



OAISYS Management Studio User Guide

Version 8.0

2/20/2014

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OVERVIEW

This document serves as a User Guide for the OAISYS recording solutions; Tracer and Talkument, version 8.0. The features described in this document apply to Knowledge Workers, Call Agents, and Call Managers.

The following features are Tracer only features and are not available with Talkument:

- Reports
- Evaluations (including Live Evaluations)
- Work Queues
- Coaching
- Live Calls

Tracer is OAISYS' professional interaction management solution, and is designed to provide organizations with greater insight into their phone-based interactions and, as a result, more efficient management of their overall business operations.

Tracer leverages OAISYS Portable Voice Document (PVD™) technology paired with advanced contact center management features, including customizable employee performance evaluations, live and automatic call monitoring, quality and resource utilization reporting and synchronized desktop screen recording capabilities.

Using the OAISYS Tracer contact center recording and quality assurance solution, call recordings across the enterprise become a vital part of developing effective compliance, process, and risk management programs. Tracer call monitoring functionality ensures phone-based interactions are readily available for handling disputes and verifying transactions.



FEATURES AND BENEFITS

OAISYS Tracer contact center management software provides robust, enterprise-class call recording capabilities and quality assurance functionality, including:

EASE OF TRAINING: Highlight agents' strengths and weaknesses using actual calls and improve their performance through real-world examples.

LIVE CALL MONITORING: Listen to calls as they happen and coach agents in real-time through instant messaging, reducing the need for follow-up later.

LIABILITY PROTECTION: Put your business in the driver's seat when it comes to compliance issues or dispute resolution by keeping recorded archives of calls eliminating "he said/she said" concerns.

ACTIVITY REPORTING: Tracer's reporting and scoring capabilities quantifiably tell you who your star performers are, and who needs extra help in realizing their potential.

SECURITY: Ensures recording integrity through digital watermarking. Permission settings dictate which calls the users can access.

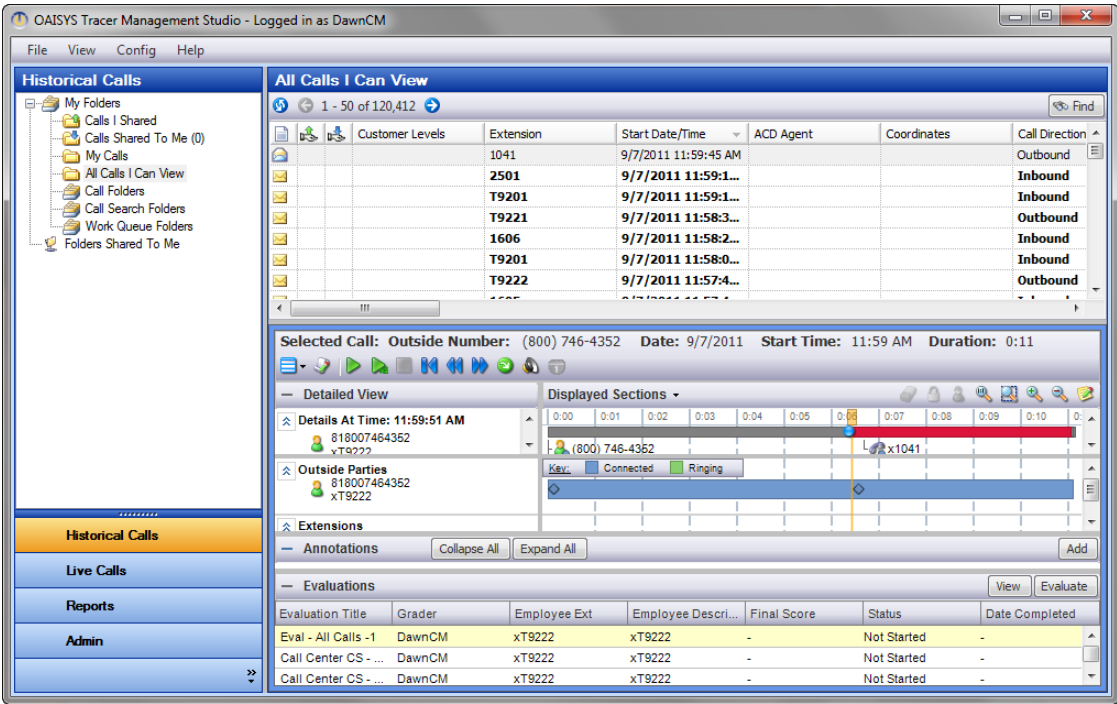
SEARCH CAPABILITY: Calls are easily found using any number of search criteria, including: telephone number, account codes, date or time of call and any customized field tags you create, such as, 'Abusive Caller' or 'Agree to Pay.'

INCIDENT RECONSTRUCTION: Allows managers and other authorized personnel to play up to eight recordings simultaneously. Multiple calls associated with a single incident can be bundled together for ease of playback and information retrieval. Each recording has variable speed, volume and balance controls, ensuring the accurate capture of critical information.

AUTOMATIC LOCATION INFORMATION INTEGRATION (ALI): ALI is commonly used in Public Safety to identify where someone is calling from; it provides a physical address that corresponds with a phone number. This information is integrated into the OAISYS solution and displayed as a street address and/or longitude/latitude coordinates. In addition, the address and/or location are searchable components to provide insight for compilation of statistical data for trend evaluation.



Tracer was created to address the needs of the small, medium, and enterprise sized call centers, making it the ideal call center recording and quality assurance solution.





OAISYS CLIENT PC REQUIREMENTS

The OAISYS **Client PCs** must meet the following requirements:

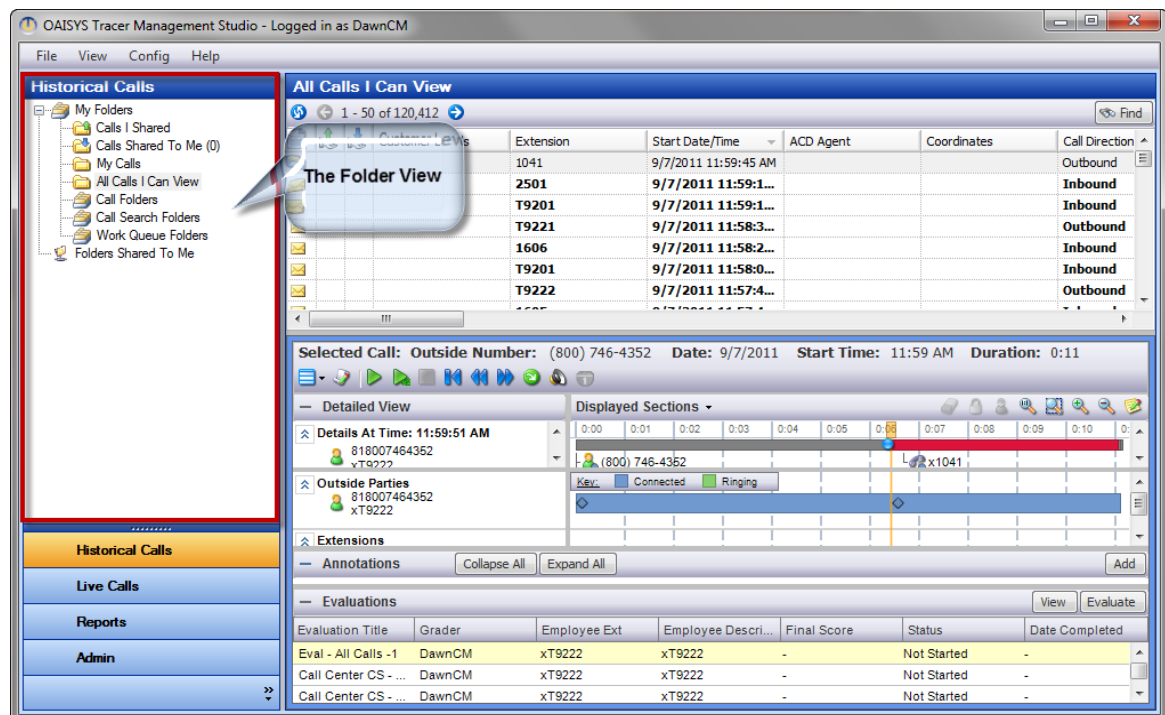
Operating System	Windows 7, Windows 2008, Windows 8.1, Windows Server 2012
Processor	Pentium 4.2.0 GHz or higher
Memory	1+ GB
Hard Drive	20 GB
Video	128+MB Video

ORGANIZATION

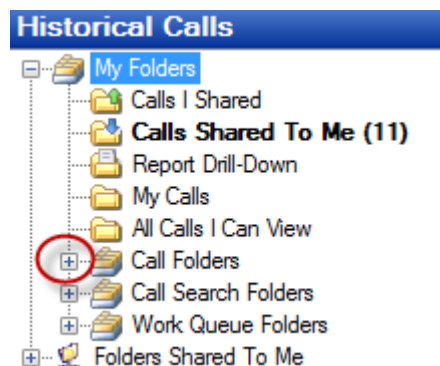
MY FOLDERS VIEW

The My Folders expands to display several types of call folders, these include:

- Call Folders
- Call Search Folders
- Calls Shared Folders
- Work Queue Folders (Tracer Only)



A plus sign indicates the folder can be expanded to display the folders under the Call Folders, Call Search Folders, or Call Shared Folders.



DEFAULT FOLDERS

Each user has a set of default personal folders under the heading *My Folders*.

These folders include:

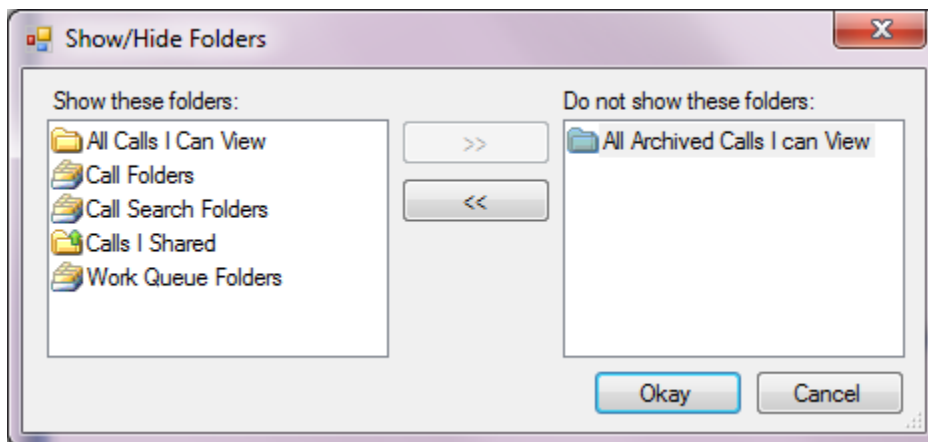
- Calls I Shared
- Calls Shared To Me (or Inbox)
- My Calls
- All Calls I Can View
- Call Folders
- Call Search Folders

Some users may also have the following folders:

- Work Queue Folders
- Report Drill Down Folders
- All Archived Calls I Can View

To change the folder display

Go to *View* → *Show/Hide Folders*



CALLS SHARED TO ME (INBOX)

The Calls Shared to Me is the inbox default folder that appears in every user's application. This is a static folder, which means it does not have a search criteria associated with it, and populates with calls that have been distributed to the user. You cannot drag and drop calls to this folder from another folder. However, you can drag and drop documents from your inbox to another folder.



CALLS I SHARED

The Calls I Shared folder populates with calls that the user has shared with one or more users or user groups. This is a dynamic folder, which means it has a search criteria associated with it, and you cannot drag and drop calls to this folder from another folder. However, you can drag and drop calls from your Calls I Shared folder to another folder.

MY CALLS

The My Calls is a dynamic default folder that appears in every user's application, and populates with calls that have call data (i.e. - extension or agent ID) associated with the user. These search criteria cannot be changed. You cannot drag and drop a call from another folder into your My Calls folder. However, you can drag a call from your My Calls folder into one of your static folders.

NOTE: The call will remain in your My Calls folder as well as the folder you placed it in.

ALL CALLS I CAN VIEW

The All Calls I Can View is a dynamic default folder that appears in every user's application interface. Calls are populated based on user permissions. You cannot drag and drop calls into this folder. However, you can drag and drop calls from your All Calls I Can View folder into one of your static folders.

NOTE: The call will remain in the All Calls I Can View folder as well as the destination folder.

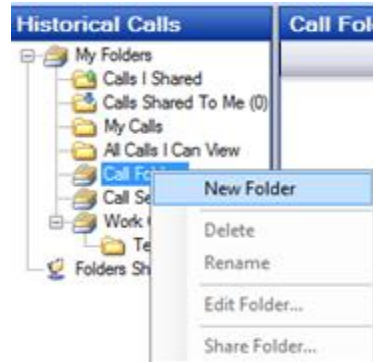
CALL FOLDERS

Every user will have Call Folders in their application. Call folders are static user created folders. The user can add and remove calls from any other folder and put them in a call folder.

To create a new call folder

Highlight *Call Folders*

Right-click → Select *New Folder*



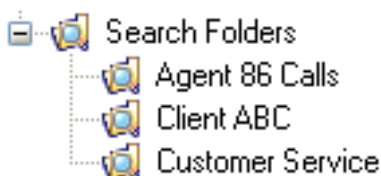
A folder will appear under your Calls Folder called *New Folder*. Name your new folder and it will appear with its new name in alphabetical order under your Calls Folders.

SEARCH FOLDERS

Call Search folders are dynamic which means each time you select the folder it will search for calls that meet the criteria or condition that you have set for that folder. Permissions set by the Administrator determine the user's ability to create search folders.

NOTE: You cannot place calls into a search folder by dragging and dropping. However, you can drag and drop calls from a search folder into one of your static personal folders.

Search folders can be distinguished from call folders by their unique icon:

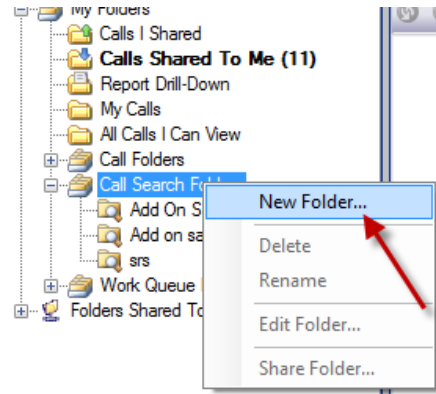




To create a new search folder

Highlight [Search Folders](#)

Right-click → Select [New Folder](#)



The following window will be displayed:

Enter a name for your new search folder. Using the Search Type drop-down list, choose Basic, Advanced, or Call Filter.

Please see the section on [Searches](#) for more information.

For a basic search

Enter your search string → Click [Okay](#)

Your new search folder will appear beneath your Search Folders. Each time you select this folder a search will be performed and all the documents that meet your criteria will appear in the folder.

Use the [Refresh](#) button to execute the search and refresh your search folder.

Stop	Date/Time	Call Dire...	Duration	Outside Number	Call Recorded
	2/22/2011 8:45:07 AM	Inbound	2:04	(770) 945-6887	Yes
	2/22/2011 9:25:34 AM	Inbound	4:56	(770) 945-6887	Yes
	2/21/2011 2:22:50 PM	Inbound	2:22	(303) 656-3335	Yes
	2/21/2011 1:49:30 PM	Inbound	0:36	(207) 582-8244	Yes
	2/21/2011 11:41:44 AM	Inbound	0:39	(919) 865-2030	Yes
	2/21/2011 11:32:48 AM	Inbound	7:47	(207) 582-8244	Yes
	2/21/2011 8:35:42 AM	Inbound	20:50	(207) 582-8244	Yes
	2/18/2011 2:29:02 PM	Inbound	6:48	(713) 462-0977	Yes
	2/18/2011 12:28:48 PM	Outbou...	1:11	(954) 725-5028	Yes
	2/18/2011 12:15:10 PM	Inbound	10:09	(800) 746-4352	Yes
			52:17	(530) 245-2835	Yes

FOLDERS SHARED TO ME (NETWORK FOLDERS)

A user's ability to create shared folders is determined by the permissions set by the Administrator. A shared folder is a folder you create that allows others to view the calls in that folder.

Example

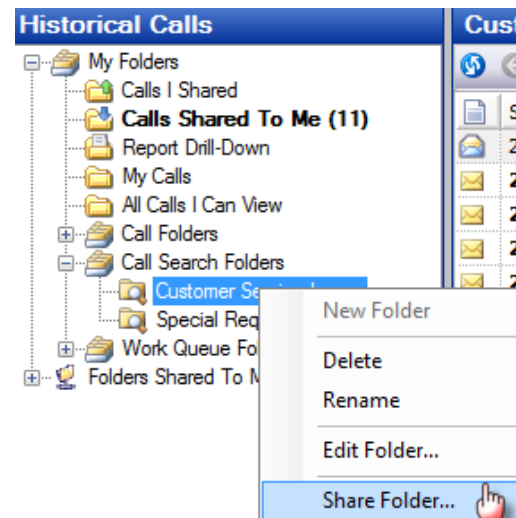
You may have a collection of calls you'd like to share with your sales team. You can create a folder called *Sales Team* and share it with all users under your Sales Team user group. Each time you have a call you'd like your sales team to review; you can drag and drop it into the specified shared folder. Shared folders are dynamic folders.

To create a new shared folder

Highlight the folder you want to share

Right-click → Select *Share Folder*

Select the users/user groups to share the folder with, and it will appear under the Shared Folders of the selected users/user groups. The name of the user who shared the folder will also appear under the Shared Folders.



FOLDER MAINTENANCE

Each time you select a folder and right-click on it you will see the following options:

- New Folder
- Delete
- Rename
- Edit Folder
- Share Folder

Some of the options may be greyed out. This means you do not have permission to access the option or that the option is not available for the selected folder.

DELETE

You cannot delete your Inbox, Shared Calls, My Calls, or All Calls I Can View folders. If you have permission to delete enabled, you can delete a user created call folder, a user created search folder, or a user created shared folder.

RENAME

You cannot rename your Inbox, Shared Calls, My Calls, or All Calls folders. If you have permission to rename enabled, you can rename a user created call folder, a user created search folder, or a user created shared folder.

EDIT FOLDER

If you have permission to edit enabled, you can edit a user created search folder or a network folder. You cannot edit your Inbox, Shared Calls, My Calls, All Calls I Can View folders, or a user created call folder.

NOTE: Editing a search folder changes the search criteria for the search folder, and editing a shared folder changes the share conditions of the folder.

