

Conversations screen

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Getting started

As of release 6.0 the Conversations Screen has replaced the Interactions screen used in previous versions of QM suite. The new Conversations Screen runs on a unique Omnichannel conversations platform, with built in search engine and player, known as ZOOM Omnichannel Search Engine (OSE). The main benefits include significantly better performance and expansion to include additional communication channels such as emails and chats on top of the voice and screen conversations. All this functionality is now centralized in a single (omni) channel engine. Currently we support integration of emails from Sales Force or eGain and chats from Cisco Spark. The Quality Management Admin Guide covers the [Conversations Screen - Omnichannel Search Engine \(OSE\)](#) in more detail.

The ZOOM 6.4 release brings a layout redesign to the Conversations screen. Primarily this change accommodates the growing number of filters and features.

Click **Conversations** in the navigation tree of Quality Management to get started. The **Conversations** screen is where you can search and view emails, chats or play recorded conversations as well as initiate a conversation review. You need proper privileges to access the Conversations screen and to view conversations. See the [Roles](#) page for more details.

The Conversations screen consists of the following main sections.

The screenshot shows the Zoom Quality Management Conversations screen. It features a top bar with a search field and filter options. Below is a list of conversations, each with a row of details including contact names, subject lines, durations, and timestamps. A selected conversation is highlighted in blue, and its details are shown in a side panel. This panel includes a key conversation summary and actions like 'Review', 'Add Tag', 'Export', and 'Anonymize'. Below the summary is a preview pane showing a timeline of conversation segments with play buttons and durations. To the right of the preview pane is a detail pane showing metadata for the selected segment. At the bottom of the screen is a player for audio playback, showing a progress bar and a play button.

- Top bar** – Contains the search bar, filters and action buttons used for saving, refreshing and resetting searches.
- List of conversations** – All or filtered conversations are listed in this main section together with the number of found conversations. The Load More button and the selected row will be highlighted.
- Key conversation info and actions** – Selected conversation summary and the key actions used for reviewing, tagging, exporting or anonymizing.
- Preview pane** – Shows conversation segments and review history in a timeline. Call segments can be played from here, chats will be grouped in threads and emails listed in the order they occurred.
- Detail pane** – Shows detailed information about the selected conversation segment.
- Player** – Call conversations will play here, the audio waveform and the speech tags or screen recording will be visible if available.

<p>← 23</p> <p>Manaf Al Rayan (MAM) ref_20230404_20230404 (ref)</p>	<p>helpdesk@cozmin.com, lucia.kiki@cozmin.com, muhammad.gasfar@cozmin.com, muhammadhafa.gasfar@cozmin.com, muhammad.rahim@cozmin.com, muhammad.gasfar@cozmin.com, mawadd.ahad@cozmin.com, pavel.mogato@cozmin.com</p>	09/07/2018
<p>→ </p> <p>SPOGA + GARA 2018</p>	<p>christine.clark@gp-fac.info, vshelpdesk@cozmin.com</p>	Today at 04:42
<p>→ </p> <p>SPOGA + GARA 2018</p>	<p>christine.clark@gp-fac.info, helpdesk@cozmin.com</p>	Today at 04:42
<p>→ </p> <p>Configuration Management Standard Requirements</p>	<p>marqly@theinfoservice.com, vshelpdesk@cozmin.com</p>	Today at 03:02
<p>→ </p> <p>Configuration Management Standard Requirements</p>	<p>helpdesk@cozmin.com, marqly@theinfoservice.com</p>	Today at 01:44
<p>Total 2,959</p> <p style="text-align: center;">Load more</p>		

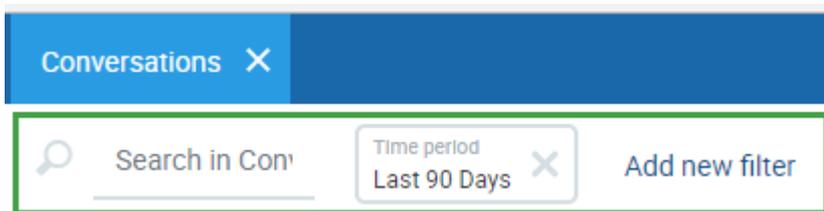
i If there are no stored conversations found the message *No conversations found* will be displayed.

Troubleshooting tip – If you use Google Chrome browser and have issues with viewing the Conversations screen please ensure you have the default 'Allow local data to be set (recommended)' option set under **Chrome Advanced settings > Content settings**.

Save, reset or refresh search

Search for conversations according to the criteria described in the following sections.

At the top left of the Conversations screen, the following options are displayed:



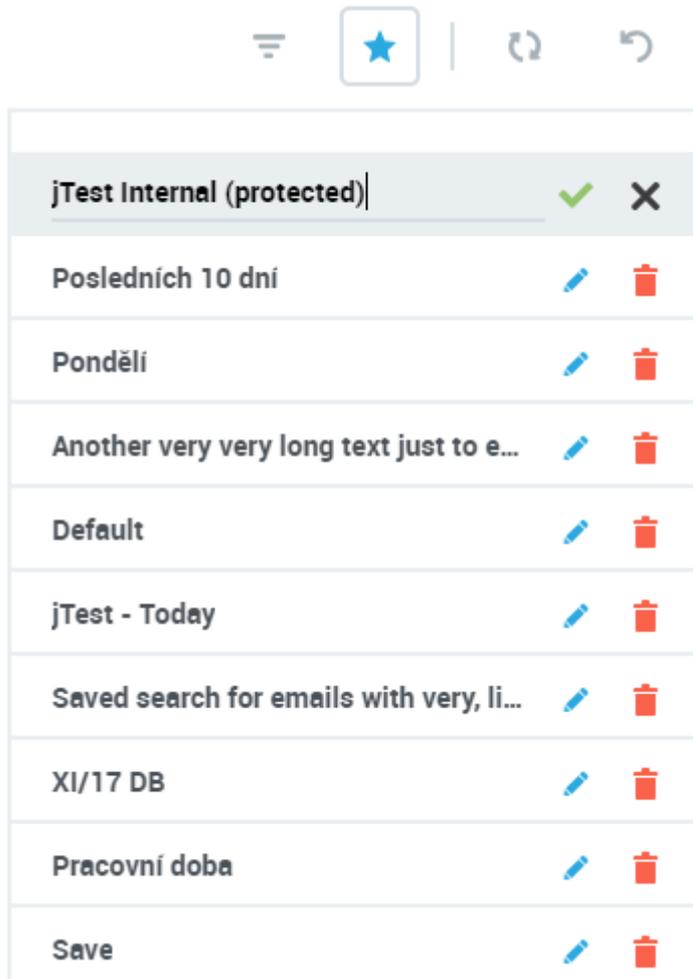
- **Search in Conversations** – Search conversations that either include or exclude specified terms, names or other entered text contained in several fields. Learn more in the section – [129580470](#).
- Default **Time period** filter – Preset filter to display conversations that occurred in the last 90 days. You may remove the filter by clicking the **X** cross icon on the filter label. Alternatively, along with other filters, you may change the Time Period filter to another date range as explained in the following sections.
- **Add new filter** – Click to view the filtering options. A filtering pane with all filter options opens to the right on the screen. Individual filters are explained in the following sections.

At any time while searching for conversations you can use the top right buttons to perform the following actions:



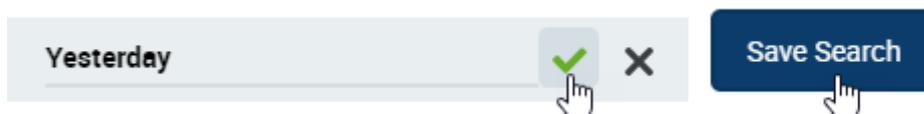
- **Filters** – Click to view the filtering options available to narrow down the number of displayed conversations

- ★ **Use Saved Search** – retrieve and use your previously saved searches
 - You can rename or delete your saved searches. There's an immediate **Undo Delete** option for unintentional deletion.



Search Name	Save Status	Delete
jTest Internal (protected)	✓	✗
Posledních 10 dni	✎	✗
Ponděli	✎	✗
Another very very long text just to e...	✎	✗
Default	✎	✗
jTest - Today	✎	✗
Saved search for emails with very, li...	✎	✗
XI/17 DB	✎	✗
Pracovní doba	✎	✗
Save	✎	✗

- 🔄 **Refresh Search** – re-run the search with all the parameters you've just set
- ↺ **Reset Search** – clear ALL search criteria just set
- Save Search** – save all the search parameters just set. (Use a unique name for each search you wish to save)



– The following chapters cover topics about finding conversations. To jump to the section about viewing conversations see the [129580470](#) section on this page. –

Searching for conversations by STANDARD criteria

Search in Conversations

 Search in Con

A great way to filter email and chat conversations according to content. This is specifically helpful when you wish to find all conversations that include a certain word(s).

With this **full text search**, you may search conversations that either include or exclude specified terms, names or other entered text in the following conversation fields:

- email address – Exact match is required for an email address to be found!
- email subject
- email body
- chat room name
- chat message
- tag's comment
- conversation ID (exact match only)

Found conversations will be sorted by their match probability score. The first occurrence of any searched terms will be highlighted and the respective text line together with the number of highlight occurrences in the conversation displayed directly on the Conversation preview row.

In the following example, we search for the word "help":

Conversations X

help Time period Last 90 Days Add new filter

final permanent license file to be uploaded and then your installation will be complete. If you require any further help or guidance, do not hesitate to contact us at ZOOM helpdesk. ZOOM Portal +3

09/07/2018

4 REMINDER: Your Commercial Inactive license # [redacted] is about to expire! - [ref: [redacted].ref]

then receive a final permanent license file to be uploaded and then your installation will be complete. If you require any further help or guidance, do not hesitate to contact us at ZOOM helpdesk +3

30/07/2018

6 ZOOM Quality Management Temporary licensing for Royal Commission Yanbu Medical Center - [ref_00D30VKPk_500101iEmg.ref]

restart calrec For more details- please refer to your Administrator guide. If you require any further help or guidance, do not hesitate to contact us at Zoom helpdesk- helpdesk@zoomint.com. +4

25/07/2018

5 Trying to find a recording - [redacted]

:ushelpdesk@zoomint.com> On Jul 25, 2018, at 11:01, Brad, Kendra <kendra.beard@duke.edu> wrote: Hey Brad, Can you help me find this number 800-888-2888 Best Regards, Kendra S +4

25/07/2018

[Newsletter] 3 ways AI can amplify your marketing

change further? (Our editors particularly love it if clients would be brave enough to write about this) - How can MR help the digital transformation of business? - How can MR help companies monetize their +4

Total 504 Load more

The highlights will also be visible in all the conversations you choose to view.

Conversations X

help Time period Last 90 Days Add new filter

5 Help [redacted] Help +3

Welcome to BPT Help Desk

Welcome to BPT Help Desk +1

5 Nexant Inc - Help Request [redacted]

Nexant Inc - Help Request +3

3 Screen Capture not Working for SACWIS Help Desk

Screen Capture not Working for SACWIS Help Desk +2

12 Help Needed turning on recording - [redacted]

Help Needed turning on recording - [redacted]

Review Add Tag Export Anonymize

5

Started 13/07/2018 Originator Ethan Bryant, Cameron Hayden, Andy Horton Participants kathy.m@mcbride.org, ushelpdesk@zoomint.com

13 Jul 2018

09:05 PM kathy.m@mcbride.org ushelpdesk@z...

Help

I got locked out of Quality Management.

Can you help?

Kathy M. McBride

13/07/2018

Help

I got locked out of Quality Management.

Can you help?

