



## **Interaction Recorder® Administration Overview**

### **Version 2.4**



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## Interaction Recorder Administration Overview

### Overview

Interaction Recorder is a call recording add-on product to Interactive Intelligence's Customer Interaction Center® (CIC) for contact centers and enterprises. Interaction Recorder provides organizations an easy and cost-effective way to record, store and manage interactions and further allows for Screen Recording to further enhance the training of agents and the effectiveness of supervisors. By providing businesses with a recording solution filled with **Innovation**, backed by years of development and customer-tested **Experience**, Interaction Recorder provides a **Value** exceeding customer demand in the market.

Interaction Recorder boasts innovative technology that sets itself apart from much of the competition in the market today. Its **powerful recording and scoring solution** allows agents to be more effectively trained and become more effective with their job faster. The **complete integration and testing assurance** of Interaction Recorder within CIC ensures its success and removes integration issues that exist when using other 3<sup>rd</sup> party products. This also eliminates the expense and time of having to do other integration testing required when using a 3<sup>rd</sup> party solution.

With the launch of 2.4 an additional **Interaction Screen Recorder** option is available to track the agent's screens for better training and scoring. And finally, Interaction Recorder offers a **recording verification algorithm** ensuring that the recordings provided are, in fact, the actual pure recording giving management the raw history for the most effective decision-making.

With seven years of development and customer deployments Interaction Recorder boasts successful Recorder customers with over one third of our 100,000 contact center seats using Interaction Recorder.

Through these functions, organizations can improve quality, increase productivity, reduce operating costs, improve customer satisfaction and generate new product and service ideas. Use Interaction Recorder to:

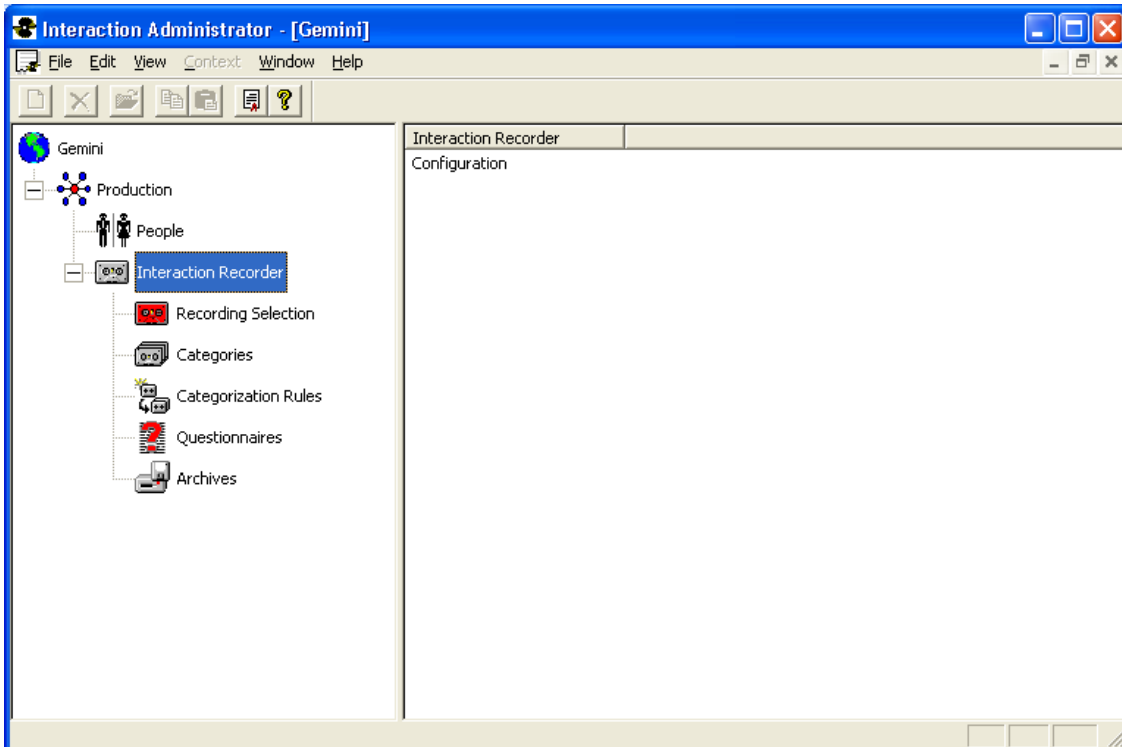
- **Build business-driven recording rules** to record phone calls, e-mail, faxes and Web text chats.
- **Initiate recording using custom attributes** created by the IC Server, such as recording all interactions conducted with strategic customers.
- **Cost-effectively store and manage digital recordings** to meet legal requirements and verify interaction content when challenged.
- **Provide secure access to recordings** for customer-specific areas, reducing the chances of tampering and enabling the reselling of hosted recording services to internal or external groups.
- **Categorize and group recordings** based on customer-specific, configured hierarchies for distributed or large organizations.



