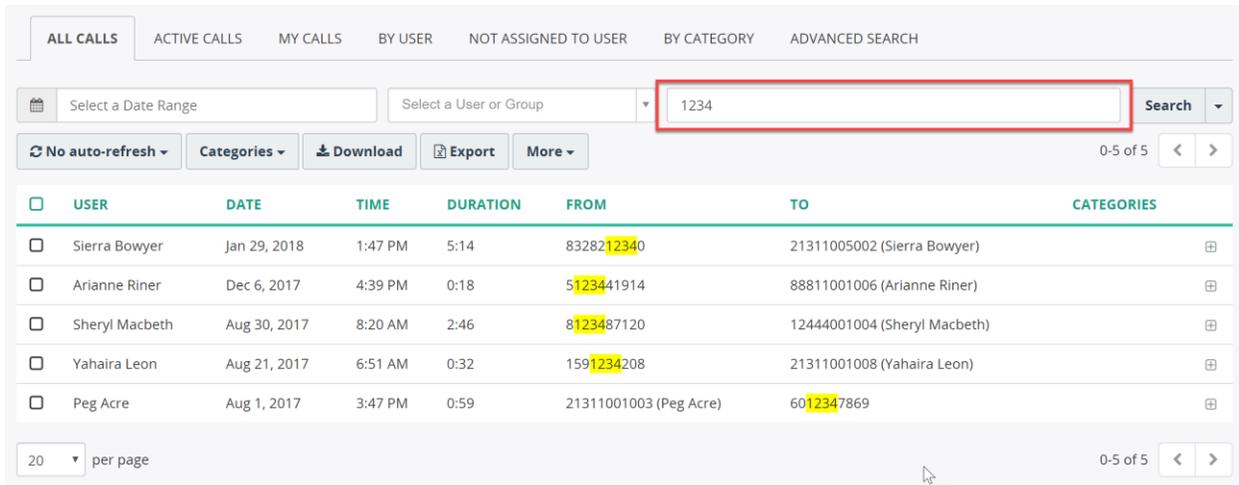
The drop-down list includes an inline search box, which you can use to quickly locate the user or group in the long list. The following example demonstrates how group “Flexus – Sales Department” is quickly located using an inline search by text “sales”:

The screenshot shows the search interface with the user or group selection dropdown open. The dropdown is highlighted with a red box and contains the following options: sales, Flexus - Sales Department, Brandon Thornburg, Cedrick Irons, Damion Rein, Donette Olds, Manual Spoor, and Micheal Harvell. The search field contains the text "Select a User or Group". The interface also shows a table of recordings with columns for USER, DATE, TIME, and TO. The table is filtered to show recordings from February 13, 2018, at 9:30 AM. The search field contains the text "Select a Date Range".

## Quick search by text

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

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



The screenshot shows a search interface with a search bar containing the text "1234". Below the search bar is a table of search results. The phone numbers in the "FROM" and "TO" columns are highlighted in yellow, indicating a successful search match.

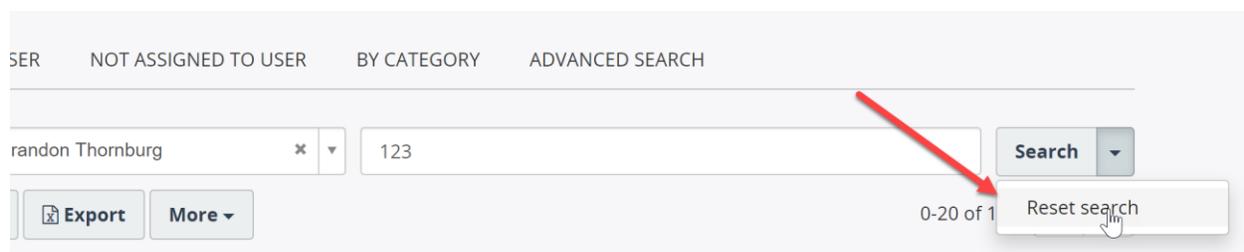
USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES
Sierra Bowyer	Jan 29, 2018	1:47 PM	5:14	8328212340	21311005002 (Sierra Bowyer)	
Arianne Riner	Dec 6, 2017	4:39 PM	0:18	5123441914	88811001006 (Arianne Riner)	
Sheryl Macbeth	Aug 30, 2017	8:20 AM	2:46	8123487120	12444001004 (Sheryl Macbeth)	
Yahaira Leon	Aug 21, 2017	6:51 AM	0:32	1591234208	21311001008 (Yahaira Leon)	
Peg Acre	Aug 1, 2017	3:47 PM	0:59	21311001003 (Peg Acre)	6012347869	

The “**Search a Text**” field performs a search in the following call attributes:

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

## Resetting searching criteria

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



The screenshot shows the search interface with the search bar containing "123" and the user name "randon Thornburg". The "Search" button is highlighted with a red arrow, and its dropdown menu is open, showing the option "Reset search" selected.

## Advanced search

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

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

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

The screenshot shows the 'ADVANCED SEARCH' tab selected in a navigation bar. Below the navigation bar, there are two search criteria defined:

- Group: Is Sales Department
- Duration: Between 30 and 60

Below the search criteria, there is a '+ Add Criteria' link and a 'Search' button. At the bottom of the search area, there are buttons for 'Delete', 'Categories', 'No auto-refresh', and 'Download'. On the right, it shows '0-20 of many' with navigation arrows.

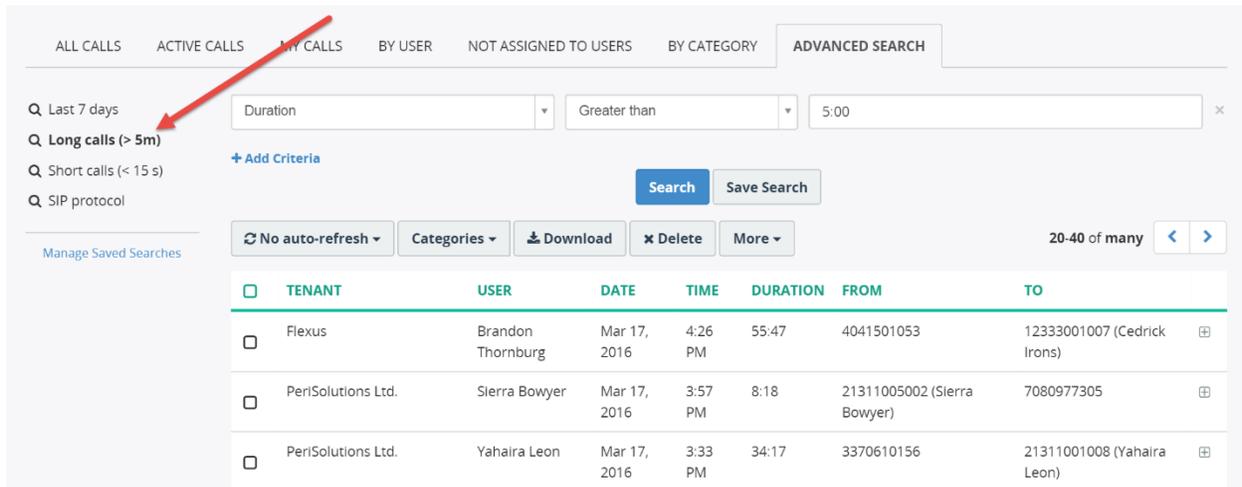
<input type="checkbox"/>	DATE	TIME	DURATION	FROM	TO	
<input type="checkbox"/>	May 3, 2015	11:24 AM	0:59	12333001100 (Micheal Harvell)	8303620297	<input type="checkbox"/>
<input type="checkbox"/>	May 2, 2015	7:22 PM	0:45	3910091940	12333001011 (Veta Pospisil)	<input type="checkbox"/>
<input type="checkbox"/>	May 2, 2015	6:25 PM	0:57	12333001010 (Manual Spoor)	5281360644	<input type="checkbox"/>