Kathy M. McBride
Patient Access Center Coordinator
Tulsa Medical Center - Community Care
Office Phone: 781.622.4801
Cell: 603.674.3233
Fax: 781.261.1970

09:09 PM Cameron Hayden kathy.m@mcbride.org

Help [ref: [redacted].ref]

Hello Kathy, how are you? I tried to call and see if you are available before 2:30 CT (essentially within 20 minutes). If you remember the password, you can wait for 90 minutes, and your access will be restored automatically. Otherwise,

16 Jul 2018

This e-mail message, including any attachments, is intended for the

Exact matches will be found in any language or alphabet, however, for results returning variations of the entered words the results are limited by the language you set and its library. E.g. If your language is set to English and you search for the word "help", the search results return the exact match "help" but also "helping", "helped", "helpful", "unhelpful" etc. The full text search is case insensitive.

i Full text search - language preference

The full text search is by default set to perform language analysis using the English language. A different language can be configured by your Administrator. [Read more.](#)

Using double quotes

To look for an exact phrase, enclose it in double quotes. For example "customer satisfaction" will match only conversations which have exactly those two terms together.

Boolean operators

You may also use the Boolean operators (in UPPERCASE) in the full text search. This table summarizes the available operators and examples for the three most common verticals:

Operator	Meaning	Example (Medical)	Example (Telecom)	Example (Banking)
-	EXCLUDE the term or phrase immediately (no space) after this operator	-"appointment with a doctor"	-receipt	-"interested in"
+	MUST INCLUDE the term or phrase immediately (no space) after this operator	+appointment +"appointment with doctor"	+billing +"internet bill"	+reduced +"reduced interest rates"
AND	MUST INCLUDE BOTH the terms or phrases before and after this operator	+appointment AND "Dr. Smith"	bill AND disconnection	reduced AND penalties
OR	MUST INCLUDE EITHER of the terms or phrases before or after this operator	"John Smith" OR "James Smith"	bill OR invoicing	penalty OR charge
NOT	EXCLUDE the term or phrase after this operator	NOT "appointment with a doctor"	NOT receipt	NOT "interested in"

Grouping more operators

It may be useful to combine more Boolean operators in one search query. For example, to search for problematic conversations for a given customer you could use the following: (problem OR issue) AND xyzCompany

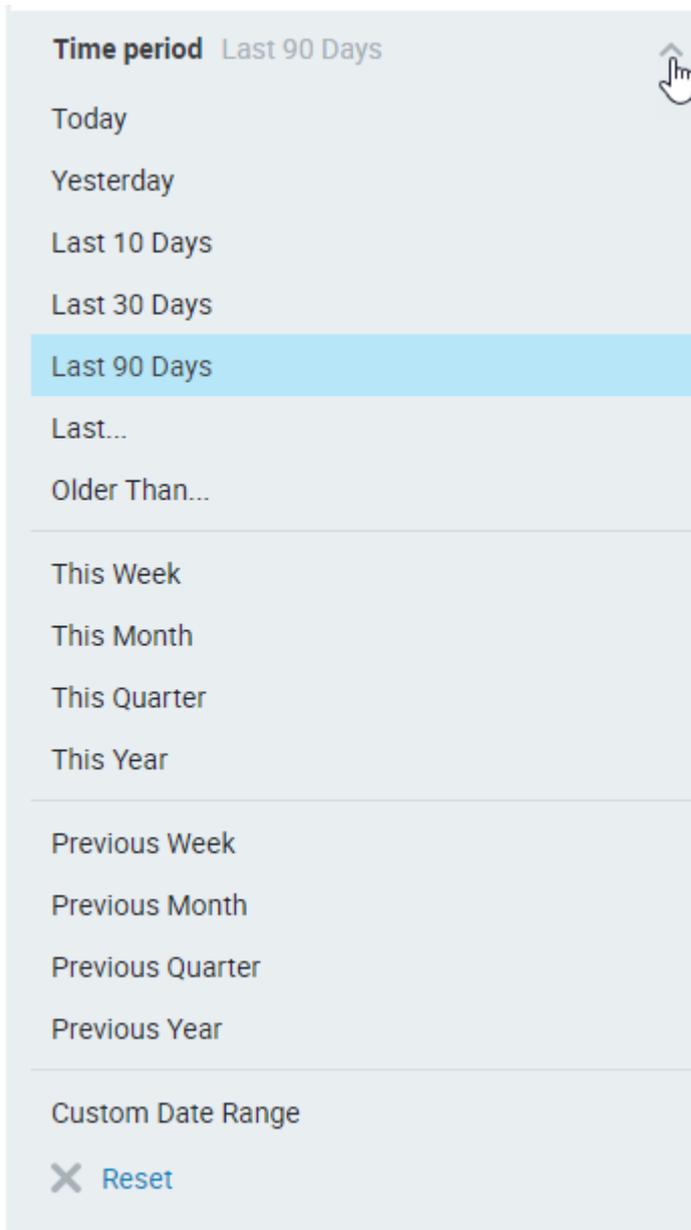
Telephone number

Use this search option if you know the participant (e.g. customer, other agent) phone number or at least one to several first digits. You may use a plus sign indicating an international number at the beginning as well as spaces for enhanced clarity. Other characters are not accepted.

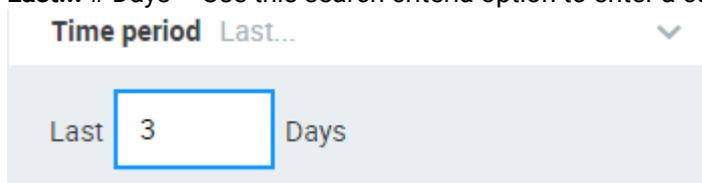
Conversations that include the specified phone number, or its first defined sequence, will be returned.

Time period

You may search for conversations based on the time period they started.



- **All Time** – Default value returning all conversations without any time limitation. Most recent conversations will be displayed first.
- **Today, Yesterday, Last 10 Days, Last 30 Days** – Quickly find conversations started in the predefined time period.
- **Last... # Days** – Use this search criteria option to enter a custom number of days.

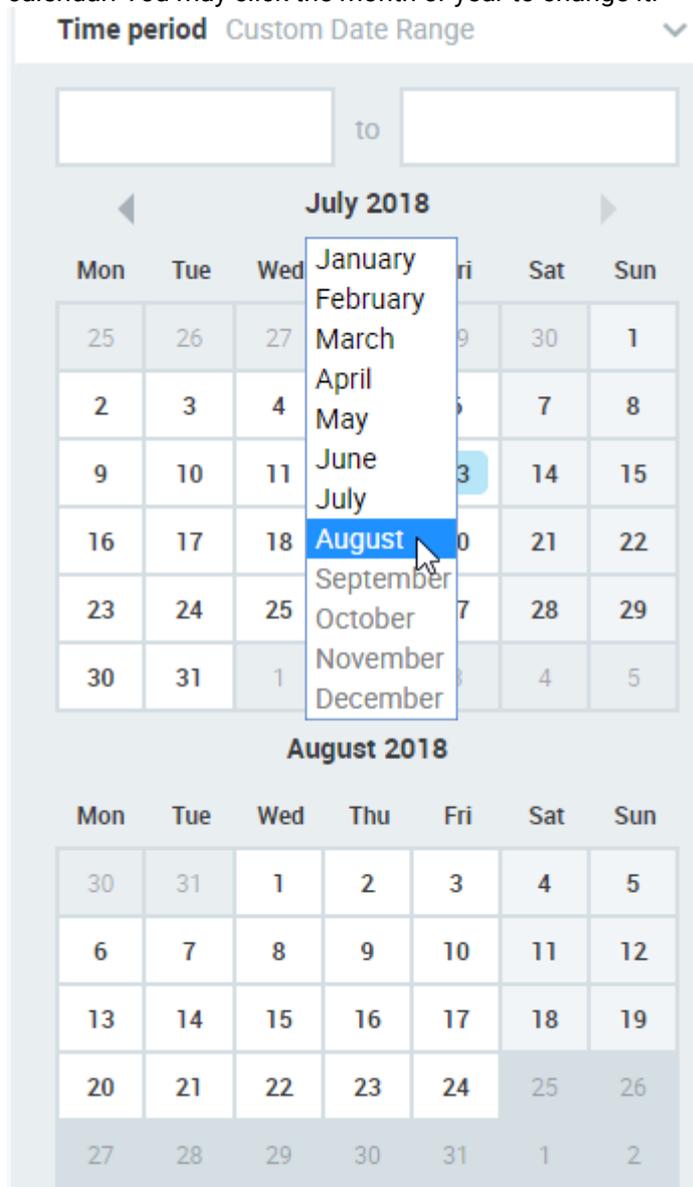


i Using Last days

Using 'last days' returns conversations started during the selected number of preceding full days including up until the moment when the search is performed.

E.g. If a search is performed on Wednesday midday to return the last 2 days the results will show conversations that started on that week Monday, Tuesday plus on Wednesday until noon.

- **Older Than...** – Find conversations that are older than the number of days you set. In other words, if you set Older Than "90" Days, all conversations in the last 90 days will be filtered out.
- **This Week, This Month, This Quarter, This Year** – Quickly find conversations started in the specified current time period.
- **Previous Week, Previous Month, Previous Quarter, Previous Year** – Quickly find conversations started in the specified previous time period.
- **Custom Date Range** – Select this option to pick a custom date range for the conversation start using the calendar. You may click the month or year to change it.



Click a date in the calendar, then click another date and the date range will be intuitively highlighted.

Time period Custom Date Range 

to

◀ July 2018 ▶

Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

August 2018

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

Time period Custom Date Range ▼

to

July 2018

Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

August 2018

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

Your selected date range will be applied.

Time period Custom Date Range ▼

to

If you decide to change an already selected time period, just select a different date range from the calendar or choose your preferred item from the drop down menu and the filter will be reset.

ⓘ Please Note

Only conversations started within the selected time period in the time zone of the call center where the agent was physically located will be returned.

Days of week

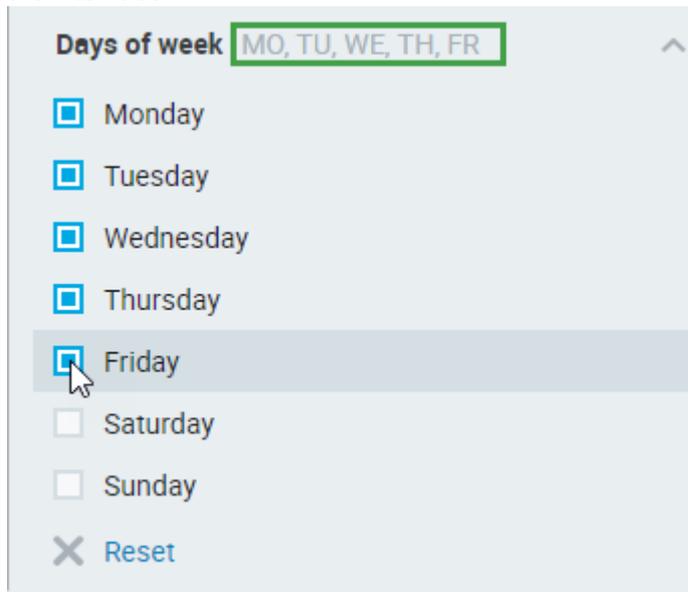
You may search for conversations that started on specified days of the week.



The screenshot shows a filter menu titled "Days of week" with an upward arrow icon. It contains a list of days from Monday to Sunday, each with an unselected checkbox.

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

- **Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday** – Choose a day or more days of the week to filter conversations that started only on the specified day. Selected days will also display next to the filter label.