SHARE FOLDER

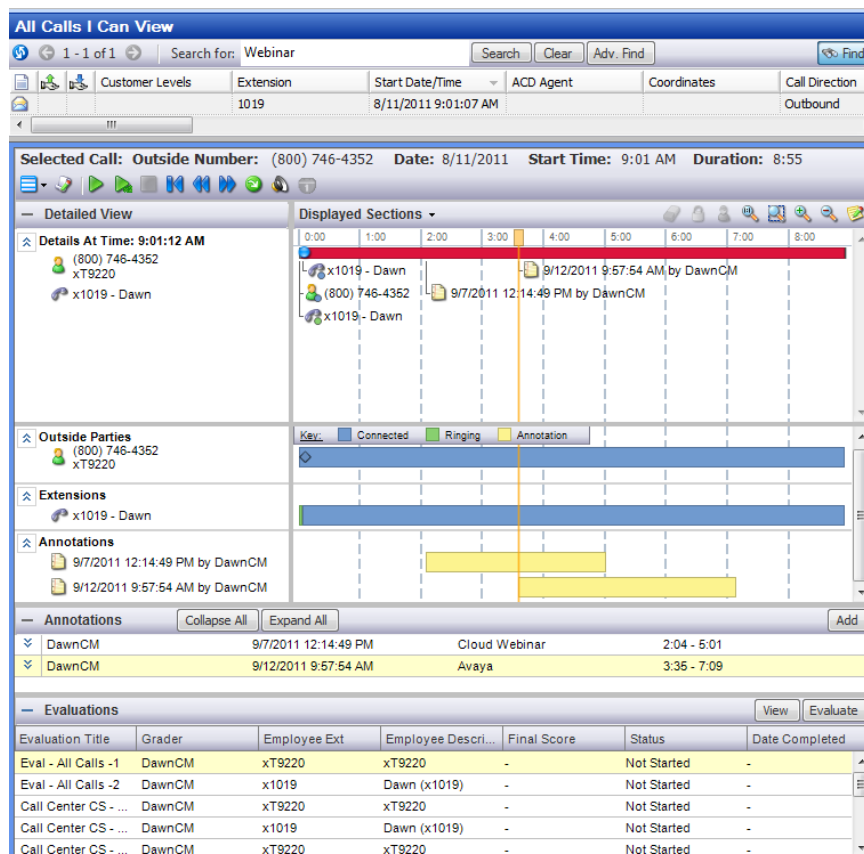
You can share your Calls I Shared, My Calls, or All Calls I Can View folders. If you have permission to share documents enabled, you can share a Call Folder, a Search Folder, your Calls Shared to Me Folder, your My Calls Folder, and your All Calls I Can View Folder.

CALL VIEW

The Call View is a visual representation of a call.

It includes:

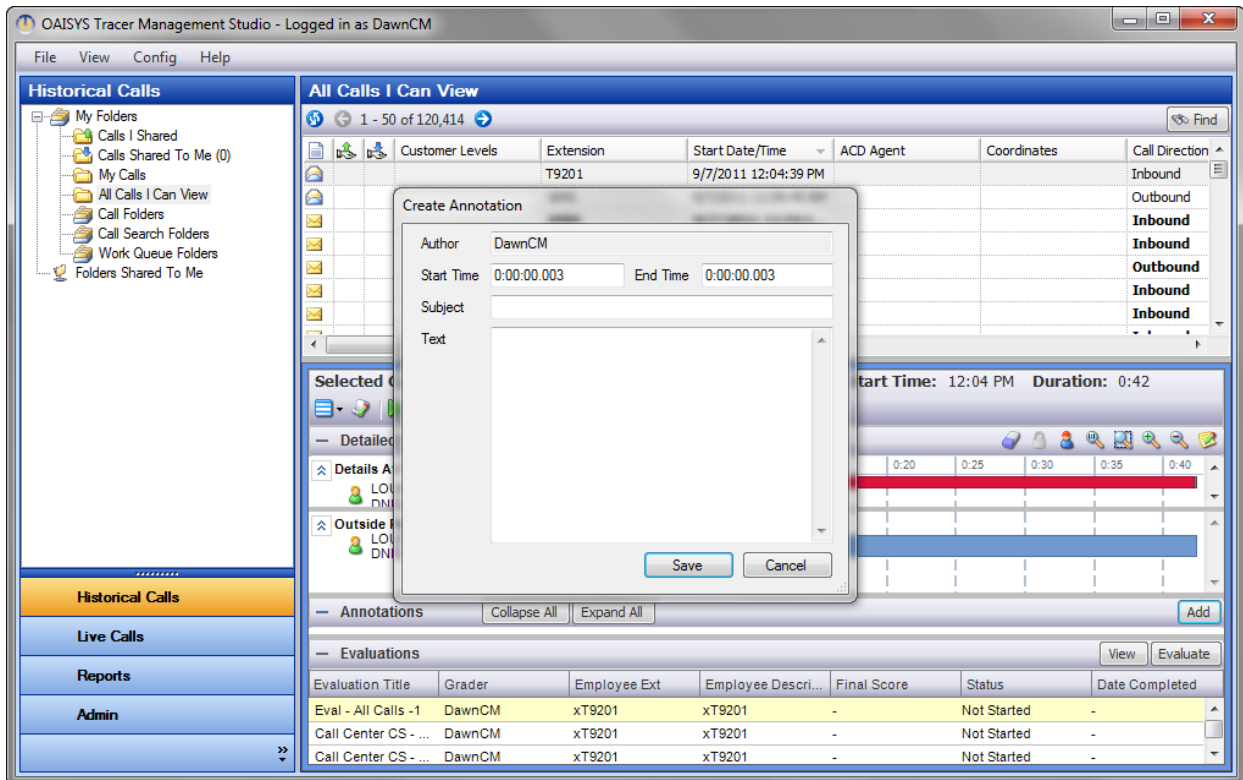
- Information bar
- Playback controls
- Slider and Hover Ball
- Start and End Times of the call
- Call transitions
- Extensions and Outside Parties involved with the call
- Annotations
- Visual indication if a user does not have permission to certain parts of a call
- Visual indication for desktop video if Desktop Screen Recording is being used



Each of these is explored in more detail on the following pages.

ANNOTATIONS

Annotations are comments that are added to a call recording, and aid in identifying key information about calls. Annotations have a starting point, an ending point, an author, a subject, and text.



A user with permissions enabled can annotate an entire call, or any part of a call. The ability to Add, Edit, and/or Delete annotations is permissions based. By default, a user will have the ability to annotate all of the calls that appear in their My Calls folder. There are no limitations on the number of annotations a voice document can have. Part of the power of the OAISYS Client is the ability to conduct a search based on text entered as an annotation. (For more information on permissions and permission lists, refer to the [OAISYS Administrative Guide](#).)

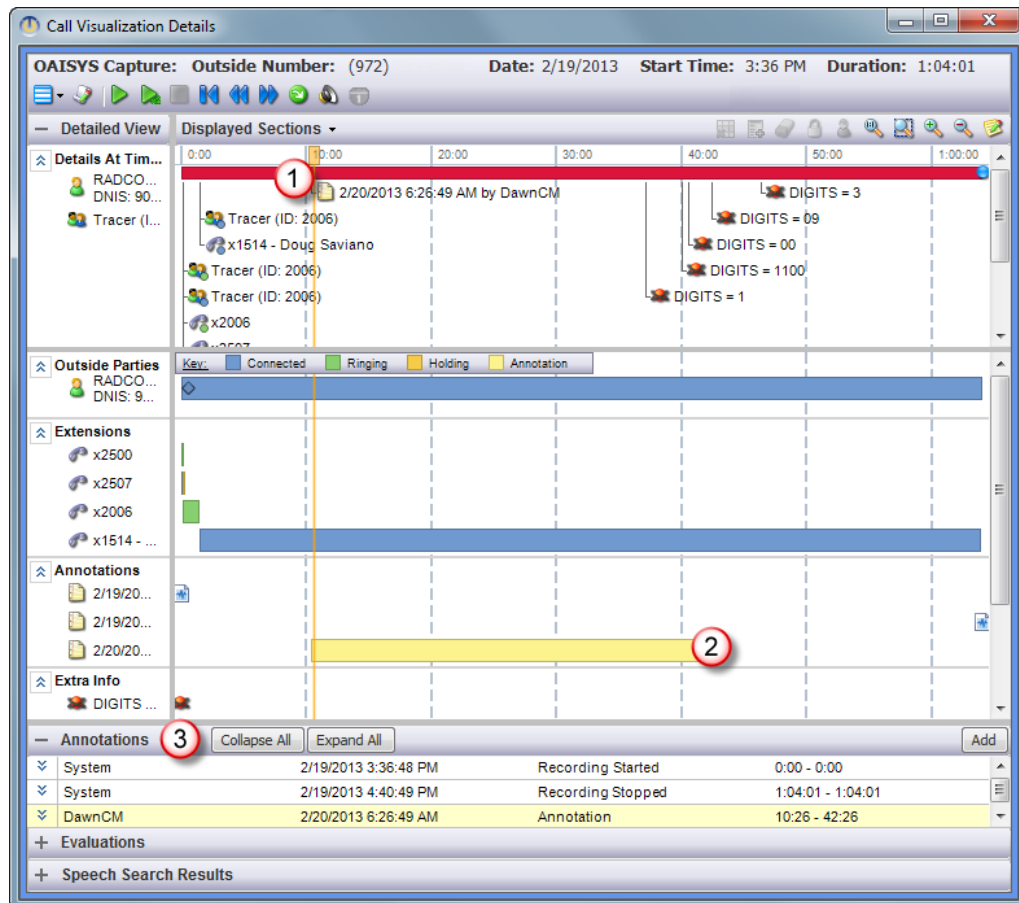
VIEW ANNOTATIONS

There are several ways to identify if annotations are associated with a call:

- From the Visualization window you can identify annotations by the date, time stamp, and author next to the annotation icon.

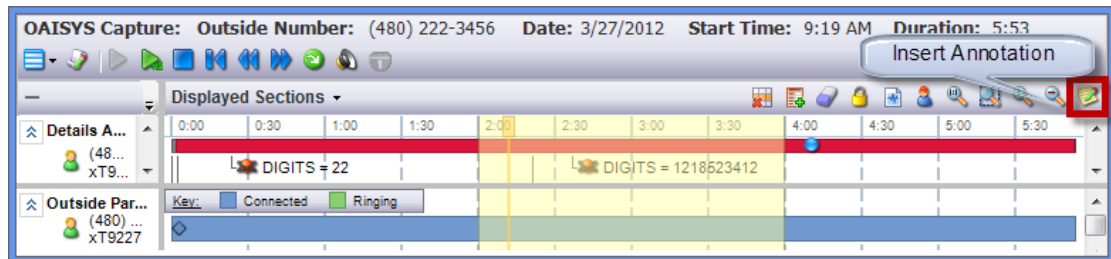


- From the Detailed View you can identify annotations under the Annotations section. A checkmark in the box beside Annotations must be selected to display annotations. The annotations appear as a yellow bar on the timeline in the place in the call where the annotation was entered.
- Expand the Annotations panel. Highlight an annotation on the left to see the Author, Start Time, End Time, Subject, and Text on the left.



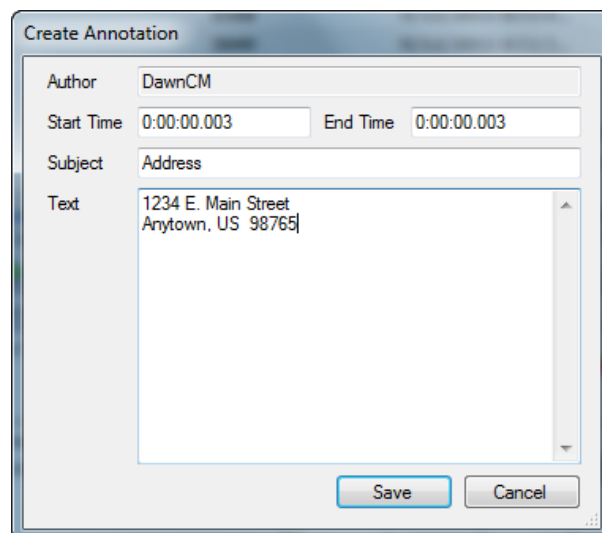
ADD OR INSERT AN ANNOTATION

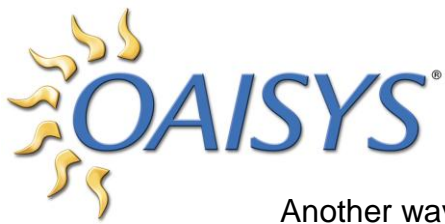
1. From the call list view, highlight the desired call. The highlighted record will load in the Call Visualization area.
2. Click on the highlighted call to open the Call Visualization details.
3. Use your mouse to highlight an entire call or just a section of a call.
4. Click the [Insert Annotation](#) button as shown below.



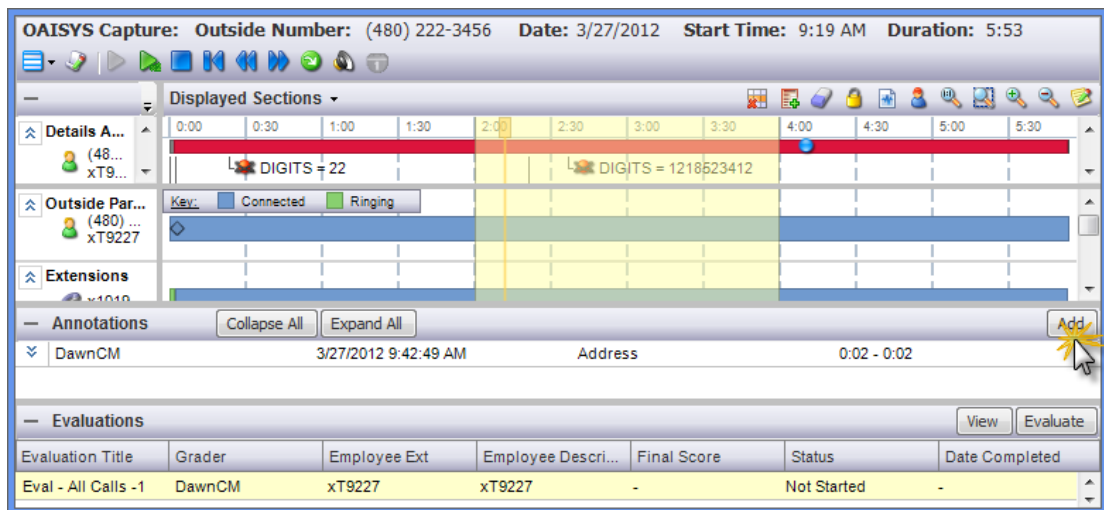
5. This will open the [Create Annotation](#) box. The author field will populate the name of the user logged into the system. The start time and end time will automatically be filled out according to the highlighted section of the call.
6. Enter a subject for the annotation → Enter text for the annotation → Click [Save](#) to save the information

NOTE: You must enter either a subject or text or both. You cannot leave both the subject and the text blank.





Another way to annotate a call is to highlight the section of the call that you want to annotate and click [Add](#) in the Annotation section.

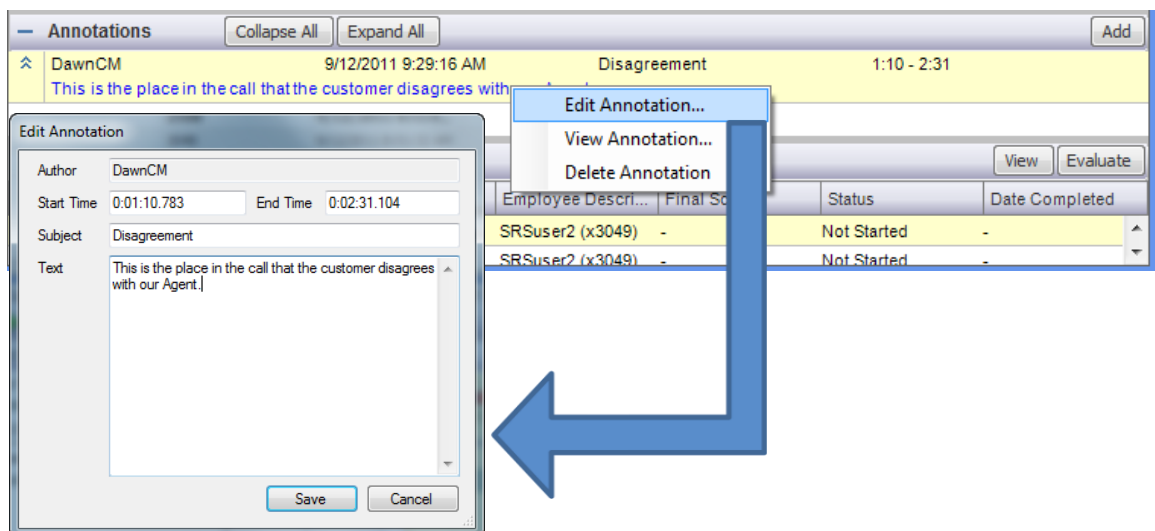


NOTE: If you do not highlight a section of a call and you click [Add](#), the annotation will apply only to that specific point in the call.

EDIT AN ANNOTATION

Highlight the annotation you wish to edit in the Annotation pane → Right-click and select [Edit Annotation](#).

This will open up the Edit Annotation box. Make desired changes and click [Save](#).



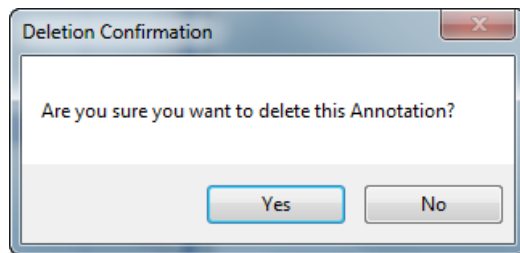
NOTE: You can only edit an annotation if you have proper permissions.

DELETE AN ANNOTATION

From the annotation pane, highlight the annotation you want to delete → Right-click and select [Delete Annotation](#)

A confirmation dialog box will appear.

Click [Yes](#) to confirm or [No](#) to deny the deletion.

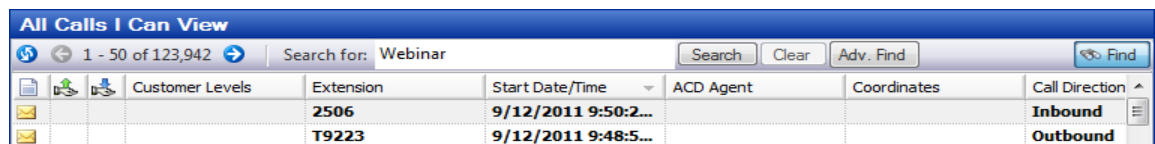


NOTE: You can only delete an annotation if you have proper permissions enabled.

SEARCH FOR AN ANNOTATION

Annotations can be searched according to the Subject of the annotation, the Text within the annotation, by Author, according to Date/Time, or a Date/Time range. Both Basic and Advanced searches can be performed on annotations.

Basic Search: Enter the text string for the subject or the text within the annotation → click [Enter](#) or [Search](#)



A screenshot of a web application interface titled 'All Calls I Can View'. It shows a search bar with 'Webinar' entered and a 'Search' button. Below the search bar is a table with columns: Customer Levels, Extension, Start Date/Time, ACD Agent, Coordinates, and Call Direction. The table contains two rows of data.