- **Quickly search and retrieve recordings** to resolve disputes, verify sales, or mentor employees to improve performance.
- **Score interactions** based on customer-specific questionnaires to measure the quality of the interaction, measure customer satisfaction with current products and services, and verify sales.
- **Review interaction scores** based on out-of-the-box reports to quickly determine performance levels.
- **Perform centralized system administration** from the same graphical interface as your IC Server, reducing IT time and maintenance as well as costs.
- **Archive older recordings** to comply with legal requirements.
- **Expand recording capacity** as your business grows through additional compression servers in a “compression farm”.

### Administrating Interaction Recorder

- Administration tasks for Interaction Recorder are performed in Interaction Administrator, the same interface used to administer the IC server, Interaction Dialer, and Interaction Director. This simplifies an administrator’s job, as there is only one location for all system administration tasks.
- The standard menu interface makes Interaction Administrator easy to learn and use for managers, supervisors, and quality monitoring team members where appropriate.
- Interaction Administrator also allows local or remote access to perform administration tasks.





## Interaction Administrator Recorder Highlights

The following is a summary of the different containers found in the Interaction Administrator for Interaction Recorder. Recording Selection or rules, Categories, Categorization Rules, Questionnaires, Archives, Roles and User rights are all set up in Interaction Administrator and are further discussed later in this document.

**IR Basic Administration of Recorder (Interaction Recorder):** This container provides the Recording selection for the management of selector rules that are used to determine which interactions are recorded and are which ones are not.

**Categories:** This container provides for the security by managing groupings as well as organizing the recording as needed by the administrator.