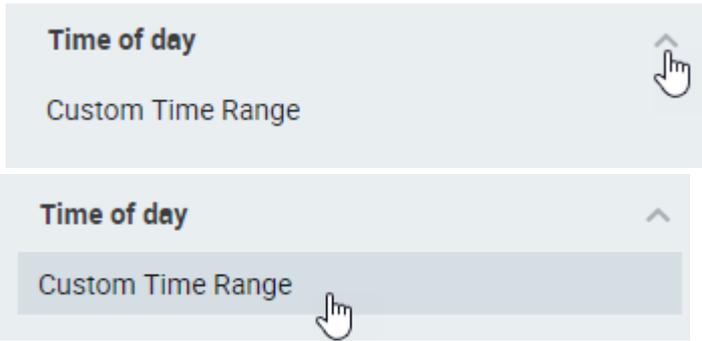


The screenshot shows the "Days of week" filter menu with the label "MO, TU, WE, TH, FR" highlighted in a green box. The days Monday through Friday are selected with blue checkboxes, and Friday is highlighted with a mouse cursor. Saturday and Sunday are unselected. A "Reset" option is at the bottom.

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday
-

Time of day

You may further define your search for conversations by time of day range, e.g. If you know at what time they roughly occurred. Click **Time of day**, then **Custom Time Range**.



- **Custom Time Range** – Use this option to search for conversations that occurred during the specified hours of a day. Enter the specific hour and minute of a day in each field in the suggested four digit format 00:00 – 23:59.

Time of day Custom Time Range ▼

00:00 to 23:59

Time of day Custom Time Range ▼

09:00 to 17:00

i Custom Time Range

The two time fields work on a From – To bases, thus the second field must represent a later time.

The application accepts incomplete values as illustrated in the following examples:

User input	Result
3	3 hours
3.5	3 hours and 30 minutes
3:5	3 hours and 5 minutes

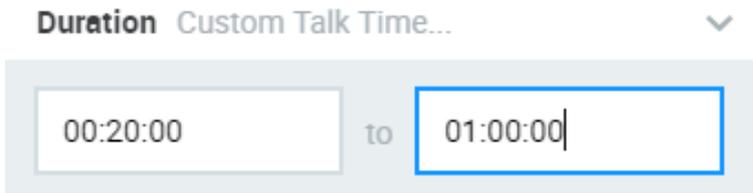
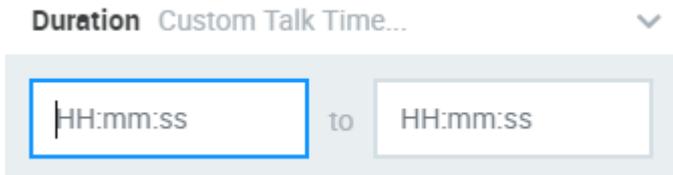
Duration

You can search call conversations by the duration of their talk time.



Search for conversations with the specified talk time:

- **Very Short Calls - Under 30 Seconds**
 - **Short Calls - 30 Seconds to 1 Minute**
 - **Normal Calls - 1 to 3 Minutes**
 - **Long Calls - 3 to 10 Minutes**
 - **Very Long Calls - Over 10 Minutes**
- **Custom Talk Time...** – You may specify the Talk Time (left side) as the minimum duration and the maximum duration (right side) in hours, minutes and seconds, using the format – HH:mm:ss.



i Custom Talk Time

If you leave the left Talk Time field with the default value (00:00:00), the field will be considered as having the duration value of 0.

If you leave the right duration field with the default value (00:00:00), the field value will be considered as unlimited.

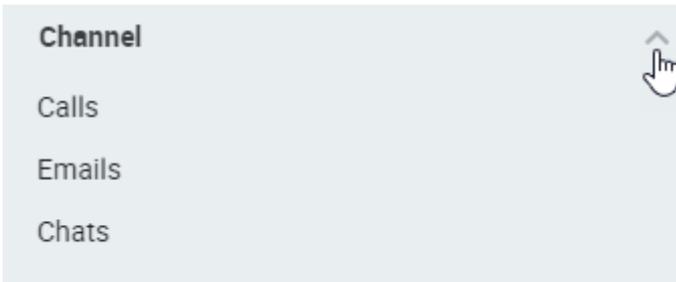
The application accepts incomplete values as illustrated in the following examples:

User input	Result
3	3 minutes
3.5	3 minutes and 30 seconds
3:5	3 minutes and 5 seconds
75	1 hour and 15 minutes

1:3:5	1 hour and 3 minutes and 5 seconds
-------	------------------------------------

Channel

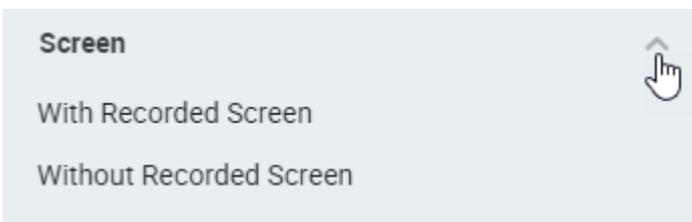
Choose to filter conversations by channel.



- **Calls** – Include conversations that contain a call.
- **Emails** – Include conversations containing an email.
- **Chats** – Include conversations containing a chat.

Screen

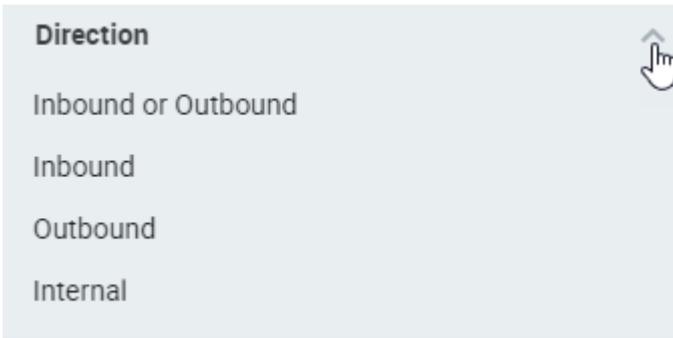
You may choose to filter conversation by whether or not they contain an agent desktop screen recording.



- **With Recorded Screen** – Include only conversations with recorded screen.
- **Without Recorded Screen** – Include only conversations without recorded screen.

Direction

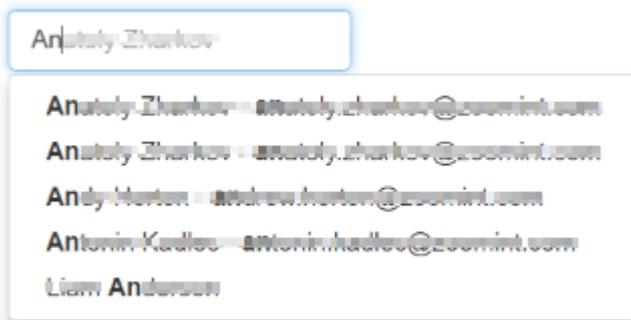
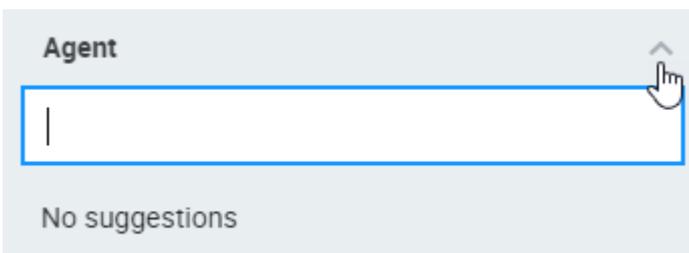
You can search for conversations based on their direction.



- **Inbound or Outbound** – Include both, either inbound or outbound conversations. Internal conversations will be excluded.
- **Inbound** – Displays inbound conversation only.
- **Outbound** – Displays outbound conversation only.
- **Internal** – Displays only internal conversations, for example between agents.

Agent

You may search conversations by participating Agent's name, extension or email address. As soon as you type the second character the search will start suggesting matches. You may search for one agent at a time.

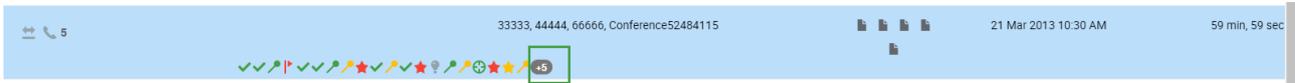


Speech Tags

If your Quality Management version also includes ZOOM Speech Analytics functionality you may benefit from this powerful phonetic search technology. Read more about the [ZOOM Speech Analytics](#).

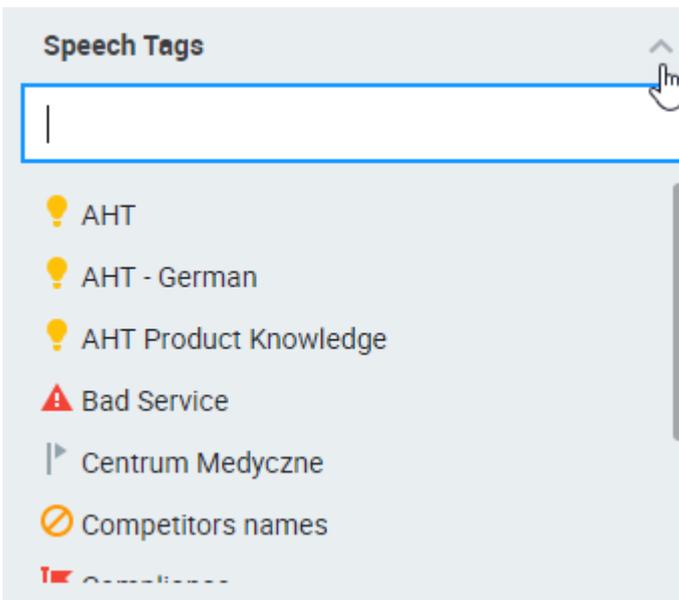
Conversations screen enables you to search conversations for configured Speech Phrases by Speech Tags. By default all existing Speech Tags and thus all phrases are included. Read more about [how to create Speech Tags and phrases](#).

Each conversation with Speech Tags will display the first 20 Speech Tag icons on the row in the order as they appear in the conversation. If there are more than 20 Speech Tags, this will be indicated with a number of additional Speech Tags found in the conversation.



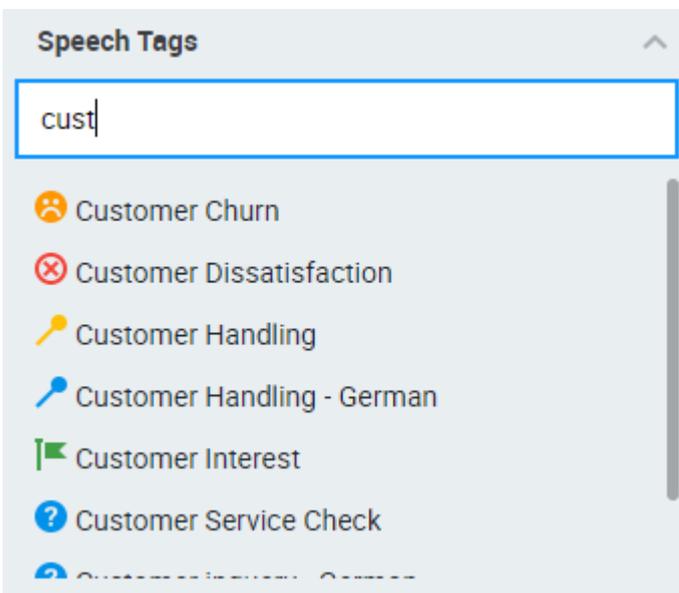
To search conversations by Speech Tags, click the **Speech Tags** drop-down menu.

A search field and the first ten available Speech Tags are listed alphabetically. Scroll down if needed.



Start typing a name of the Speech Tag you want to search for.

