QMS Administration for Managers

Quick Reference Guide

Login, Record, Search, and Playback

For more information on any of these topics please reference the Record On-Demand, Searching and Playback (Power User) quick reference card.

Export Recordings

As you listen to recordings you may want to export them for use in training or staff meetings.

To export one or more recordings:

1. Navigate to the **Search Recordings** tab of the Navigation Bar and search for the recording
2. Search for recordings
3. Select a recording (or multiple recordings)
   - Use Shift+Click or Ctrl+Click to select multiple items
4. Choose an export option:
   - Select **Export Media** from the context menu to export one or more recordings (multiple recordings are automatically zipped when exported)
   - Select **Details** from the context menu, then **Export Chain** from the additional options menu to export a recorded call chain that was transferred from user to user
   - Select **Export Results** to export a .csv file (this file may be useful to confirm how many calls you've recorded for a person or multiple people)

Verify Recording Authenticity

You can determine if a recording has been edited by verifying the system watermark that is automatically applied to each recording. Watermarks indicate the authenticity of a recording. If a recording is altered in any way, the watermark is deemed invalid.

To verify a watermark:

1. Select the recording
2. Select **Details** from the context menu, then **Verify Watermark** from the additional options menu to verify the watermark.
   - **Recording is Valid**: the recording hasn't been altered
   - **Recording is Invalid**: the recording has been altered in some way

Playback Recordings

You can open multiple recordings at the same time, although you can only listen to one at a time.

Using Flags in Recordings

Flags are used to notate calls that need some sort of future follow-up. You can group Flags into Flag Profiles and assign members to those profiles to determine who can use them.

Flags are commonly used for the following:

- To note training opportunities
- To bring attention to a specific call
- To track calls from certain accounts
- As a reminder of past conversations with specific customers

Creating a Flag Profile

Create Flag Profiles and Flags within them so that people can assign them to calls.

1. From the **Administration** menu, select **Flag Profiles**.
2. Click Add Profile
3. Type a name for the new Flag Profile.
4. Create Flags within the Flag Profile by typing in the **Flag List** box and clicking **Add New Flag**.
   You can add multiple flags here.
5. If you wish to define the values to be used for the Flag, double click on the newly created Flag names, and select the **Use Pre-defined Flag Values** option.
   a. Type in the **Pre-defined Flag Value** box and click **Add New Value**
   b. Additional values are added here too.
6. If you wish user-defined values or text to be used for the Flag, select the **Use User-defined Flag Values** option

Adding Members to a Flag Profile

Add members to a Flag Profile so that they can use Flags.

1. Add members to the Flag Profile so that they can use the Flags by clicking Edit Members.
2. Use the arrow keys to add members the Flag Profile.
3. Return to the previous tab and when finished, click **Save**.

User Creation and Configuration

Creating a New User

1. From the Administration menu, select Users.
2. Create a new user by clicking Add, which will open the New User tab.
3. Complete all required fields and other fields as necessary
4. Click Save.

Notes:

- All fields outlined in red are required fields
- Hover your mouse over the field for a descriptive screen tip

Notes about Specific Fields

Department: Enables users to filter by department when searching for recordings, i.e., “Support”, (not required)

Location: Enables users to filter by location when searching for recordings, i.e., “LA Office”, (not required)

Username: Every user must have a username. For users who need not login to QMS, you may withhold providing their user credentials to them.

Security Profile: (required)* Editable by the administrator.

- **Agent**: Front end agent who makes/receives phone calls
- **Privileged User**: Listen to others’ recordings
- **Administrator**: Has access to everything in QMS
- **Limited Admin**: Manage recordings, monitor calls, add new users, administer profiles, create evaluations
- **Manager**: Manage recordings, create evaluations

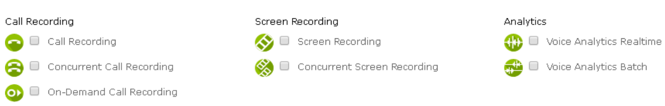
*Editable by the administrator. Descriptions assume default settings.

Account State: (required)

- **Active**: User is licensed and available to have their calls recorded
- **Inactive**: User is unlicensed and cannot have any calls recorded, nor can they sign into the client

Windows Login: The user's Windows login in domain\Username format

Licenses



Licensing options include Call Recording, Screen Recording, Analytics, and others. These are dependent on what licensing you have purchased for your solution.

Call Recording

Enable this option for recording users’ calls.

Recording Server: The name of the network device hosting the Call Recording service

Primary Extension: Users’ line appearance/main extension;

must be unique (required)

Endpoint IP Address: Fill this out if you know it, otherwise leave it at 0.0.0.0 and have the user reboot their phone (may require unplugging their phone and plugging it back in.) Privacy Enabled: Prevents calls from being recorded for that user

Lookback Recording Enabled: On-Demand users only. The entire call is recorded regardless of when the user started/demanded the recording.

Privacy Enabled: select this check box to prevent the user from being recorded where possible, even if engaged in a call with another user that is being recorded

Screen Recording

Enable this option for recording users’ computer screens while they are on a phone call. This is used in conjunction with the Call Recording license.

Agent Evaluation

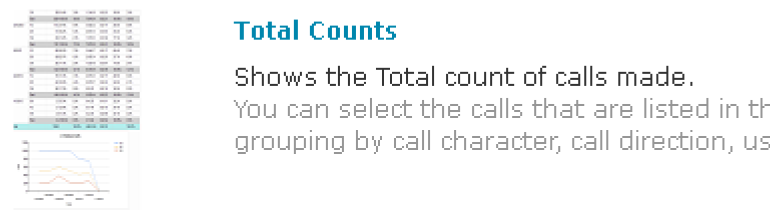
Enable this option to quickly and easily evaluate customer interactions to create consistent customer experiences and ensure high customer satisfaction. This is used in conjunction with the Call Recording license.

Reporting

The reports available to you are dependent on the licensing you’ve purchased. If you have Call Recording, you can run reports on the calls that have been recorded while if you have the Agent Evaluation license there are several extra reports you can run based the on evaluations you have completed.

Click on Reporting to access reports.

- Click on the **Reports** tab to display available reports
- Click on the name of the report you wish to run to configure the settings and format for the report. The report will run and display on its own tab.



- Click **Run Report**. if you wish to run the report again.
- Click **Save** to make the report available in the Reports Dashboard.
- Click the **Schedule** button to automate delivery of this report via email as a .pdf, .csv, .xlsx, etc.

The **Dashboard** is a convenient way to display your most run reports.

- Click on the Dashboard tab to display the reports dashboard.
- You can display up to four graphical reports at once.
- Use the drop-down boxes to select the reports you wish to display in the Dashboard.

Alerts

Alerts allow you to set up real-time alert notifications for events that you are interested in.

To add an alert:

1. From the Administration menu, select Alerts.
2. Click the Add Alert Add Alert button.
3. Complete required and parameter fields as necessary.
4. Assign User Triggers and User Targets
5. Click Save.