SEGRA CALL RECORDING
User Guide

Revision Jan 2019

Table of Contents

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.

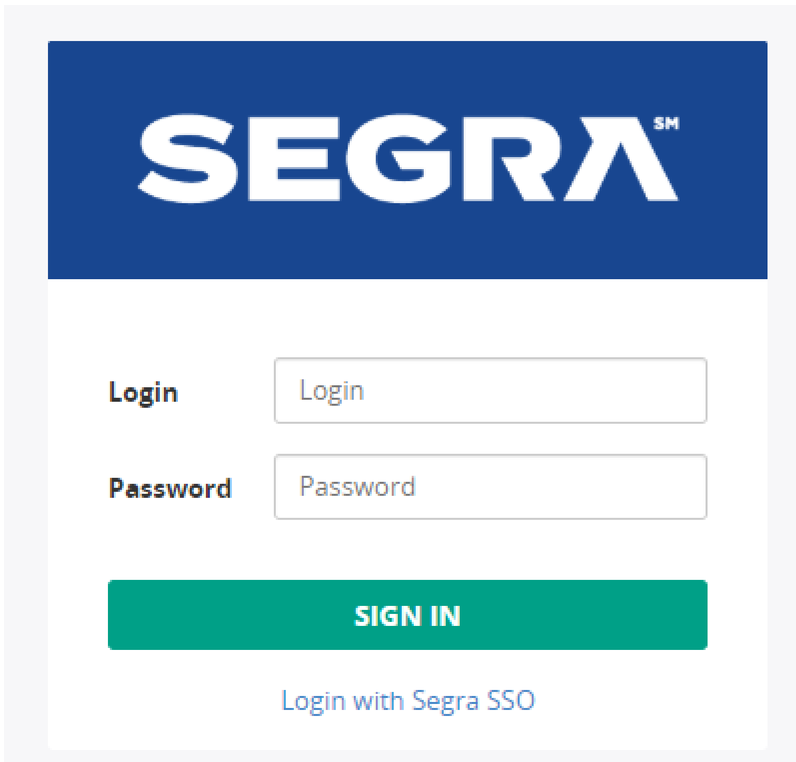
Recorded calls are easily managed, cataloged, retrieved, and can be played back using web portal. All call recordings may also be downloaded and kept locally.

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:

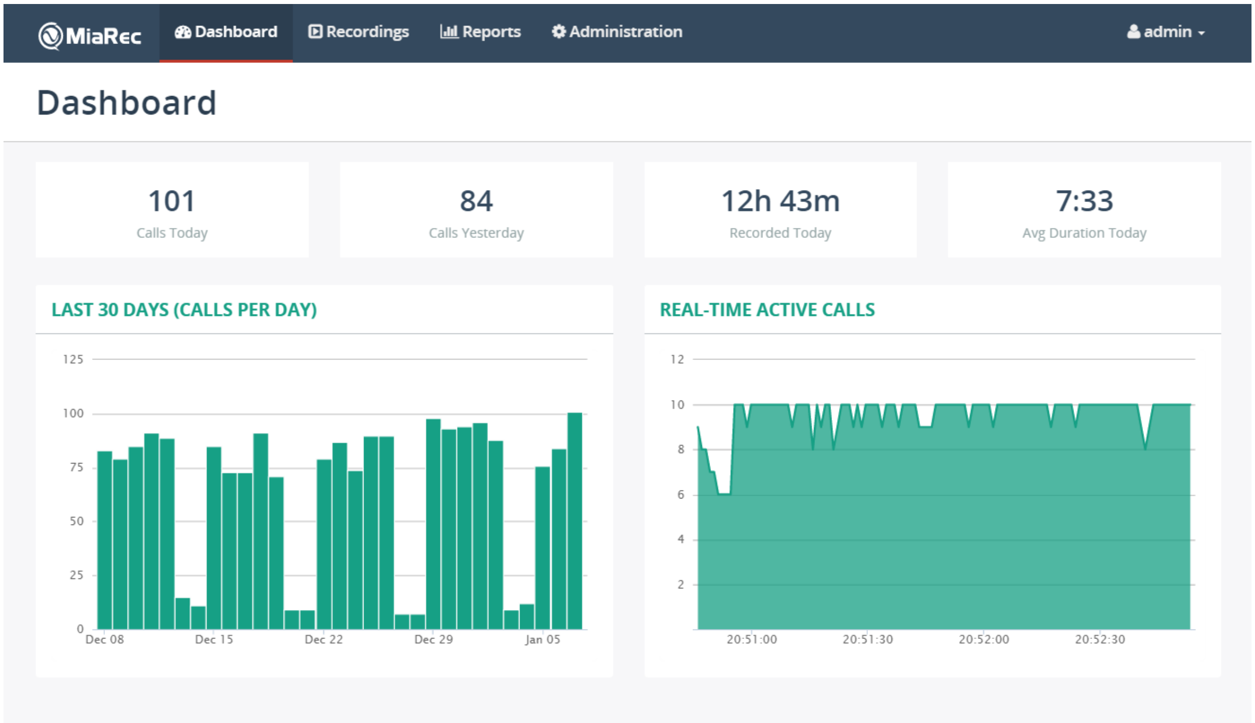
https://recording.segra.net

Please enter your login credentials to access the portal.



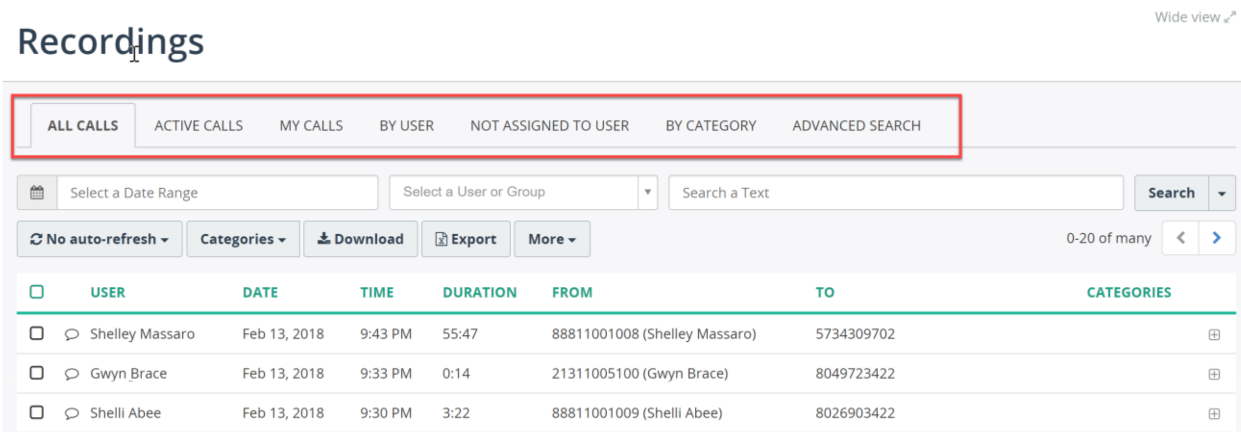
DASHBOARD

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:



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:

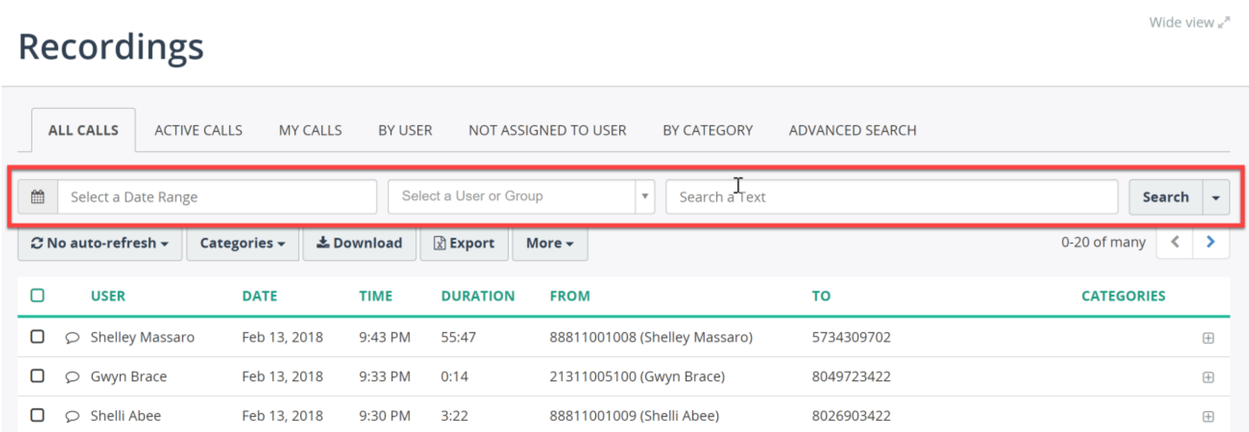
- **Quick search** by the most frequently used searching criteria date, user/group and text
- **Advanced search** by other attributes like call duration, call direction, etc.parameters

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

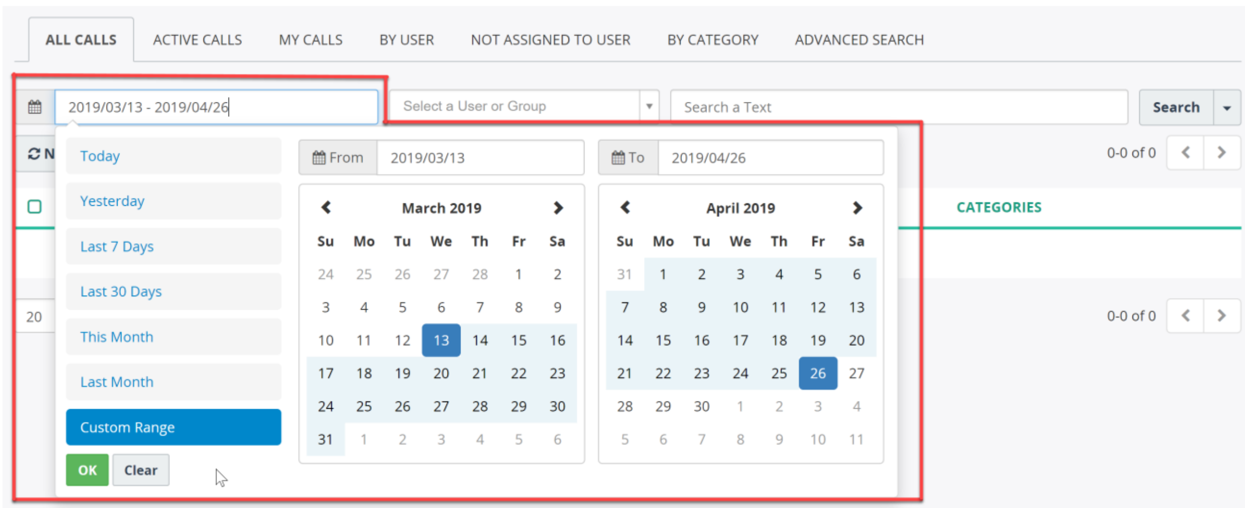
These are the most frequently used searching criteria available to user in one click.



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:

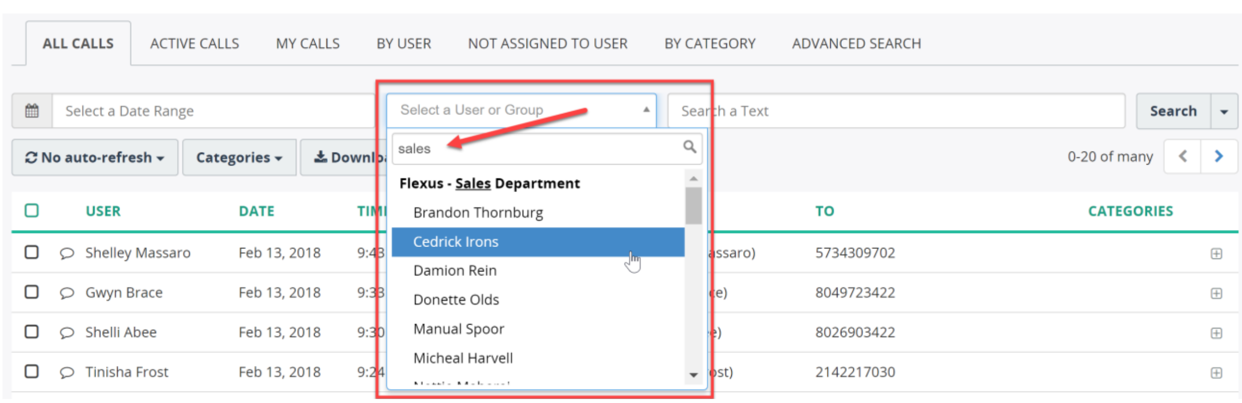
- Today
- Yesterday
- Last 7 Days
- Last 30 Days
- This Month
- Last Month
- Custom Range



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.