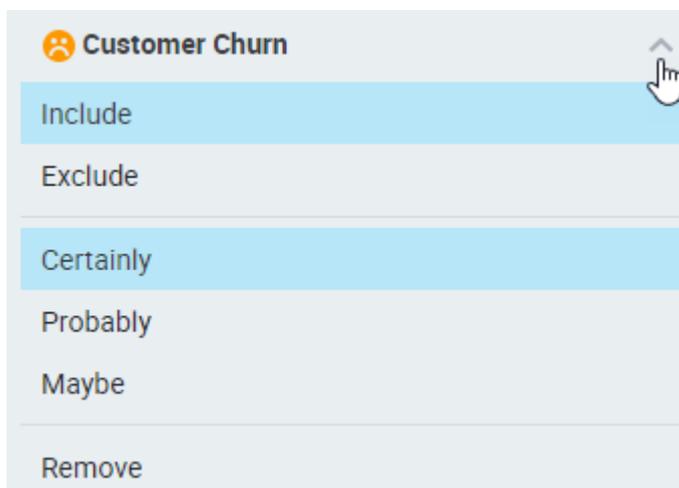
The list of Speech Tag choices will adjust accordingly. Showing the first ten results containing the typed characters.



Once you select one Speech Tag only those conversations will be returned in your search that either include (by default) or exclude this specific Speech Tag depending on your selection.

Each Speech Tag you select enables you to further specify the following options in its drop-down:

- **Include** – Default action. Conversations with the Speech Tag within the specified confidence range will be included.
- **Exclude** – Conversations containing the Speech Tag will be excluded from the searched conversations. Conversations with the Speech Tag within the specified confidence range will be excluded.
- **Certainly** – Default confidence. This means that the confidence is 65% or higher.
- **Probably** – The minimum confidence is set to 50%.
- **Maybe** – The minimum confidence is set to 40%.
- **Remove** – Click to remove the Speech Tag from your filter.



The more Speech Tags you choose to be included or excluded the narrower your search will be.

To return to the default setting showing conversations not filtered by specific Speech Tags simply remove all the Speech Tags you selected. Alternatively, click **Reset Search**, however, this will clear ALL the search filters you've set.

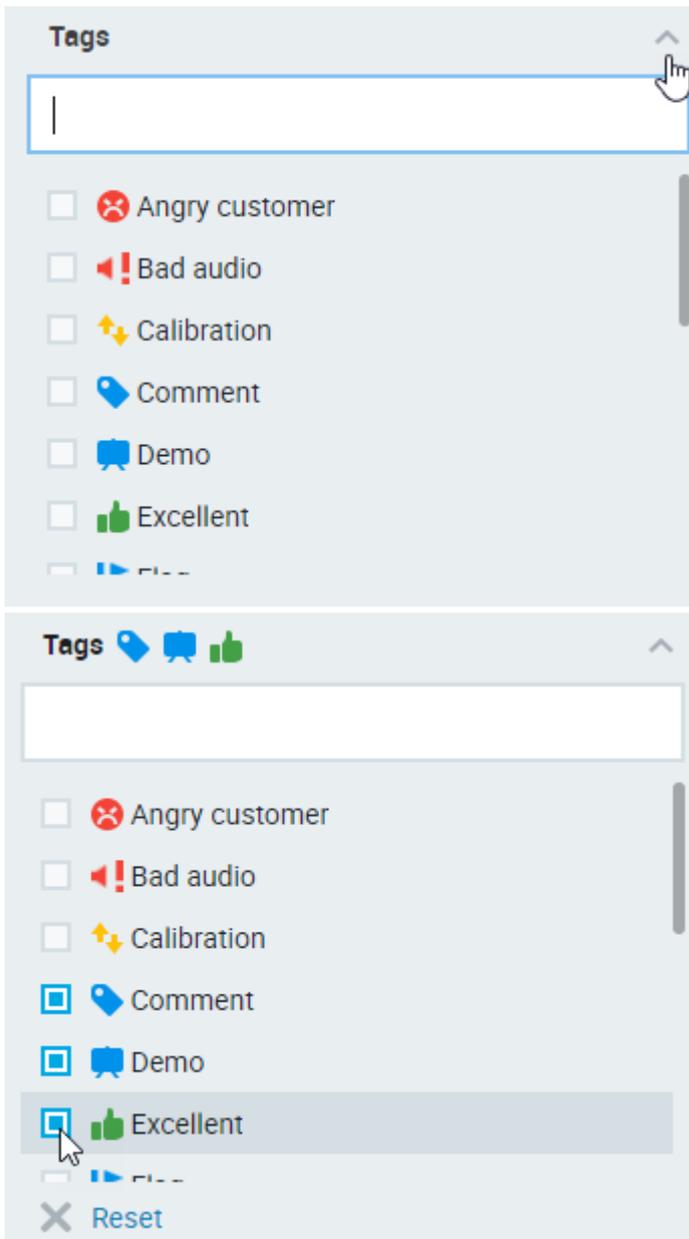
Tags

Searching by Tags

Tags are a great way to mark conversations for future references, such as for quality management or compliance purposes, use the **Tags** filter to quickly find tagged conversations.

- **Type** in the tag name to quickly find it, useful in the case of many tags. As you start typing, you will see the available options with a match highlighted.
- Alternatively, use the **scroll** bar to see all available tags and to find the tag you need.

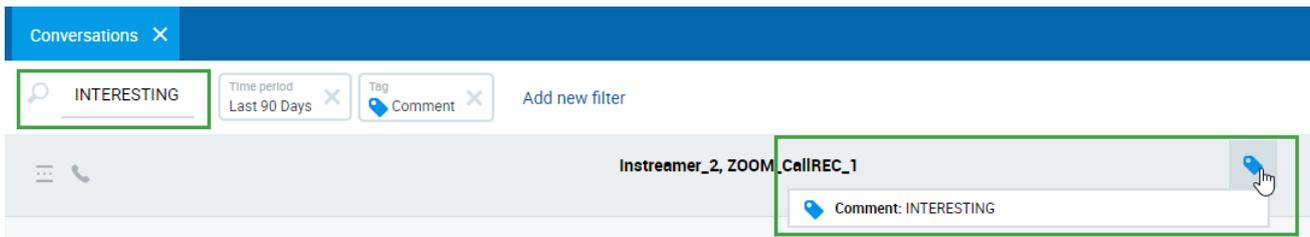
- Use the corresponding **check** boxes to choose one or more tags. Already **selected tags will also be displayed** in the form of an icon next to the filter name. To remove a selected tag simply uncheck its checkbox. To remove all checked tags click **✕ Reset**.



As soon as you make your tag(s) selection conversations will be filtered by the chosen tags.

⚠ When multiple tags are selected any conversation with *one or more* matching tags will be displayed. The search logic used for multiple tags is OR.

You may also use the **Full Text Search** to find conversations with particular text contained in the tag's comments. The text is case insensitive.



Data tags

Tags can also have an associated data Key-Value pair and thus two additional behaviors:

1. If **you add such a tag** to a conversation, the corresponding Key-Value pair will be applied to the metadata of all conversation's segments. Modifying or deleting such a tag will also affect the metadata Key-Value pair respectively.
2. When metadata for a segment includes the corresponding Key-Value pair, it will be **visualized as this data tag automatically by the system**. This visualization is not a user-added tag and cannot contain comments. However, it can be used to modify metadata directly for just one segment by changing the data tag to another data tag or deleting it completely.



- In addition to any user-added tags, the application will show a data tag for each segment with the corresponding Key-Value pair. This means that in a conversation you should see 1 tag that was added by a user plus as many tags as the number of segments with the corresponding Key-Value pair. Segments without the corresponding Key-Value pair in the source DB won't show the data tag, resulting in there being fewer tags than segments in the conversation. This could potentially occur when you delete the tag from one of the segments in the QM Conversations screen.
- Changes to the data tags will also be propagated back to the conversation's metadata (couple_extdata table) stored in Call Recording.

EXAMPLE: When you use a GDPR tag for a conversation with, say, 7 segments, you will see 8 tags in total (1+7). If one metadata representing GDPR tag is removed via QM Conversations screen from Call Recording, you will see that there are 7 segments, but 1+6 tags.

Adding tags

You have the option to tag any selected conversation so you can find it in the future with ease. Select a conversation and click **Add Tag**.



Clicking the **Add Tag** button shows the preset **Flag** tag – you may add a comment not exceeding 1000 characters.

You can choose from the available tags, one at a time, and optionally type a comment. If you choose the **Comment** tag, entering a comment is mandatory. There is a one directional comment propagation from segment comments stored in Call Recording into the Comment tag's comment.

New Tag

Flag

Optional comment

Save

You may even create your own custom tag. See [Tags](#) page for more information. – Please note you need a permission to manage tags, by default assigned to the CC Manager and Compliance Analyst role.

Alternatively, it's also possible to manage tags via Framework Data API. More info can be found on your QM local host's API Swagger documentation (e.g. <http://your.local.machine/encourage/api-doc/index.html>). [More about Swagger](#) (OpenAPI 2.0).

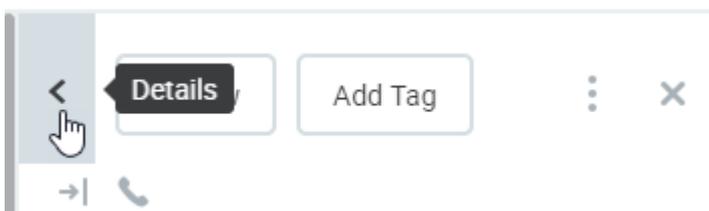
i Custom tags

- New key-value pair custom tags are usually created by Administrators.
- Any custom tag added to a conversation will propagate its corresponding Key Value pair back to the Call Recording metadata.

Tagged conversations will display a general tag icon . Hover over the icon to see the exact tag(s) with any comments that were added.

+	Florence Lear	+420777864502	 69 %	41 sec	17 Aug 1:49 PM
+	Florence Lear	+420737239880		15 sec	17 Aug 12:24 PM
+	Holly Stair	+420724178600		31 sec	17 Aug 10:48 AM
+	Holly Stair	+420724178600		16 sec	17 Aug 10:46 AM

The tags will also be visible within the **Conversation Details** window. Click the **Details** button to see it.



Conversations

Search... Time period Last 90 Days Add new filter

Florence Lear	+420777864502
Florence Lear	+420737239880
Holly Stair	+420724178600
Holly Stair	+420724178600
Holly Stair	+420737239880
Holly Stair	+420226218062
Holly Stair	+420226218062
Holly Stair	+420226218063
Holly Stair	+420226218063
Holly Stair	+420737239880
63	2992001, 981002
	2992001, 981002
	2992001, 981002
18	Instreamer_2, ZOOM_CallREC_1
	2004. 737239880

Review Add Tag Export Anonymize

Started 17 Aug 12:24 PM Originator Florence Lear Participants +420737239880

17 Aug 2018

12:24 PM
Florence Lear +420737239880
15 sec

Planned

24 Aug 2018

Flag
CcManager CcManager

Excellent: Great customer service skills
CcManager CcManager

Handled By	Florence Lear
Participants	+420737239880
Started	17 Aug 12:24 PM
Last Update	Today 2:52 PM
Talk Time	15 sec
Direction	Inbound
Segments	

Other

AMZCL_AWSAccountid	896560741059
AMZCL_AWSContactTraceRecordFormatVersion	2017-03-10
AMZCL_AgentConnectionAttempts	1
AMZCL_Agent_ARN	arn:aws:connect:us-east-1:896560741059:instance/57e83ef3-4509-4c99-87b7-3ecdce9e6177-agent/b8d1b54d-3437-455e-b705-917113d6c219

Warning Message

If the following message displays when working with tags please refresh your screen and add the tag again.