Customer Levels	Extension	Start Date/Time	ACD Agent	Coordinates	Call Direction
	2506	9/12/2011 9:50:2...			Inbound
	T9223	9/12/2011 9:48:5...			Outbound

Basic searches execute the search on all fields available.

Example

If you want to search for an annotation with a subject of “Address” as shown above, a basic search would return results for all calls with “Address” in any field. If there were a call with the outside name of “Address” for example, this too would match your Basic search criteria.

For more information on [Searches](#), please refer to that section of the documentation.



Advanced Search: An advanced search can be done based on the criteria of either the subject of the annotation or the text content of the annotation.

The screenshot shows the 'All Calls I Can View' window. At the top, there's a search bar with '1 - 24 of 24' and buttons for 'Search', 'Clear', 'Adv. Find', and 'Find'. Below this is the 'Advanced Search' section. It has three fields: 'Field' set to 'Annotation Text', 'Condition' set to 'Contains Phrase', and 'Value' set to 'Webinar'. To the right of these fields is a 'Search Criteria' box showing 'Annotation Text Contains Phrase "Webinar"'. Below the search criteria is an 'Execute Search' button. At the bottom of the window is a table with columns: 'Customer Levels', 'Extension', 'Start Date/Time', 'ACD Agent', 'Coordinates', and 'Call Direction'. The table contains three rows of data.

Customer Levels	Extension	Start Date/Time	ACD Agent	Coordinates	Call Direction
	2506	8/22/2011 6:19:27 AM			Inbound
	1019	8/11/2011 9:01:07 AM			Outbound
	1019	8/10/2011 11:54:...			Outbound

If you select Annotation Subject or Annotation Text from the drop down you'll have the following condition options:

- Exactly Matches
- Contains
- Starts With
- Ends With
- Contains Word
- Contains Phrase
- Starts in Word

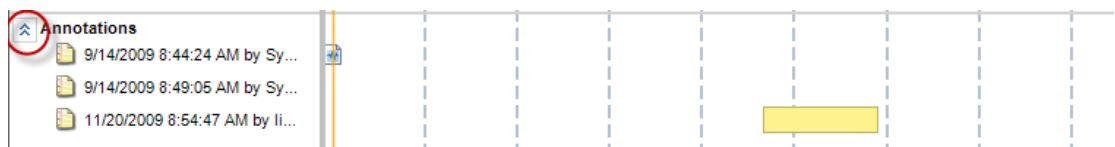
Once you select a condition you must enter a value.

For more information on Advanced Searches refer to the documentation on [Searches](#).

ANNOTATION VIEW

To display the annotation view from the OAISYS client, click the double arrows.

Use the [Expand All](#) and [Collapse All](#) buttons to display or conceal all of the contents of the annotations. The Author, Created date, and time are displayed. If the annotations are collapsed, the information is not displayed.



NOTE: You can individually select annotation text to be displayed by clicking on the annotation itself.

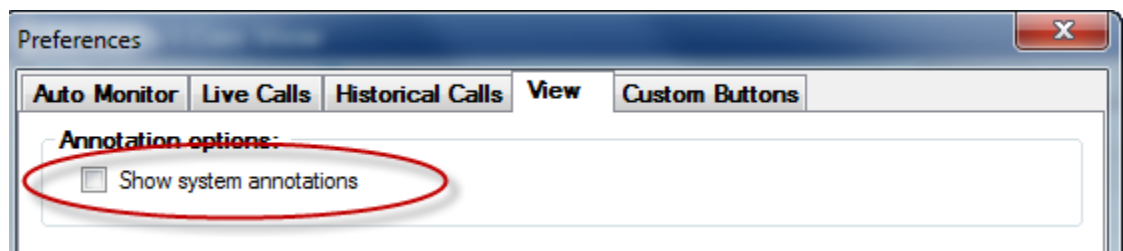
SYSTEM ANNOTATIONS

System annotations are added by the OAISYS system, and will display with the author as 'System.'

These annotations provide information regarding why a recording was started or stopped. The user can toggle the display of System Annotations by setting the option in the Configuration section of the menu bar.

Go to [Configuration](#) → [Preferences](#) → [View](#) tab

By default, the system annotations are not displayed.

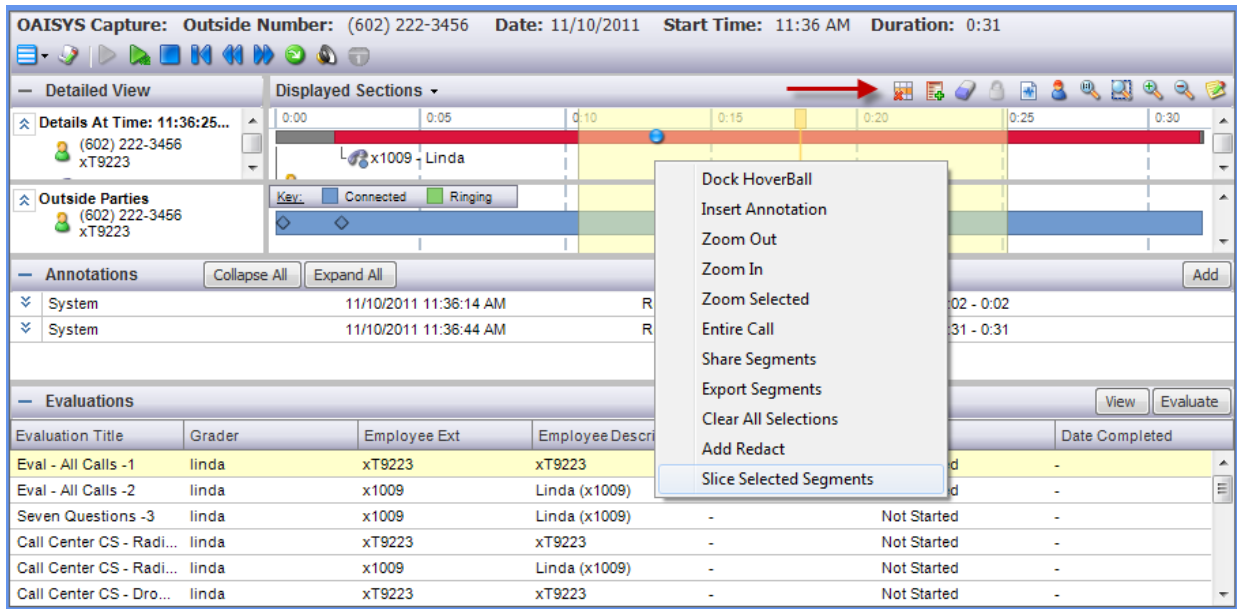


CALL SLICING

The intent of this feature is for two or more legitimate calls to be made from one initial recording by slicing segments from the initial call recording. This feature applies to audio segments only.

Example

Recording a Radio Channel: one long recording consists of two separate issues; these issues can be sliced into two separate recordings.

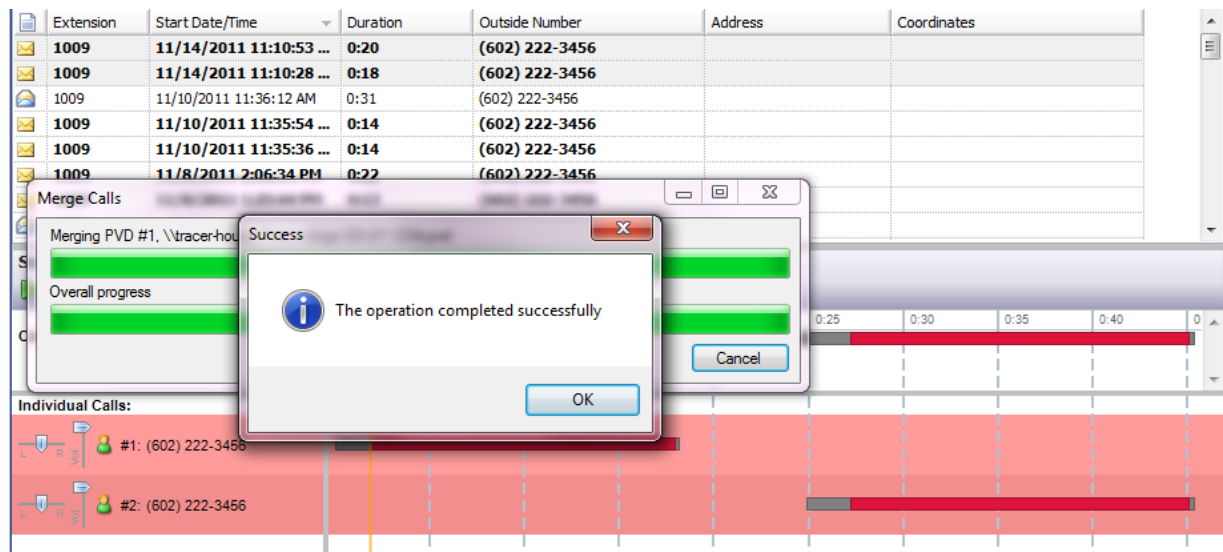
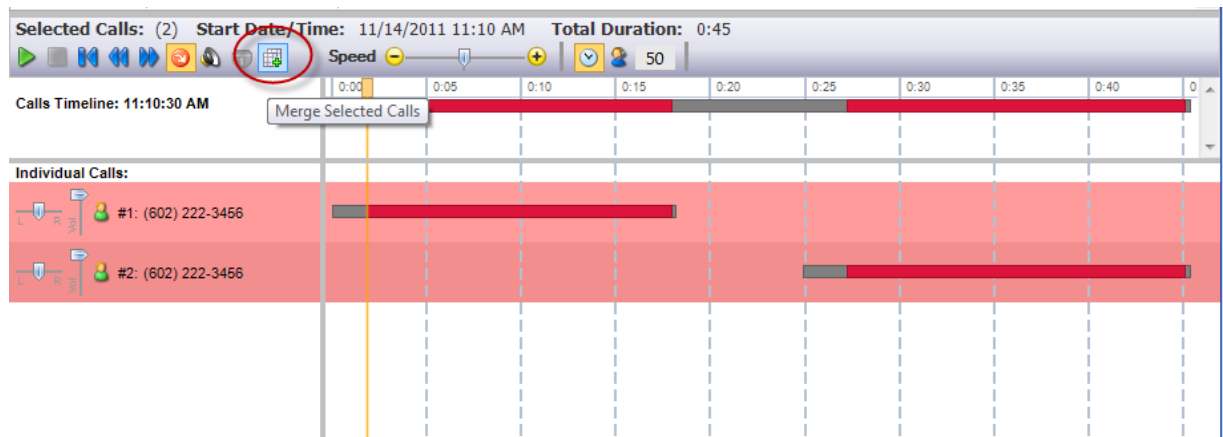


The screenshot displays the OAISYS Capture interface for a call recording. The top bar shows the Outside Number (602) 222-3456, Date (11/10/2011), Start Time (11:36 AM), and Duration (0:31). The interface includes a timeline at the top with a red arrow pointing to a specific segment. A context menu is open over the timeline, listing various actions: Dock HoverBall, Insert Annotation, Zoom Out, Zoom In, Zoom Selected, Entire Call, Share Segments, Export Segments, Clear All Selections, Add Redact, and Slice Selected Segments (which is highlighted). The left sidebar shows details for the call, including the time (11:36:25...), the number (602) 222-3456, and the extension xT9223. The bottom section contains a table of evaluations.

Evaluation Title	Grader	Employee Ext	Employee Description	Date Completed
Eval - All Calls -1	linda	xT9223	xT9223	-
Eval - All Calls -2	linda	x1009	Linda (x1009)	-
Seven Questions -3	linda	x1009	Linda (x1009)	-
Call Center CS - Radi...	linda	xT9223	xT9223	-
Call Center CS - Radi...	linda	x1009	Linda (x1009)	-
Call Center CS - Dro...	linda	xT9223	xT9223	-

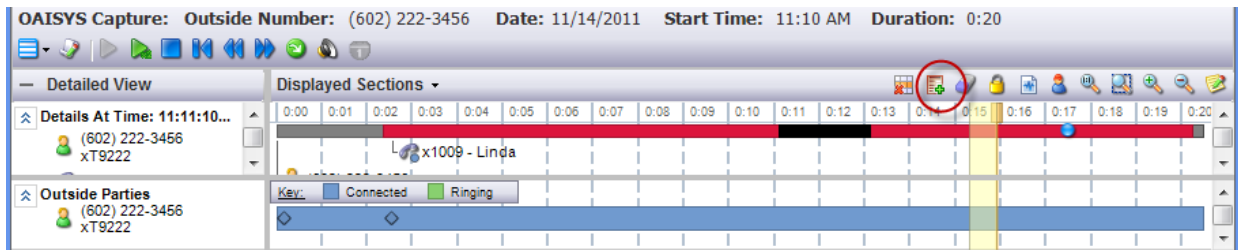
CALL MERGING

The intent of this feature is for one legitimate PVD recording to be made out of multiple PVD segments. In the case of a Radio recording, the user has the ability to merge the segments into one recording. This feature applies to audio segments only.



CALL REDACTING

Sometimes called “Blurring” or “Scrubbing”, this feature provides the ability to highlight a segment of the audio and play silence over it. This feature applies to audio segments only.



HISTORICAL CALLS PLAYBACK

INFORMATION BAR

The information bar displays the following information about the selected document or the current document displayed in the child window:

- Recording Capture Type
- The Calling Number
- Date
- Start Time
- Duration of the call



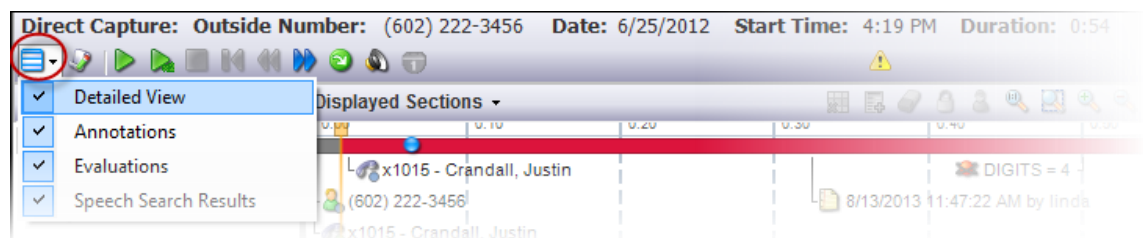
DISPLAY

Click the Display icon directly under the information bar to select the document you want displayed in the Call View.

Your options are:

- Detailed View
- Annotations
- Evaluations
- Speech Search Results (Requires OAISYS Speech Search Option)

At least one of these options must be displayed at all times.



Detailed View: If you select this option, the detailed view of the call is displayed. The call details include:

- Call Transitions
- Outside Parties
- Extensions
- ACD Agents



- ACD Groups
- Annotations
- Account Codes
- Extra Info

Annotations: If you select this option, the Annotations window will be displayed.

It includes:

- Author
- Created Date and Time
- Subject
- Time Interval
- Annotation Text

Evaluations: If you select this option, all evaluations that are associated with the call will display.

Speech Search Results: This option requires the add-on OAISYS Speech Search option. If you select this option, all previously saved speech search results that are associated with the call will display.

DETAILED VIEW

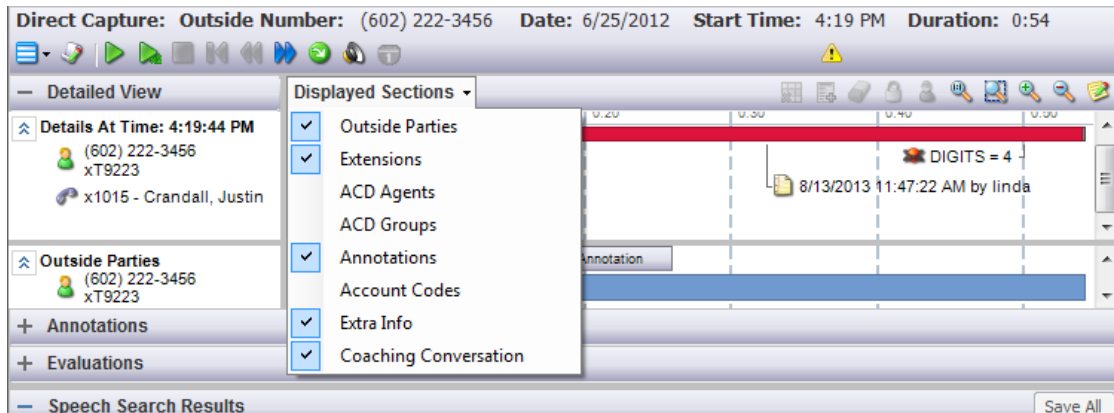
The Detailed View section of the OAISYS application displays:

- Sections of the call that were and were not recorded
- Sections of the call that the user does and does not have permission to listen to
- Outside parties and extensions
- ACD agents
- ACD groups
- Account codes
- Extra information
- Annotations
- Coaching conversations
- Time line for the duration of the call

The user can select which of these options to display by clicking on *Displayed*



[Sections](#) and entering a check mark next to the options they'd like displayed.



The gray and/or red bar represents the audio. The gray represents audio that was not recorded or audio that was recorded but the user does not have permission to listen to.

If the user hovers over the gray part of the bar, the tool tip will inform the user whether or not there is audio recorded and whether or not the user has permission to listen to the audio.

The green bar represents desktop video (not shown).

NOTE: The optional [OAISYS Screen Recording Server](#) is required for Desktop Screen Recording.

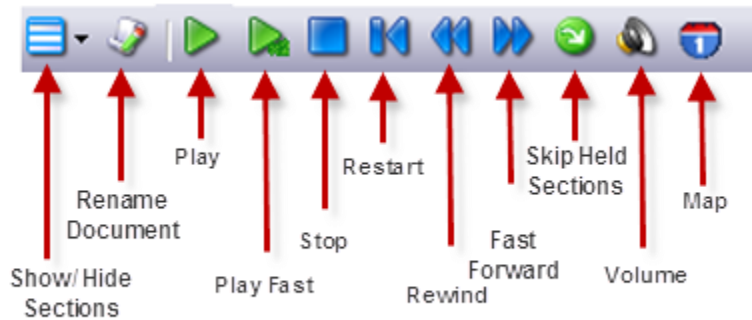
The blue hover ball docks to the play cursor and can be dragged across the gray/red bar to display what happened at that point in time in the call. As the user moves the hover ball, the information will dynamically change in the left panel to represent what happened at that point in time.

The user can also choose to dock the hover ball by right-clicking on the hover ball and selecting [dock hover ball](#).

Undock the hover ball by right clicking and selecting [dock hover ball](#) again.

PLAYBACK CONTROLS

The audio playback controls are located in the Detailed View section of the client application. The controls are used to view the entire call, play the recording, play the recording in high speed, stop playback of the recording, jump to the beginning of a call recording, rewind, and fast forward.



Show/Hide Sections – Show and hide sections of the call.

Rename Document – Change the name of the document file.

Play – Play the recording back in normal speed.

Play High Speed – Play the recording back in fast mode.

Stop – Stop playback of the recording.