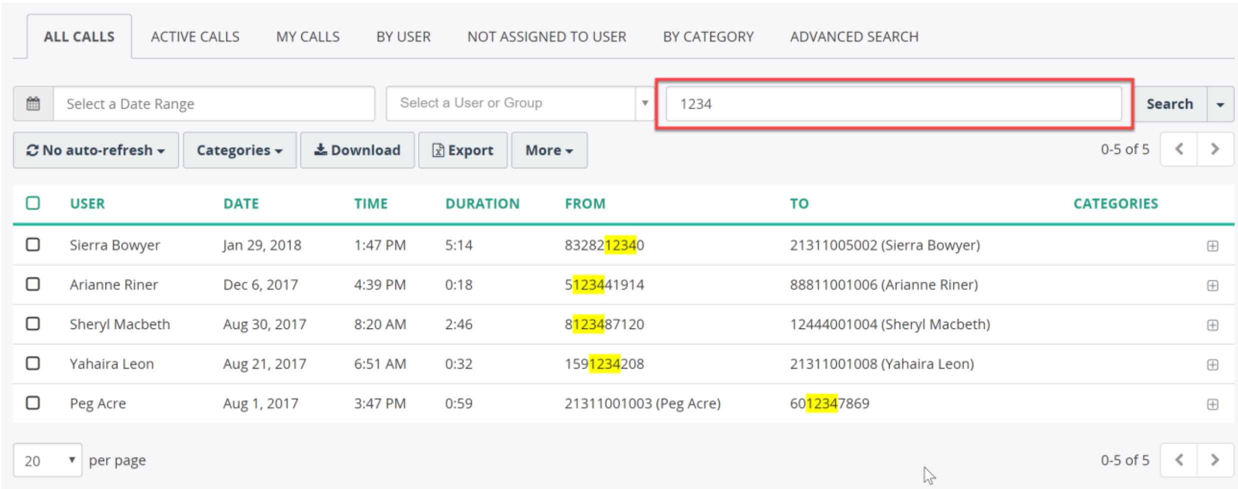
The drop-down list includes an inline search box, which you can use to quickly locate the user or group in the long list. The following example demonstrates how group “Flexus – Sales Department” is quickly located using an inline search by text “sales”:



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.

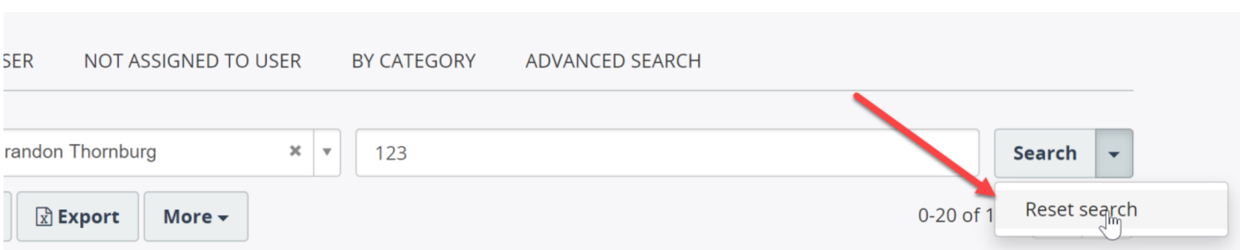


The “Search a Text” field performs a search in the following call attributes:

- 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.

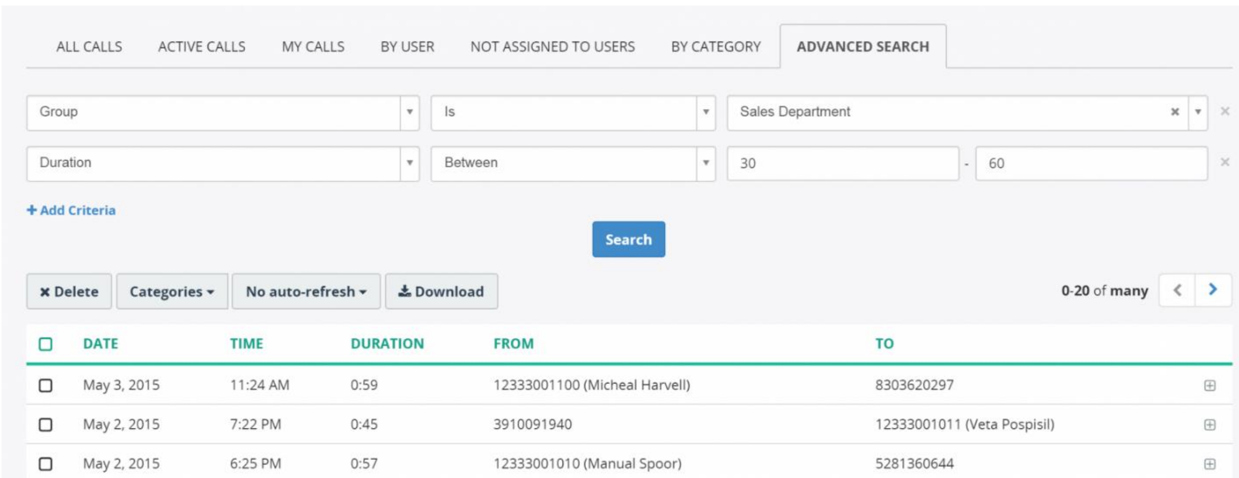


Advanced search

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.

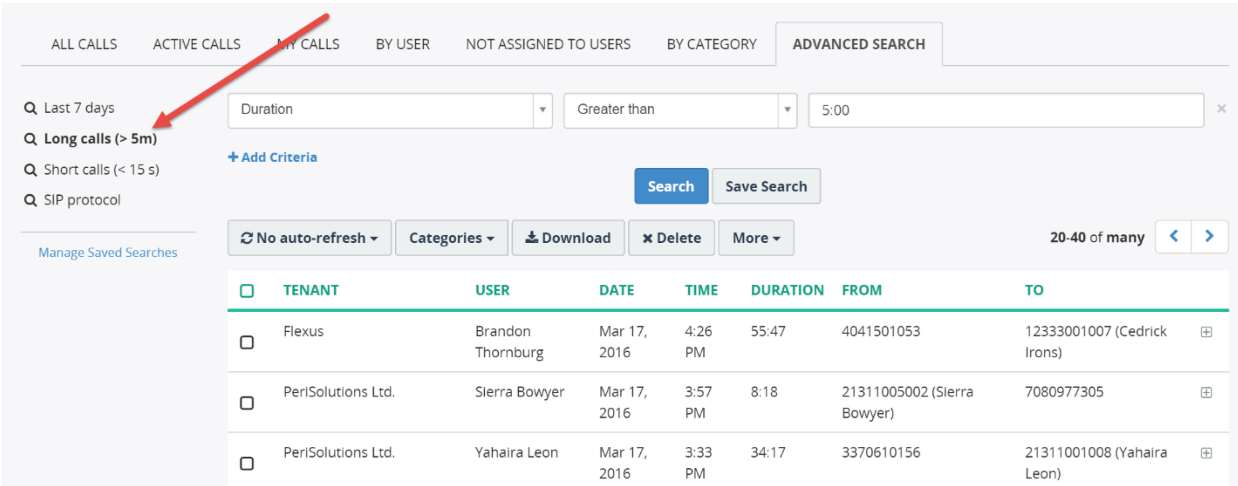


It supports various comparison operators like:

- 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

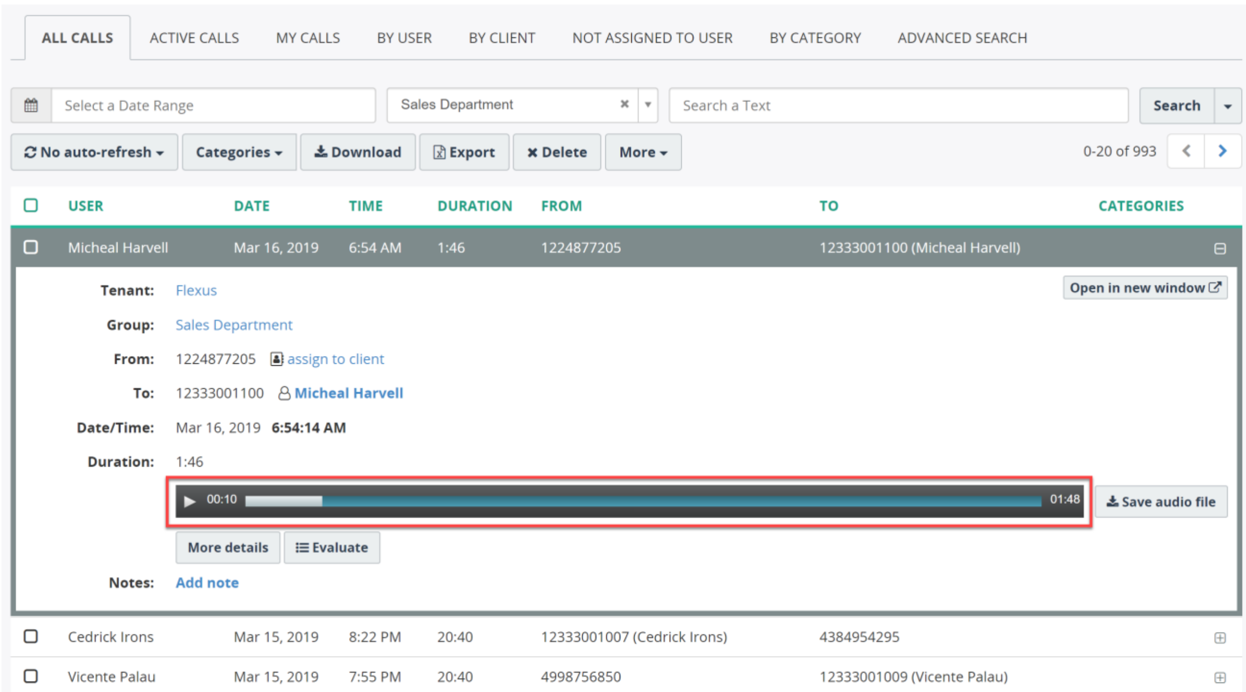
You can save the advanced search criteria for later quick reference. The following screenshot demonstrates the saved search “Long calls (>5m)” to quickly access recordings longer than 5 minutes.



PLAYBACK AND DOWNLOAD

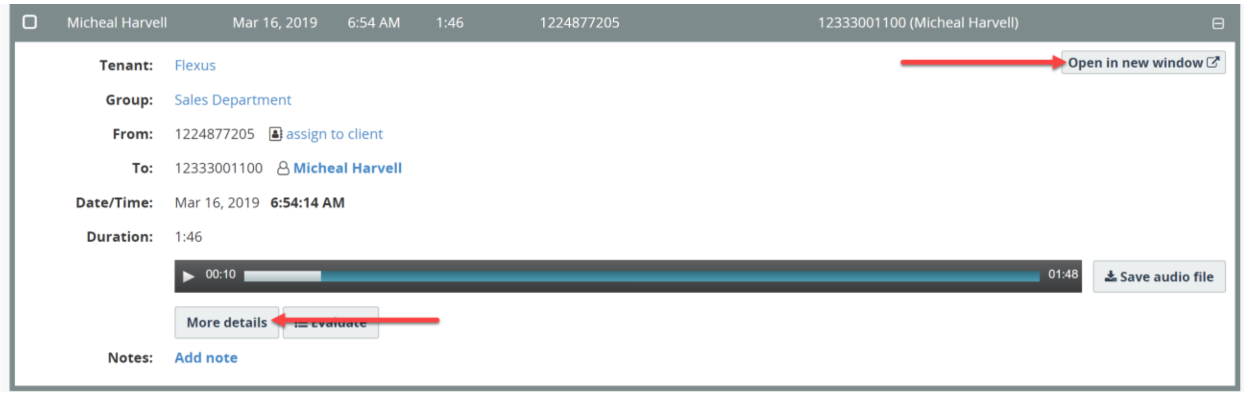
Inline basic media player

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.