Unable to perform action. Refresh search results and try again.

Editing tags

You can edit existing tags. Click the general tag icon and click to choose, if available, which tag to modify or even to remove.

Florence Lear	+420737239880	15 sec	17 Aug 12:24 PM
Holly Stair	+420724178600	31 sec	17 Aug 10:48 AM
Holly Stair	+420724178600	16 sec	17 Aug 10:46 AM
Holly Stair	+420737239880	36 sec	17 Aug 10:37 AM
Holly Stair	+420226218062	50 sec	17 Aug 10:30 AM
Holly Stair	+420226218062	47 sec	17 Aug 10:29 AM
Holly Stair	+420226218063	31 sec	17 Aug 10:28 AM
Holly Stair	+420226218063	14 sec	17 Aug 10:27 AM
Holly Stair	+420737239880	20 sec	17 Aug 10:14 AM
63	2992001, 981002	15 h, 43 min, 27 sec	16 Aug 4:23 PM
	2992001, 981002	8 min, 31 sec	16 Aug 4:07 PM

Flag

Angry customer

Bad audio

Calibration

Comment

Demo

Excellent

Optional comment

Save Cancel

Excellent: Great customer service skills
CcManager CcManager

The **Conversations Details** window also enables you to edit or delete the tags and their comments. Simply select the conversation, click to expand the **Details** arrow icon and choose the tag you wish to modify.

You may also modify or remove your own custom tag, at the moment only via Framework Data API. More info can be found on your QM local host's API Swagger documentation (e.g. <http://your.local.machine/encourage/api-doc/index.html>). [More about Swagger \(OpenAPI 2.0\)](#).



- If propagation of a tag change to the metadata stored in the Call Recording DB fails you will see an error message with a prompt to try saving your changes at a later time.
- A saved search that includes tag(s) with Key-Value pair will also return results based on Key-Value pair associated at the time of the search execution.

Tag changes in Audit Log

User added tags updates will be marked as CONVERSATION_EVENT_TAG_UPDATE in the Audit Log.

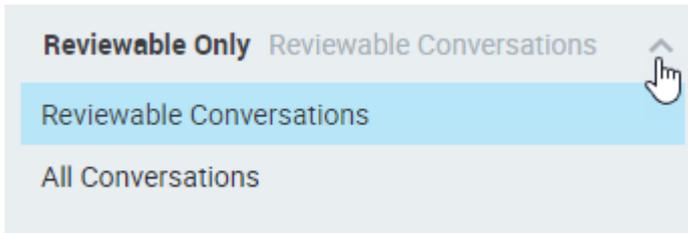
System-visualized tags changes will be marked depending on the channel as follows:

- CONVERSATION_EVENT_EMAIL_CHANGE
- CONVERSATION_EVENT_CHAT_CHANGE
- CONVERSATION_EVENT_METADATA_CHANGE

Reviewable

By default, you will only see "**Reviewable**" conversations. This means any conversation with at least one playable segment or containing chat/email. In other words, conversations with no playable media and without chat/email will be excluded from search.

To see all conversations, including those without playable media, click the Reviewable filter and select the **All** value.



Searching for conversations by CUSTOM data (Configurable by Administrator)

Alongside the above standard filters you may also search conversations by the custom external data stored within the email, chat or Call Recording. External data includes: JTAPI_CISCO_ID, Genesys Connection ID, Avaya CM call ID or additional integrated and collected call information from contact center applications. The custom data are configured by your Administrator. Administrators, see the [Adding data search fields in Conversations](#) screen page or for more details refer to [ZOOM OSE \(Conversations Screen\) services configuration](#) page.

Example: Cisco ID

An example of a searching based on custom data is to filter by Cisco ID.

Cisco Id

- **Starts with** – Search for conversations where Cisco ID starts with the characters you typed
- **Contains** – Search for conversations where Cisco ID contains the characters you typed
- **Less Than, Less Than or Equal, Greater Than or Equal, Greater Than** – Optionally, use any of the available operators to define the Cisco ID. Only available if the typed character(s)/digit(s) match any of the records.
- You may use the checkboxes next to the found matches to include those specific Cisco IDs in your search.

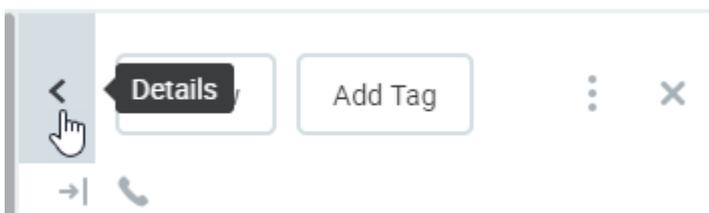
Viewing Conversations

As noted at the beginning of this page, as of release 6.0, Quality Management expands the recorded call and screen conversations to emails and chats. Currently, we support integration of emails from Sales Force or eGain and chats from Cisco Spark.

Selecting a conversation row shows the **conversation preview** on the right of the screen. The preview shows the key information about the conversation, including, the direction, type, calling parties, conversations segments, review status, flags or comments.

The screenshot shows a 'Conversations' screen with a list of entries. The selected entry is from 'Florence Lear' with the contact ID '[anonphonenumber]'. The details panel on the right shows the start time '17 Aug 12:24 PM', the originator 'Florence Lear', and participants including '[anonphonenumber]'. It also displays a 'Planned' status, a 'Flag' by 'CcManager CcManager', and an 'Excellent' rating for 'Great customer service skills' by 'CcManager CcManager'.

To see more detailed information about the selected conversation click the expand arrow showing the **details**.



Conversations screen will display the selected **Conversation Details** for all its segments (calls, chats and emails) including, if available, Review details such as the Questionnaire name, Reviewer, Reviewee and score. Most of the information is already indicated on each of the listed conversations.

Chat conversations will be grouped together as shown below until the occurrence of another segment type such as call or email.

Conversations ×

Search... Channel Chats × Add new filter

- #spark4dev 9 jermaine.bhoorasingh@point72.com, liams@sologysolutions.com, s...
- #spark4dev 39 [anondigitaladdress]
- #spark4dev 35 [anondigitaladdress]
- #spark4dev 56 aalledey@cisco.com, ekalsey@... bialver@cisco.com, diswamy@... izumi.iwata@phoneplli.net, jef... joe_bennett@bridgepoint.com, a... joshorve@cisco.com, jrengene@... jtaylor@entirext.com, judupre... miteshd@analyticplus.com, ni... nofar.schnider@here.com, rilox... shodson@netelligent.com, suc... thomas.scheible@bechtel.com, xiengjiw@cisco.com
- #spark4dev 4 jtaylor@entirext.com, timsch@...
- #spark4dev 25 edkong@cisco.com, ekalsey@c... deepe@fissioncloud.com, disw... greger@hudy.no, hemmohan@... jiejefe@cisco.com, joyin@cisc... judupree@cisco.com, kiskande... miteshd@analyticplus.com, na... pmethieu@gomindsight.com, re... rmeslanke@smp-corp.com, tim...
- #spark4dev 15 aalledey@cisco.com, ekalsey@... enrico.portolan@gmail.com, jijo... judupree@cisco.com, jwelsh@p... nathan.bauer@kohls.com, nigel
- Pavel Micka, Supersmart Bot + 1 other Redek Mensik

Review Add Tag Export Anonymize

Started 11 Nov 2017 11:03 PM Originator #spark4dev Participants [anondigitaladdress]

11 Nov 2017 11:03 PM [anondigitaladdress] #spark4dev

Hi!

I am developing an Android app and I am trying to receive a call from another Spark user. I am able to login, authorize, register the phone (to send and receive calls) and I can also set the listener for receiving calls. But, when someone calls the app stops working and the error is: JNI DETECTED ERROR IN APPLICATION: can't call void com.webex.wseclient.WseSurfaceView.disableSurfaceStatListener() on null object Any idea? Thanks!

29 Aug 2018 Calibration CcManager CcManager

11 Nov 2017 11:03 PM [anondigitaladdress] #spark4dev

Hi! I am developing an Android app and I am trying to receive a call from another Spark user. I am able to login, authorize, register the phone (to send and receive calls) and I can also set the listener for receiving calls. But, when someone calls the app stops working and the error is: JNI DETECTED ERROR IN APPLICATION: can't call void com.webex.wseclient.WseSurfaceView.disableSurfaceStatListener() on null object Any idea? Thanks!

12 Nov 2017 4:48 AM [anondigitaladdress]

I don't seem to be able to retrieve Spark messages from other Orgs. Is this expected? My webhook receives a notification of a new message in my room. The message was left by someone from a different Org. When I try to retrieve the message by ID, Spark says that the message cannot be found.

12 Nov 2017 8:15 AM [anondigitaladdress]

Martin Vassor This blog may help you a bit. <https://developer.ciscospark.com/blog/blog-details-8667.html>

13 Nov 2017 4:45 AM [anondigitaladdress]

It should display the GMT time.

In the case of emails all details such as sender, sent date, recipients and subject will be shown. Click each conversation segment in the thread to see it expanded on the right. Additionally, you may click the link icon  to navigate to the original conversation. This will redirect to the source – such as to Salesforce (login credentials may be required).

Conversations ×

Search... Channel Emails × Add new filter

- Brent Forst 4 Sending syslog messages to storage pool ellenn@hotmail.com, support@xptech.com
- Sienna Gregan, Roni Harris 4 Amazon Prime dbkirk@tworm.us, support@xptech.com
- Jody Gardner 3 Apollo lake support for Centos 6.8 jefkw@dayrep.com, support@xptech.com
- Brent Forst 3 A guide to install webserver gija22@hotmail.nl, support@xptech.com
- Trevor Lowry 5 How to change default password policy mebarta@duub.hu, support@xptech.com
- Manuel Wheeler 4 Log files empty after logrotate processes them bertley@house.com, support@xptech.com

Review Add Tag Export Anonymize

Started 17 Feb 2018 Originator Brent Forst Participants ellenn@hotmail.com support@xptech.com

17 Feb 2018 10:37 AM ellenn@hotmail.com support@xptech.com

Sending syslog messages to storage pool

I have a centralized syslog server configured and working. It collects logs from a remote device and stores them in /var/log/<remotehostname>/logfile.log, as it should. The problem is, /var/log is very small, and I will eventually have multiple systems sending logs, so I need to store them on a larger device.

10:55 AM Brent Forst ellenn@hotmail.com

Sending syslog messages to storage pool

Why not just mount your new filesystem on /var/log? you would of course need to mount it separately first, copy the existing data over to it, then mount it and restorecon -r /var/log

11:01 AM ellenn@hotmail.com support@xptech.com

Sending syslog messages to storage pool

Thanks for your reply. I think I understand your logic, but would you mind explaining in greater detail?

11:15 AM Brent Forst ellenn@hotmail.com

17 Feb 2018 17 Feb 10:37 AM ellenn@hotmail.com support@xptech.com

Sending syslog messages to storage pool

I have a centralized syslog server configured and working. It collects logs from a remote device and stores them in /var/log/<remotehostname>/logfile.log, as it should. The problem is, /var/log is very small, and I will eventually have multiple systems sending logs, so I need to store them on a larger device.

In rsyslog.conf, I have attempted to specify a different directory in which to send the logs, but upon restarting rsyslog, no log files show up in that directory. This directory is located on a 1TB storage device (sdb) which is mounted under /mnt/. I then tried to send them to a directory on the same device as /var/log (sda), but no logs showed up there either. Permissions for these directories are the same as the directory which gets created under /var/log.

TL;DR Need to send log files to storage device, not /var/log.

Any idea what I could be missing? Thanks.