Restart – Go back to the beginning of the recording.

Rewind – Rewind playback approximately 12 seconds.

Fast Forward – Fast forward playback approximately 12 seconds.

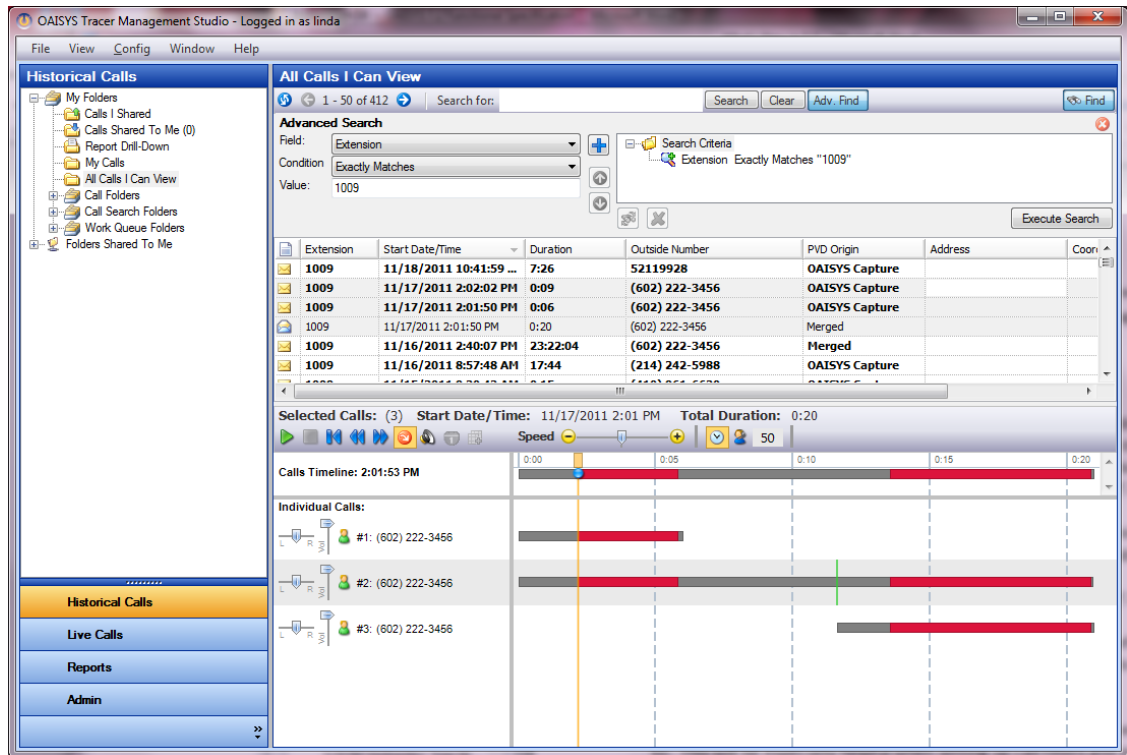
Skip Held Sections – Automatically skips playback over any duration when the call was placed on hold.

Volume – Adjust the playback volume.

Map – Displays the caller's location on a map if an address or coordinates are available.

EMBEDDED MULTI CALL PLAYER

The ability to select and view up to eight (8) calls is now embedded in the Management Studio. Previously, this feature was only available in the separate child window Multi Call Player.



CALL DETAILS

The Call Details section of the client application displays:

- Outside Parties and extensions
- ACD agents
- ACD groups
- Account codes
- Extra information
- Annotations

The user can select which of these options to display by clicking on [Displayed Sections](#) and entering a check mark next to the options they'd like displayed.

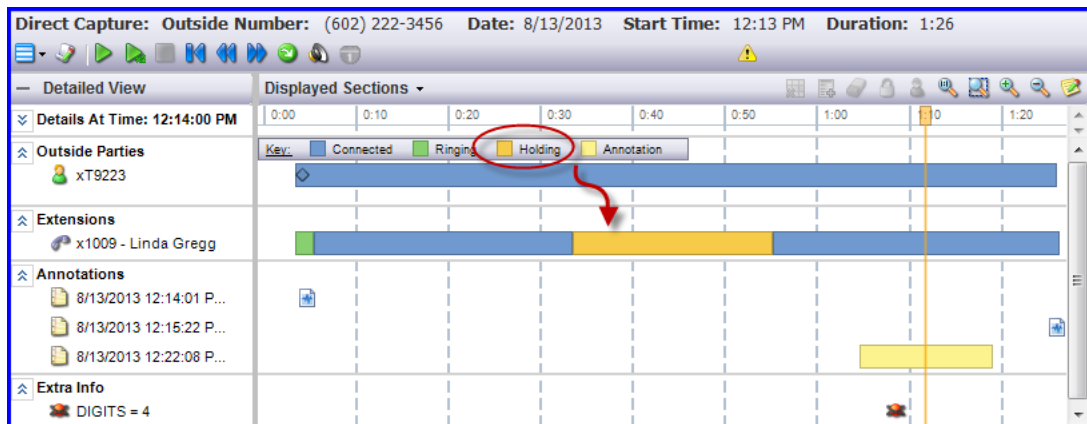
Example

If the user does not want to see where extension 1009 is involved in the call below, uncheck the box, and the bar next to x1009 will disappear.



Call transitions are represented by different colors. Each call state, and duration of that state is displayed as a color coded bar. Annotations are represented by a color bar for the duration of the annotation and at the point in the timeline where the annotation was entered.

Account codes and extra info are displayed with markers below the color coded bars.



ANNOTATIONS

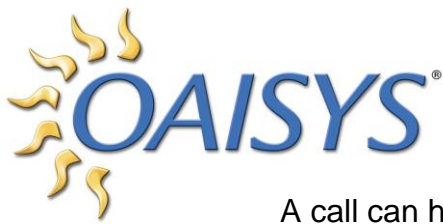
The Annotation section can be used to View, Add, Edit, and Delete annotations. Please refer to the section on [Annotations](#) for more information.



EVALUATIONS

The Evaluation section is used to perform evaluations live via the Live Calls feature, or on historical calls. The user with permission can export or email the evaluations and share the call.

Evaluation Title	Grader	Employee Ext	Employee Descri...	Final Score	Status	Date Completed
Eval - All Calls -1	DawnCM	xT9220	xT9220	5	Completed	9/12/2011 10:0...
Eval - All Calls -2	DawnCM	x1019	Dawn (x1019)	-	Not Started	-
Call Center CS - ...	DawnCM	xT9220	xT9220	-	Not Started	-



A call can have zero, one, or more evaluations associated with it. The user will highlight a call in the call list view.

If the highlighted call has an evaluation associated with it, the evaluation will appear under the evaluation summary section.

Highlight the evaluation and click on the [Evaluate](#) button.

This will launch an evaluation form.

EVALUATION FORM

An evaluation can have zero, one or more categories with at least one question per category. A text box is provided at the bottom of each category to add notes and comments. Use the Finish, Finish Later, or Cancel buttons at the bottom of the evaluation form to indicate the status of the evaluation.

The screenshot shows a web application window titled "Edit Evaluation". At the top, it displays "Eval - All Calls -2", "Ext: xT9201", and "Grader: DawnCM". Below this, it shows "Call: Outside Number: (410) 583-4948", "Date: 10/14/2011", and "Start Time: 12:44 PM". There are navigation icons (back, forward, etc.) below the call information. The form contains two question sections. "Question 1: Question 1" asks to "Rate the agent's overall performance from 1 to 5. (5 being the highest)". It has radio buttons for "Not Applicable", 0, 1, 2, 3, 4, and 5. "Question 2: Question 2" asks "Do you think the customer was happy with the agent's proposal?". It has radio buttons for "Not Applicable", "Fail", and "Pass". Below the questions is a large text area labeled "Overall Comments and Notes:". At the bottom of the form are three buttons: "Finish", "Finish Later", and "Cancel".

NOTE: Evaluation scores can be modified by the user that completed the evaluation by selecting the evaluation, clicking [Evaluate](#), making the appropriate changes, and clicking [Finish](#). This will update the score accordingly.



Email an evaluation to someone once the evaluation is complete by clicking the [Email Evaluation](#) button as shown below.

Direct Capture: Outside Number: (602) 222-3456 Date: 8/13/2013 Start Time: 12:13 PM Duration: 1:26

Details At Time: 12:14:00 PM

Outside Parties: xT9223

Extensions: x1009 - Linda Gregg

Annotations: + Annotations

Evaluations

Evaluation Title	Grader	Employee Ext	Employee Descrip...	Final Score	Status	Date Completed
Eval - All Calls -1	linda	xT9223	xT9223	4.5	Completed	8/13/2013 12:4...
Eval - All Calls -2	linda	x1009	Linda Gregg (x10...	-	Not Started	-
Seven Questions -3	linda	x1009	Linda Gregg (x10...	-	Not Started	-

This will display the Create and Manage Share box. Email to an external user or share with another OAISYS client user.

Email and Share Evaluation and Document

Do not share with:

Name	Class	Email Address	Expires
[All Users]	User Group		
[Guest Users]	User Group		
[sysadmin]	User		

Share with:

Name	Class	Email Address	Expires
------	-------	---------------	---------

Sharing options

☐ This share will expire on: Friday, March 04, 2011

☒ Allow internal user(s) to further share the document(s).

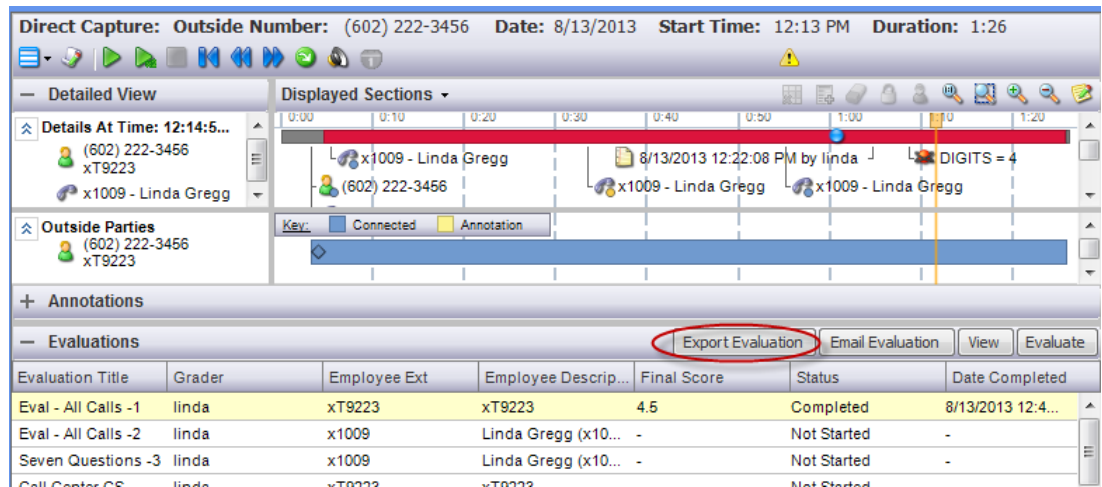
☒ Allow the recipient(s) to create, change, and delete their own annotations, based on your permissions.

☐ Send evaluation email

Okay Cancel

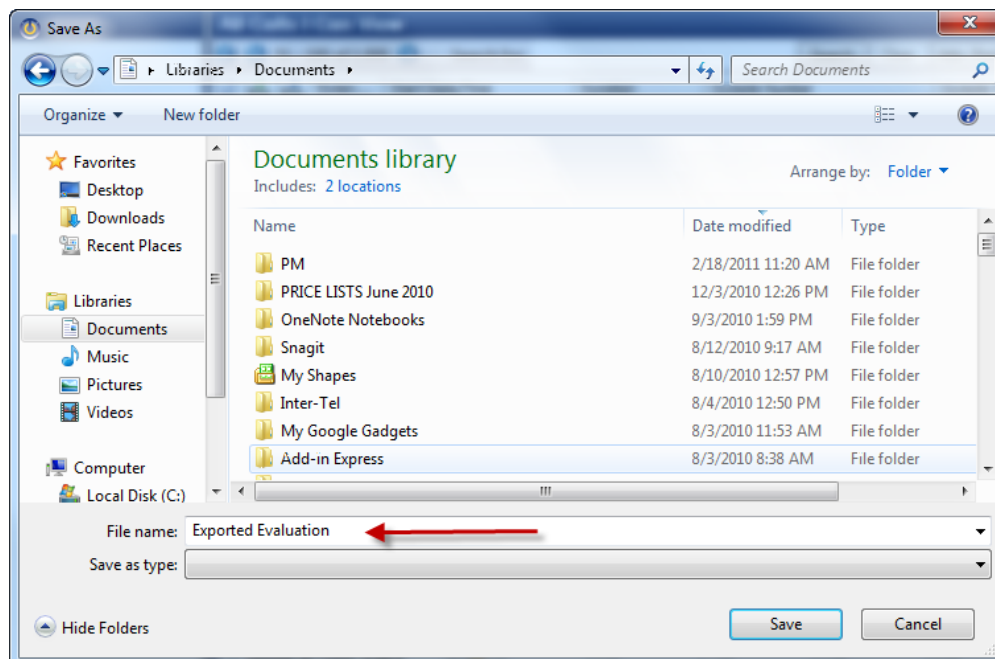


Once the evaluation is complete, an [Export Evaluation](#) button becomes visible which allows the export of the evaluation to a specific file location.



To export an evaluation

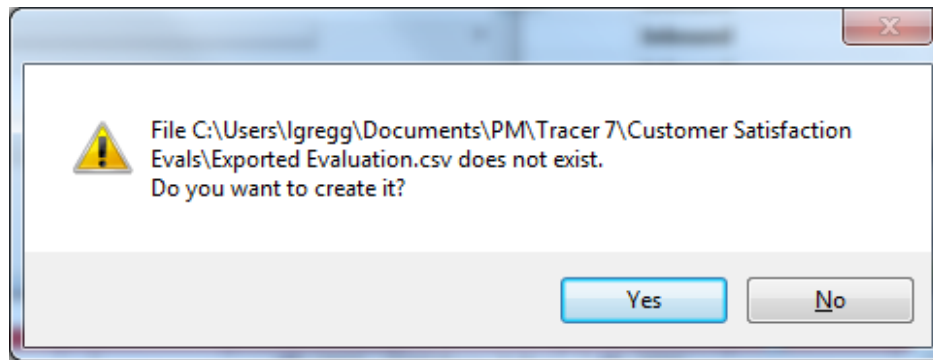
Click the [Export Evaluation](#) button → Enter a File Name for your evaluation → Select the desired location for export → Click [Save](#)



NOTE: The file will be saved in *.csv format.



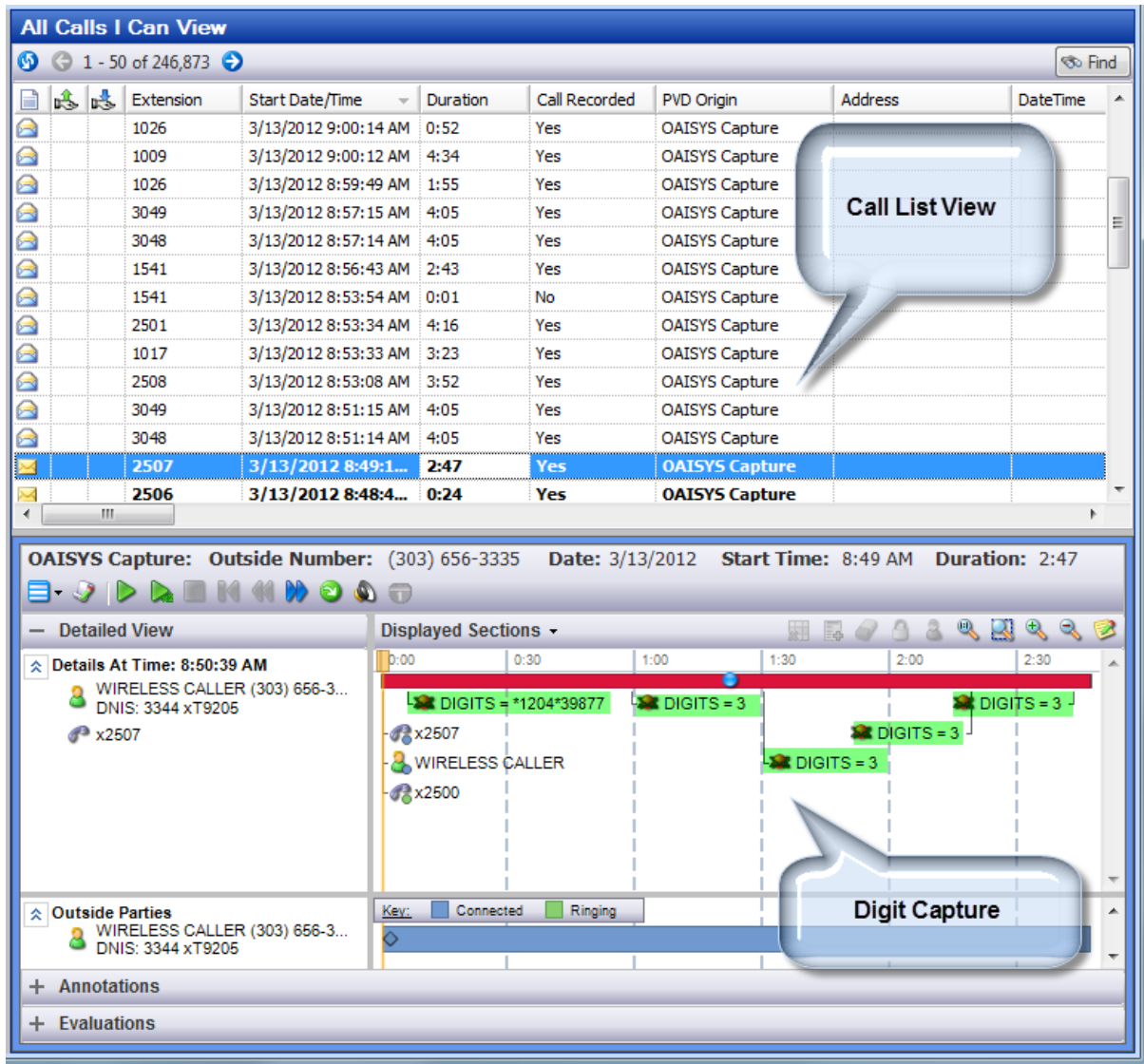
Once you click the [Save](#) button you will get a message:



Click [Yes](#) to save the file → Browse to the saved file to review the content.
Perform a Live Evaluation following the same steps from the Live Calls application.

CALL LIST VIEW

The call list view consists of a listing of all calls in a selected folder. Calls can be read or unread. An unread call is displayed in **bold** text. You can also distinguish a read call from an unread call by the icon that appears in the first column of the call list view. The read icon looks like an opened envelope while the unread call icon looks like a closed envelope.