Advanced media player

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



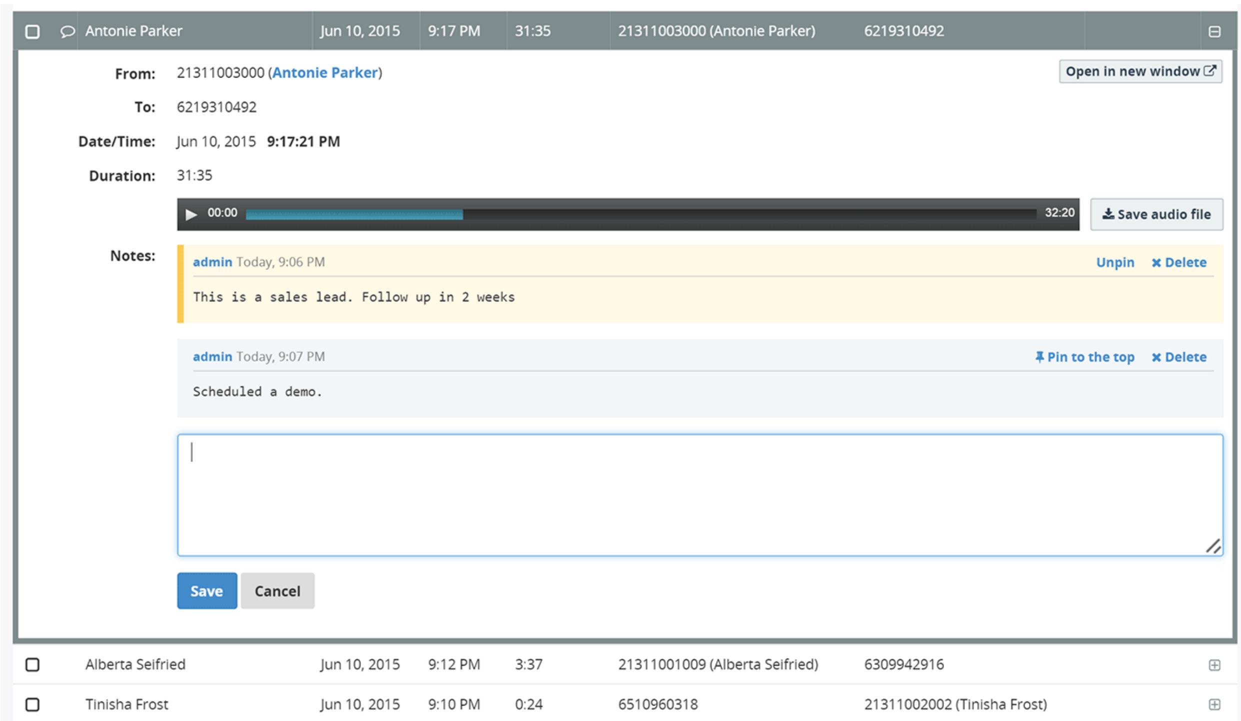
The Advanced Media Player displays an audio waveform, which presents an easy way to detect periods of silence and talk-over within the conversation.

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.

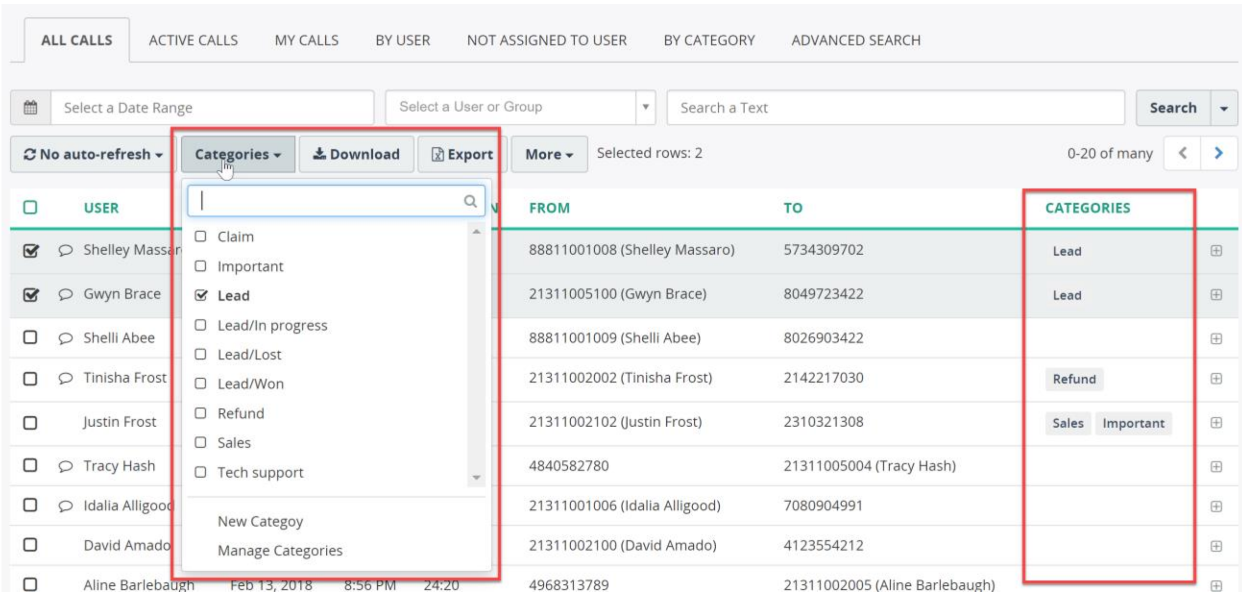
Notes are displayed from oldest to newest; additionally, it is possible to pin any notes on top (out of order).



CATEGORIES (TAGS)

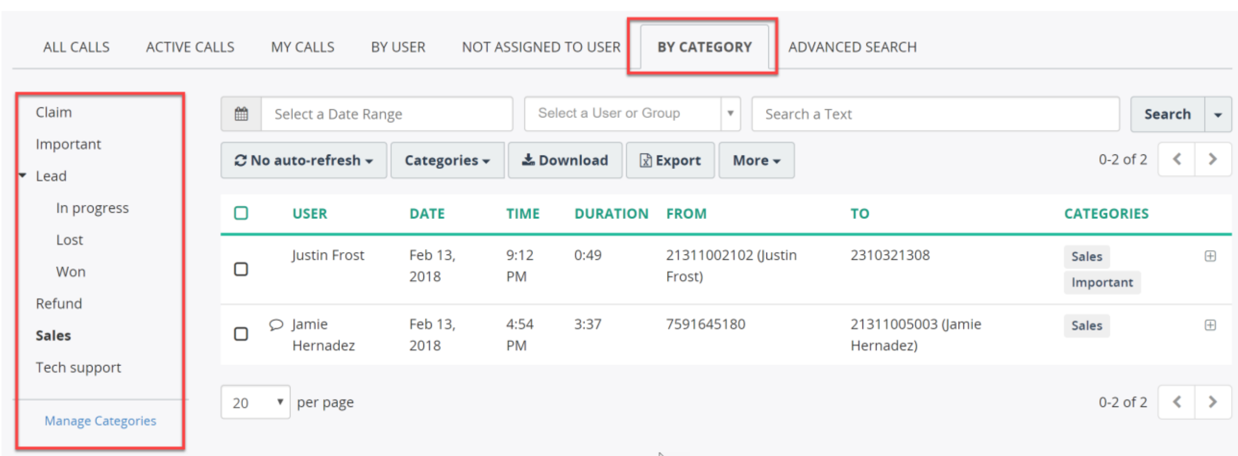
Segra supports user-defined categories for call recordings.

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.



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

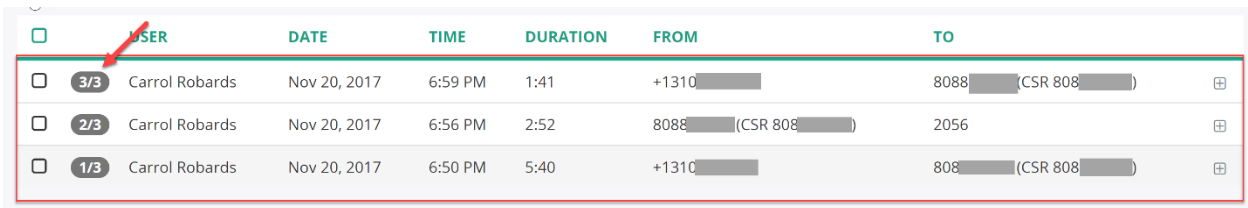
To search recordings by category, you can use the “**Advanced Search**” page or navigate to the “**By category**” page, which displayed categories pane on the left:



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.



Visualization of multi-segment calls

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

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.

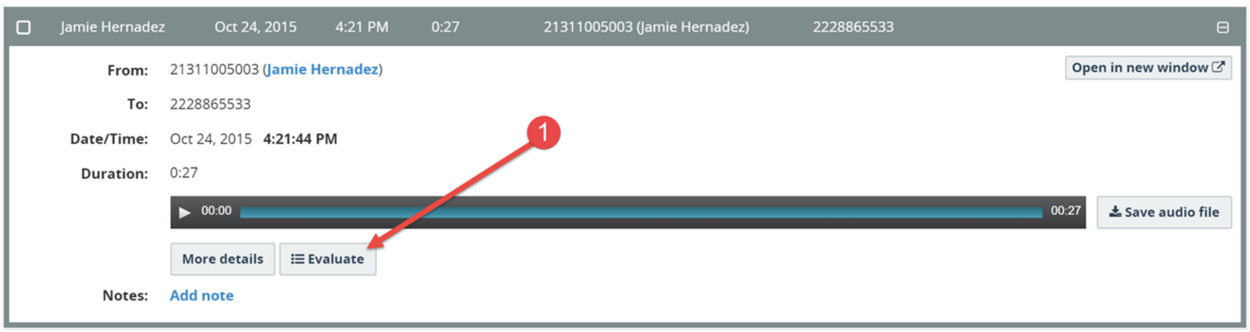
AGENT EVALUATION

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

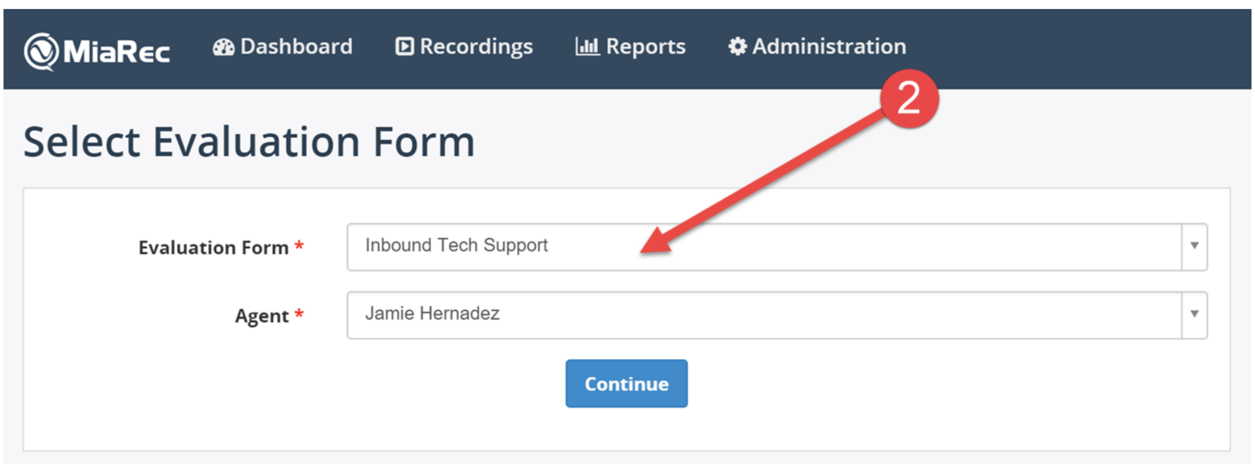
Prerequisites:

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

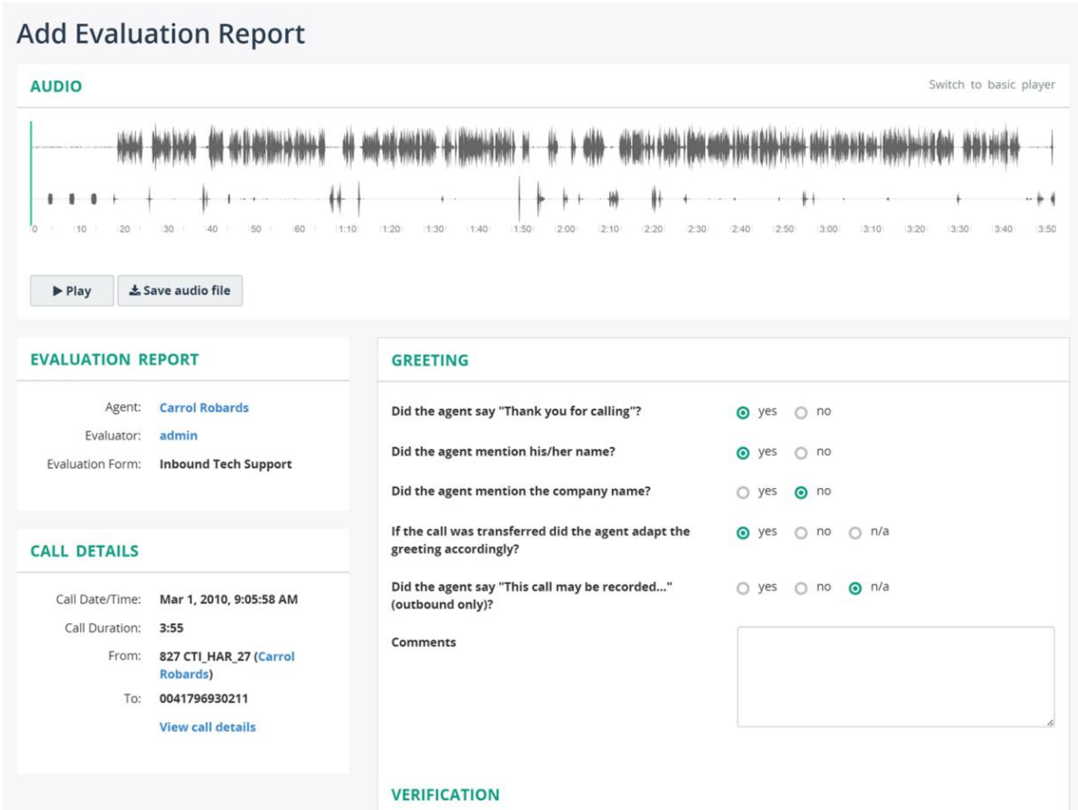
To evaluate an agent, select a call recording and click "Evaluate" button in call details:



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.

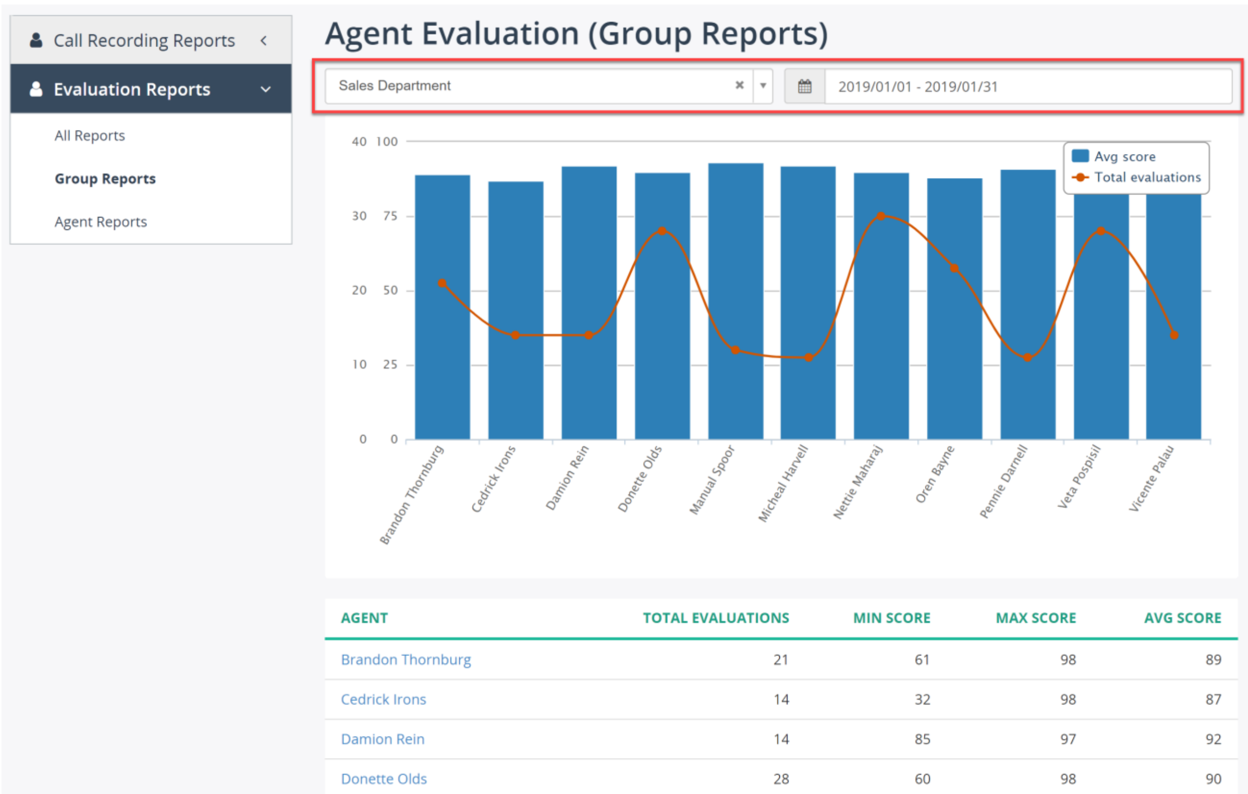


Reports

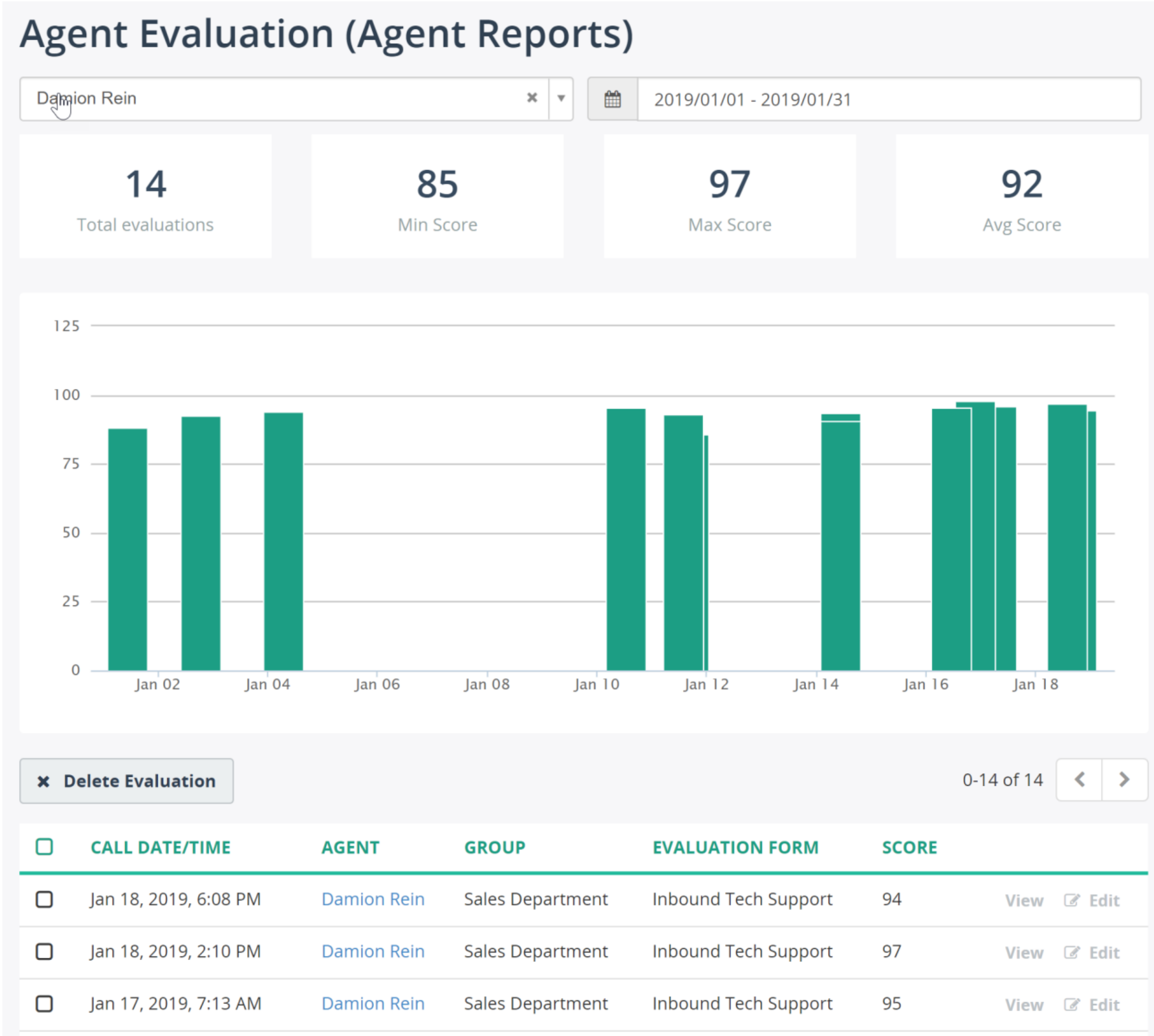
To compare scores of multiple agents within a group, navigate to **Reports -> Evaluation Reports -> Group Reports**, select a group and date range for report.