Other

CRM_Ceseld	0fa-33d-e99
CRM_Customerid	655-488-922

 This player is available from Version 6.4.1 and above!

Interaction Player

The Interaction Player is a media player which allows playback of media listed on the Conversations screen. ZOOM version 6.4.1 and higher offers a revamped and enhanced interaction player, providing extended support for the playback of multiple media formats within an intuitive user interface. All participants are visible as separate, color coded waveforms within the player. Having all participants visible permits users the opportunity to clearly see and understand what occurred during the conversation.

Supported Media	MP3, WAV, RECD
Unsupported Media	Multiple screen recordings of multiple users, cube phone video recordings (MP4)

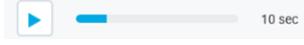
The Player and its functionality (basic usage)

Select a **call (voice conversation)** from the conversation list. The details of the call will display to the right side and the Player's interface will appear at the bottom of the screen and the waveform will load along the timeline. Click the Play icon  to begin playback of all related media. It is also possible to play each segment directly from within the **Details** window.

Click the Play icon  to begin playback of all related media. Click on the waveform icon to view  or hide  the individual segments. It is also possible to play each segment directly from within the **Preview** window.

Media Playback

There are multiple ways to start playback of a recording:

1. **Double-click on the item** from the list of conversations to play the associated recording. (**Click once** to highlight a conversation, **click twice** to begin playback)
2. Click once to highlight a conversation, then **Click on the play button** of the particular call segment from within the **Preview** panel on the right hand side. The playhead  will indicate the progress of the playback on the timeline within the Interaction Player interface. Progress will also displayed on the bar in the Preview pane: 
3. **Click on the Play button** within the **Interaction Player** interface at the bottom of the screen to begin playback from the beginning of the recording. Click on the timeline to move the playhead and start the playback from the different point in time,

The screenshot displays a call recording interface. On the left, a list of calls is shown with columns for phone icons, participant IDs (e.g., 'a1 b1'), and call numbers (e.g., '1022'). One call is highlighted with a green circle '1'. On the right, a detailed view of the selected call is shown, including a 'Comment' field with the text 'screen without recd', a play button, and a progress bar. Below this, a table lists call details such as 'Handled By', 'Participants', 'Started', 'Last Update', 'Talk Time', 'Direction', and 'Segments'. Further down, 'Custom Data' and 'Other' sections provide additional information like 'Call Manager Id', 'Cisco Id', 'CALLED_URL', and 'CALLING_URL'. At the bottom, a waveform player is visible, showing a color-coded waveform with a play button and a progress bar. A green circle '2' is placed over the play button in the waveform player.

The Player plays the conversation. If a record related to the selected conversation contains any Speech tags they will be displayed in the Player along with the color coded waveform. The various colors in the waveform distinguish the called and calling parties as follows:

- **Light green** – Called customer
- **Dark green** – **Calling party*** / customer
- **Light blue** – **Called party*** / agent
- **Dark blue** – Calling agent
- **Orange** – Customer on hold
- **Gradient red** – Crosstalk

***Green** is used as a default color if the calling/called party can not be recognized.

It is important to note that the waveform of the person initiating the call is always darker. If available, the timeline will be marked during the agents wrap-up time.

The Interaction Player and its functionality

The various parties in the conversation are displayed below the primary waveform separately. Click on the waveform icon to view  or hide  the individual segments. Each individual waveform is color coded: green for customers, blue for agents (if the ID or DN for the specific agent is available to be paired with the conversation or segment).

The screenshot shows a waveform player with a primary waveform at the top and several individual waveforms below it. The primary waveform is color-coded with green, blue, and orange. Below it, there are two individual waveforms, one for '1022' (green) and one for '1021' (blue). A play button and a progress bar are visible at the top left of the waveform player. A green circle '1' is placed over the play button, and a green circle '2' is placed over the progress bar. A green circle '3' is placed over the waveform icon, and a green circle '4' is placed over the hide icon.

1. Click the **Play**  or **Pause**  button to control the conversation playback.

2. Hover over the **volume** and  click to adjust the audio volume or to **mute**  the sound.
3. If the conversation you are playing contains a screen recording (record will be marked with the **Screen icon** ). Click on the icon to open the playback window. If no screen recording is available the icon is greyed out . During playback the icon will be blue .
4. The scroll bar (on the right hand side) is only visible in the case that there are more than four media streams.

Additional Media Available

The waveform will indicate if there is additional media available with a particular audio recording. If Screen recordings are available they are indicated on the screen by a darker band below the audio waveform. The video indicator bar may not correspond to the audio length! The potential options are displayed in the image below. What is actually displayed on your screen will correspond to the actual content available for review and playback.

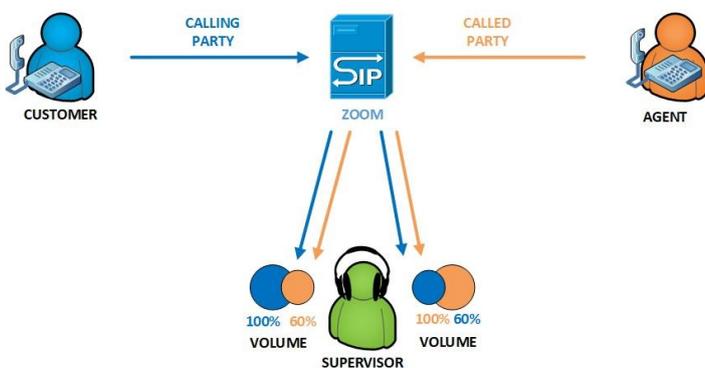


Saved Preferences

Volume and some player preferences are saved and will be applied to the next conversation opened. *If you mute a recording the next recording you open will also be muted!*

Call volume

The player outputs audio in a way that enhances the listening experience. The audio streams are played back in stereo so that both parties can be heard. To enhance the listening experience the audio for Calling parties is played at 100% Volume in the left ear, while the called party is played back at 60%. On the opposite ear the Called party is played at 100% while the Calling party is played back at 60%. It is still possible to use only one earphone to listen to both parties.



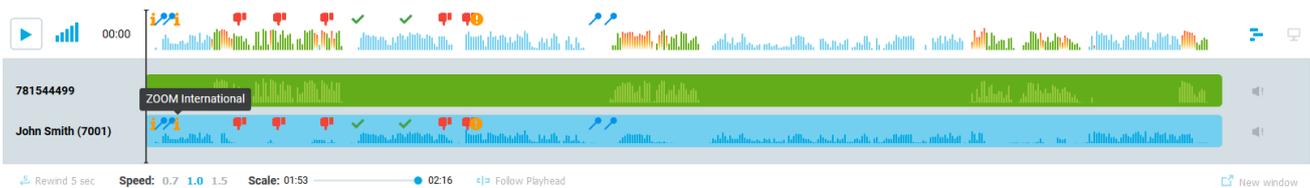
Call on Hold

Whenever possible calls on hold will be indicated within the player. In this example the agent activity remains visible while the customer is on Hold (marked in **Orange**).



Speech Tags

Tags are displayed in their relevant location. Hover the mouse over a tag to view the tag name.



The Player and its functionality (Advanced usage)

Play single stream / Channel

To playback only one selected audio stream click on the **audio icon** , it will change to a blue **speaker icon**  to indicate that it has been selected. The selected audio will be playable, all others will be **muted** .

Tip

If there are more than four (4) audio segments it is possible to scroll up and down to view them all.

Time

Hover over the timestamp to view the length of the entire recorded conversation and the date and time at which it was recorded.



1. The current position of the playhead is shown in relation to the total length of the conversation. In the example here we see that we are six seconds into a recording which is twenty one seconds long – 00:06 / 00:21)
The date and time of the original conversation is displayed directly alongside the conversation length. In this example we see that the conversation occurred on the twelfth of May, 2016. *The time indicated is the time when the actual recording occurred.*
2. The playhead  indicates where the playback is at a given time. Click to move the playhead to a new location.

Gaps in recording

Any gap in the recording is indicated by a small triangle  along the timeline and empty space between the various waveforms.

Playback options

Additional playback options may be available at the bottom of the Player during playback of longer conversations.



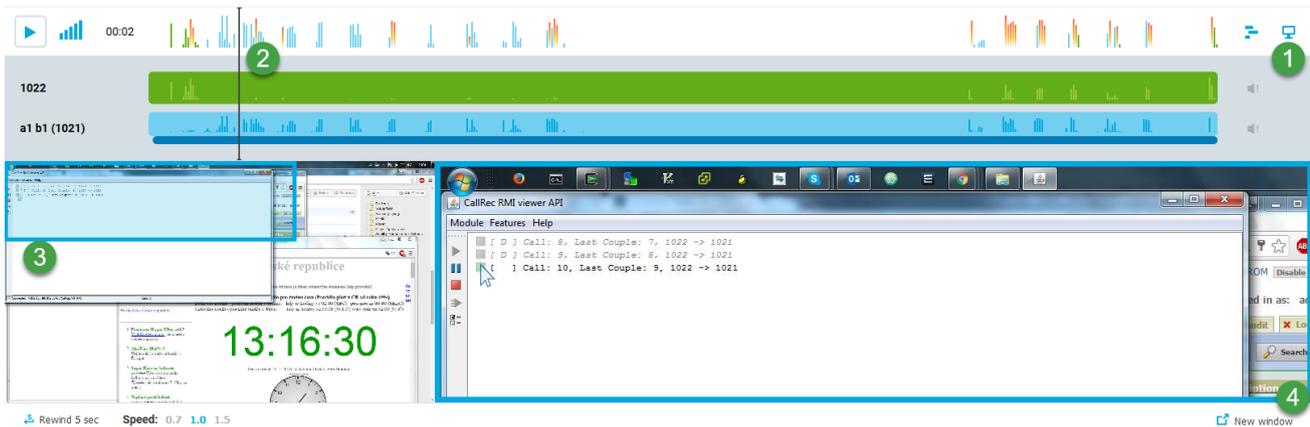
1. **Rewind 5 sec:** Click to skip back five seconds in time during playback.
2. **Speed:** Adjust the speed of playback to 0.7, or to 1.5 times the normal speed. Note, voices may be distorted as a result.
3. **Scale:** Zoom the amount of playback time visible. For longer conversations this focuses on a specific portion of the recording.
4. **Follow playhead:** When using the Scale option to zoom in on a part of a conversation the playhead may be lost. Click to jump to the playhead location.
5. **New window:** Click to open the current screen recording in a new window if available.

Review screen recordings

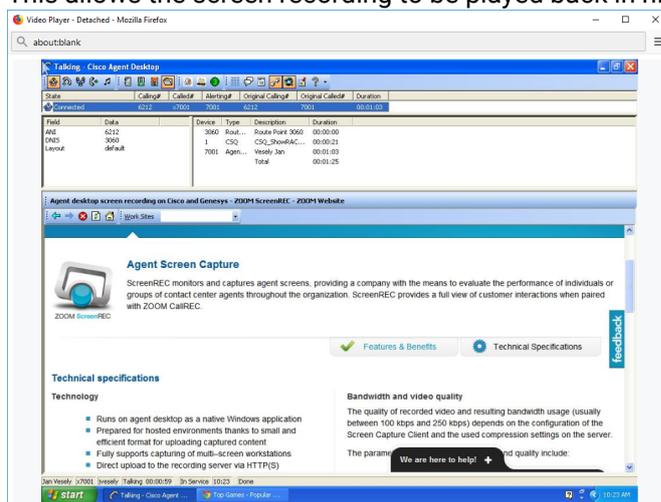
To view available screen recordings click the **Show screen capture**  icon, the recording of the monitor(s) will display below the wave form. Clicking the icon  again will collapse the viewing area.