**Categorization Rules:** This container provides the function of steering categorizations into rules

**Questionnaires:** This container is for the management of blank or prototype scoring forms.

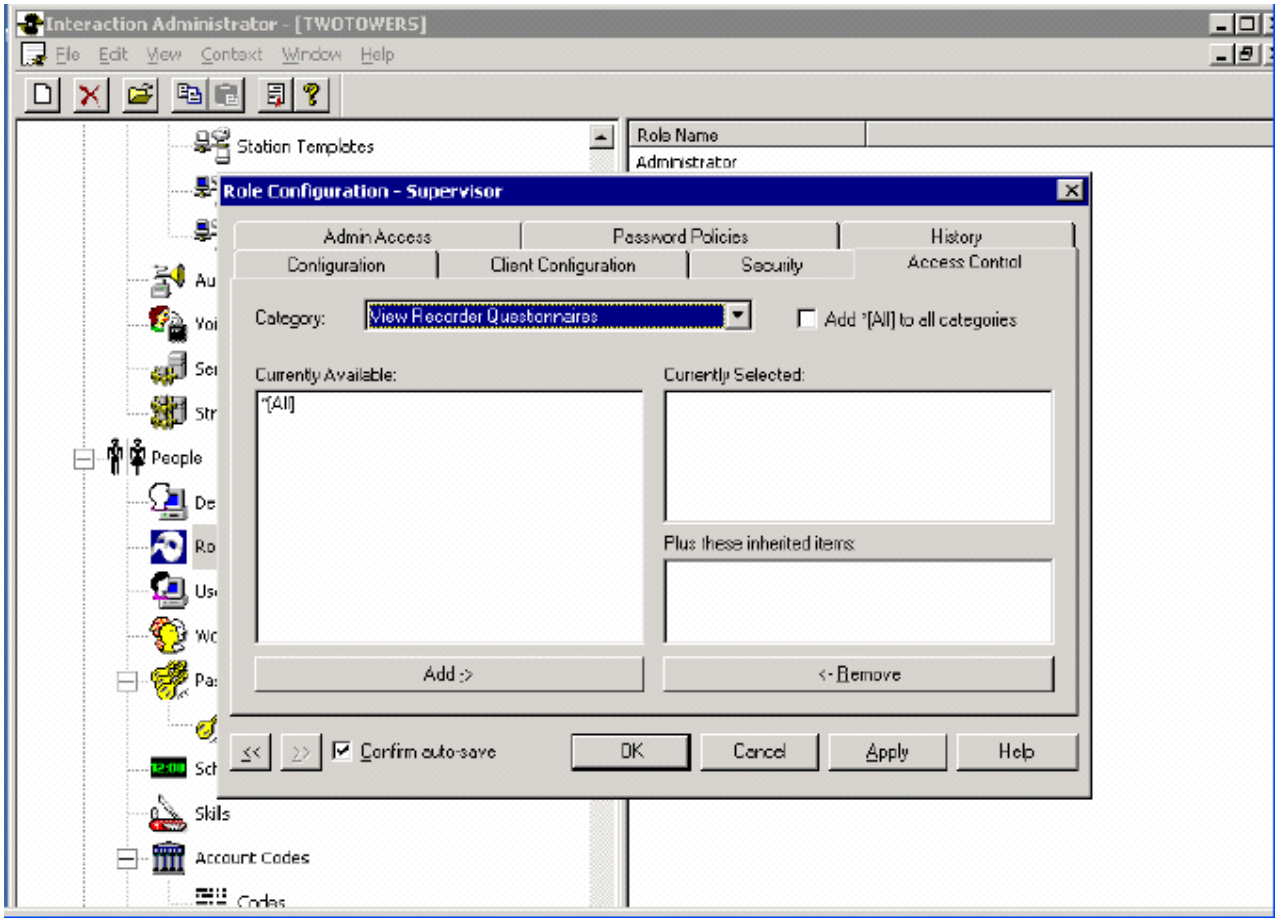
**Achieves:** This container manages the storage location of recordings and which recordings will be achieved.

### The Administrative Interface for Interaction Recorder

#### *Roles, User Rights, Workgroups and Partitioned Access*

A Role is a pre-defined set of attributes and security permissions that define a user's access to various system features and objects. Through the Roles and/or Users containers in Interaction Administrator, the Administrator can set the following rights related to Interaction Recorder.

- See and/or modify selected categories and any recordings under them.
- See existing questionnaires. Once a questionnaire is completed, it cannot be changed.
- Create new questionnaires
  - Modify existing questionnaires
  - Delete questionnaires
- Fill out new questionnaires.
- Create new questionnaires and associate them to interactions.
- Create new categories. Create, modify and delete existing categories



**Rights to view categories and questionnaires can be configured through a Role or by individual user or workgroup in Interaction Administrator.**