This report shows the following statistics:

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

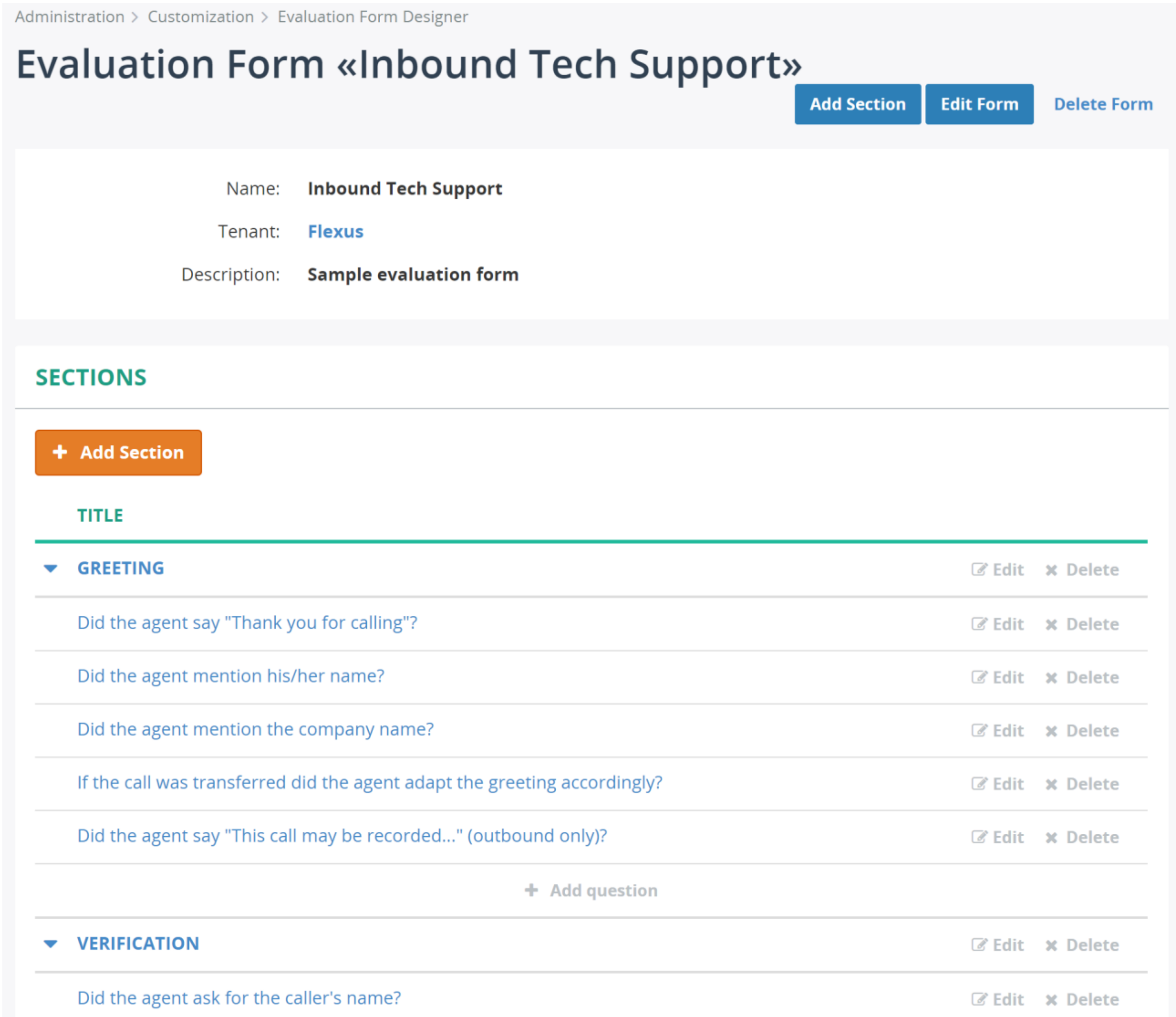


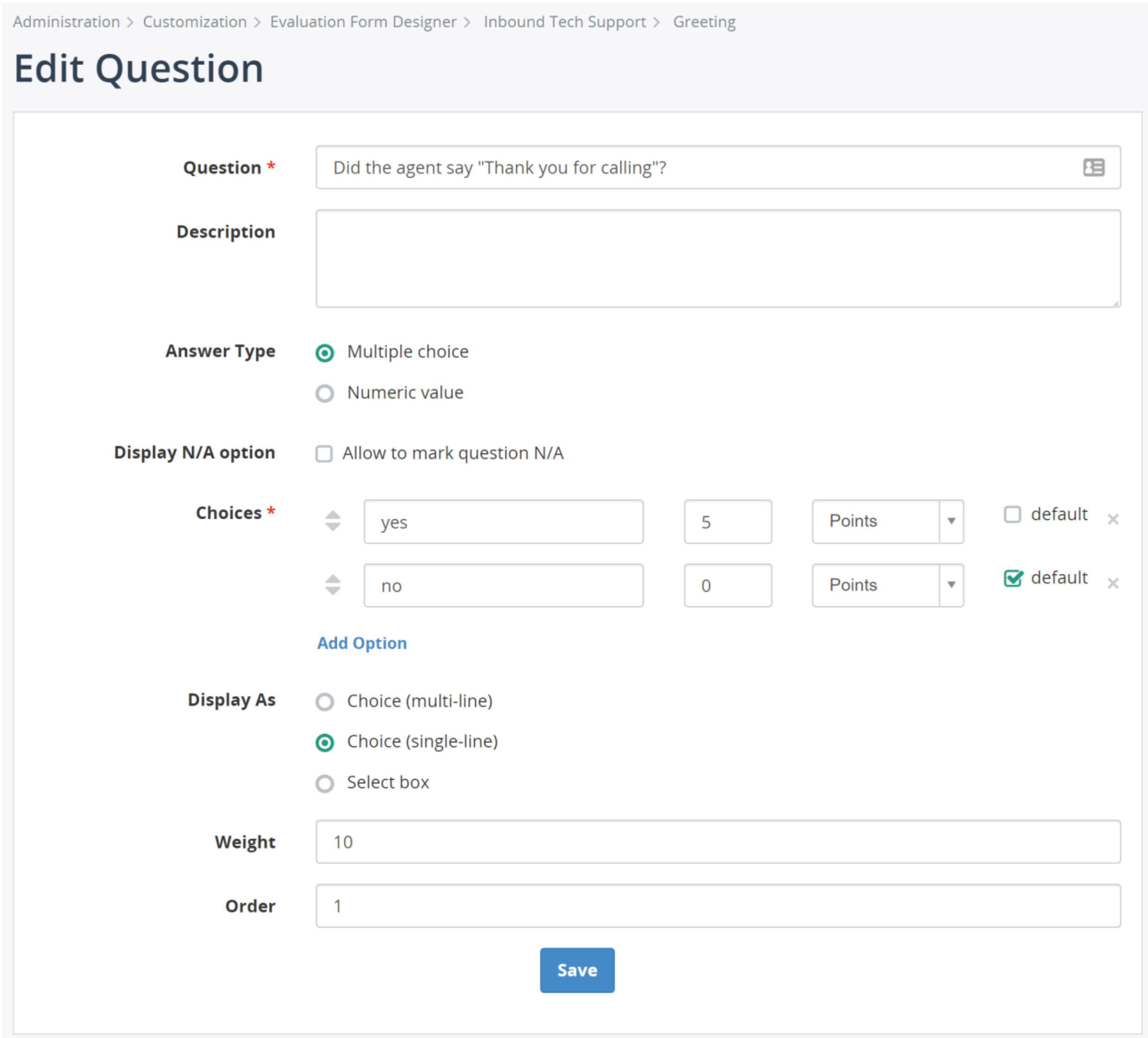
By clicking on agent's name in the Group Report, you can navigate to Agent's report:



Evaluation form designer

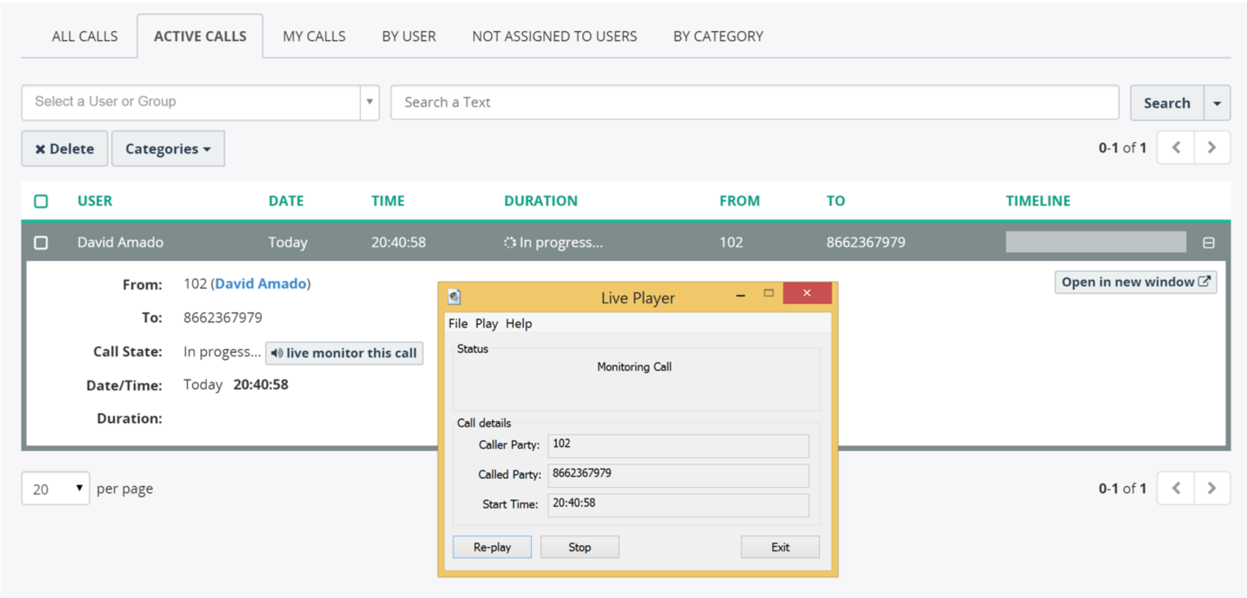
To customize the existing evaluation form or creating new one, navigate to **Administration -> Customization -> Evaluation Form Designer.** Here, you can add/edit/delete sections and questions respectively:




Administration > Customization > Evaluation Form Designer > Inbound Tech Support > Greeting
Edit Question
Question *
Did the agent say "Thank you for calling"?
Description
Answer Type
Multiple choice
Numeric value
Display N/A option
Allow to mark question N/A
Choices *
yes
5
Points
default
no
0
Points
default
Add Option
Display As
Choice (multi-line)
Choice (single-line)
Select box
Weight
10
Order
1
Save

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.



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.

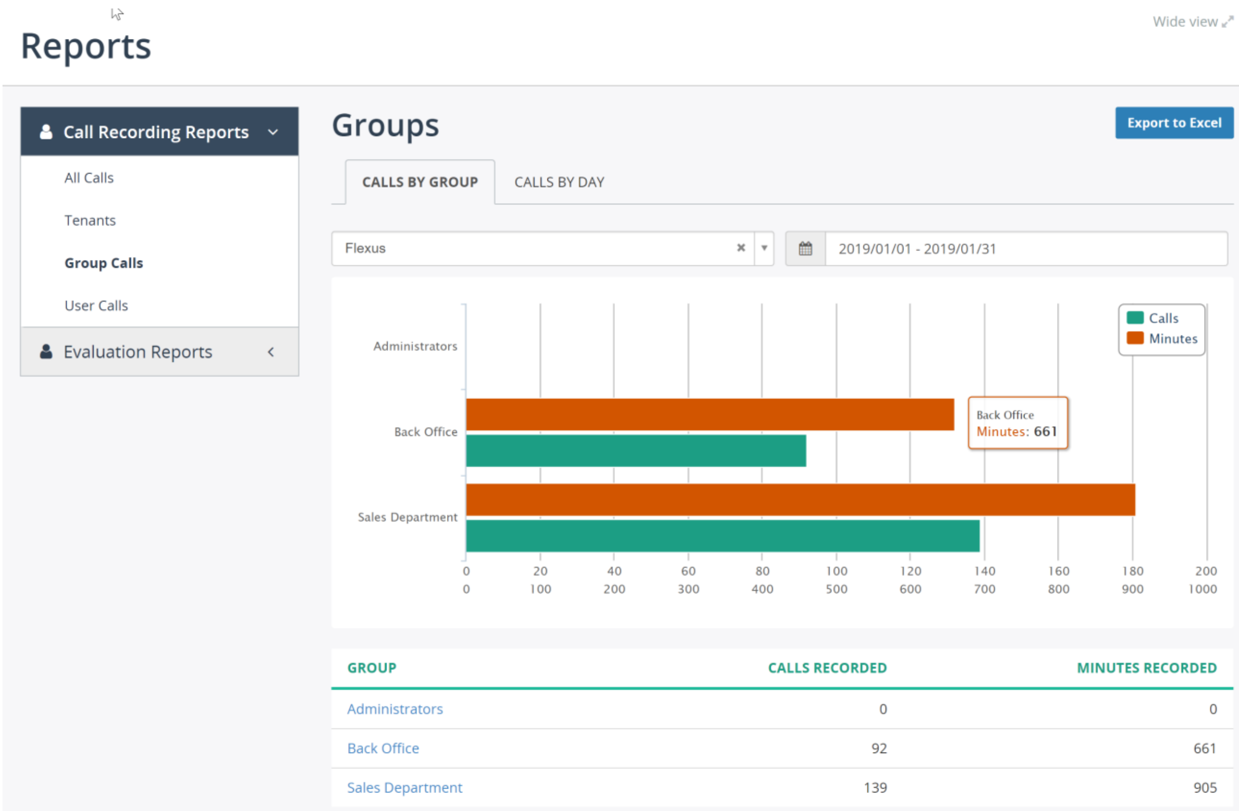
If the Live Player application doesn’t pop-up, make sure it is installed on your computer. You can download it from: https://www.Segra.com/files/download/LivePlayerSetup.exe