It supports various comparison operators like:

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

## Saving the search criteria

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



The screenshot shows a call recording interface with the following elements:

- Navigation tabs: ALL CALLS, ACTIVE CALLS, MY CALLS, BY USER, NOT ASSIGNED TO USERS, BY CATEGORY, **ADVANCED SEARCH**
- Search filters on the left:
  - Q Last 7 days
  - Q Long calls (> 5m)** (highlighted with a red arrow)
  - Q Short calls (< 15 s)
  - Q SIP protocol
- Advanced search criteria: Duration [Greater than] 5:00
- Buttons: + Add Criteria, Search, Save Search
- Table controls: No auto-refresh, Categories, Download, Delete, More
- Page info: 20-40 of many
- Table with columns: TENANT, USER, DATE, TIME, DURATION, FROM, TO

<input type="checkbox"/>	TENANT	USER	DATE	TIME	DURATION	FROM	TO
<input type="checkbox"/>	Flexus	Brandon Thornburg	Mar 17, 2016	4:26 PM	55:47	4041501053	12333001007 (Cedrick Irons)
<input type="checkbox"/>	PeriSolutions Ltd.	Sierra Bowyer	Mar 17, 2016	3:57 PM	8:18	21311005002 (Sierra Bowyer)	7080977305
<input type="checkbox"/>	PeriSolutions Ltd.	Yahaira Leon	Mar 17, 2016	3:33 PM	34:17	3370610156	21311001008 (Yahaira Leon)

# PLAYBACK AND DOWNLOAD

## Inline basic media player

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

The screenshot displays a web interface for managing call recordings. At the top, there are navigation tabs: ALL CALLS, ACTIVE CALLS, MY CALLS, BY USER, BY CLIENT, NOT ASSIGNED TO USER, BY CATEGORY, and ADVANCED SEARCH. Below these are search filters: a date range selector, a dropdown for 'Sales Department', and a text search box. A toolbar contains buttons for 'No auto-refresh', 'Categories', 'Download', 'Export', 'Delete', and 'More'. A pagination indicator shows '0-20 of 993'.

The main content area features a table with columns: USER, DATE, TIME, DURATION, FROM, TO, and CATEGORIES. The first row is selected, showing details for Micheal Harvell's call on Mar 16, 2019, at 6:54 AM, with a duration of 1:46. The call details include: Tenant: Flexus, Group: Sales Department, From: 1224877205 (with an 'assign to client' icon), To: 12333001100 (Micheal Harvell), Date/Time: Mar 16, 2019 6:54:14 AM, and Duration: 1:46. A red box highlights the audio player, which shows a progress bar from 00:10 to 01:48 and a 'Save audio file' button. Below the player are 'More details' and 'Evaluate' buttons, and a 'Notes: Add note' section.

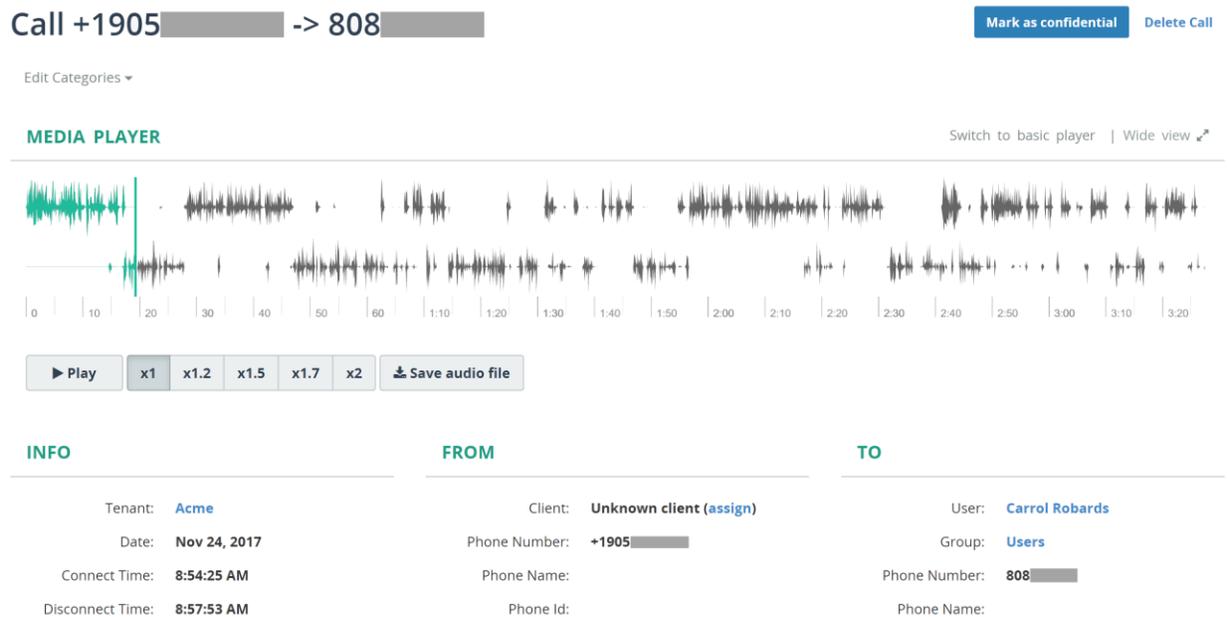
USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES
Micheal Harvell	Mar 16, 2019	6:54 AM	1:46	1224877205	12333001100 (Micheal Harvell)	
Cedrick Irons	Mar 15, 2019	8:22 PM	20:40	12333001007 (Cedrick Irons)	4384954295	
Vicente Palau	Mar 15, 2019	7:55 PM	20:40	4998756850	12333001009 (Vicente Palau)	

## Advanced media player

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



The Advanced Media Player displays an audio waveform, which presents an easy way to detect periods of silence and talk-over within the conversation.