**Benefit:**

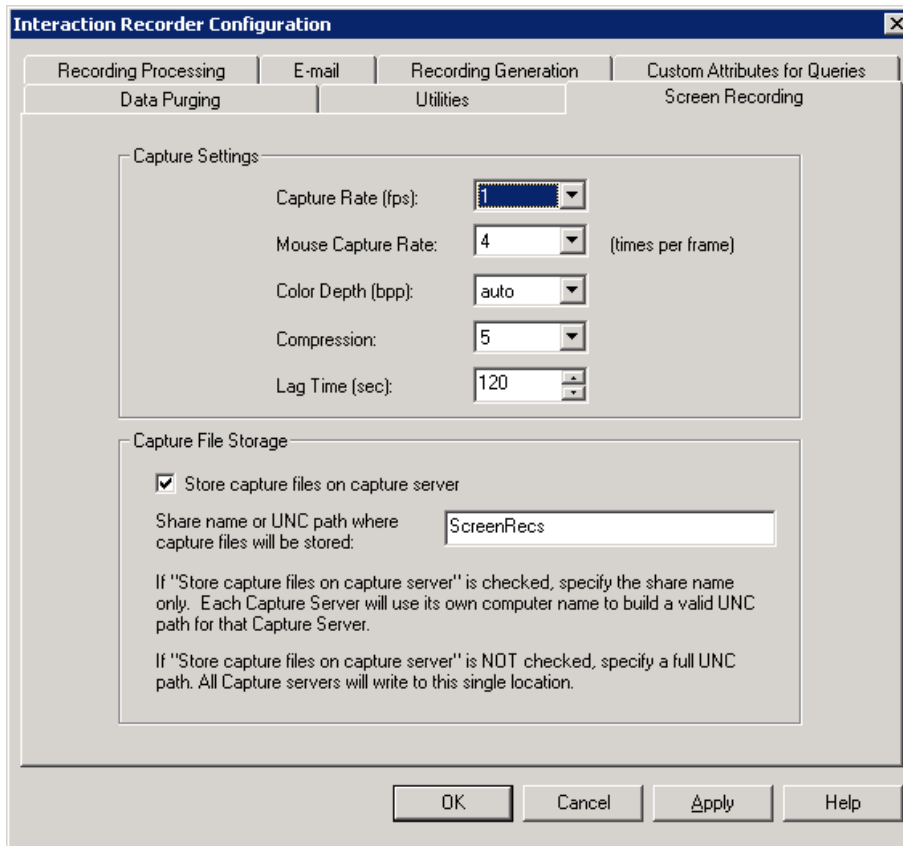
Rights configuration through Interaction Administrator’s Roles container simplifies the process and cuts down on administration time. Partitioned access allows customers in distributed and regulated environments to assure departments that they will only have access to their specific recordings.

**Interaction Administrator Recorder Details**

The IC Server allows you to administer your entire communications system, including Interaction Recorder, in one place using an intuitive graphical interface. For more detail on using Interaction Administrator and configuring CIC, please refer to the CIC Standard Features Document. This section will cover configuration of Interaction Recorder.

**Centralized Administration**

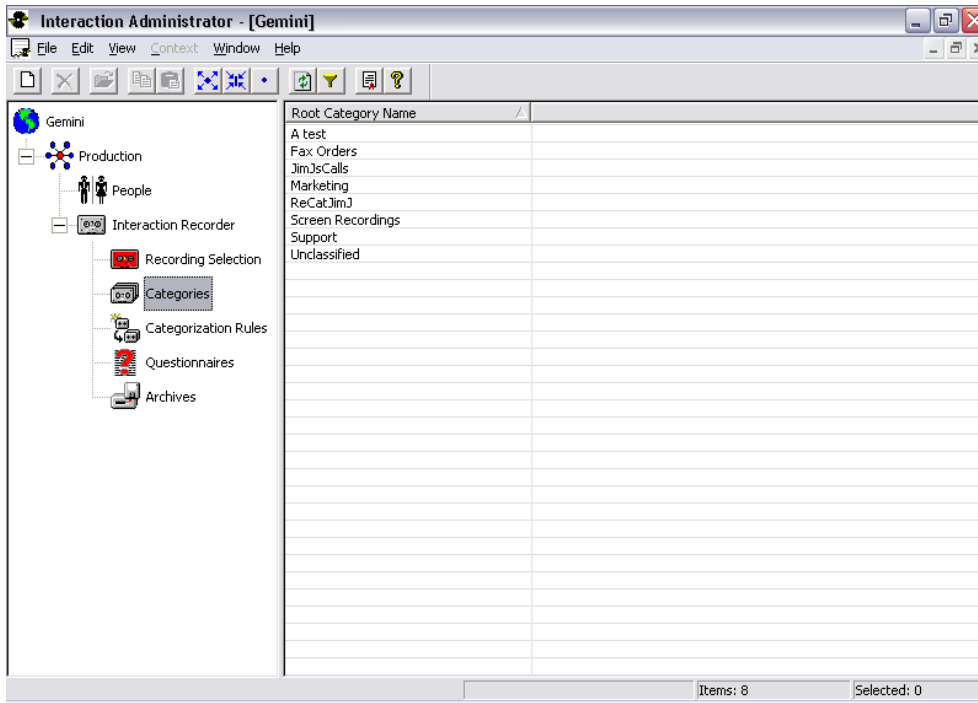
- Single point of administration for all applications – configure users, create recording rules, categories, import rules, and archive recordings from one interface.
- Easy-to-use, standard menu interface
- Local or Remote Access
- Top level display of all configuration items for easy viewing