The Player area expands displaying the recording. Some parts of the conversation may have a screen recording attached, others not. If no screen recording is available you will be notified about the absence of a screen recording within the given conversation segment by a message displayed within the playback area.

The elapsed time indicates at what time in the conversation the playhead is located. At any time you may **click the playhead** at the point in the timeline where you want to start playback.



1. Click on the **Screen** icon  to open the player.
2. The playhead indicates elapsed time (If the waveform is visible it indicates who is speaking –)
3. The entire recorded agents' monitor(s) is viewable to the left hand side. The **focused window** on the right side displays a zoomed version of the recording and highlights where the agents mouse cursor was at that time in playback. *Hover over the recorded screen to focus on a different area.*
4. Click on the **New window** icon  to open and review the recording in a new (full size) window. This allows the screen recording to be played back in higher resolution.

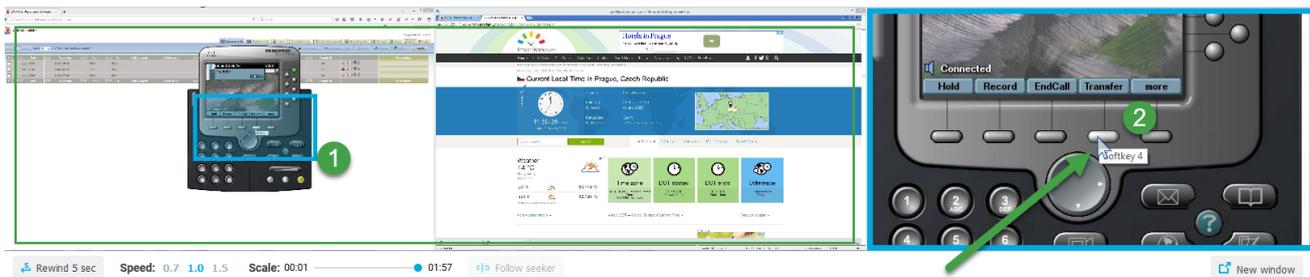


Multiple monitors and playback

It is possible to view the recordings of multiple monitors within one segment if an agent is using multiple monitors at their workstation.

In the case that the recording contains multiple recorded monitors the zoom function becomes more apparent. In the example below two recorded monitor screens are visible on the left side, while the focused area is displayed on the right side.

1. The area which is **focused** is marked by a blue box.
2. The **focused** view on the right **highlights** the agents mouse cursor.



i Space Saving Tip

Click on the **Waveform icon**  to collapse the visible wave forms and provide easier viewing of other content on the screen.

Click on **Screen icon**  to stop viewing the visible recording.

! *If there are multiple screen recordings (RECD files) in a conversation between two agents only one is playable. All files are exportable from within the Call Recording WebUI.*

When there are more than four participants to a conversation the player may not display the recordings properly.

Full screen playback

To enlarge the recorded screen view click the **New window icon** . The **Player opens in a new window** that you can resize as needed and then close as necessary. The Playback controls remain on the conversation screen, they are not available on the newly opened window! To return to the Conversations Screen close the the external window.

i Playback tips

The agent's mouse is visible on the recorded screen and will be highlighted (enlarged) by default. Hover your mouse cursor over an area of the screen recording to view that area of the recorded agents desktop. When you move your mouse away the zoomed window will again focus on the recorded agent's cursor.

Playback starts from the time where you place the playhead.

i Troubleshooting tip

In case the Player does not play conversations, please check that the following default options are enabled in your Internet Browser:

- Enable automatic image resizing
- Play animations in webpages
- Play sounds in webpages

Please note that some calls are more suited for playback with the Call Recording player (available from the Call Recording WebUI).

- Calls and screens between two agents and (two RECD files) – playback of multiple files is not supported if they are in separate segments. Only one RECD file will be playable.
- Video Recordings (Mp4 files such as Cisco Video Phone recordings)

Error/Warning message	Description
No sound during playback	Waveform loads and player plays as expected but there is no sound. Check that the player is not muted. Click on the sound bar icon . 
Media file cannot be played	Conversation loading issue.
Missing Media	Media not available for playback or decryption error.
Video Error	For RECD, missing file or inaccessible storage.
No video available for the current playback time	File not yet loaded. Click play on the Play  to load and display content. or Video file not playable or unavailable.
Load Waveform Failed	Waveform can not be rendered due to a missing or erroneous audio file. <i>Audio may still be played.</i> The  No Stream Recorded warning message will display alongside the conversation to indicate this error.
Segment media error	Audio file loading issue.
Some parts of the mix are not available	There is a segment missing from the conversation.
Failed to Load Conversation	Can not load the conversation or server error.
Failed to Load Waveform	Can not load the file or unable to generate the waveform.
No audio	Audio file missing or not playable.
Failed to parse message	Browser error. Disable add-ons and reload the page.

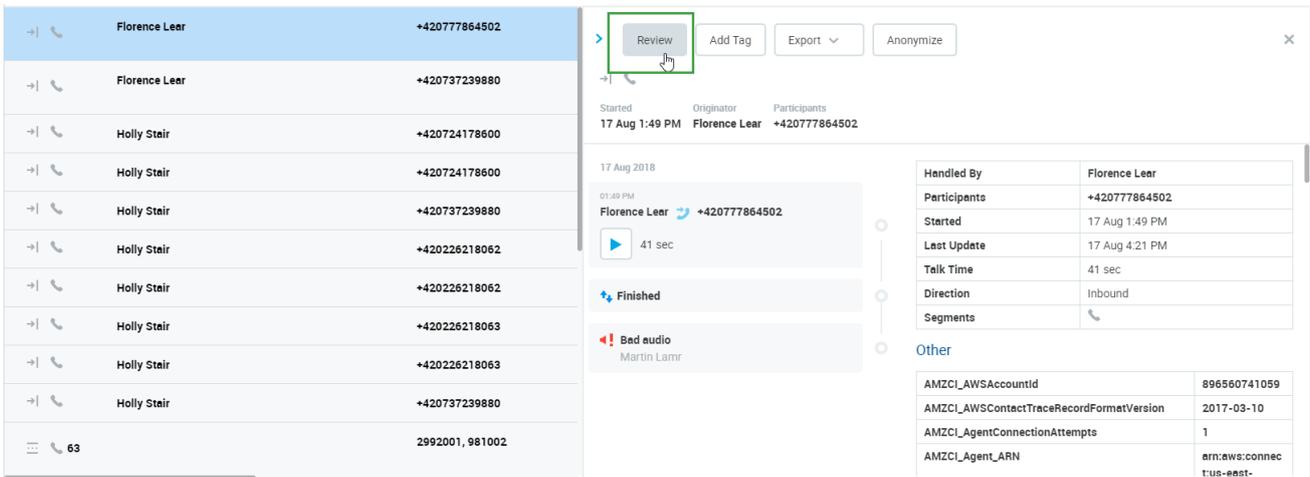
Note: The player in Version 6.4.x is NOT backwards compatible with lower versions!

 Playback may be affected by a known limitation of Internet Explorer. The number of permitted Websocket connections is (by default) configured at 6. This permits only a limited number of streams to be played back at any given time. The limitation is specific to Internet Explorer and does not affect other browsers.

Review

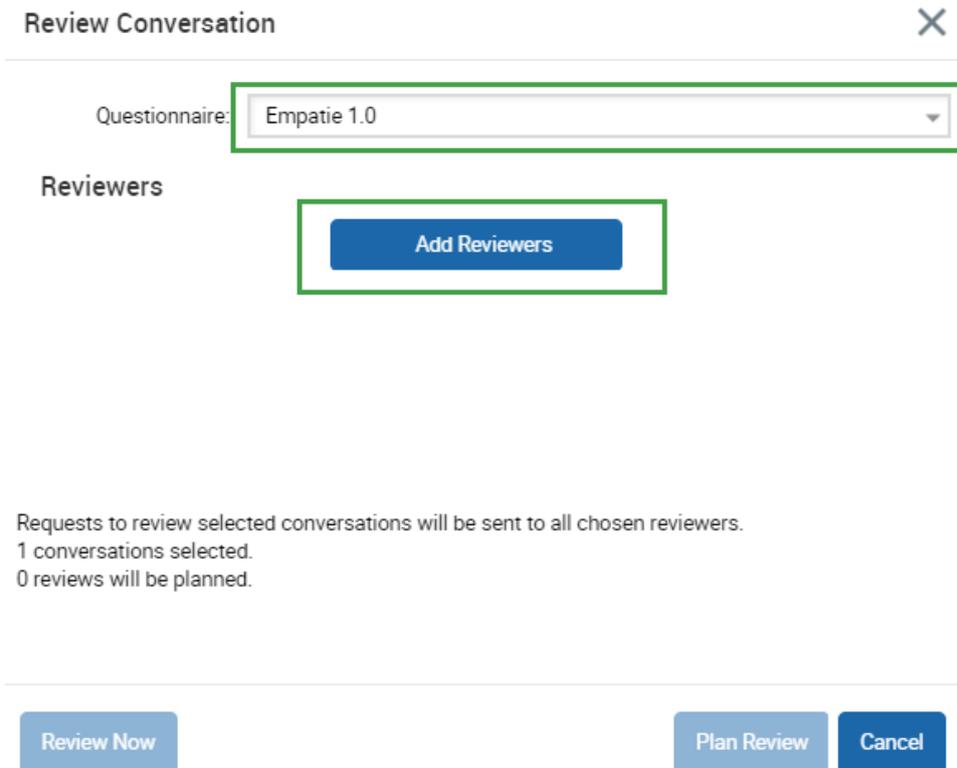
The Conversation screen enables you to review selected conversation. A conversation may have one or more identified agents associated with the selected conversation:

- In case there is **only one identified agent in the conversation**, simply click **Review** and the **Review Conversation** dialog displays.
- In case there is **more than one agent associated with the conversation**, the **Review** button changes into a dropdown from which you need to select the agent you wish to review.



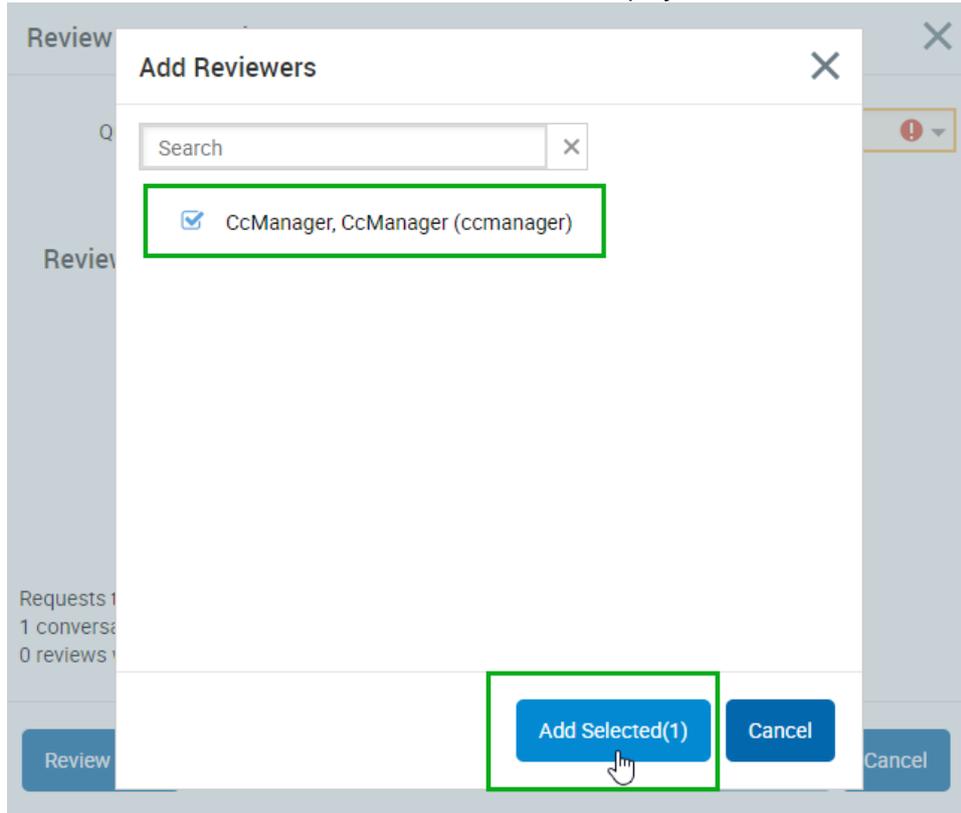
The **Review Conversation** window displays:

1. Select a **Questionnaire** to be used for the given review.
2. Click **Add Reviewers** to continue.



3. In the **Add Reviewers** window select one or more **Reviewer(s)** for example for calibration purposes. You may select/deselect all Reviewers by clicking the top checkbox next to **Reviewer**. Only reviewers that have the right to review the respective agents will be listed. This includes also the agents that participated in the conversation if they have the "Review - Review Myself" and "Reviews - Assign to Myself" permissions. See [Roles](#) for more details on permissions.