With the Advanced Media Player, you can easily control the playback speed from x1 to x2. Speeding up will allow you to listen to the recording faster, which saves time.

# CALL NOTES

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

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

The screenshot displays a call recording interface. At the top, a header bar shows the call ID '21311003000 (Antonie Parker)', the date 'Jun 10, 2015', time '9:17 PM', duration '31:35', and the other party's ID '6219310492'. Below this, the call details are listed: 'From: 21311003000 (Antonie Parker)', 'To: 6219310492', 'Date/Time: Jun 10, 2015 9:17:21 PM', and 'Duration: 31:35'. A progress bar for the audio recording is shown with a play button, a 'Save audio file' button, and a '32:20' duration. The 'Notes' section contains two entries: the first, dated 'Today, 9:06 PM', reads 'This is a sales lead. Follow up in 2 weeks' and has 'Unpin' and 'Delete' options; the second, dated 'Today, 9:07 PM', reads 'Scheduled a demo.' and has 'Pin to the top' and 'Delete' options. Below the notes is a text input field and 'Save' and 'Cancel' buttons. At the bottom, a list of other calls is visible, including 'Alberta Seifried' and 'Tinisha Frost'.

Call ID	Date	Time	Duration	Other Party ID
21311003000 (Antonie Parker)	Jun 10, 2015	9:17 PM	31:35	6219310492
21311001009 (Alberta Seifried)	Jun 10, 2015	9:12 PM	3:37	6309942916
6510960318	Jun 10, 2015	9:10 PM	0:24	21311002002 (Tinisha Frost)

# CATEGORIES (TAGS)

Segra supports user-defined categories for call recordings.

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

USER	FROM	TO	CATEGORIES
Shelley Massaro	88811001008 (Shelley Massaro)	5734309702	Lead
Gwyn Brace	21311005100 (Gwyn Brace)	8049723422	Lead
Shelli Abee	88811001009 (Shelli Abee)	8026903422	Refund
Tinisha Frost	21311002002 (Tinisha Frost)	2142217030	Sales Important
Justin Frost	21311002102 (Justin Frost)	2310321308	
Tracy Hash	4840582780	21311005004 (Tracy Hash)	
Idalia Alligood	21311001006 (Idalia Alligood)	7080904991	
David Amado	21311002100 (David Amado)	4123554212	
Aline Barlebaugh	4968313789	21311002005 (Aline Barlebaugh)	

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

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

USER	DATE	TIME	DURATION	FROM	TO	CATEGORIES
Justin Frost	Feb 13, 2018	9:12 PM	0:49	21311002102 (Justin Frost)	2310321308	Sales Important
Jamie Hernandez	Feb 13, 2018	4:54 PM	3:37	7591645180	21311005003 (Jamie Hernandez)	Sales

# CALL FLOW RECONSTRUCTION / MULTI-SEGMENT CALLS

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

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



	USER	DATE	TIME	DURATION	FROM	TO
<input type="checkbox"/>	3/3 Carrol Robards	Nov 20, 2017	6:59 PM	1:41	+1310 [REDACTED]	8088 [REDACTED] (CSR 808 [REDACTED])
<input type="checkbox"/>	2/3 Carrol Robards	Nov 20, 2017	6:56 PM	2:52	8088 [REDACTED] (CSR 808 [REDACTED])	2056
<input type="checkbox"/>	1/3 Carrol Robards	Nov 20, 2017	6:50 PM	5:40	+1310 [REDACTED]	808 [REDACTED] (CSR 808 [REDACTED])

## Visualization of multi-segment calls

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



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

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

0 | 1:10 | 2:0 | 3:0 | 4:0 | 5:0 | 6:0 | 7:0 | 8:0 | 9:0 | 10:0 | 11:0 | 12:0 | 1:00 | 1:10 | 1:20 | 1:30 | 1:40 | 1:50 | 2:00 | 2:10 | 2:20 | 2:30 | 2:40 | 2:50 | 3:00 | 3:10 | 3:20 | 3:30 | 3:40 | 3:50 | 4:00 | 4:10 | 4:20 | 4:30 | 4:40 | 4:50 | 5:00 | 5:10 | 5:20 | 5:30

**▶ Play** **⬇ Save audio file**

**ALL CALLS IN THIS INTERACTION**

TIME	DURATION	FROM -> TO	TIMELINE	
6:50 PM	5:40	+1310 [REDACTED] -> 808 [REDACTED] (CSR 808 [REDACTED])	[REDACTED]	<a href="#">View</a>
6:56 PM	2:52	808 [REDACTED] (CSR 808 [REDACTED]) -> 2056	[REDACTED]	<a href="#">View</a>
6:59 PM	1:41	+1310 [REDACTED] -> 808 [REDACTED] (CSR 808 [REDACTED])	[REDACTED]	<a href="#">View</a>

## Supported call scenarios

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

- An inbound call is transferred from one agent to another; in this case, both parts of the call will be added to the interaction.
- An agent puts the call on hold, makes an outbound consultative call, and then returns to their original call. In this case, all 3 calls will be added to the interaction.
- An agent has an active call occurring, and he/she receives a second incoming call. The agent places the first call on hold and proceeds to answer the new call. The agent then returns to their original call. In this scenario, the incoming call that occurs between the hold/resume event is treated as an outside interaction. Only the 1st and the 3rd call segments will be added to the interaction.