### Interaction Recorder Configuration:

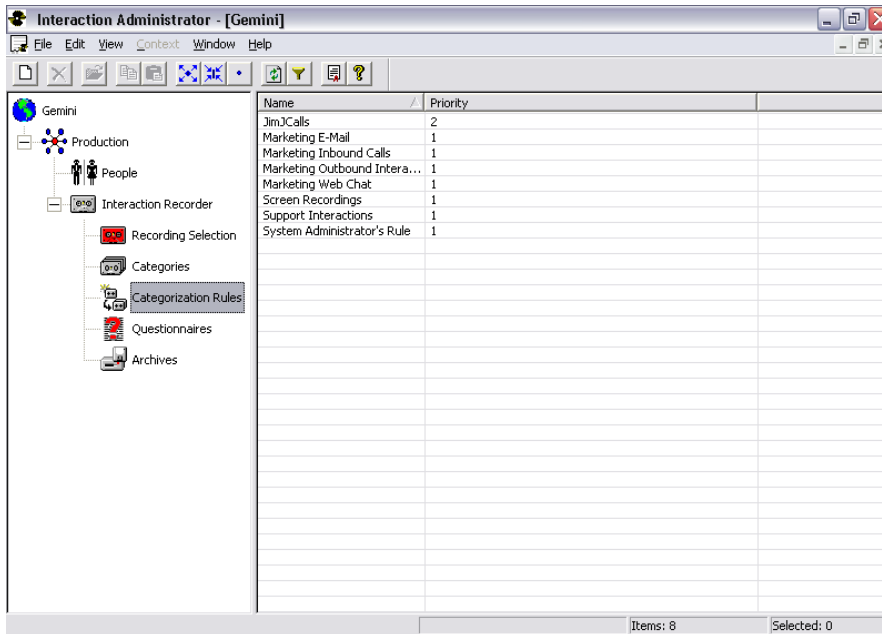
Administrators can set the following:

- Screen Recording capabilities
- The Database poll rate
- The compressed recordings directory location.
- The compression queue length
- The uncompressed directory location
- The compression format
- The recording sites for multi-site locations.
- The system alert email addresses.
- The ability to stop recording upon a transfer of an interaction
- The ability to start a recording after an interaction transfer.
- The machine where unprocessed recordings are located.
- The custom attributes which will appear in the Query Builder.
- Automatic data purging.
- Set purge time.
- Set purging of non-archived recordings based on age of records.
- Set purging of archived recordings based on age of records.
- The ability to record warm transfers per ACD routing rules.