The screenshot displays the OAISYS software interface. The top section, titled "All Calls I Can View", shows a list of calls with columns for Extension, Start Date/Time, Duration, Call Recorded, PVD Origin, Address, and DateTime. A call with extension 2507 is highlighted. Below this, the "Digit Capture" section shows a detailed view of the selected call, including a timeline of digits and a key for Connected and Ringing states.

Extension	Start Date/Time	Duration	Call Recorded	PVD Origin
1026	3/13/2012 9:00:14 AM	0:52	Yes	OAISYS Capture
1009	3/13/2012 9:00:12 AM	4:34	Yes	OAISYS Capture
1026	3/13/2012 8:59:49 AM	1:55	Yes	OAISYS Capture
3049	3/13/2012 8:57:15 AM	4:05	Yes	OAISYS Capture
3048	3/13/2012 8:57:14 AM	4:05	Yes	OAISYS Capture
1541	3/13/2012 8:56:43 AM	2:43	Yes	OAISYS Capture
1541	3/13/2012 8:53:54 AM	0:01	No	OAISYS Capture
2501	3/13/2012 8:53:34 AM	4:16	Yes	OAISYS Capture
1017	3/13/2012 8:53:33 AM	3:23	Yes	OAISYS Capture
2508	3/13/2012 8:53:08 AM	3:52	Yes	OAISYS Capture
3049	3/13/2012 8:51:15 AM	4:05	Yes	OAISYS Capture
3048	3/13/2012 8:51:14 AM	4:05	Yes	OAISYS Capture
2507	3/13/2012 8:49:1...	2:47	Yes	OAISYS Capture
2506	3/13/2012 8:48:4...	0:24	Yes	OAISYS Capture

Call List View

Digit Capture

NOTE: Some columns in the Call List view are editable while some are not.



OUTSIDE-NUMBER LOOKUP LINK

This feature allows users to lookup a phone number through a pre-configured URL. OAISYS does not offer or support this service; it is available through a number of companies that provide data quality and phone number/address management solutions.

The pre-configured URL is accessed by clicking on the outside number indicated with a hyperlink.

The screenshot shows the OAISYS Tracer Management Studio interface. A red arrow points to the 'Outside Number' column header in the 'All Calls I Can View' table. The table lists various calls with columns for Start Date/Time, Duration, Outside Number, Call Direction, Extension, Address, and Coordinates. Below the table, there is a detailed view of a specific call, showing a timeline of events and a list of extensions.

Start Date/Time	Duration	Outside Number	Call Direction	Extension	Address	Coordinates
4/23/2012 2:19:22 PM	0:51	(888) 496-9040	Inbound	2506		
5/3/2012 10:49:55 AM	12:18	(888) 496-9040	Outbound	1504		
4/16/2012 10:31:48 AM	3:14	(480) 555-1212	Inbound	1607		
4/17/2012 12:30:49 PM	1:38	(480) 555-1212	Inbound	1607		
5/14/2012 8:27:42 AM	1:47	(888) 496-9040	Outbound	1207		
4/26/2012 9:56:37 AM	44:21	(480) 222-3456	Inbound	1016		
4/26/2012 11:12:09 AM	14:15	(480) 496-9040	Inbound	1514		
5/3/2012 1:14:48 PM	39:29	(888) 496-9040	Inbound	1016		
4/26/2012 1:02:04 PM	1:01	(888) 496-9040	Outbound	1514		
4/26/2012 1:08:49 PM	1:28	(888) 496-9040	Inbound	1514		
5/10/2012 1:26:26 PM	0:58	(480) 496-9040	Outbound	1534		
4/20/2012 8:34:09 AM	0:30	(480) 222-3456	Outbound	1004		
4/27/2012 8:35:55 AM	16:30	(888) 496-9040	Inbound	1016		

DIGIT CAPTURE

Used for Analog, Digital (T1/PRI) Trunk Taps, and Digital Stations using NGX boards only; this feature captures the DTMF digits entered on recorded calls. Users with appropriate permissions can view the digits captured.

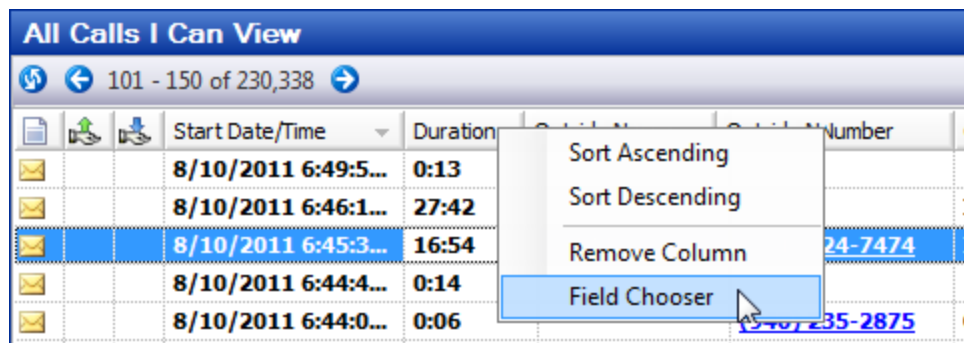
SORT

Columns can be sorted by clicking on the column header. There are up to four sort orders. After clicking on the first column a number one will appear in that column. Hold the **Control** (Ctrl) button down and select the second column you'd like to sort by.

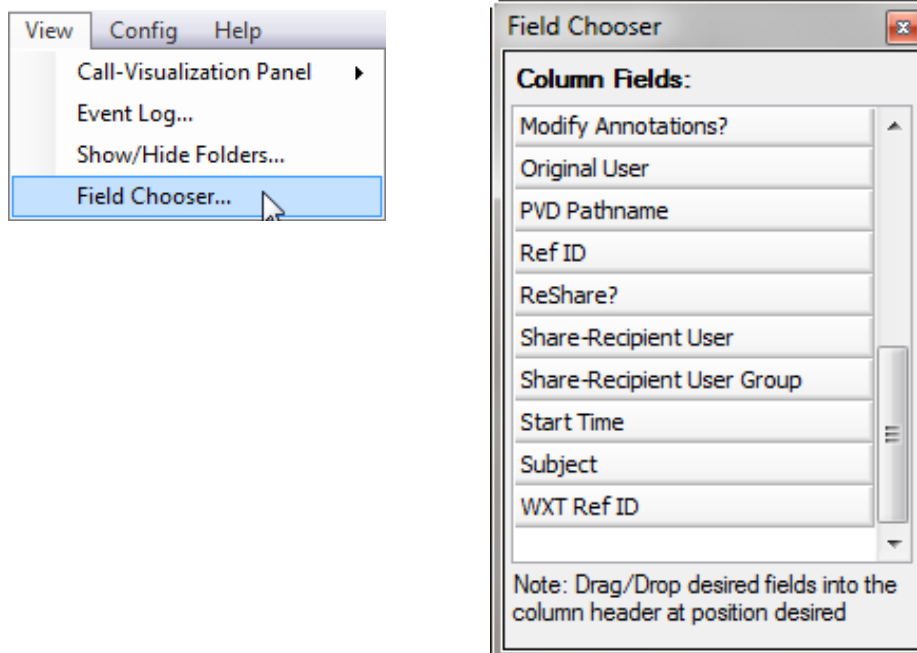
CUSTOMIZE

Information about calls appears in table format consisting of rows and columns. Each row represents an individual call. Each column represents information about the calls. The order in which the columns appear can be customized by dragging and dropping the column.

The columns you display in your document list view are customizable per user. Right-click on the column header → Select *Field Chooser*



Or, from the menu bar, go to *View* → *Field Chooser*



NOTE: If a user attempts to move a column and the header disappears from view, the user can find the column header using Field Chooser.



CALL LIST FIELD COLUMNS

Call-Record ID – ID Number of the Call Record

Start Date/Time – Date and Time the call started

Duration – The length of time the call lasted from start to finish

Outside Name – Name of the outside caller for inbound calls if available

Account Code – Account code entered during call if applicable

Outside Number – Number of caller for inbound/outbound calls if available

Call Direction – Direction of call, either inbound or outbound

ACD Agent – ACD Agent associated with the call

ACD Group – ACD Group associated with the call

DNIS/DID – DNIS or DID if available

Extension – Last extension involved with the call

Extension Description – Programmable descriptor field for the extension (can be agent's name or other value to identify the owner of the extension)

Issued Share – Represents calls/call segments you have shared with others

Original User – The person who initiated the share

PVD Origin – The origin of the call recording document; options can include: OAISYS Capture/Imported/Sliced/Merged/Unknown

Save Until – Date the call document is tagged as being saved until (default value is blank)

Share Expires – The date until you are able to view the shared cal/call segment

Share Recipient – The person receiving the shared call/call segment

Sharing User – The person who sent the shared call/call segment to you

Subject – Extra info added to call by another OAISYS application

Read – Displays an envelope in the column; an unread call looks like a closed envelop and a read call looks like an open envelope

Received Share – Represents calls/call segments that have been shared to you

Ref ID – Document reference identification number

Start Time – Start time of the call only (does not include date)

Area Code – Area code of the inbound or outbound call if available

PVD Pathname – Location where the PVD is stored

Save Until – Date document is tagged as being saved until (default is blank)



Call Recorded – Yes/No indicates whether or not the call was recorded

Call Answered – Yes/No indicates whether or not the call was answered

Customizable Call Columns – In addition to the call columns listed above; custom call columns can be set up in the OAISYS Administrator

NOTE: If there are multiple values associated with a column the last value entered will be displayed.

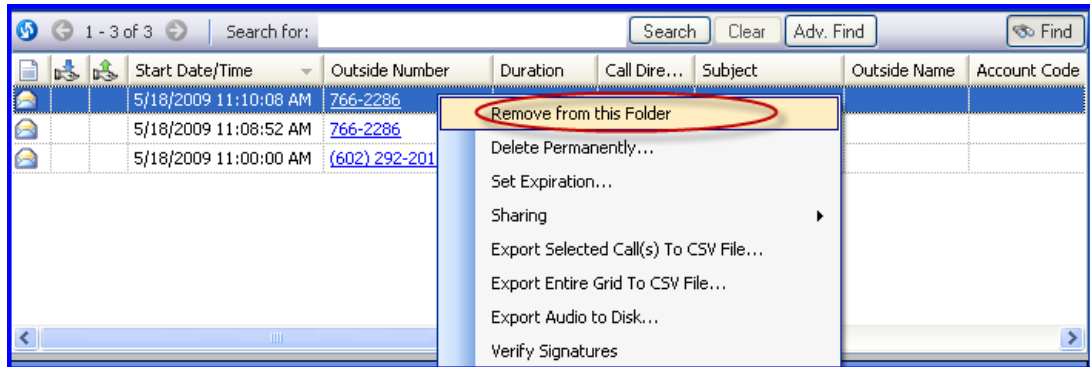
Example

If more than one account code is entered during a call, the last account code that was entered will display in the Account Code column.

Some PBXs do not support all of the information available in call columns.

REMOVE FROM THIS FOLDER

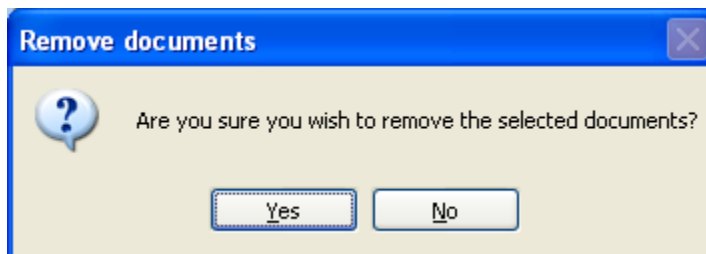
You can remove a call from a folder if you have permission to do so (permissions are assigned by the Administrator). When you remove a call from a folder, you do not delete the call recording. You simply remove the reference to the call from the selected folder. You cannot remove calls from the Shared Calls, My Calls, All Calls, or any of Search folders.



To remove a call

Select a call → Right-click → Select *Remove from this Folder*

A confirmation dialog box will appear. Confirm the removal by clicking *Yes* or cancel the removal by clicking *No*



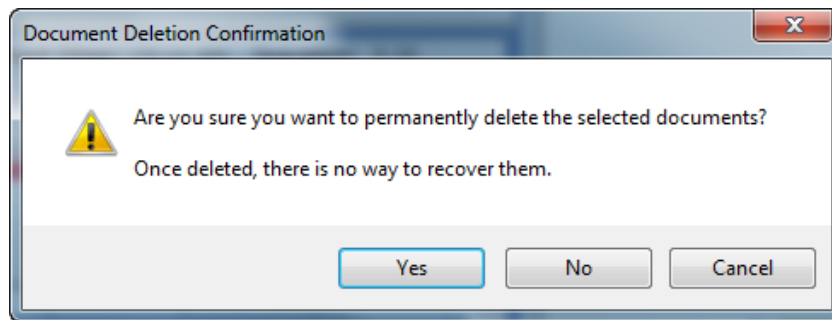
DELETE PERMANENTLY

You can delete a call from any folder if you have permission to do so (permissions are assigned by the Administrator). When you delete a call you delete all references to that call permanently.

To delete a call

Select a call → Right-click → Select *Delete Permanently*

A confirmation dialog box will appear. Confirm deletion by clicking *Yes* or cancel the deletion by clicking *No* or *Cancel*



SET EXPIRATION

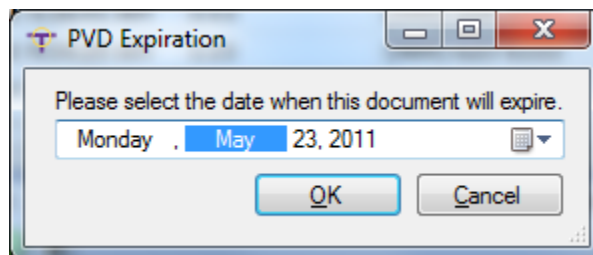
You can set the expiration date of a call located in any folder if you have permission to do so (permissions are assigned by the Administrator).

To set the expiration date of the call

Highlight the call → Right-click → Select *Set Expiration Date*

Select a date for the call to expire → Click on the drop-down to select a date from the calendar → Click *OK*

The default date is set to three months from today's date.

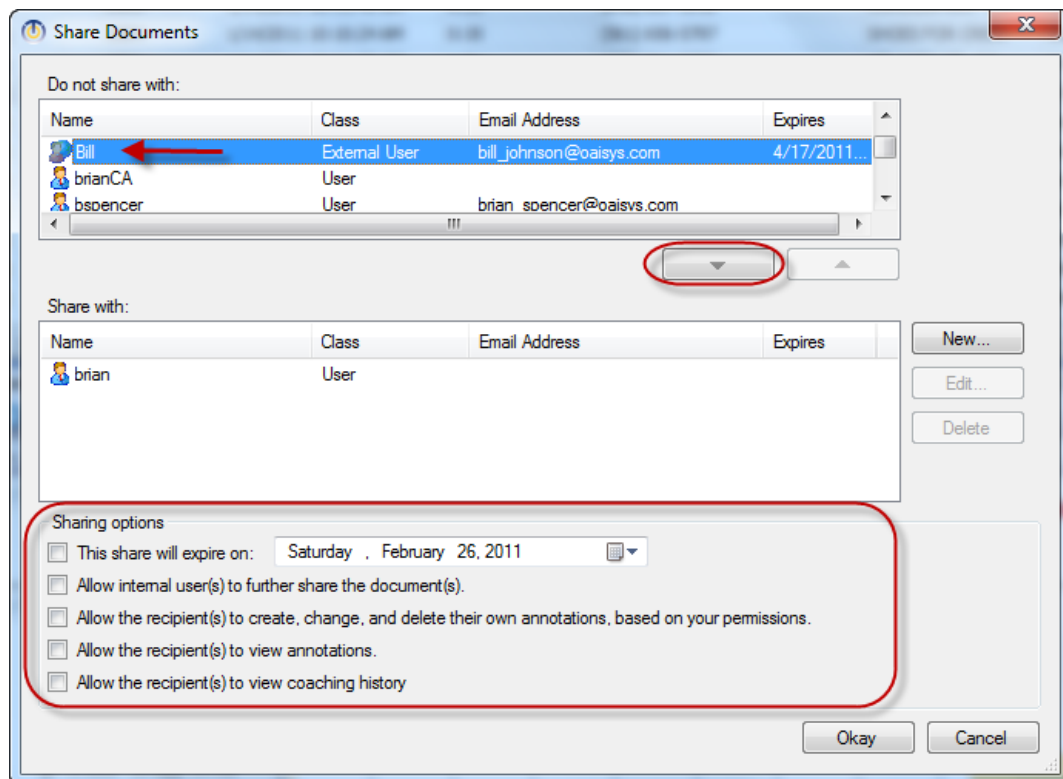


SHARE

You can share a call located in any folder if you have permission to do so (permissions are assigned by the Administrator).

To share the call

Highlight the call → Right-click → select *Sharing* → *Create and Manage Shares*
The Share Documents window will appear.



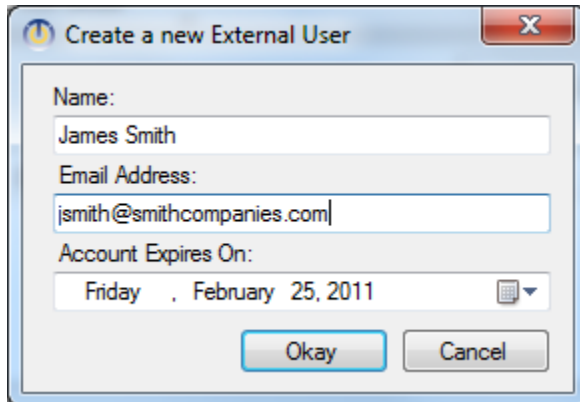
Select one or more users/user groups/external users to share the selected call with, and use the arrow to move them to the *Share with* box.

The user class is displayed next to the name. User represents a user with a client account. A user group represents a group of users set up in the Administrative client application. An external user is someone outside of the regular business that has a temporary user account. An external user must have an email account associated with their name. An external user must have an expiration date associated with their user account.

ADD A NEW EXTERNAL USER

To add an external user not displayed in the list of names

Click on [New](#) → enter the name, email address, and the date you would like the account to expire on; the default is three days → Click [Okay](#)



SHARING OPTIONS

This Share will expire on

Enter a checkmark to indicate you'd like to specify an expiration date. Enter a date or click on the drop-down to display a calendar. This is the date the selected user or user group can access the call(s) through. If a user tries to access a document beyond the expiration date they will receive an expiration notice and they will not have access to the call(s).

Allow internal user(s) to further share the call(s)

Enter a checkmark to indicate whether or not you'd like to allow the recipient(s) of the shared call(s) to share the call(s) with someone else.

NOTE: If the recipient of the shared call(s) is allowed to further share the call(s) the next recipient will be limited to the permissions of the original sender.

Example

If you share a call involving you and the president of your company, but you only have permission to listen to the segment of the call that involves you, the



recipient, and anyone whom they share it with, will be limited to the segment of the call that involves you.