REPORTS

Segra provides a number of pre-configured reports:

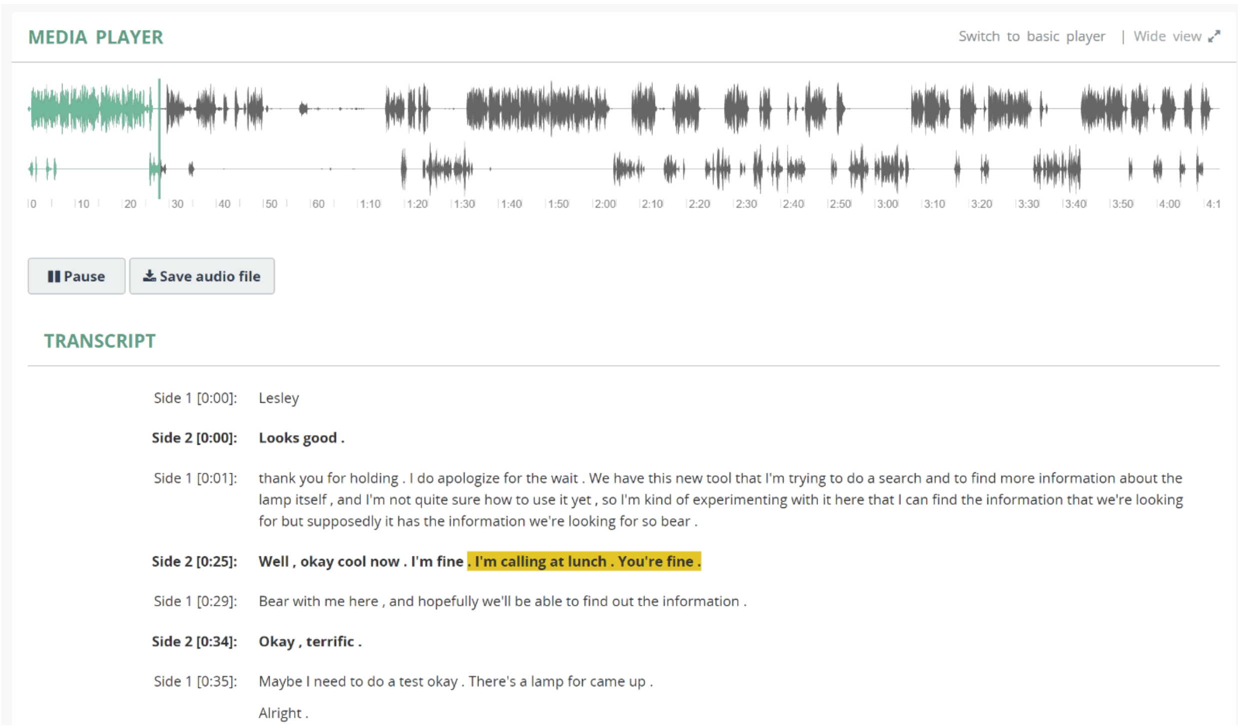
- All calls report (calls per day)
- Tenants report (calls per tenant)
- Group Calls report (calls per group)
- User Calls report (calls per user)

The following screenshot demonstrates a "Group Calls" report.

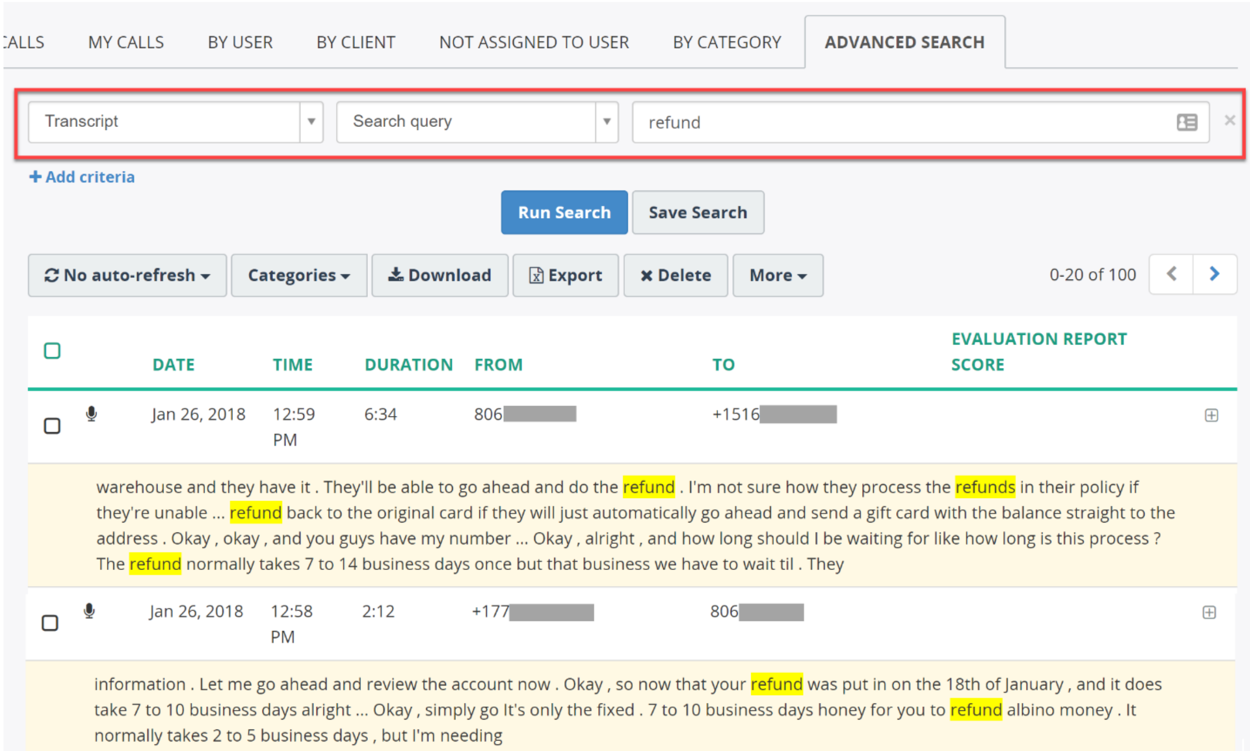


SPEECH-TO-TEXT TRANSCRIPTION

Segra Speech-to-text transcription addon 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.



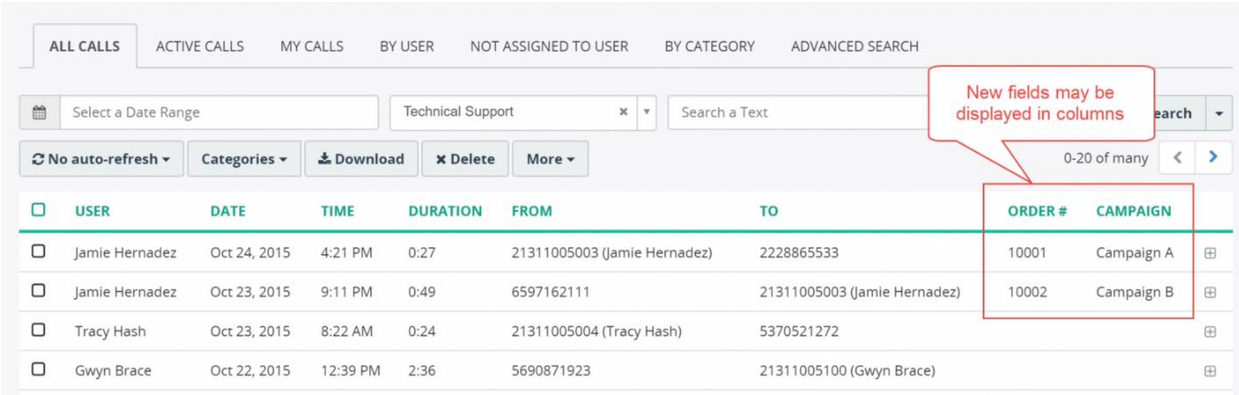
To search recordings using text, navigate to “**Advanced Search**” page and select “**Transcript**” from the searching criteria, type in the text to search and hit “**Search**” button.



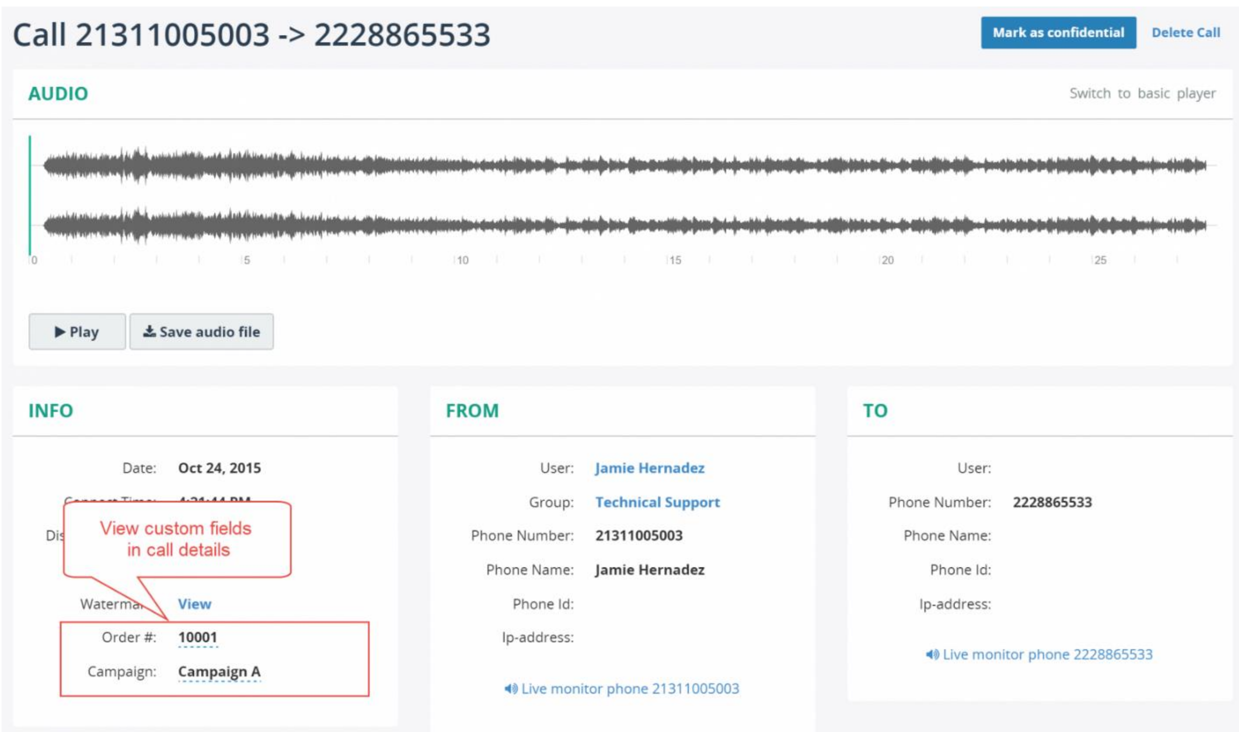
CUSTOM FIELDS

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

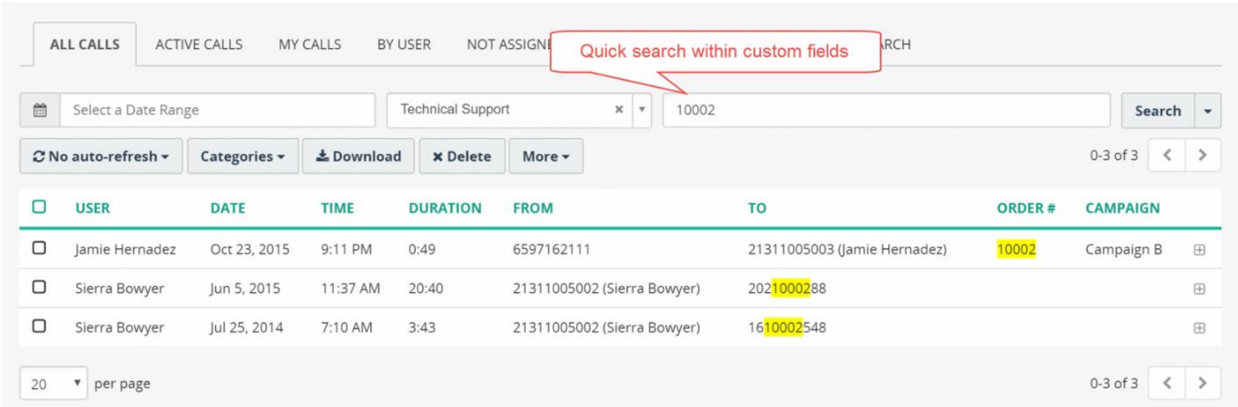
The custom fields may be displayed in a call list (see the screenshot below):