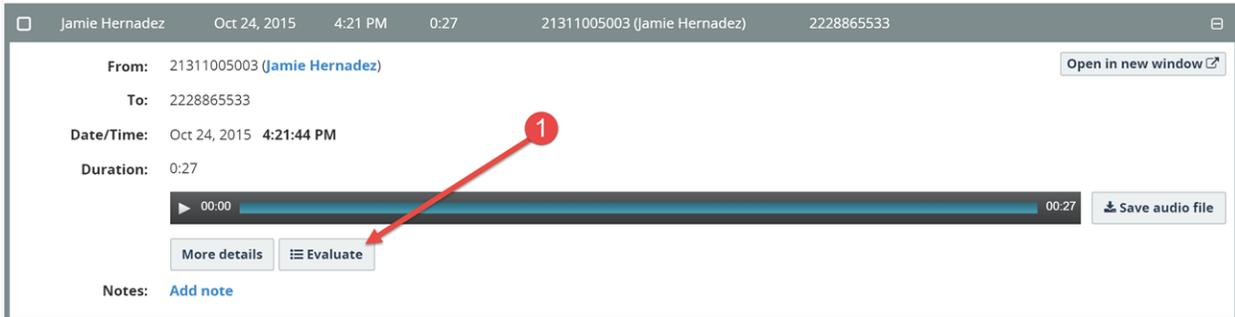
# AGENT EVALUATION

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

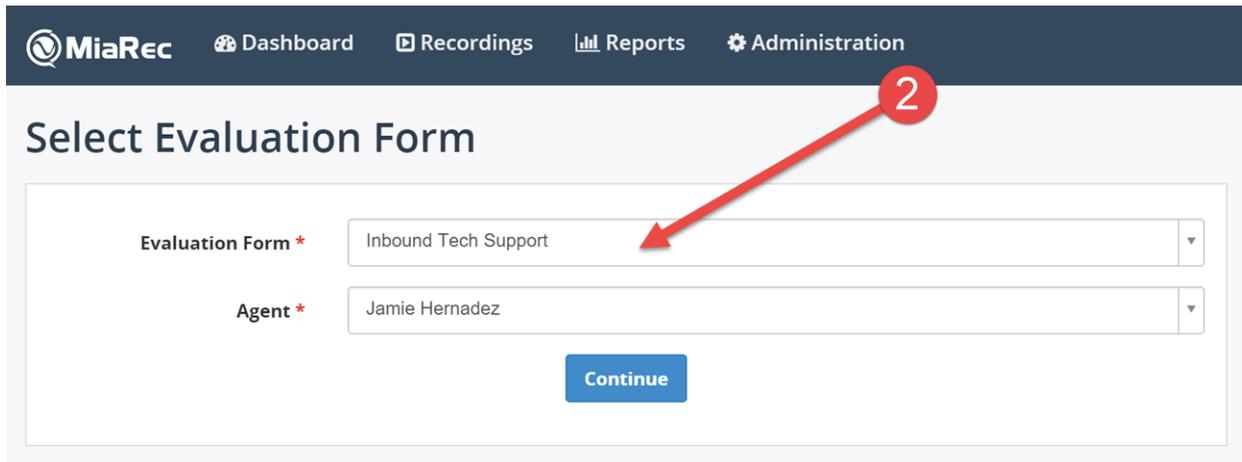
## Prerequisites:

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

To evaluate an agent, select a call recording and click "Evaluate" button in call details:



Select the evaluation form to use for this call:

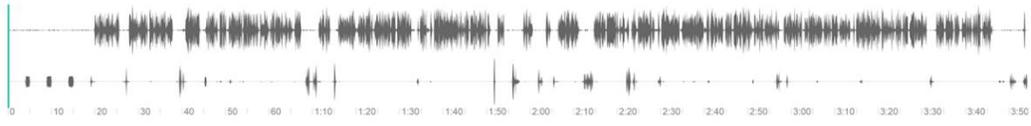


Listen to the recording and answer questions in the evaluation form. Once all questions have been answered, the call will receive a score from 0 to 100 points.

### Add Evaluation Report

#### AUDIO

Switch to basic player



▶ Play    ⬇ Save audio file

#### EVALUATION REPORT

Agent: **Carrol Robards**  
Evaluator: **admin**  
Evaluation Form: **Inbound Tech Support**

#### CALL DETAILS

Call Date/Time: **Mar 1, 2010, 9:05:58 AM**  
Call Duration: **3:55**  
From: **827 CTI\_HAR\_27 (Carrol Robards)**  
To: **0041796930211**  
[View call details](#)

#### GREETING

Did the agent say "Thank you for calling"?     yes     no

Did the agent mention his/her name?     yes     no

Did the agent mention the company name?     yes     no

If the call was transferred did the agent adapt the greeting accordingly?     yes     no     n/a

Did the agent say "This call may be recorded..." (outbound only)?     yes     no     n/a

Comments

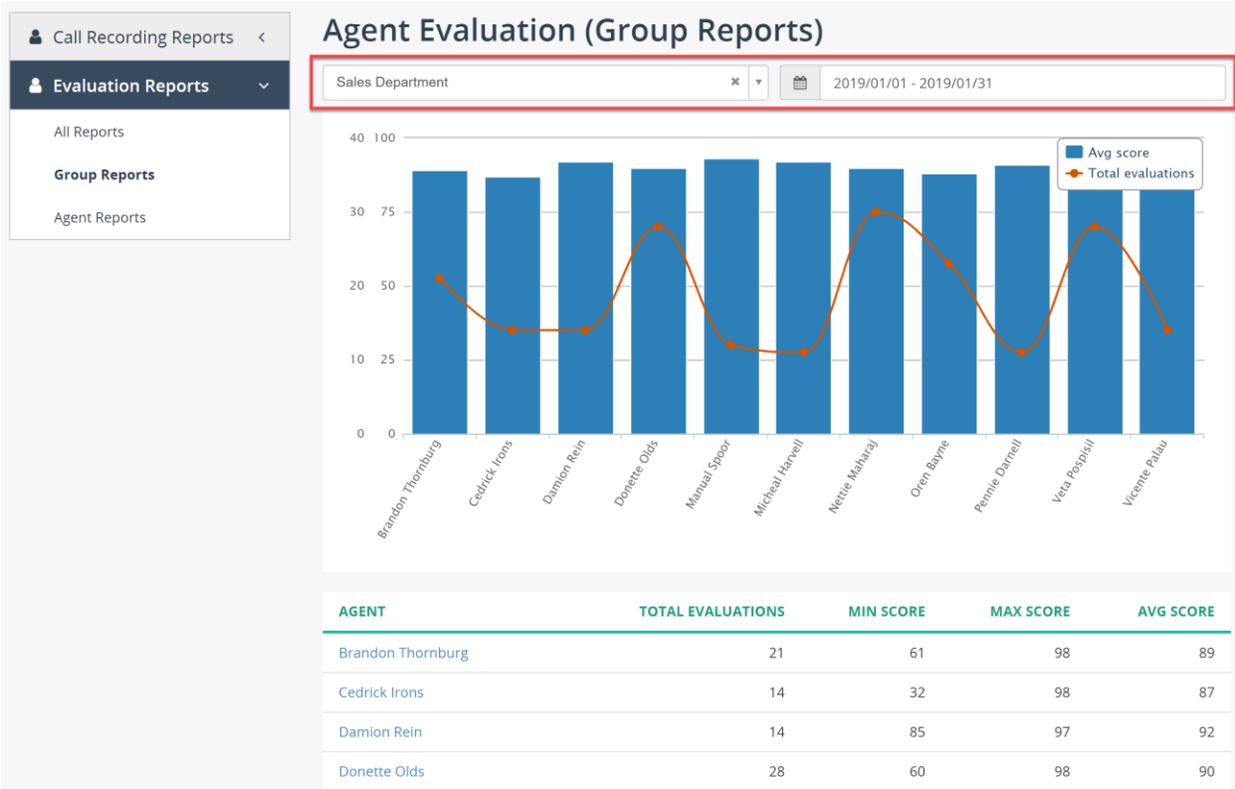
#### VERIFICATION

## Reports

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

This report shows the following statistics:

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

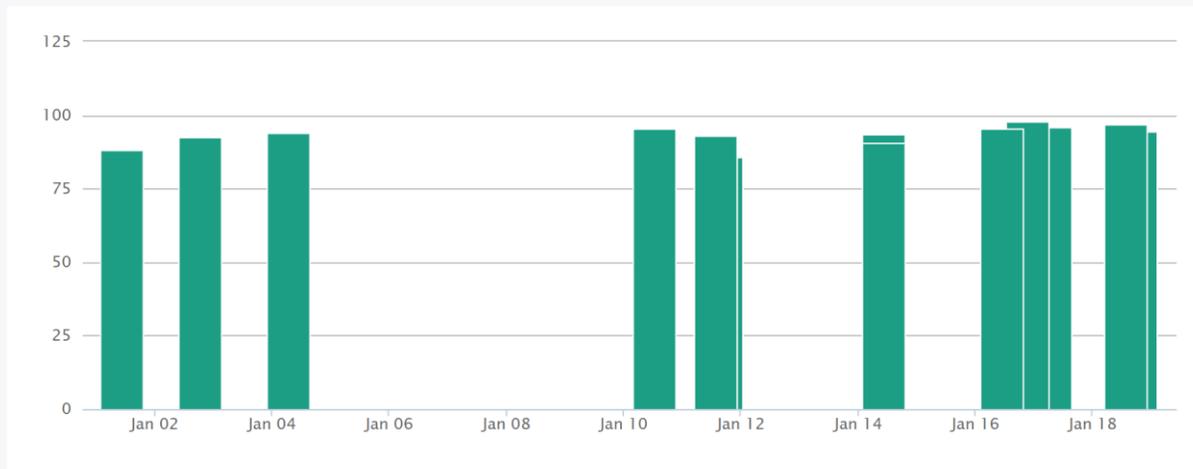


By clicking on agent's name in the Group Report, you can navigate to Agent's report:

## Agent Evaluation (Agent Reports)

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

<b>14</b> Total evaluations	<b>85</b> Min Score	<b>97</b> Max Score	<b>92</b> Avg Score
--------------------------------	------------------------	------------------------	------------------------



✕ Delete Evaluation 0-14 of 14 ◀ ▶

<input type="checkbox"/>	CALL DATE/TIME	AGENT	GROUP	EVALUATION FORM	SCORE	
<input type="checkbox"/>	Jan 18, 2019, 6:08 PM	<a href="#">Damion Rein</a>	Sales Department	Inbound Tech Support	94	<a href="#">View</a> <a href="#">Edit</a>
<input type="checkbox"/>	Jan 18, 2019, 2:10 PM	<a href="#">Damion Rein</a>	Sales Department	Inbound Tech Support	97	<a href="#">View</a> <a href="#">Edit</a>
<input type="checkbox"/>	Jan 17, 2019, 7:13 AM	<a href="#">Damion Rein</a>	Sales Department	Inbound Tech Support	95	<a href="#">View</a> <a href="#">Edit</a>

## Evaluation form designer

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

Administration > Customization > Evaluation Form Designer

### Evaluation Form «Inbound Tech Support»

Add Section

Edit Form

Delete Form

Name: **Inbound Tech Support**

Tenant: **Flexus**

Description: **Sample evaluation form**

#### SECTIONS

+ Add Section

##### TITLE

##### ▼ GREETING

[Edit](#) [Delete](#)

Did the agent say "Thank you for calling"?

[Edit](#) [Delete](#)

Did the agent mention his/her name?

[Edit](#) [Delete](#)

Did the agent mention the company name?

[Edit](#) [Delete](#)

If the call was transferred did the agent adapt the greeting accordingly?

[Edit](#) [Delete](#)

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

[Edit](#) [Delete](#)

+ Add question

##### ▼ VERIFICATION

[Edit](#) [Delete](#)

Did the agent ask for the caller's name?

[Edit](#) [Delete](#)

## Edit Question

**Question \***  

**Description**

**Answer Type**  Multiple choice  
 Numeric value

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

**Choices \***

<input data-bbox="576 640 876 682" type="text" value="yes"/>	<input data-bbox="917 640 1015 682" type="text" value="5"/>	<input data-bbox="1063 640 1193 682" type="text" value="Points"/> <input data-bbox="1193 640 1218 682" type="text" value="v"/>	<input type="checkbox"/> default <input data-bbox="1372 640 1396 682" type="text" value="x"/>
<input data-bbox="576 703 876 745" type="text" value="no"/>	<input data-bbox="917 703 1015 745" type="text" value="0"/>	<input data-bbox="1063 703 1193 745" type="text" value="Points"/> <input data-bbox="1193 703 1218 745" type="text" value="v"/>	<input checked="" type="checkbox"/> default <input data-bbox="1372 703 1396 745" type="text" value="x"/>

[Add Option](#)

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

**Weight**

**Order**

# LIVE MONITORING

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

The screenshot displays a web-based call monitoring interface. At the top, there are navigation tabs: ALL CALLS, ACTIVE CALLS (selected), MY CALLS, BY USER, NOT ASSIGNED TO USERS, and BY CATEGORY. Below the tabs is a search bar with a dropdown menu labeled 'Select a User or Group' and a text input field labeled 'Search a Text'. There are also buttons for 'Delete' and 'Categories', and a pagination indicator '0-1 of 1'. The main area shows a table with columns: USER, DATE, TIME, DURATION, FROM, TO, and TIMELINE. A single call is listed for 'David Amado' on 'Today' at '20:40:58', with a duration of 'In progress...'. The call details are expanded, showing 'From: 102 (David Amado)', 'To: 8662367979', 'Call State: In progress...' with a 'live monitor this call' button, 'Date/Time: Today 20:40:58', and 'Duration:'. A 'Live Player' pop-up window is overlaid on the call details, containing a 'Status' section with 'Monitoring Call', 'Call details' section with 'Caller Party: 102', 'Called Party: 8662367979', and 'Start Time: 20:40:58', and control buttons for 'Re-play', 'Stop', and 'Exit'. There is also an 'Open in new window' link in the top right of the call details area.

To start live monitoring, open call details of the corresponding call in progress, and click “Live monitor this call” button. The Live Player application should pop-up allowing you to listen to the call in-progress.