### Categories

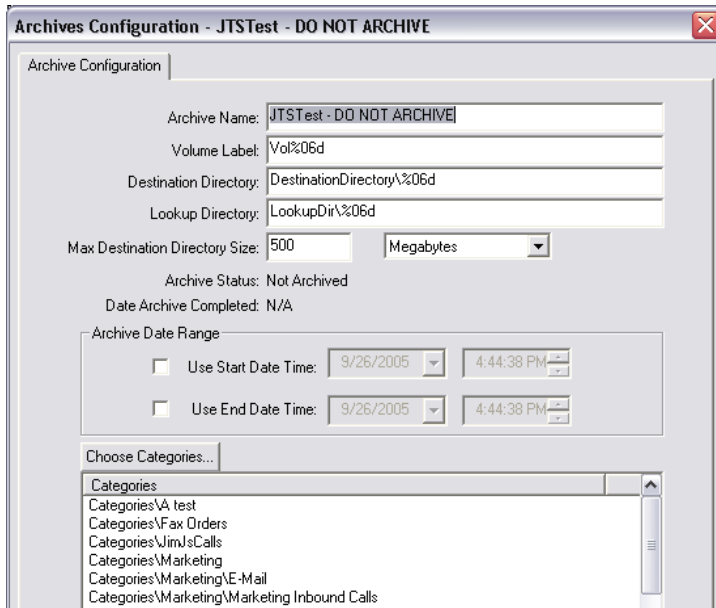
- Administrator creates, updates and deletes the categories through the Categories container.