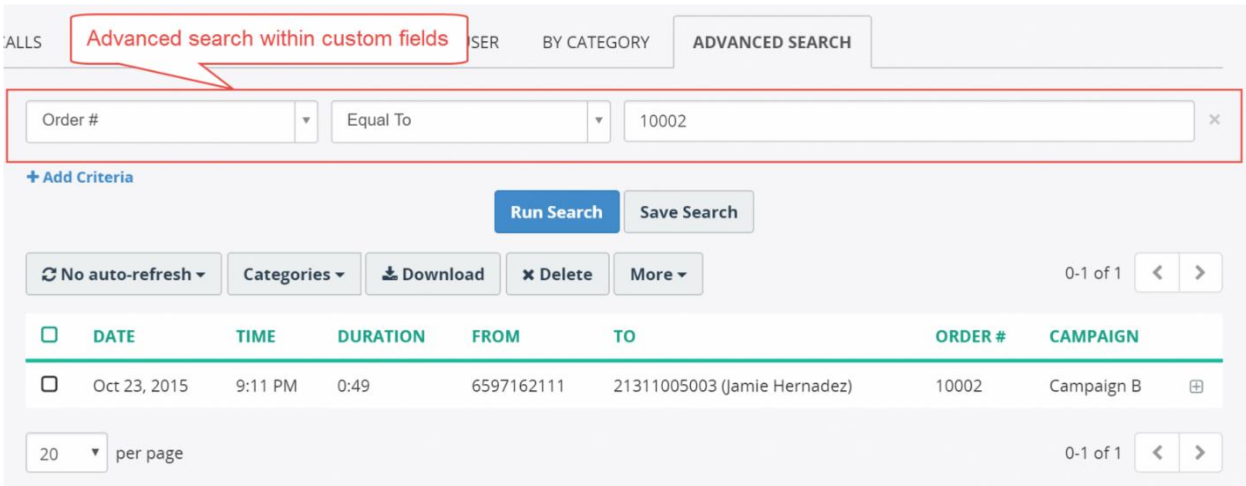


Additionally, customer field values are displayed in call details:

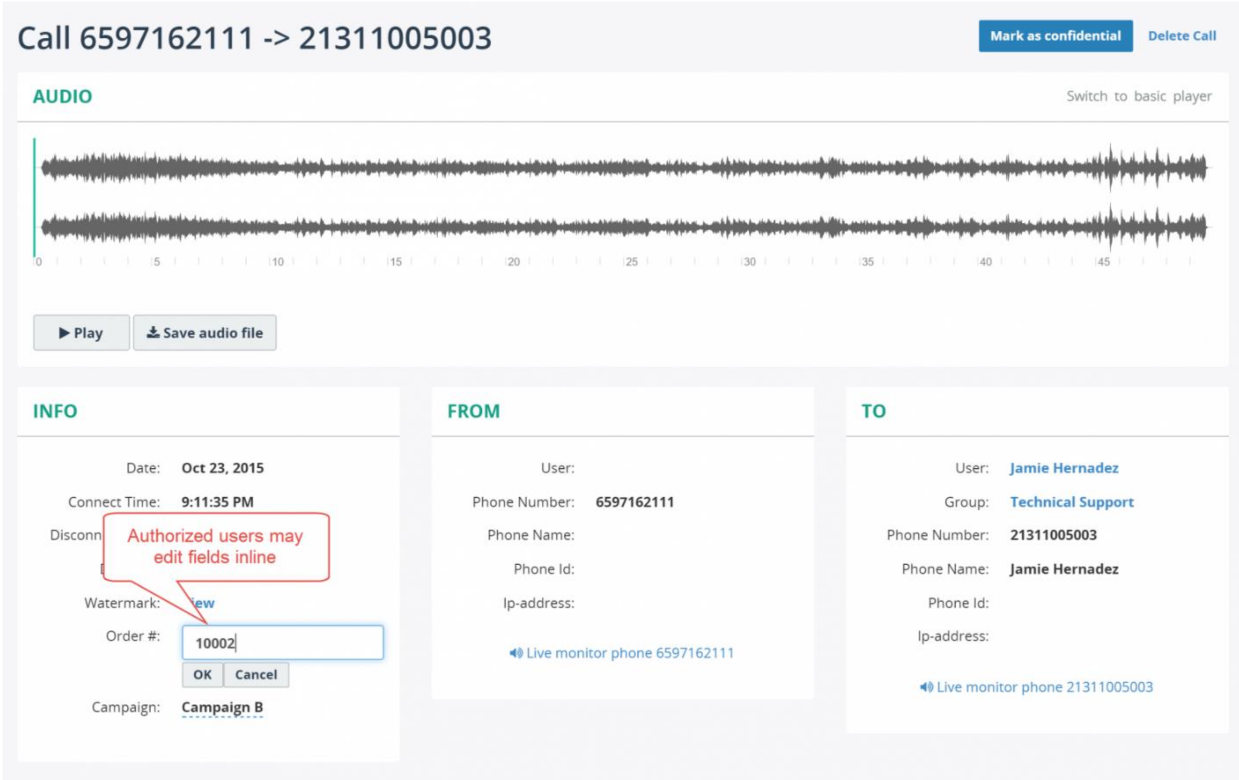


Users may use quick search or advanced search capability to find recordings by value in custom field:





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



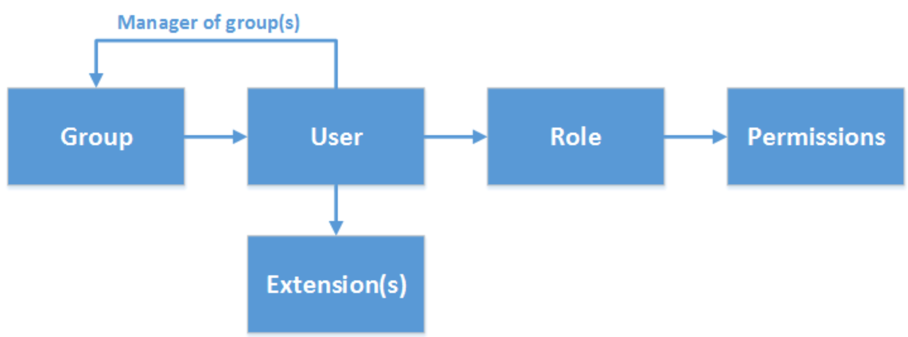
ROLE-BASED ACCESS CONTROL

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).

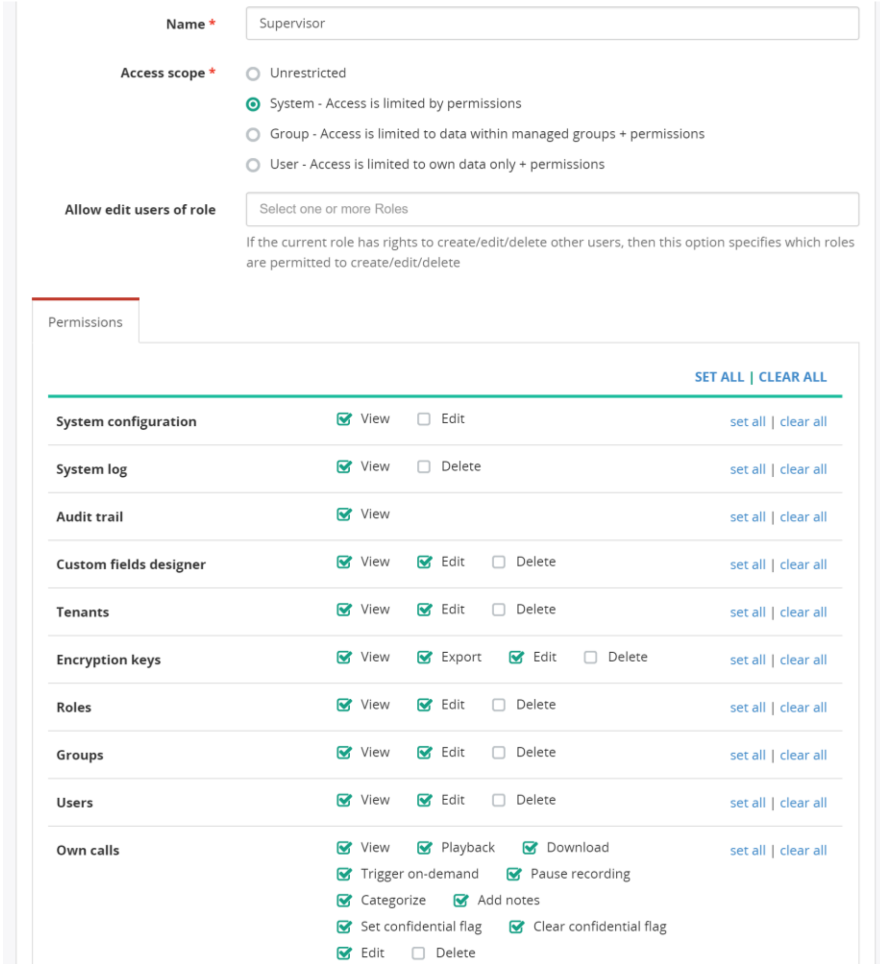
The following diagram shows the user hierarchy, particularly:

- 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.