If the Live Player application doesn’t pop-up, make sure it is installed on your computer. You can download it from: <https://www.Segra.com/files/download/LivePlayerSetup.exe>

# REPORTS

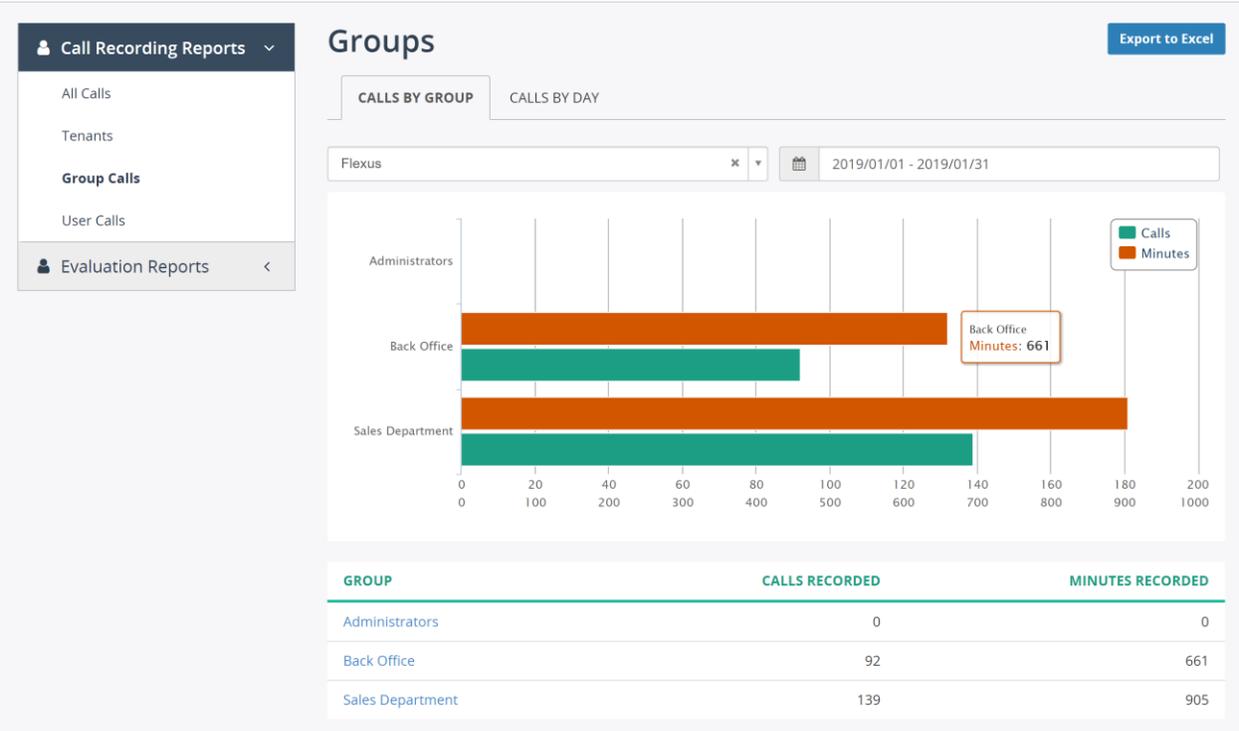
Segra provides a number of pre-configured reports:

- All calls report (calls per day)
- Tenants report (calls per tenant)
- Group Calls report (calls per group)
- User Calls report (calls per user)

The following screenshot demonstrates a “Group Calls” report.

## Reports

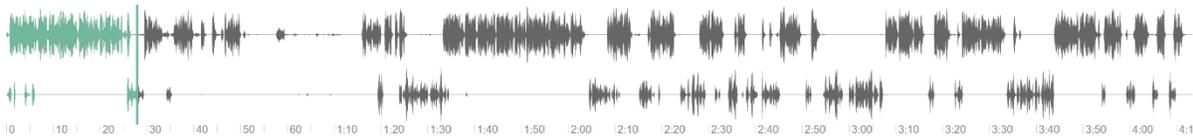
Wide view ↗



# SPEECH-TO-TEXT TRANSCRIPTION

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

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



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

|| Pause    ⬇️ Save audio file

**TRANSCRIPT**

Side 1 [0:00]: Lesley

Side 2 [0:00]: **Looks good .**

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

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

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

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

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

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

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

Transcript Search query refund

[+ Add criteria](#)

[Run Search](#) [Save Search](#)

[No auto-refresh](#)
[Categories](#)
[Download](#)
[Export](#)
[Delete](#)
[More](#)
0-20 of 100 < >

	DATE	TIME	DURATION	FROM	TO	EVALUATION REPORT SCORE
<input type="checkbox"/>	Jan 26, 2018	12:59 PM	6:34	806-████████	+1516-████████	
<p>warehouse and they have it . They'll be able to go ahead and do the <b>refund</b> . I'm not sure how they process the <b>refunds</b> in their policy if they're unable ... <b>refund</b> back to the original card if they will just automatically go ahead and send a gift card with the balance straight to the address . Okay , okay , and you guys have my number ... Okay , alright , and how long should I be waiting for like how long is this process ? The <b>refund</b> normally takes 7 to 14 business days once but that business we have to wait til . They</p>						
<input type="checkbox"/>	Jan 26, 2018	12:58 PM	2:12	+177-████████	806-████████	
<p>information . Let me go ahead and review the account now . Okay , so now that your <b>refund</b> was put in on the 18th of January , and it does take 7 to 10 business days alright ... Okay , simply go It's only the fixed . 7 to 10 business days honey for you to <b>refund</b> albino money . It normally takes 2 to 5 business days , but I'm needing</p>						

# CUSTOM FIELDS

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

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

USER	DATE	TIME	DURATION	FROM	TO	ORDER #	CAMPAIGN
Jamie Hernandez	Oct 24, 2015	4:21 PM	0:27	21311005003 (Jamie Hernandez)	2228865533	10001	Campaign A
Jamie Hernandez	Oct 23, 2015	9:11 PM	0:49	6597162111	21311005003 (Jamie Hernandez)	10002	Campaign B
Tracy Hash	Oct 23, 2015	8:22 AM	0:24	21311005004 (Tracy Hash)	5370521272		
Gwyn Brace	Oct 22, 2015	12:39 PM	2:36	5690871923	21311005100 (Gwyn Brace)		

Additionally, customer field values are displayed in call details:

Call 21311005003 -> 2228865533

Mark as confidential Delete Call

**AUDIO** Switch to basic player

▶ Play Save audio file

**INFO**

Date: Oct 24, 2015

Dis: [View](#)

Watermark: [View](#)

Order #: **10001**

Campaign: **Campaign A**

**FROM**

User: **Jamie Hernandez**

Group: **Technical Support**

Phone Number: **21311005003**

Phone Name: **Jamie Hernandez**

Phone Id:

Ip-address:

Live monitor phone 21311005003

**TO**

User:

Phone Number: **2228865533**

Phone Name:

Phone Id:

Ip-address:

Live monitor phone 2228865533

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

ALL CALLS ACTIVE CALLS MY CALLS BY USER NOT ASSIGNED **Quick search within custom fields** ARCH

Select a Date Range Technical Support x 10002 Search

No auto-refresh Categories Download Delete More 0-3 of 3

USER	DATE	TIME	DURATION	FROM	TO	ORDER #	CAMPAIGN
Jamie Hernandez	Oct 23, 2015	9:11 PM	0:49	6597162111	21311005003 (Jamie Hernandez)	10002	Campaign B
Sierra Bowyer	Jun 5, 2015	11:37 AM	20:40	21311005002 (Sierra Bowyer)	2021000288		
Sierra Bowyer	Jul 25, 2014	7:10 AM	3:43	21311005002 (Sierra Bowyer)	1610002548		