Allow the recipient(s) to create, change, and delete their own annotations, based on your permissions

Enter a checkmark to indicate whether or not you'd like to allow the recipient(s) to be allowed to use the annotation feature to create, edit, or delete annotations. This refers to their annotations. They cannot edit or delete annotations that already exist in the call(s).

Allow the recipient(s) to view annotations

Enter a checkmark to indicate you'd like the recipient(s) to view annotations associated with the call.

Allow the recipient(s) to view coaching history

Enter a checkmark to indicate you'd like the recipient(s) to view the coaching session associated with the call.

Click [Okay](#) to complete the sharing of the call(s).

EXPORTING CALLS AND CALL SEGMENTS

There are several options available when exporting calls, those options include:

- Exporting selected calls
- Exporting the entire grid
- Exporting audio files to disk

EXPORT CALL SEGMENT

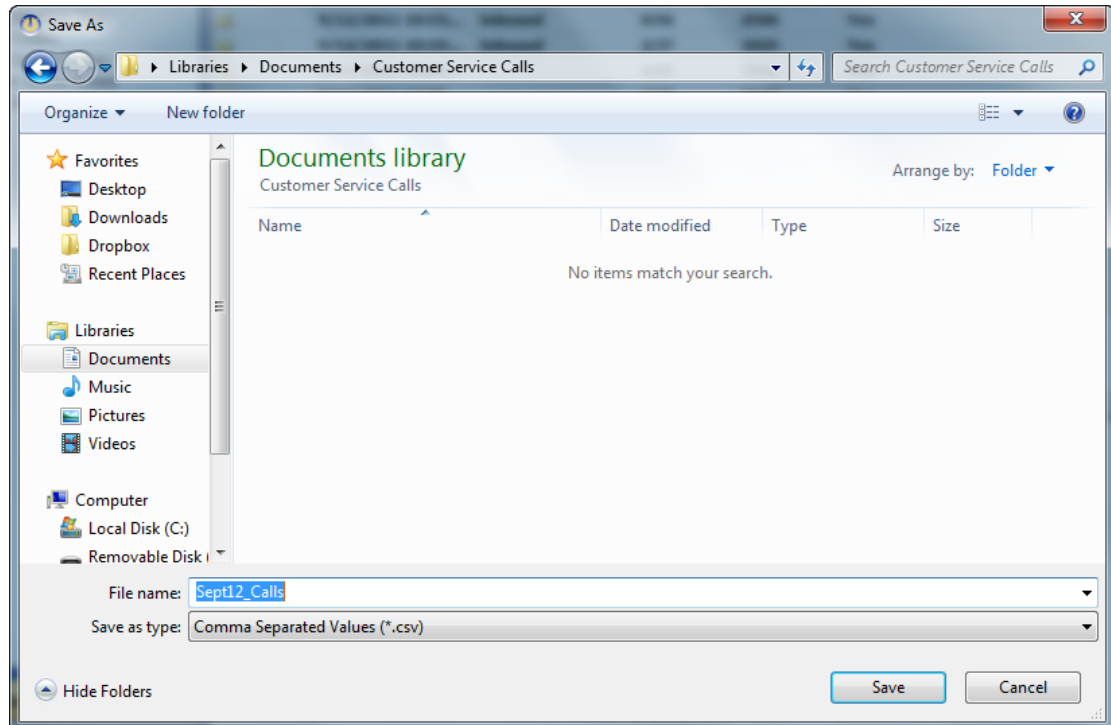
This is the ability to highlight a segment or multiple segments of a call and export only the selected segments. This permission is enabled if permissions to export a call are enabled.

EXPORT SELECTED CALLS(S) TO CSV FILE

Select one or more call recordings in the list.

Right-click → select [Export selected calls to CSV File](#)

This *.csv file will contain all of the call data.



EXPORT ENTIRE GRID TO CSV FILE

Select any call in any folder, right-click and select [export entire grid to CSV file](#).

This will export all calls in the highlighted folder to a single *.csv file.

EXPORT AUDIO TO DISK

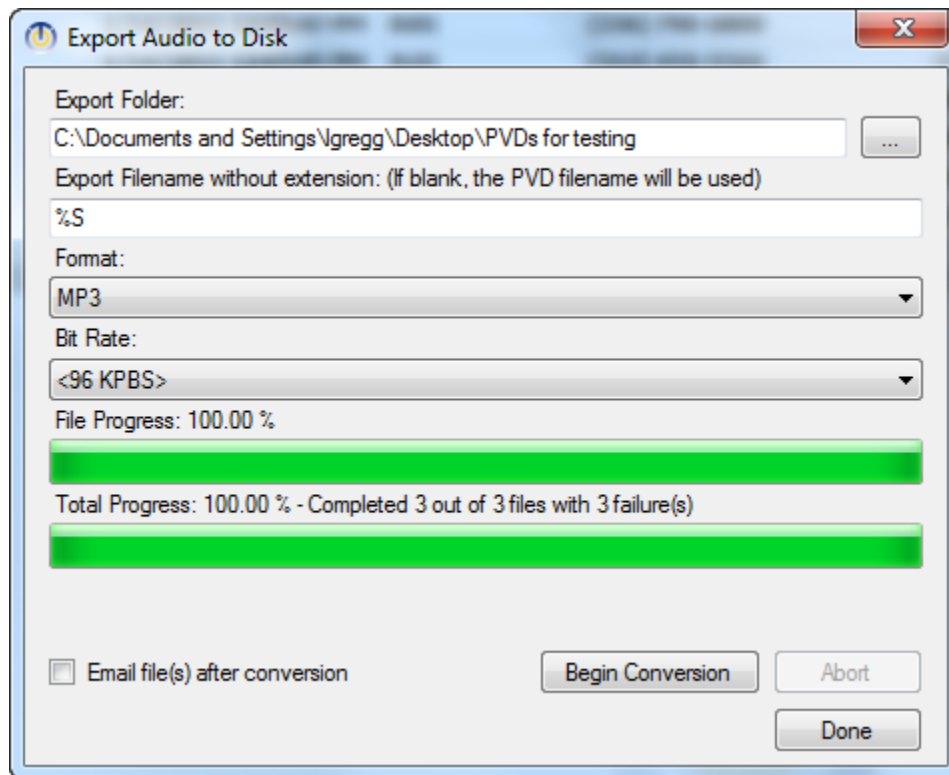
You can export the audio files to disk if you have permission to do so (permissions are set by the Administrator).

To export to disk

Select a call in the list view → right-click → select [Export Audio to Disk](#)



Browse to the location to export the audio file → select a format from the drop-down list.



Check the box to indicate whether or not you'd like to email the file after it has converted. If you check this box an email window will pop up after the file has been converted. You can type in one or more recipients email address and the file will show attached.

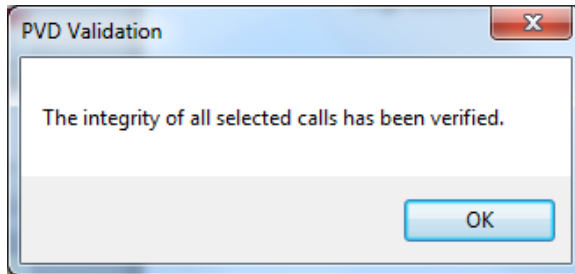
VERIFY SIGNATURES

The OASYS system applies a digital signature to every call recording. The purpose of this digital signature is to validate the integrity of the recordings. This tool is used to check to see if the digital signature is intact.

If a recording were altered in some way the integrity check would fail.

To use this tool

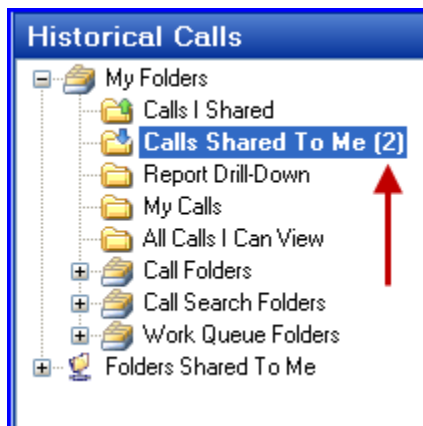
Highlight the desired call(s) in any folder → right-click → select *Verify Signatures*



RECEIVING A SHARED CALL

INTERNAL USERS

Once a call recording has been shared with you by a user the call(s) will appear in your Calls Shared To Me folder, or Inbox. The number in parentheses shows how many new calls you have in your Inbox.



If the Management Studio is minimized and you receive a new call in your Calls Shared To Me folder you will receive a visual notification. A pop-up notification will announce receipt of a new call and an icon will appear in your tray.



You can sort Shared calls. The column headers indicate if a call is shared, who it is from, the date the share expires, and if the recipient is allowed to create, edit, or delete annotations.

EXTERNAL USERS

Once a call has been shared with a recipient by a user, the recipient will receive an email notification that includes a link to the call recording. If the recipient has

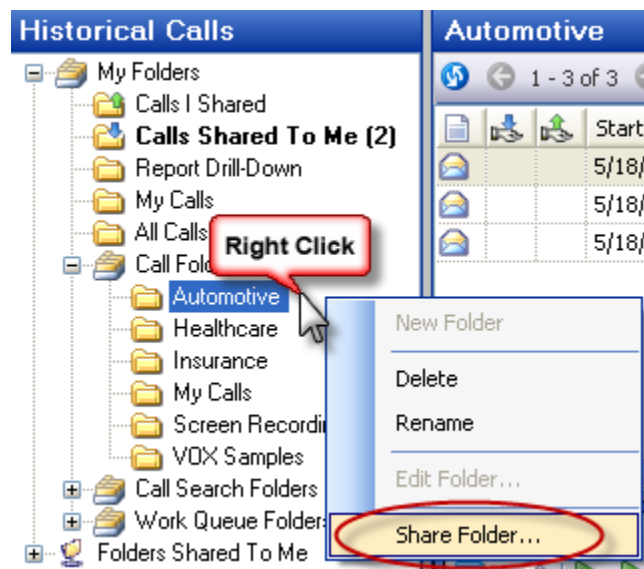


loaded the OAISYS client previously, the client will launch upon clicking the link and the distributed call will be selected and available for the user to play and view the information they have permissions to access. If the recipient has not loaded the client before, they'll be prompted to do so. By default, the temporary account should be valid for three days. The distributor of the call recording can set this to another value.

NOTE: The recipient must have .NET 3.5 SP1 and .NET 4.0 as well as DirectX June 2010 release or later installed on their PC.

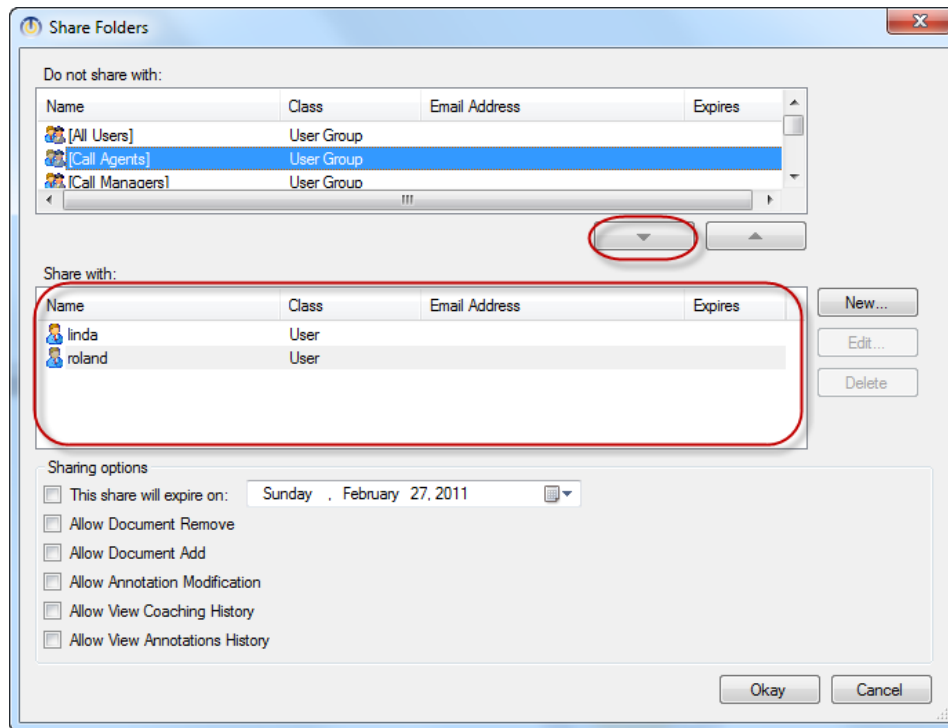
SHARING A FOLDER

From the folder view, select the folder to share → Right-click on the folder → select *Share Folder*





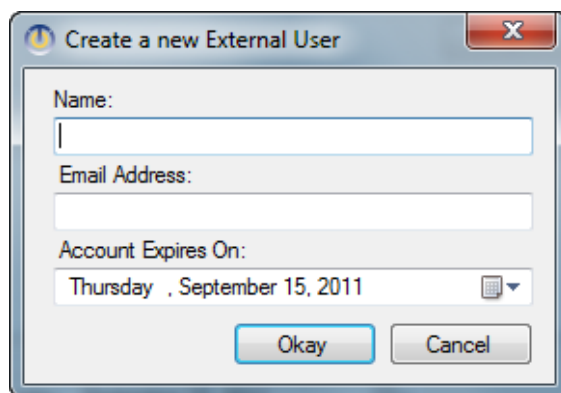
This will bring up the Share Folders window.



Select the users/user groups you want to share the folder with by entering a checkmark next to their name.

If you wish to share with an external user who is not listed and you have permission to add external users, follow the instructions below:

Click the [New](#) button → add their name, email address, and expiration date for their temporary account → Click [Okay](#)





SHARING OPTIONS

Select the date the shared folder will expire on or click on the drop-down to pick a date from the calendar.

Allow Document Remove

Checking this box enables the users/user groups you are sharing the folder with to remove calls from the shared folder.

Allow Document Delete

Checking this box enables the users/user groups you are sharing the folder with to permanently delete calls from this folder. Once deleted, the call is gone.

Allow Document Add

Checking this box enables the users/user groups you are sharing the folder with to add calls to this folder.

Allow Annotation Modification

Checking this box enables the users/user groups you are sharing the folder with to modify annotations.

Allow View Coaching History

Checking this box enables the users/user groups you are sharing the folder with to view coaching histories associated with the calls in the shared folder.

Allow View Annotation History

Checking this box enables the users/user groups you are sharing the folder with to view annotation histories associated with the calls in the shared folder.

NOTE: Shared folders cannot be further shared by a recipient of a shared folder.

FIND/SEARCHING

There are two types of searches available within the OAISYS Management Studio; Basic and Advanced. Each is available from the call list section of the application.

NOTE: Searches cannot be conducted on the criterion of “Redacted”.

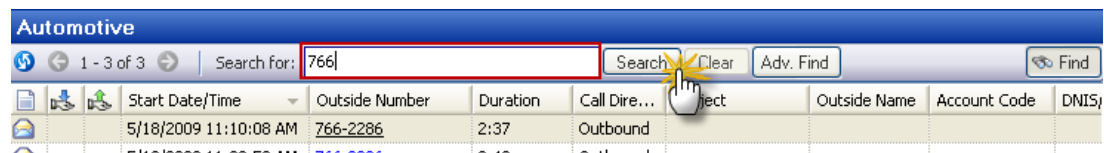
BASIC SEARCH

The basic search allows the user to enter a text string consisting of letters, numbers, or characters and the application will search all fields for the text string entered by the user.

To perform a Basic Search

Click on the [Find](#) button → highlight the call folder you want to search

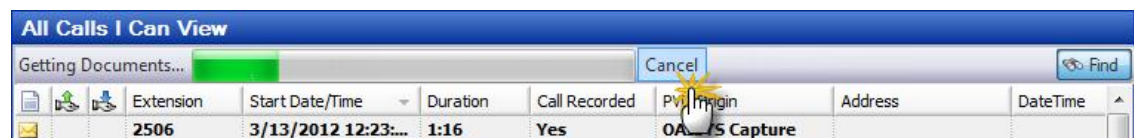
Enter the information you want to be found → click the [Search](#) button as shown below or click [Enter](#) on your keyboard



The OAISYS Management Studio will begin searching all of the calls in the highlighted folder for the information you entered. A green bar indicates the search is in progress. Once complete, the number of calls that meet the search criteria will display next to the search.

Click [Clear](#) to Clear the search results in the selected folder. Keep in mind that for a basic search, all fields are searched and this may take a while if there are many calls in the selected folder.

The [Cancel](#) button is located in the Historical Calls section, providing the ability to cancel a search before it has completed, and will allow the user to cancel loading a folder full of calls. This is particularly useful for customers with heavy call volumes.





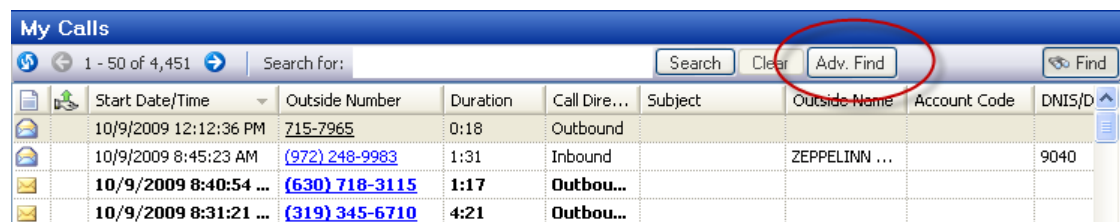
Keep in mind that for a basic search, all fields are searched and this may take a while if there are many calls in the selected folder.

Basic Search – Below are all of the search fields used for the basic search.

- Start Date
- Start Time
- Outside Number
- Duration
- Call Direction
- Subject
- DNIS/DID
- DNIS Description
- Account Code
- Account Code Description
- Outside Name
- Area Code (North America only)
- Agent ID
- Agent ID Description
- Extension
- Extension Description
- Extension Name
- ACD Group
- ACD Group Description
- Extra Call Info
- Annotation Content
- Annotation Date
- Annotation Author
- Annotation Subject

ADVANCED SEARCH

The advanced search is located at the top of the Call List View, and allows the user to select a specific field to search and a value for the field. Advanced searches are most useful when you know exactly what you are looking for.



To perform an Advanced Search

Use the folder view on the left → highlight the call folder you want to conduct the Advanced Search on → Click **Adv. Find** → select a field from the drop down box

Selecting the field enables a condition control. The condition control populates with conditions that are appropriate for the selected field. If appropriate, the value control will become enabled.



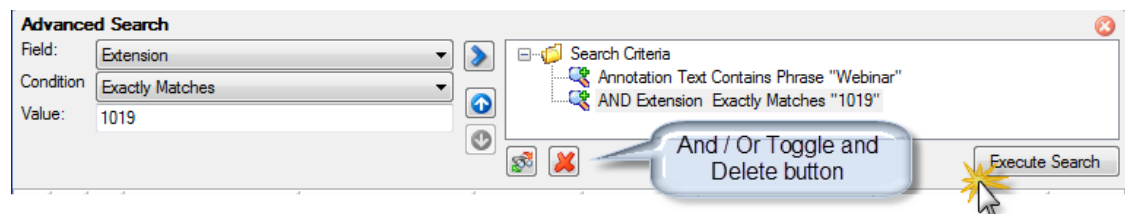
Enter a search value (The advanced search window allows for multiple criteria, including missing information.)