### Categorization Rules

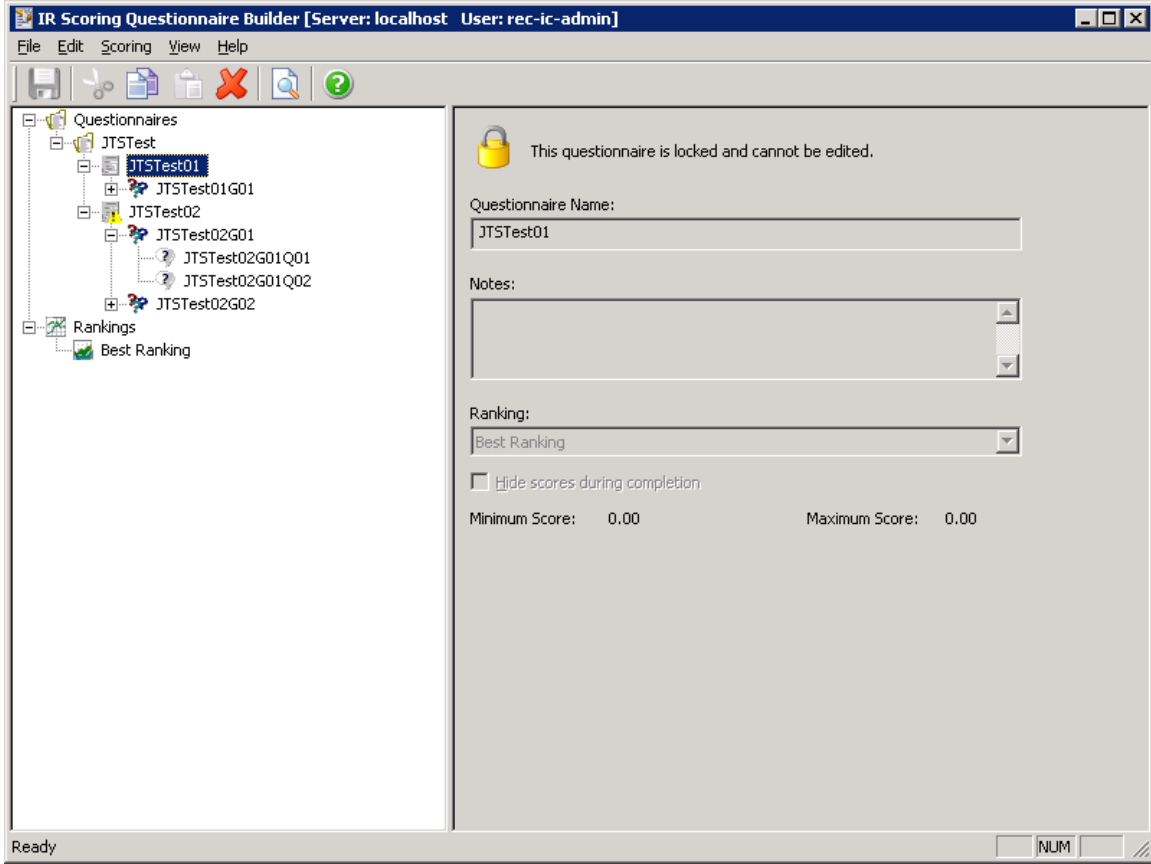


- Uses an interface similar to that of the Query Builder in the Interaction Recorder client.
- Administrator creates the rules which categorize recording files automatically upon completion of the recording.



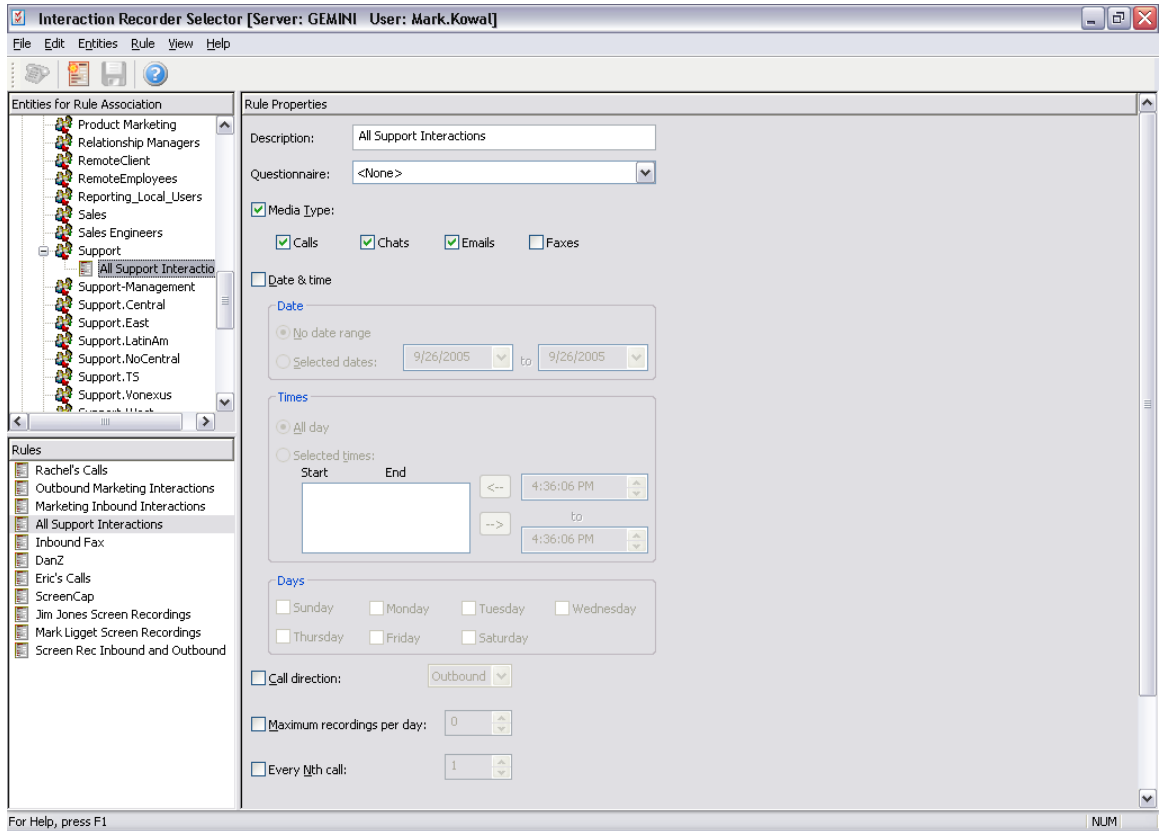
### Archives

- Administrator sets the archive configuration.
- Archive recordings based on recording age and category.
- Archive Name
- Volume Label
- Destination Directory
- Lookup Directory
- Maximum Destination Directory Size
- The Date Range of Recordings to be Archived
- The Categories of Recordings to be Archived



### Questionnaires

- Build questionnaires and ranking (grading) formats in Interaction Administrator through easy-to-use wizards. See the Quality Monitoring section of this document for more detail.