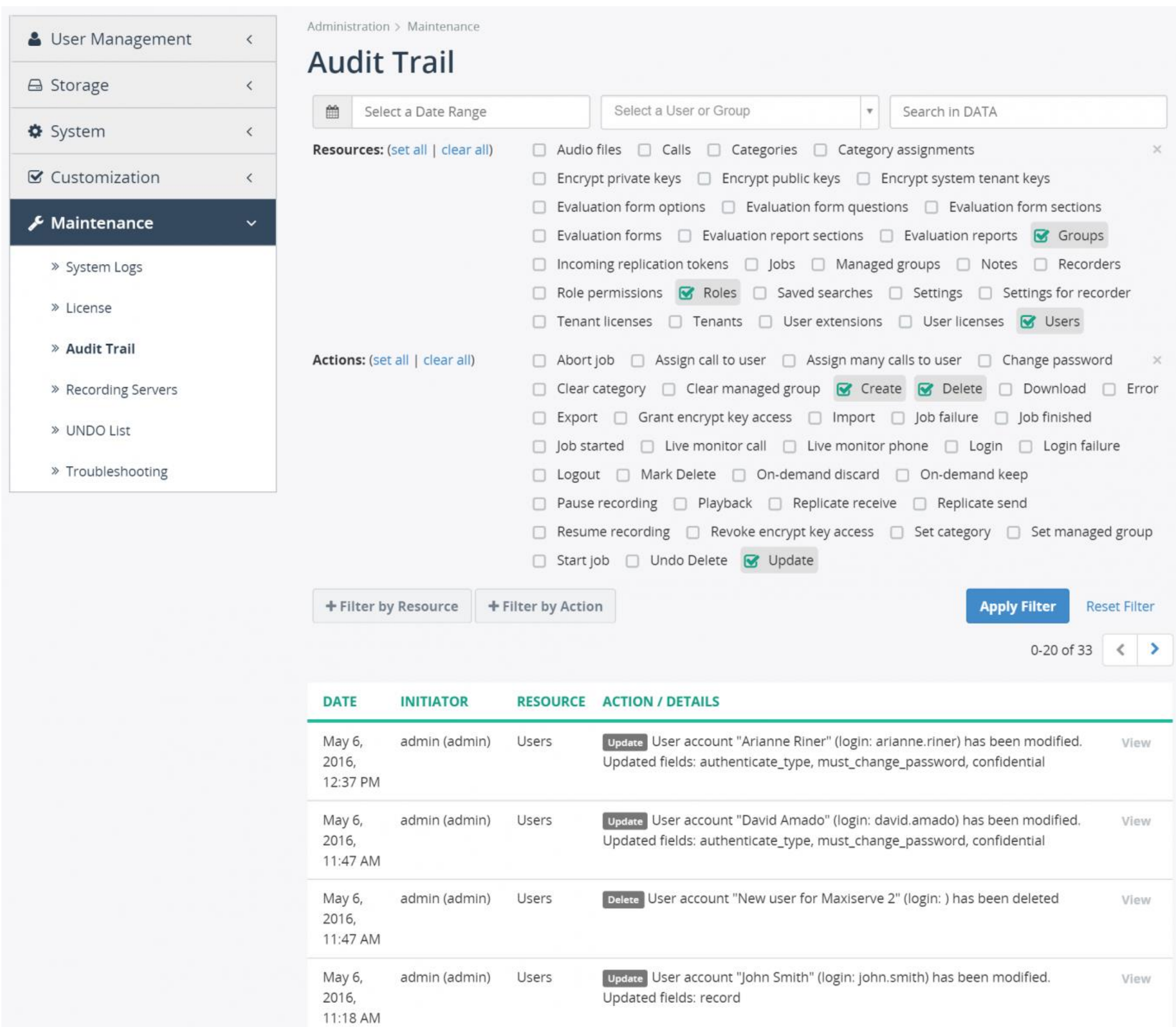
AUDIT TRAIL

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.

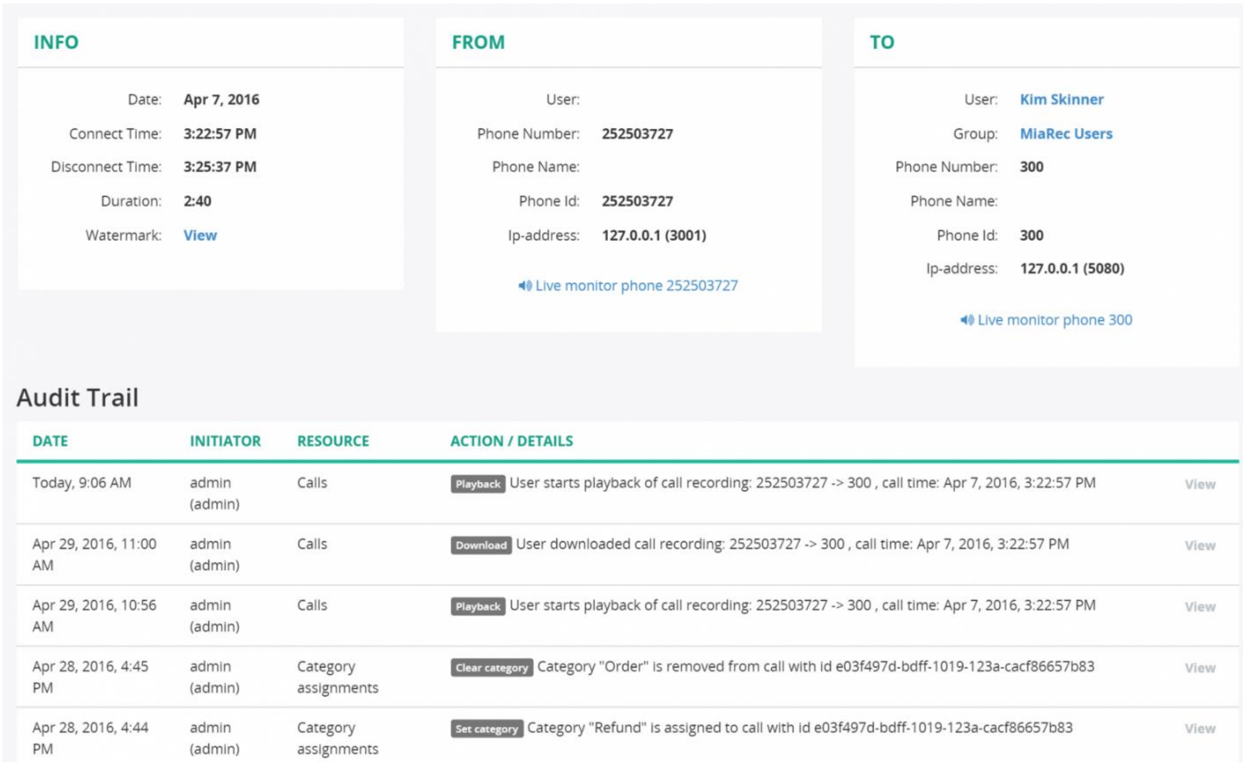
Every function performed by every user is logged to Audit Trail. The log message includes such data as:

- 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:

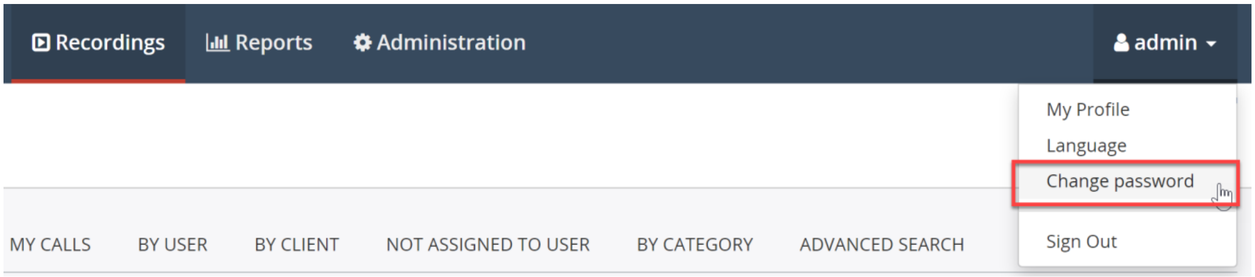


Additionally, when you view call details, user profile, or any other resource, you will be able to see all audit log messages associated with that object. The following screenshot shows sample call recording with the associated audit trail messages.



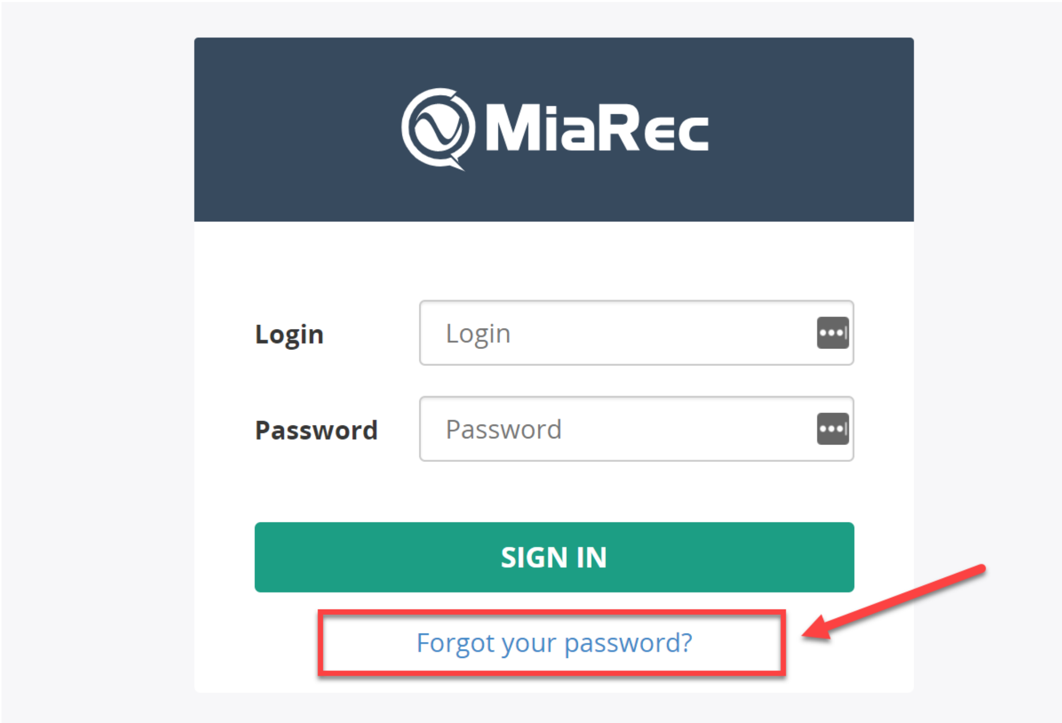
CHANGE OWN PASSWORD

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.

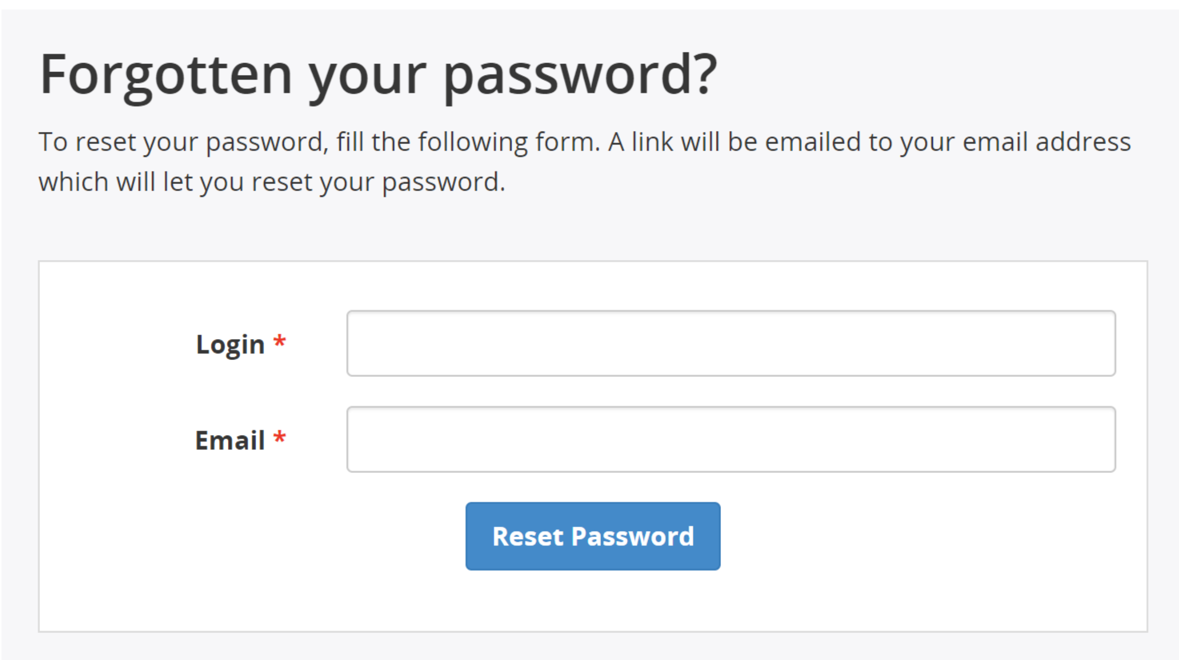


RESET PASSWORD BY EMAIL

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



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



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.