Example

Search all call documents that do not have a correlating account code.

Use the [And/Or](#) toggle to change the search from an 'and' statement to an 'or' statement.

Use the up and down arrows to move the search elements up and down to support grouped element searches.



Finally, click [Execute Search](#) to begin the Advanced Search.

While the search is performed you will see a green bar indicating the search is in progress. Once the search is complete the number of calls meeting the search criteria is displayed next to the Search.

Click [Clear](#) to Clear the search results in the selected folder.

Close the Advanced Search dialog box by clicking on the X in the upper right corner.

SPEECH SEARCH – OPTIONAL

Speech Search is an optional feature which allows users to search historical call recordings for one or more keywords or phrases spoken during the phone call.

This feature is embedded in the Advanced Search section and is phonetically-based; even a slight difference in spelling will affect the outcome of the search results. You may add more than one word or phrase in the same manner as you add additional call data search criteria.

For additional information on using the Speech Search feature, please refer to the [Speech Search User Guide](#).

WORK QUEUES (TRACER ONLY)

A work queue is intended to be used like a To Do list.

What needs to be done before I create a Work Queue?

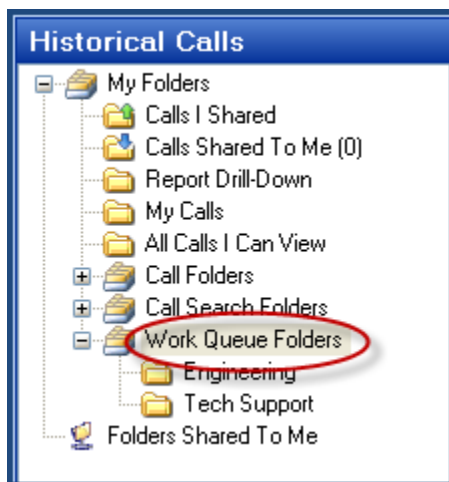
1. An Extension List or an Agent List must be set up in the Administrator.
2. A call filter must be created in the Administrator.
3. An Evaluation must be created in the Administrator. The evaluation will be associated with either an agent list or an extension list and a call filter.

WORK QUEUE DESCRIPTION

The user creates a Work Queue folder that randomly populates calls the user must listen to and evaluate. This can be a set number of calls per day or per week, or a percentage of calls that must be evaluated per day or per week.

Example

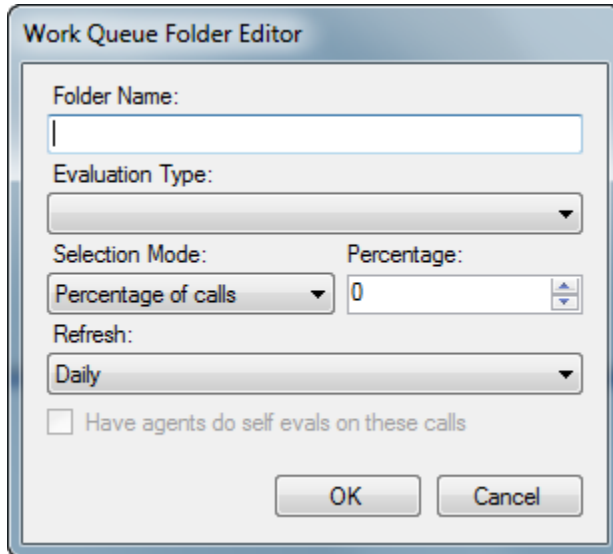
“I want to evaluate a random sample (20%) of my sales agents’ incoming calls each week.”



CREATE A NEW WORK QUEUE

Right-click on the Work Queue Folders → select *New Folder*

This displays the following window:



The 'Work Queue Folder Editor' dialog box contains the following fields and controls:

- Folder Name:** A text input field.
- Evaluation Type:** A dropdown menu.
- Selection Mode:** A dropdown menu with 'Percentage of calls' selected.
- Percentage:** A numeric input field with '0' entered.
- Refresh:** A dropdown menu with 'Daily' selected.
- Checkbox:** An unchecked checkbox labeled 'Have agents do self evals on these calls'.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

Folder Name: Enter a name for the Work Queue Folder

Evaluation Type: Select the evaluation you'd like this work queue to be associated with from the drop down list.

NOTE: Evaluations must be created in the administrative application before they will appear in the drop down list.

Selection Mode: Select either Percentage of Calls or Number of Calls.

Percentage: Enter a percentage of calls you wish to evaluate.

Number: Enter the number of calls you wish to populate the work queue.

Refresh: Select Daily or Weekly. This is how often you would like your work queue to repopulate with fresh calls.

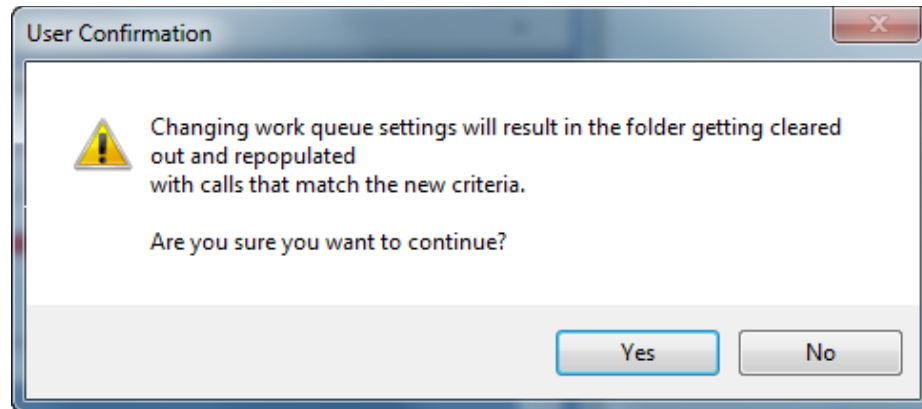
Checkbox: Enter a check to indicate that the agent(s) must evaluate the same call(s). If selected, the agent will see a work queue folder in their Tracer application. The work queue will automatically be populated with the same calls that their manager evaluated.

EDIT A WORK QUEUE

Select the [Work Queue](#) → right-click → select [Edit Folder](#)

Change any information and click [OK](#) to save the changes.

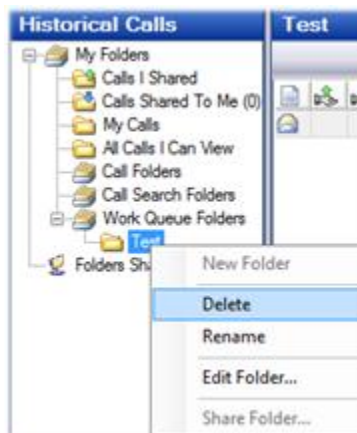
The following warning message will appear:



NOTE: Clicking [Yes](#) will remove all existing calls in your Work Queue. Your folder will repopulate with new calls.

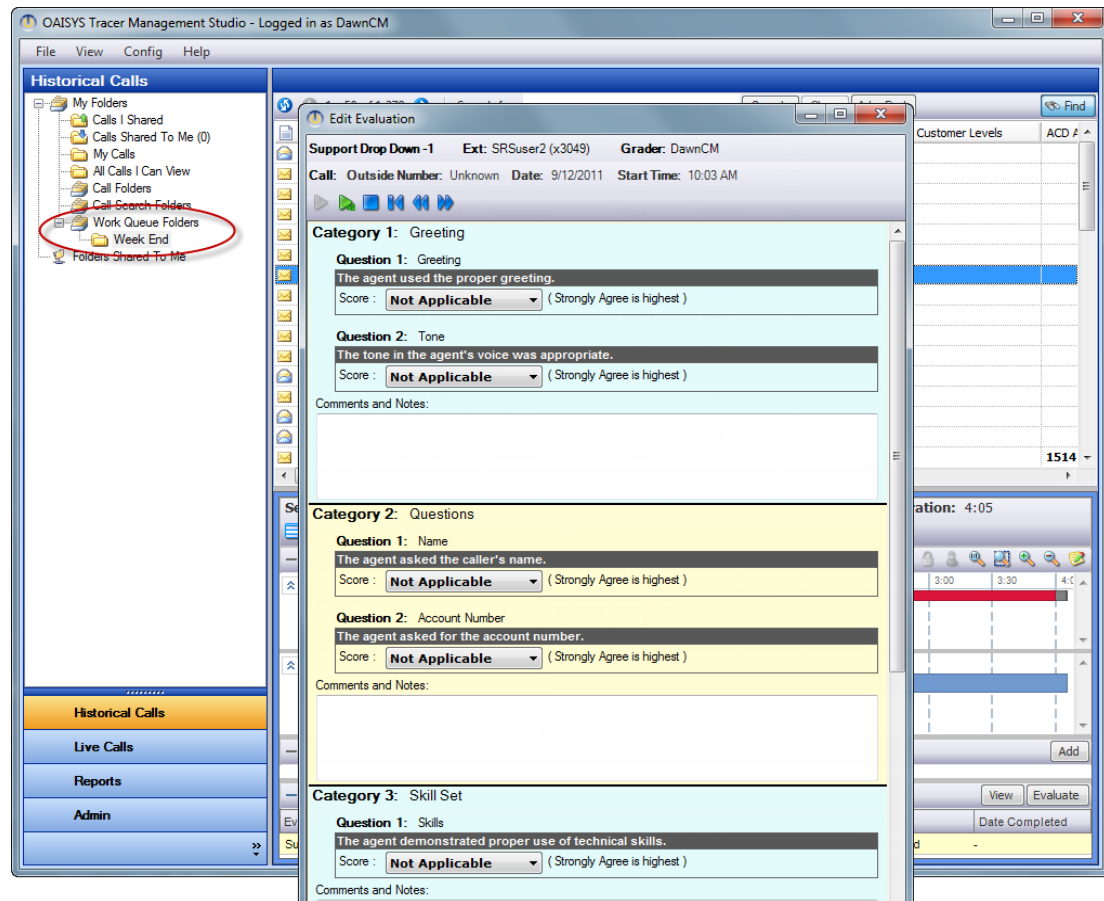
DELETE A WORK QUEUE

Select the work queue folder you want to delete → right-click → select [Delete](#)



USING A WORK QUEUE

Once a work queue is created it is populated with random calls the user must evaluate. When the user highlights the Work Queue, the first call in the work queue will open with the evaluation form and the audio will begin playback.



The user may begin evaluating the call immediately. Once the user finishes the evaluation the call will disappear from the Work Queue and the next call in the list will open to be evaluated. The user may choose to finish the evaluation later - if the user does not complete the evaluation, the call will remain in the Work Queue. Once a call evaluation is finished, the next call evaluation in the list will open. This will occur until the user clicks off of the Work Queue folder. The Work Queue is repopulated with random calls every 24 hours according to the housekeeping settings.

The work queue will randomly populate with calls according to the user



permission settings. If a call in a Work Queue has more than one evaluation associated with it, the following behavior will occur:

The evaluation form will open for the first agent or extension when the call is selected. The user may choose to finish the evaluation later and can select the same call but another evaluation for the call. The call will disappear from the user's work queue when any one of the available evaluations is complete. If desired, the user can find the other evaluations through a search in another folder in Historical Calls. If a call has more than one evaluation associated with it, the first agent or extension involved in the call will be the first evaluation in the list and thus the first evaluation to open.

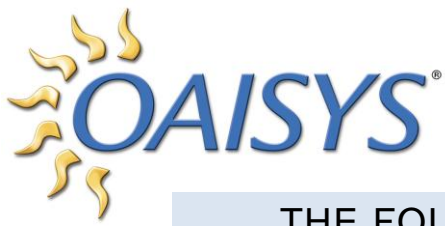


LIVE CALLS

The Live Calls application is used to monitor or listen live to calls as they take place. This is a permissions-based application requiring a user-type of 'Call Manager' designation for access to the Live Calls interface. A user may have permission to all calls on their phone system or only calls that meet a criteria determined by the administrator. In addition to listening live to a call, permissions can be enabled for a user to stop and start call recordings, add a piece of information to a call, add an annotation to a call, evaluate an agent's performance, or coach an agent from the Live Calls interface.

Start Date/Time	Channel State	Screen State	Extension	Outside Number	Outside Name	Direction
9/12/2011 10:48:58 AM	Recording	Not Recording	1514	(602) 357-3911	JP VOICE	Inbound
9/12/2011 10:50:14 AM	Recording	Not Recording	2501	(224) 699-6000	JP MORGAN	Inbound
9/12/2011 10:41:31 AM	Recording	Not Recording	1016	(503) 654-3000	MATRIX NETWORKS	Inbound
9/12/2011 10:47:30 AM	Recording	Not Recording	1025	(800) 461-8649		Outbound
9/12/2011 10:51:32 AM	Recording	Recording	3048			Unknown
9/12/2011 10:51:33 AM	Recording	Not Recording	3049			Unknown

Evaluation Title	Grader	Employee Ext	Employee Descri...	Final Score	Status	Date Completed
Eval - All Calls	DawnCM	xT9202	xT9202	-	Not Started	-
Eval - All Calls	DawnCM	x1514	Doug Saviano (x...	-	Not Started	-
Call Center CS - ...	DawnCM	xT9202	xT9202	-	Not Started	-



THE FOLDER VIEW WITHIN LIVE CALLS

Live Calls are very similar to Historical Calls. The interface consists of a folder view, a call view, call details, annotations, and evaluations.

The folders are:

All Calls

This folder contains a list of all calls the user has permission to see that are currently taking place on the phone system or systems. **Calls can be live monitored across more than one Tracer system.

Calls by User

This is a customized folder or folders that can be used to monitor live calls by a specific Tracer User.

Example

A Call Manager has many calls in their All Calls folder and they are primarily interested in listening or monitoring a new employee's calls. They can set up Calls by User folder.

Calls by Category

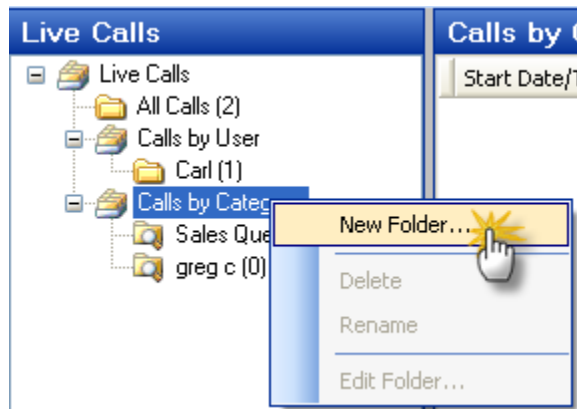
This is a customized folder or folders that can be used to monitor live calls by any number of criteria. This is set up similar to a search folder.

Example

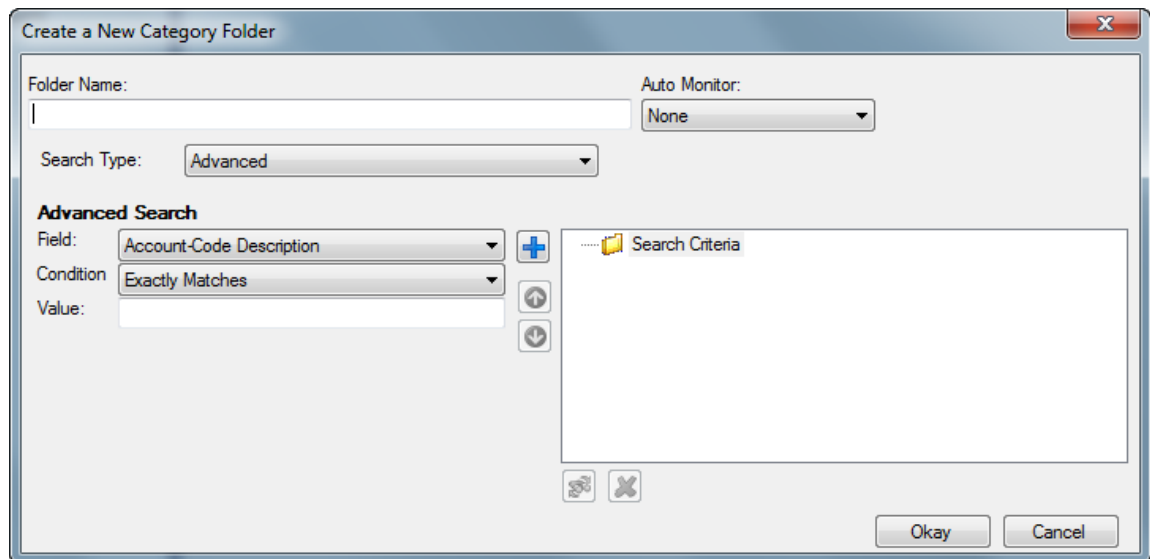
A Call Manager must watch for calls from a certain area code, or if a Call Manager wants to be aware of outbound calls from a group of employees that exceed ten minutes. Calls by Category folders can be used to accomplish this.

Create a New Folder

Select [Calls by User](#) or [Calls by Category](#) → Right-click → Choose [New Folder](#)



The following window will display.



Enter a name for your folder → select the Search Type: Basic, Advanced, or Call Filter → enter your search criteria → click [Okay](#)

Your newly created folder will appear as a subfolder in your Live Calls folder view. When you highlight the folder, all calls that meet the criteria will display.

Go to [View](#) → [Field Chooser](#) to select the fields you would like to display in the Call Grid → drag and drop the fields



LISTEN LIVE

Double-click on a call in the call grid to open a child window. Click the [Listen Live](#) button to immediately begin playing the call over your PC speakers.

Call Redaction

Users can redact portions of live calls if appropriate permissions are enabled. *Spoken time overlay remains in place even if a portion of the call is redacted.*

NOTE: You can click [Listen Live](#) from the parent window also.

The screenshot displays the OAISYS Management Studio interface. The top window shows a list of calls with columns for Start Date/Time, Extension, Outside Number, Screen State, Channel State, Outside Name, Account Code, and Direction. A call with Extension 1009 and Outside Number (602) 222-3456 is selected. Below the list, a detailed view of the selected call is shown, including a timeline of the call duration (0:00 to 0:50) and a list of annotations. The 'Listen Live' button is highlighted in the 'Call Active' section. The bottom window shows a list of evaluations for the selected call, with columns for Evaluation Title, Grader, Employee Ext, Employee Description, Final Score, Status, and Date Completed.