### Recording Selection

- Administrator creates recording rules by utilizing a wizard, or by manually setting the Rules Properties. See the Recording and Compression Section of this document for details on creating the rules.
- Administrator associates a questionnaire with a recording rule.

### Users and Roles

- Through the Roles and/or User containers, the Administrator sets rights to see and/or modify categories and any recordings under them, and see/use specific questionnaires. Please see the CIC Standard Features List for more information

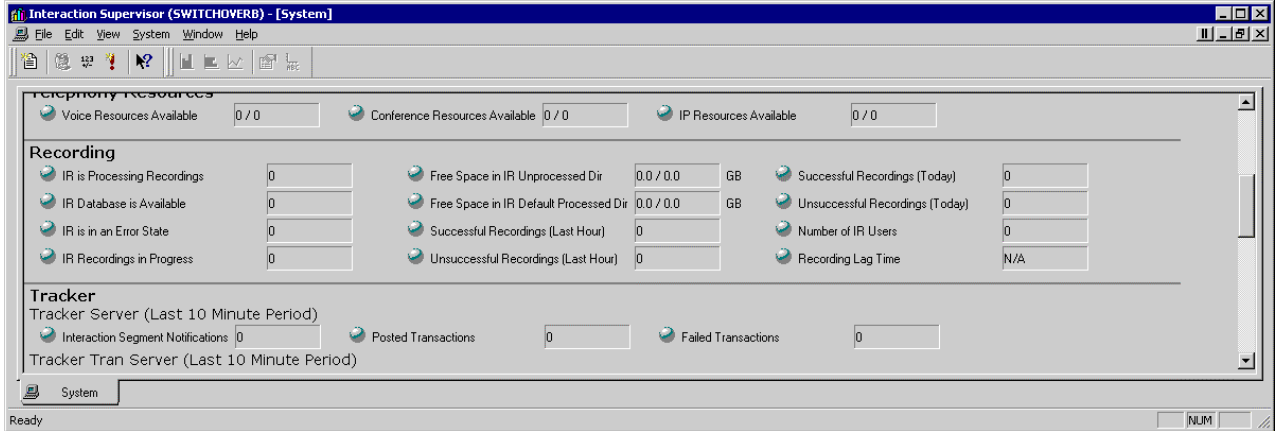


## Interaction Recorder System Monitoring

Interaction Supervisor’s Admin Plug-In provides the ability to monitor Interaction Recorder’s performance and send alerts when specific triggers are met. For more information on Interaction Supervisor’s functions, please refer to the CIC Standard Features List.

The following items can be monitored by Interaction Supervisor:

Activity	Statistic Type	Brief Explanation
IR is processing recordings	Yes/No	Indicates that Interaction Recorder is running and processing recordings
IR database is available	Yes/No	Indicates that IR database server is available on network
IR is in an error state	Yes/No	Indicates that there is an error
IR Recordings in progress	Yes/No	# Recordings currently being processed
Free space in IR Unprocessed Directory	Available space	Displays available disk space in directory
Free Space in IR default processed Directory	Available space	Displays available disk space in directory
IR Recordings successfully processed last hour and current day	Total Number	Number of items for the rolling last hour and current day
IR Recordings unsuccessfully processed last hour and current day	Total Number	Number of items for the rolling last hour and current day
Number of IR users	Current number	Number logged in
Recording lag time	Time duration	Difference between time oldest call was disconnected and current time



### Interaction Supervisor View of Interaction Recorder Activity

**Benefit:**

System Administrators can easily identify when a problem has occurred and resolve it more quickly.