20 per page 0-3 of 3

ALLS **Advanced search within custom fields** SER BY CATEGORY **ADVANCED SEARCH**

Order # Equal To 10002 x

+ Add Criteria

Run Search Save Search

No auto-refresh Categories Download Delete More 0-1 of 1

DATE	TIME	DURATION	FROM	TO	ORDER #	CAMPAIGN
Oct 23, 2015	9:11 PM	0:49	6597162111	21311005003 (Jamie Hernandez)	10002	Campaign B

20 per page 0-1 of 1

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

Call 6597162111 -> 21311005003 Mark as confidential Delete Call

**AUDIO** Switch to basic player



▶ Play ⬇️ Save audio file

**INFO**

Date: **Oct 23, 2015**  
Connect Time: **9:11:35 PM**  
Disconnect: **10:00:02**  
Watermark: **ew**  
Order #:   
OK Cancel  
Campaign: **Campaign B**

**FROM**

User:  
Phone Number: **6597162111**  
Phone Name:  
Phone Id:  
Ip-address:  
[📞 Live monitor phone 6597162111](#)

**TO**

User: **Jamie Hernandez**  
Group: **Technical Support**  
Phone Number: **21311005003**  
Phone Name: **Jamie Hernandez**  
Phone Id:  
Ip-address:  
[📞 Live monitor phone 21311005003](#)

*Authorized users may edit fields inline*

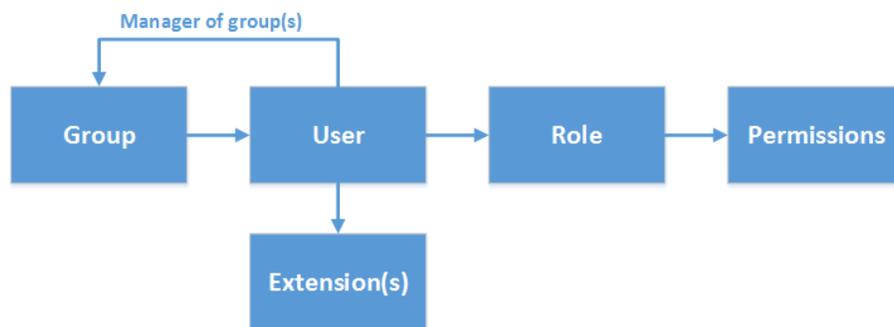
## ROLE-BASED ACCESS CONTROL

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

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

The following diagram shows the user hierarchy, particularly:

- User can be a member of one or multiple groups
- User can be a manager of one or multiple groups
- User is assigned exactly one role
- User may have multiple extensions



The role is associated with a set of granted permissions. Permissions include such privileges as "Configure System", "Configure Users", "Playback call recordings", "Delete recording", etc.

The following screenshot shows the example of permissions configuration.

**Name \***

**Access scope \***

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

**Allow edit users of role**

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

---

Permissions [SET ALL](#) | [CLEAR ALL](#)

<b>System configuration</b>	<input checked="" type="checkbox"/> View <input type="checkbox"/> Edit	<a href="#">set all</a>   <a href="#">clear all</a>
<b>System log</b>	<input checked="" type="checkbox"/> View <input type="checkbox"/> Delete	<a href="#">set all</a>   <a href="#">clear all</a>
<b>Audit trail</b>	<input checked="" type="checkbox"/> View	<a href="#">set all</a>   <a href="#">clear all</a>
<b>Custom fields designer</b>	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	<a href="#">set all</a>   <a href="#">clear all</a>
<b>Tenants</b>	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	<a href="#">set all</a>   <a href="#">clear all</a>
<b>Encryption keys</b>	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Export <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	<a href="#">set all</a>   <a href="#">clear all</a>
<b>Roles</b>	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	<a href="#">set all</a>   <a href="#">clear all</a>
<b>Groups</b>	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	<a href="#">set all</a>   <a href="#">clear all</a>
<b>Users</b>	<input checked="" type="checkbox"/> View <input checked="" type="checkbox"/> Edit <input type="checkbox"/> Delete	<a href="#">set all</a>   <a href="#">clear all</a>
<b>Own calls</b>	<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	<a href="#">set all</a>   <a href="#">clear all</a>

# AUDIT TRAIL

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

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

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

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

The screenshot displays the 'Audit Trail' interface within the 'Maintenance' section of the Segra administration portal. The interface includes a sidebar menu with options like 'User Management', 'Storage', 'System', 'Customization', and 'Maintenance'. The 'Maintenance' menu is expanded, showing 'System Logs', 'License', 'Audit Trail', 'Recording Servers', 'UNDO List', and 'Troubleshooting'. The main content area is titled 'Audit Trail' and features search filters for 'Select a Date Range', 'Select a User or Group', and 'Search in DATA'. Below the filters, there are sections for 'Resources' and 'Actions', each with a list of checkboxes for filtering. The 'Resources' section includes options like 'Audio files', 'Calls', 'Categories', 'Category assignments', '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', 'Groups', 'Incoming replication tokens', 'Jobs', 'Managed groups', 'Notes', 'Recorders', 'Role permissions', 'Roles', 'Saved searches', 'Settings', 'Settings for recorder', 'Tenant licenses', 'Tenants', 'User extensions', 'User licenses', and 'Users'. The 'Actions' section includes options like 'Abort job', 'Assign call to user', 'Assign many calls to user', 'Change password', 'Clear category', 'Clear managed group', 'Create', 'Delete', 'Download', 'Error', 'Export', 'Grant encrypt key access', 'Import', 'Job failure', 'Job finished', 'Job started', 'Live monitor call', 'Live monitor phone', 'Login', 'Login failure', 'Logout', 'Mark Delete', 'On-demand discard', 'On-demand keep', 'Pause recording', 'Playback', 'Replicate receive', 'Replicate send', 'Resume recording', 'Revoke encrypt key access', 'Set category', 'Set managed group', 'Start job', 'Undo Delete', and 'Update'. Below the filters, there are buttons for '+ Filter by Resource', '+ Filter by Action', 'Apply Filter', and 'Reset Filter'. The bottom right corner shows '0-20 of 33' and navigation arrows. The main content area contains a table with the following data:

DATE	INITIATOR	RESOURCE	ACTION / DETAILS
May 6, 2016, 12:37 PM	admin (admin)	Users	<b>Update</b> User account "Arianne Riner" (login: arianne.riner) has been modified. Updated fields: authenticate_type, must_change_password, confidential <a href="#">View</a>
May 6, 2016, 11:47 AM	admin (admin)	Users	<b>Update</b> User account "David Amado" (login: david.amado) has been modified. Updated fields: authenticate_type, must_change_password, confidential <a href="#">View</a>
May 6, 2016, 11:47 AM	admin (admin)	Users	<b>Delete</b> User account "New user for Maxiserve 2" (login: ) has been deleted <a href="#">View</a>
May 6, 2016, 11:18 AM	admin (admin)	Users	<b>Update</b> User account "John Smith" (login: john.smith) has been modified. Updated fields: record <a href="#">View</a>