Start Date/Time	Extension	Outside Number	Screen State	Channel State	Outside Name	Account Code	Direction
8/13/2013 12:52:30 PM	T9222	(410) 961-6620	Not Recording	Recording			Outbound
8/13/2013 12:41:17 PM	2007	(808) 443-2816	Not Recording	Recording	NONE		Inbound
8/13/2013 12:39:03 PM	2007	(425) 460-3044	Not Recording	Recording	FIRSTLINE		Inbound
8/13/2013 12:50:35 PM	2006	(209) 955-2643	Not Recording	Recording	IT S		Inbound
8/13/2013 12:33:15 PM	1537	(972) 948-7513	Not Recording	Recording	TEXAS		Inbound
8/13/2013 12:46:16 PM	1511	(770) 446-3100	Not Recording	Recording	FULTON COMMUNIC		Inbound
8/13/2013 12:52:22 PM	1203	(303) 656-3335	Not Recording	Recording	DENVER, CO		Inbound
8/13/2013 12:35:41 PM	1016	(817) 485-0300	Not Recording	Recording	HUGGINS HONDA		Inbound
8/13/2013 12:34:10 PM	1013	(905) 267-4428	Not Recording	Recording	ONTARIO		Inbound
8/13/2013 12:51:42 PM	1009	(602) 222-3456	Not Recording	Recording			Outbound
8/13/2013 12:49:27 PM	1004	(301) 755-2251	Not Recording	Recording			Outbound

Call Active: Ext: 1009 Outside Number: (602) 222-3456 Start: 12:51:42 PM

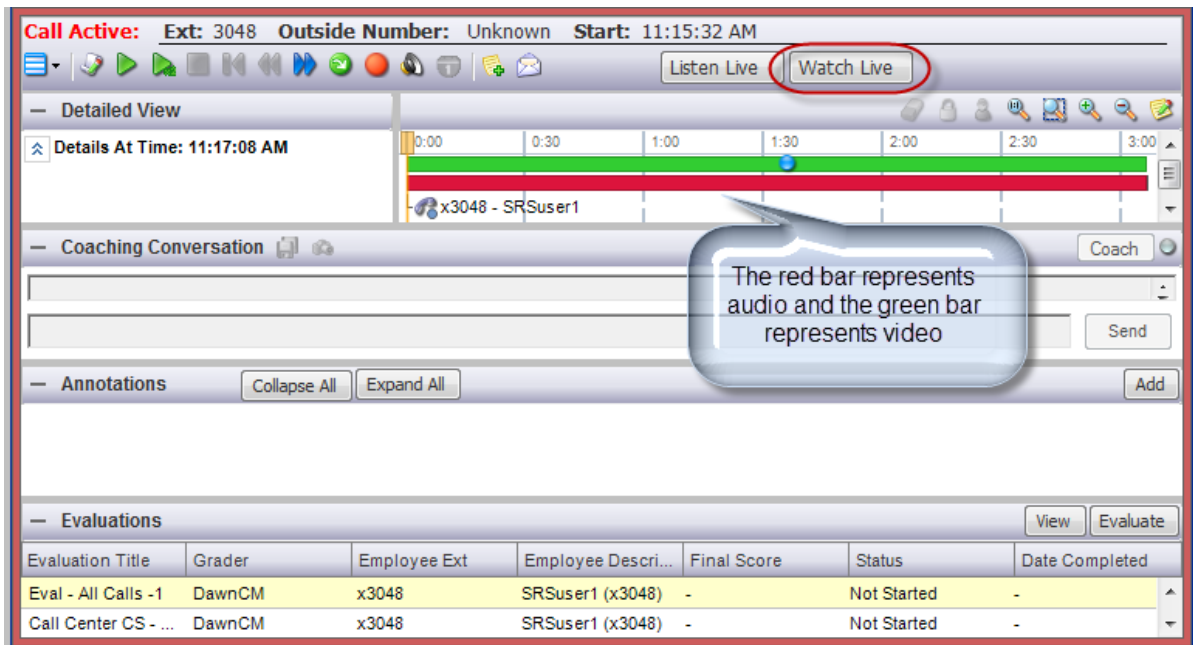
Listen Live

Annotations:

Evaluation Title	Grader	Employee Ext	Employee Description	Final Score	Status	Date Completed
Eval - All Calls -1	linda	xT9221	xT9221	-	Not Started	-
Eval - All Calls -2	linda	x1009	Linda Gregg (x1009)	-	Not Started	-
Seven Questions -3	linda	x1009	Linda Gregg (x1009)	-	Not Started	-
Call Center CS - Radi	linda	xT9221	xT9221	-	Not Started	-

LIVE DESKTOP MONITORING - OPTIONAL

OAISYS Desktop Monitoring is an optional companion product to Tracer. In the Live Calls application, users with permissions enabled for audio can also view the Live Desktop Activity of an agent while the call is in progress. If a screen recording, or desktop video is present for a call recording the user will see a green bar above the red bar in the visualization pane. The red bar represents audio and the green bar represents desktop video. (There will never be desktop video without audio, however there may be audio without desktop video.)



The user must first select the [Play](#) button to begin playback of the audio. The user can then select the [Show](#) button to begin playback of the desktop video.

DESKTOP REQUIREMENTS FOR SCREEN RECORDING

- 2.5GHz processor
- 1GB of RAM

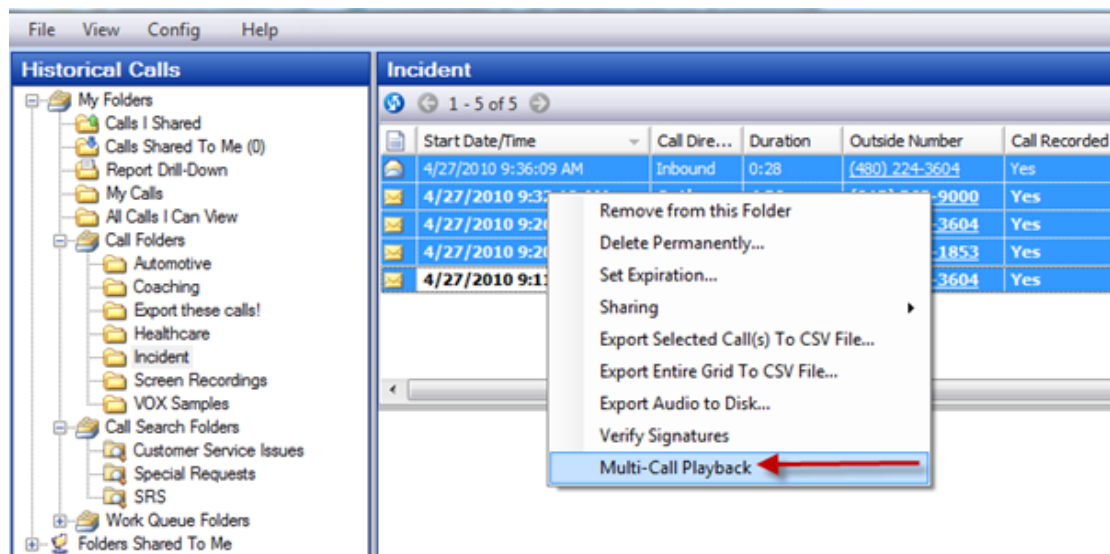


MULTI-CHANNEL PLAYBACK

The Multi-Channel Playback feature provides the user with the ability to play up to eight recordings simultaneously. This feature can be used for incident reconstruction.

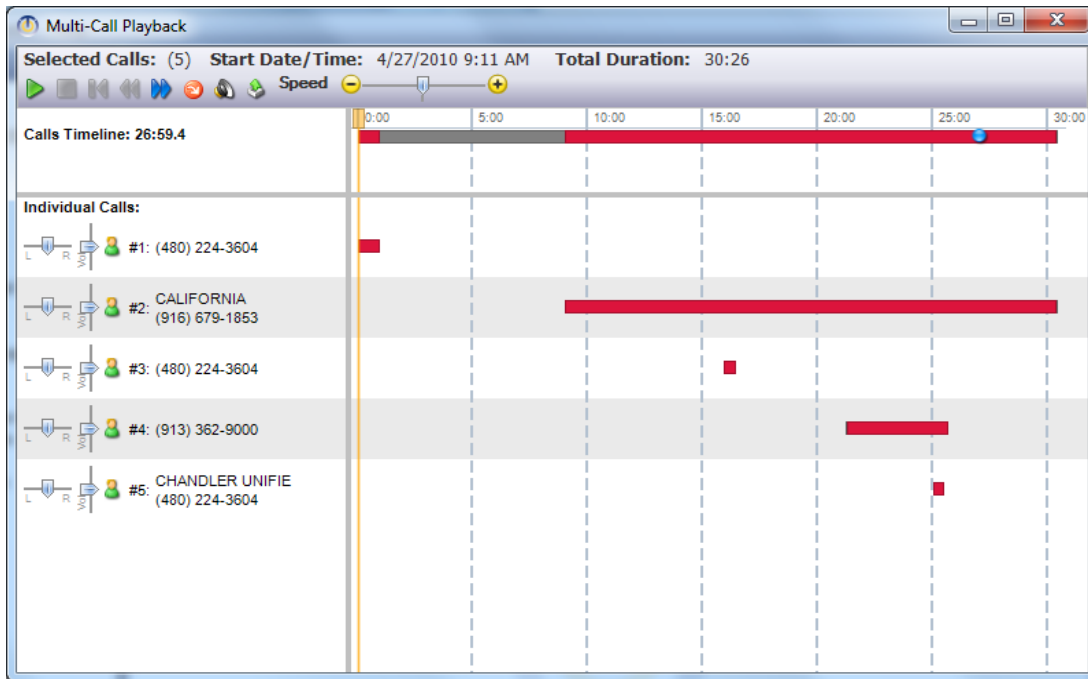
The user can select up to eight calls from the call grid for simultaneous playback. The calls will be played back as they occurred in real time. The audio can be played back slower than normal in order to capture key information. The Loop Playback feature can be used to play a section of a call or multiple calls continually, or until it is manually stopped by the user.

Highlight the desired call in the Call Grid. Use the Control or Shift keys to select additional calls → right-click → select [Multi-Call Playback](#)





The selected calls will appear in a Playback window.



Basic Call Information will be displayed. Please note that extension and other call information is available in other views within the OAISYS Management Studio. The Multi-Call Playback window does not display extension information.

Selected Calls – This displays the number of PVDs or calls that are loaded into the window.

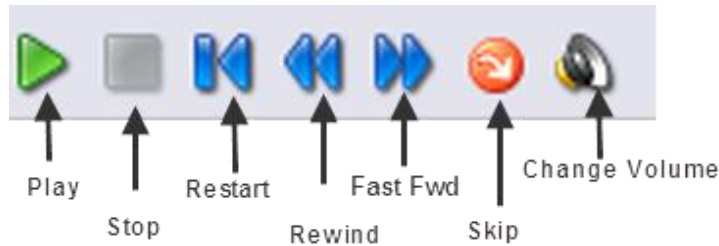
Start Date and Time – This is the start date and time of the call. If more than one call is selected this is the start date and time of the earliest or first call.

Total Duration – This is the total of all call durations.

Playback Controls – Use these buttons to control the playback of the audio.

PLAYBACK CONTROLS

Use the playback buttons to control the audio.



Play – Begin playback of the audio

Stop – Stop audio playback

Restart – restart the audio from the beginning of the file

Rewind – rewind the audio ten seconds

Fast Forward – fast forward the audio ten seconds

Skip – Skip over sections with no audio

Change Volume – adjust the volume of the audio

SPEED BAR

This tool allows the user to play audio faster or slower than normal.



Drag the slider to the left to slowdown and to the right to speed up the audio. The speed control applies to all calls in the player.

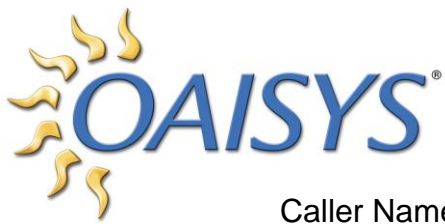
THE CALLS TIMELINE

The Calls Timeline represents the time the first call started until the time the last call ended.

The time displayed to the left is the current place of the blue Tracker Ball.

INDIVIDUAL CALLS

Each call loaded into the window will be represented by a red line. Each call has left/right speaker control. Each call has volume control. The calls all have the

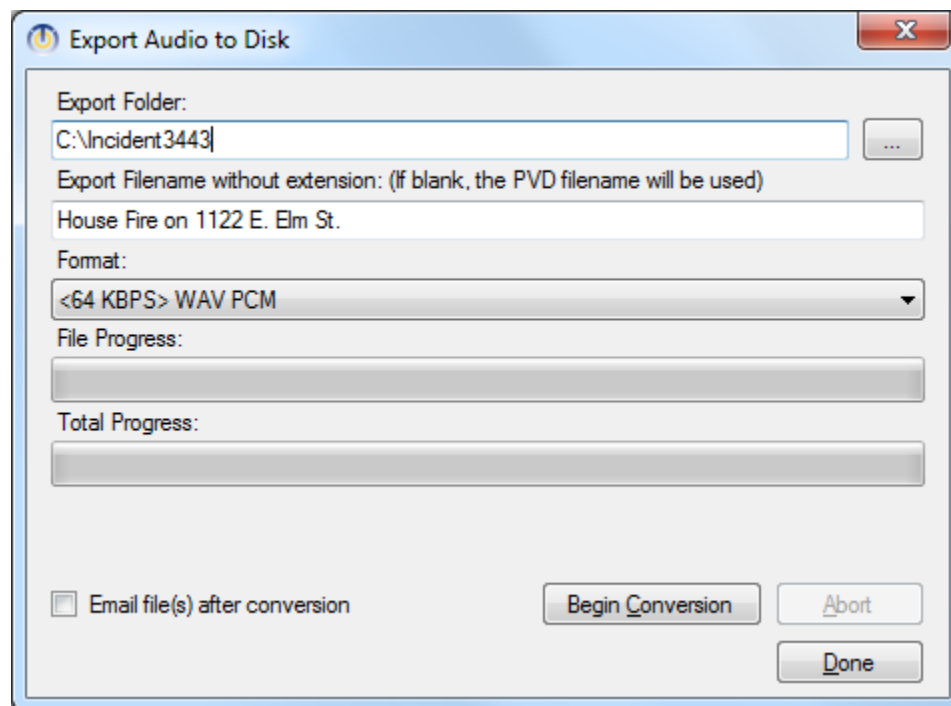


Caller Name and Outside Number when they are available. Please note additional call details are available in other views within the OAISYS Management Studio.

EXPORT MULTIPLE CALLS RELATED TO AN INCIDENT

The ability to select one or more calls' audio for export is a permission that can be allowed or denied. MP3, WAV, and PVD formats are supported.

Select the calls from the call grid → select [Export Audio to Disk](#) or click the [Export](#) icon in the Multi-Call Playback window.



Browse to the location of the export folder; for example "House Fire". Enter a file name if desired.



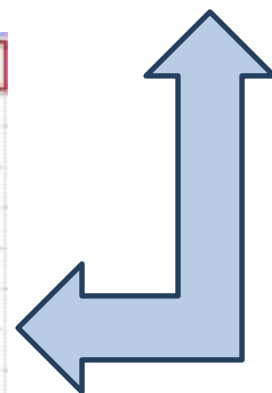
AUTOMATIC LOCATION IDENTIFICATION INTEGRATION

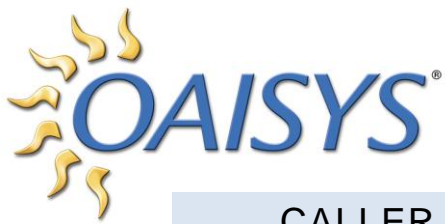
Automatic Location Identification (ALI) is an optional feature and is commonly used in Public Safety to identify where someone is calling from; it provides a physical address that corresponds with a phone number. This information is integrated into the OAISYS solution as part of the call record and displayed as a street address and/or longitude/latitude coordinates. In addition, the address and/or location are searchable information to provide insight for compilation of statistical data for trend evaluation.

- ◆ This optional feature requires a PSAP or 911 system providing the ALI information to OAISYS.
- ◆ Each 911 system may provide different output that OAISYS will need to interpret.
- ◆ Below is an example of what the ALI integration may look like in the Management Studio.

Start Date/Time	Duration	ANI	CustomerName	HouseNumber	StreetName	Longitude	Latitude	Call Recorded
1/21/2011 8:16:45 AM	0:38	(713) 555-8578	R MICHAELS	7130	GRANT BLVD			Yes
1/21/2011 8:15:55 AM	0:42	(713) 555-0707	VALLEY BANK	4235	JEFFERSON ST			Yes
1/21/2011 8:14:11 AM	2:35	(713) 555-3871	AT & T MOBILITY		SW OF 212 2ND ST	-95.3535907	+29.7568306	Yes
1/21/2011 8:13:45 AM	0:00							No
1/21/2011 8:13:45 AM	1:06	(713) 555-5670	HARRIS COUNTY	300	COURT AVE			Yes
1/21/2011 8:12:47 AM	1:48	(713) 555-8578	R MICHAELS	7130	GRANT BLVD			Yes
1/21/2011 8:12:12 AM	1:04	(713) 555-5897	EAST HOSPITAL	7965	PARKER ST			Yes
1/21/2011 8:09:33 AM	1:05	(713) 555-0045	VERIZON		NE OF 418 8TH AVE	-95.2898711	+29.9545424	Yes

StreetName	Longitude	Latitude
GRANT BLVD		
JEFFERSON ST		
SW OF 212 2ND ST	-95.3535907	+29.7568306
COURT AVE		
GRANT BLVD		
PARKER ST		
NE OF 418 8TH AVE	-95.2898711	+29.9545424





CALLER LOCATION DRIVEN MAP

The user can display a map showing a caller's location based on the caller's physical address or the longitude/latitude coordinate information. The physical address or the longitude/latitude coordinate information can be entered into the OAISYS system in several ways:

- ◆ Through ALI integration with a 911 system
- ◆ Through the OAISYS API
- ◆ By entering the information through the Desktop Client application
- ◆ Through call columns in the Management Studio

The screenshot displays the OAISYS Management Studio interface. The top window, titled "All Calls I Can View", shows a list of calls with columns for Address, Coordinates, Extension, Start Date/Time, Duration, and Outside Number. A red box highlights the "Address" and "Coordinates" columns. Below the list, a "Selected Call" summary shows details for call (602) 200-4251 on 3/6/2011 at 10:09 AM, with a duration of 0:58. A red arrow points from the "Coordinates" column in the call list to a "Call Location Map" window. This window shows a Google Map of the area around AZ Mills Mall Tempe AZ, with a red pin indicating the location. The map includes street names like S Arizona Mills Cir and S Priest Dr, and landmarks like Gameworks and Western Canal.

Requirements
OAISYS Software
Version 7.1 or later



TROUBLESHOOTING & KNOWN ISSUES

For troubleshooting and known issues please reference the OAISYS WikiSpaces:

<http://oaisys.wikispaces.com/>

Reference the Troubleshooting Guide for common issues:

[http://www.oaisys.com/downloads/OAISYS Troubleshooting Guide 2011.pdf](http://www.oaisys.com/downloads/OAISYS_Troubleshooting_Guide_2011.pdf)