– Click **Add Selected** to confirm. The button also displays the count of selected reviewers.



4. You will be returned to the Review Conversation window. At the bottom of the window you will see a message: "Request to review selected conversations will be sent to all chosen reviewers." including the selection details.
 - This means the request will be sent via email to all reviewers who have the agent(s) or groups assigned in their profile. More information can be found in [Adding Another User Type](#) section of the [Quality Management - Admin Guide](#).
 - The window also shows the number of conversations selected and the number of reviews that will be created.

Review Conversation



Questionnaire: Empatie 1.0

Reviewers

Add Reviewers

CcManager, CcManager (ccmanager)

Requests to review selected conversations will be sent to all chosen reviewers.
1 conversations selected.
1 reviews will be planned.

Review Now

Plan Review

Cancel

5. Click **Plan Review** to conclude the review request for all selected reviewers.
6. If you selected yourself as the reviewer (in our case) you can click **Review Now** to quickly create the review and subsequently perform the review process.

Self review

Agents need "Review - Review Myself" and "Reviews - Assign to Myself" permissions to be able to do a self-review.

To see the reviews go to **Reviews** in the navigation tree.

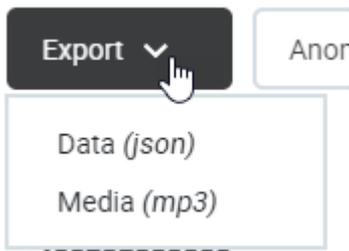
All conversations used in reviews are flagged and marked as **Protected**.

Add Tag

The **Add Tag** button is explained in the [129580470](#) section.

Export

The **Export** feature is *by default* only available to QM users with CcManager or Compliance Analyst role.



The following options are available in the Export dropdown:

- **Data (json)** – You can export data from any selected conversation into a JSON file – an open-standard file format that uses human-readable text. Information about the data exported can be found on your QM local host's API Swagger documentation (e.g. <http://your.local.machine/encourage/api-doc/index.html>). [More about Swagger](#) (OpenAPI 2.0).
 - It is possible to select and export data from one conversation at a time
 - The export file is saved to the user's computer
 - This option only exports data (e.g. Participants, custom data, reviews, etc.), text contained within emails and chat content. It does not contain voice or video recordings!
- **Media (mp3)** – This option, only active if the selected conversation contains at least one call, enables you to download the call conversation audio file.
 - Call segments will be merged into one mp3 file. In case of missing or erroneous media in one or more segments, the mp3 file won't be exported and you will see an error message.
 - The downloaded file name will be in the following format: `conversationID_timestamp.mp3`

Regulatory Compliance

When exporting conversation data, ensure that any **Personally identifiable information (PII)** or any other sensitive information from a customer is not included in the exported file sent to another customer or compliance party.

Anonymize

In order to facilitate compliance with regulatory requirements related to personal data protection, (such as [GDPR](#)) users of QM are able to select conversations on the conversation screen and anonymize Personally Identifiable Information at the click of a button. The **Anonymize** feature is available by default to QM users with the CManager or Compliance Analyst role.

*** Compliance setup**

Learn how to choose which Personally Identifiable Information (PII) can be anonymized on the [Compliance setup](#) page. Special permission is required.

Protection against Anonymization

Certain conversations may be protected against anonymization and deletion. Call conversations marked by **MiFID II TAG** are already protected against deletion by the Call Recording Delete tool. In ZOOM Quality Management, users with the "Manage Data Life Cycle" permission (by default assigned to CC Managers) have the ability to [129580470](#).

To Anonymize Personally Identifiable Information (PII)

1. Find and select the conversation on the Conversations screen that you wish to anonymize.
2. Click **Anonymize** to anonymize the select PII data.

The screenshot shows a list of conversations on the left and a detailed view of a selected conversation on the right. The 'Anonymize' button is highlighted with a green circle and a '2'. The conversation details include:

Handled By	Florence Lear
Participants	+420737239880
Started	17 Aug 12:24 PM
Last Update	24 Aug 2:53 PM
Talk Time	15 sec
Direction	Inbound
Segments	

Other metadata includes:

AMZCLAWSAccountid	896560741099
AMZCLAWSConnectTraceRecordFormatVersion	2017-03-10
AMZCLAgentConnectionAttempts	1
AMZCLAgent_ARN	arn:aws:comsec:us-east-1:896560741099:instance/57a82ef8-4509-4c99-8707-3e0d0e9e6177-agent/88d1b54

3. You will be notified that the anonymization is permanent and can not be reverted in the future.
 - Anonymization will be executed for the following:
 - a. Any data field* marked for anonymization will be anonymized in the source database (Call Recording).
 - b. Call Data anonymization will occur in both the Call Recording Database and the QM Database.
 - c. External databases are not affected by ZOOM anonymization process. These include, for example, emails from SalesForce or chats from Cisco Spark.

Anonymize Personally Identifiable Information

All PII data of conversations you selected will be permanently anonymized.

Anonymize permanently Cancel

4. Once you confirm by Clicking **Anonymize Permanently** and Anonymization is successfully performed you will see a confirmation message. An alert will display in case of an anonymization process failure.



5. The selected conversation will refresh and the anonymized data will be replaced by a placeholder indicating that the data was anonymized.



Various data fields can be selected for anonymization (see the [Compliance setup](#) page).

PII data which can be anonymized includes **Basic Data**, (such as phone number, email address or texts within email subject and body, chat room name and messages, etc.)

CustomData, (which includes all metadata configured as filters in the Conversations screen) and **Other** metadata, such as external data.

After anonymization

Anonymized data is replaced by placeholder text on the Conversation Screen. If administrators have chosen to anonymize content then the content will be replaced in conversations with *placeholder* text as follows:

- If phone number is anonymized then [anonphonenumber] will be displayed in its place
- If email is anonymized then [anondigitaladdress] will be displayed in its place
- If chats are anonymized then [anondigitaladdress] will be displayed in its place
- If text conversations are anonymized then [anonconversationcontent] will be displayed in its place
- If metadata are anonymized then [anonymized] will be displayed in its place

The screenshot displays a user interface for managing conversations. On the left, a list of contacts is shown, with 'Florence Lear' selected. Her phone number is replaced by the placeholder '[anonphonenumber]'. The main area shows a conversation with 'Florence Lear' containing a 15-second audio segment. The conversation is marked as 'Planned' and has a 'Flag' action. The right sidebar shows metadata for the conversation, including 'Handled By: Florence Lear', 'Participants: [anonphonenumber]', and various system identifiers like 'AMZCI_AWSAccountid' and 'AMZCI_AgentARN'.

[anondigitaladdress] or [anonphonenumber] or [anonymized] or [anonconversationcontent] will be displayed by the system in place of the original PII data. Information saved to the server will be overwritten.

- Anonymized conversations (media or text anonymized) are marked as non-reviewable in the following cases:
 - Call conversation with anonymized "Media files"
 - Chat or email conversation with anonymized "Subject and body"
 - Call + email or Call + chat with anonymized "Media files" and "Subject and body"

Note, a conversation is still reviewable if at least one of its segments is not anonymized.

If conversation's media is anonymized then the following happens:

- Conversation is marked as "**Planned for deletion of media files**" and request is sent to Segment service (media deletion). The media is still accessible and playable until the anonymized conversation media will be deleted by the Call Recording Delete tool. The following can be observed:
 - Conversation listing and detail:
 - icon/text with problem status "**Planned for deletion of media files**" will be displayed
 - Once a conversation is reimported then "**Planned for deletion of media files**" marking will be preserved

- Once the conversation media is deleted by the Delete tool, the conversation is marked with "**Deleted**" status. The media can no longer be accessed or played. The following will be indicated:
 - Conversation listing and detail:
 - icon with problem status "Deleted" will be displayed
 - icon representing Screen Recording in Conversation type will be deleted (call icon will be preserved)

 It is not possible to select which data will be anonymized from within the Conversations Screen. Only data fields marked for anonymization on the [Compliance setup](#) page will be anonymized!

Protected conversations against anonymization

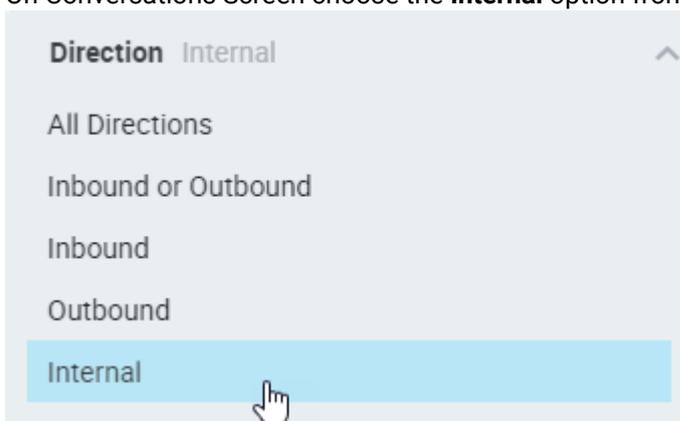
Certain conversations may be protected against anonymization and deletion using protected saved searches. Any conversation matching the protected saved search criteria will be protected against anonymization. Call conversations marked by **MiFID II TAG** are already protected against deletion by Call Recording Delete tool. Users with the "Manage Data Life Cycle" permission (by default assigned to CC Managers) can set protection (guarding) of saved searches.

CAUTION

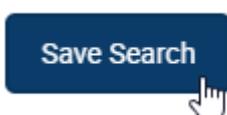
Please check the default **Reviewable Conversations** filter when creating saved searches. To change it, choose **All Conversations** from the Resource flags filter. More about [129580470](#) conversations.

The **example below** shows how to save a search which will then be set protection against anonymization. In this example we will protect Internal calls.

1. On Conversations Screen choose the **Internal** option from the **Direction** filter.



2. Click **Save Search** to save the filtered conversations (Internal calls).



3. Name the saved search as needed, e.g. "Internal calls - protected" and confirm saving.



4. This newly saved search can be set as protected under the **Data Lifecycle** section in Quality Management, accessed via **Administration > Data Lifecycle**. Learn more on the [Data Life Cycle Management](#) page.

Available Saved Searches



5. Now, when you try to anonymize an Internal call, you will be notified that the conversation is protected and cannot be anonymized.

This means that the internal calls that match the protected search criteria are protected, preventing all the matching conversations from anonymization. If needed, you can cancel the protection on the **Data Lifecycle** page.