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

**INFO**

Date: **Apr 7, 2016**

Connect Time: **3:22:57 PM**

Disconnect Time: **3:25:37 PM**

Duration: **2:40**

Watermark: [View](#)

**FROM**

User:

Phone Number: **252503727**

Phone Name:

Phone Id: **252503727**

Ip-address: **127.0.0.1 (3001)**

[🔊 Live monitor phone 252503727](#)

**TO**

User: [Kim Skinner](#)

Group: [MiaRec Users](#)

Phone Number: **300**

Phone Name:

Phone Id: **300**

Ip-address: **127.0.0.1 (5080)**

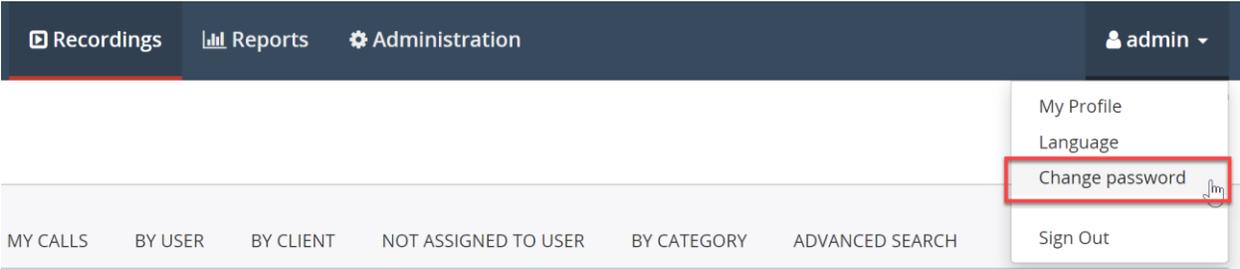
[🔊 Live monitor phone 300](#)

**Audit Trail**

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

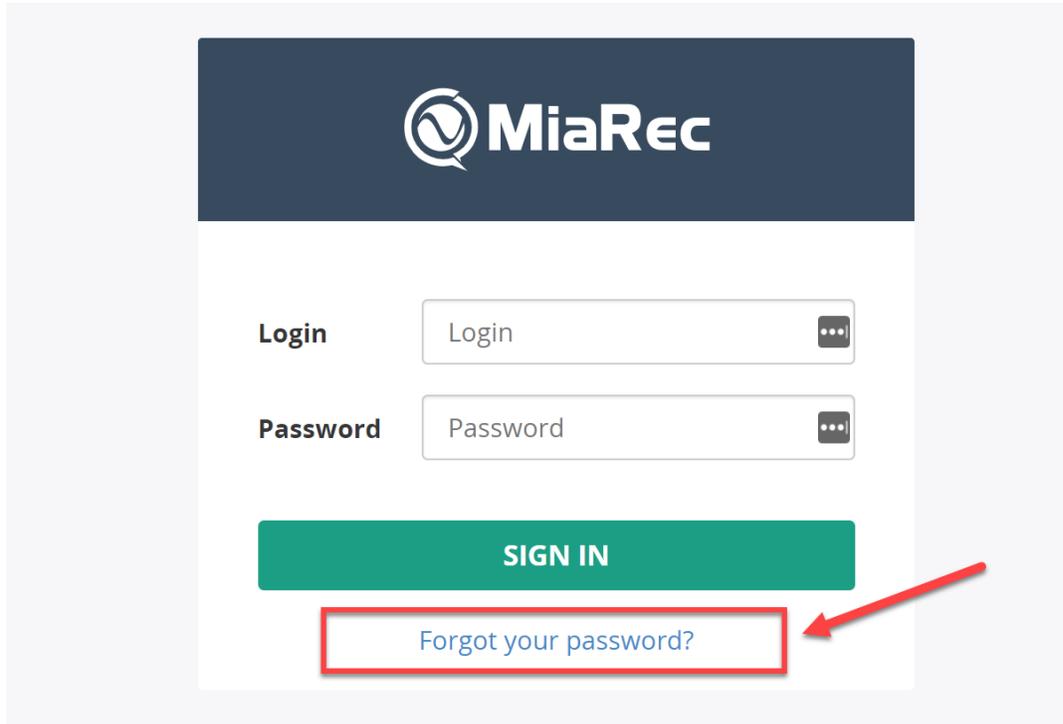
# CHANGE OWN PASSWORD

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



## RESET PASSWORD BY EMAIL

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

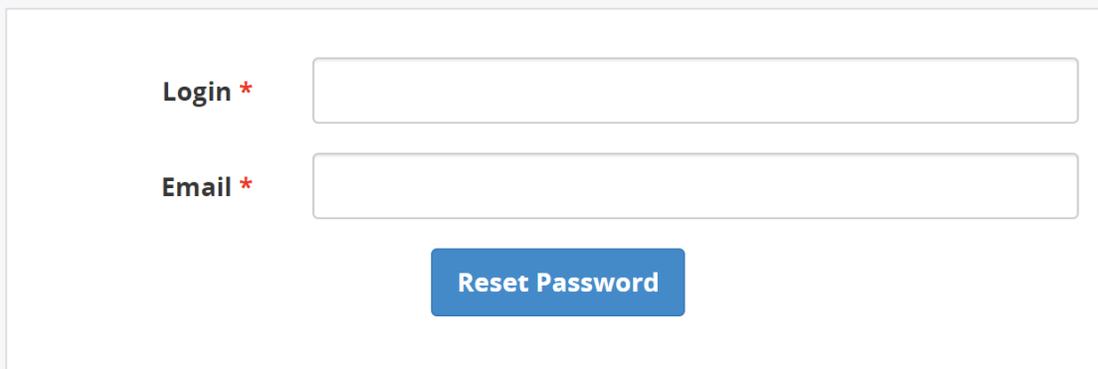


The screenshot shows the MiaRec login interface. At the top is the MiaRec logo. Below it are two input fields: "Login" and "Password", each with a three-dot menu icon to its right. A green "SIGN IN" button is positioned below the input fields. At the bottom of the form, the text "Forgot your password?" is enclosed in a red rectangular box, with a red arrow pointing to it from the right.

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

### Forgotten your password?

To reset your password, fill the following form. A link will be emailed to your email address which will let you reset your password.



The form is titled "Forgotten your password?". It contains two required input fields: "Login \*" and "Email \*". Below these fields is a blue button labeled "Reset Password".

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

- Email is not configured on your user profile. Contact your system administrator to fix that.
- A Single Sign-On is activated for your user profile, i.e. the same credentials are used to Segra web portal as well as Broadworks Web Portal / Metaswitch CommPortal. In this case, you need to reset the password in the corresponding portal rather than in Segra.