Avaya Workforce Engagement

Interactions and Analytics Administration Guide

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Contents

About this guide

This guide is intended as an aid in the implementation of Interactions and Analytics applications using a logic for customized data and instances that best serves customers' lines of business.

Intended audience

This guide is designed for:

- System and Business Partner professional services staff responsible for planning and setting up systems
- Customer IT staff responsible for system maintenance
- Application Administrators

Document Revision History

Revision	Description of changes
2.19	In *Conditional Custom Data rule comparison conditions*: • Clarified that the conditions "=" and "<>" are for values of type *Integer* or *String*. • Specified which conditions are case-sensitive, and which are not.
2.18	In *Project Rules Manager*, added the following under *Condition parameters*: • In the Employees filter, up to 1000 employees can be selected. • In the Custom Data filter, use the 'contains' operator when using wildcards.
2.17	For Interaction Data Export with Processing, the *Max number of interactions* field enables you to limit the number of interactions exported by the rule. Use of this field is optional.

Revision	Description of changes
2.16	In *Define conditions for Interaction Data Export with Processing rule*, updated for the enhancement to choose how the system evaluates employee organizational membership. Two options are available — either historically, at the time capture occurred, or as currently configured.
2.15	In *Workflow: Create a Transcription-only rule*, clarified that to create a Transcription-only rule you must be assigned the Project Rules Manager privilege.
2.14	In *Project Rules Manager*, added a PRM Rule: Transcription-only (PRM option: **Transcribe**): • Split the topic *Workflow: Create an Automated QM, Speech Analytics, or Interaction Analytics Export rule* into workflows per PRM rule type. • Under *Project Rules Manager overview*, added *Transcription-only rules*.
2.13	For *Workflow: Create a delete interactions (GDPR) rule*, removed statement that this type of rule is only available to EDM Enterprise customers.
2.12	Improvements to the *Rule Details pane* of Project Rules Manager enable you to see statistics for all rule types. Statistics include: • Overall interaction status for each rule action. • Number of recently processed interactions for the past hour and for the previous number of elapsed days since the rule start date, for up to 365 days. • Removal of the rule processing watermark, as it did not accurately identify the progress of the rule.
2.11	In *Flags and Folders*, clarified that after the retention period of a flagged folder has passed, flagged items are removed from the folder but remain available in searches unless the flag is unassigned from the contact or evaluation.
2.10	In *Interaction Data Export with Processing overview*, included a note on exporting to cloud native storage.
2.09	• Renamed the *Flag Manager* to *Flags and Folders* and updated the user interface with a new look and feel. • Added a new tab for setting retention of items in predefined evaluation folders.
2.08	In *Project Rules Manager*, updated for the ability to view completed and expired rules in the rule list.
2.07	Minor editorial revisions.

Revision	Description of changes
2.06	In *Configuring Conditional Custom Data*, removed the option to configure the default form that opens based on a Conditional Custom Data field. This feature is deprecated with the Web Form Designer.
2.05	In *Rule Details pane*, updated rule details to rename the *Current interaction* field to *Rule processing watermark*, which better describes the function of the field shown.
2.04	In *Define conditions for a rule to delete interactions using a recycle bin*, removed the comment regarding export rules.
2.03	In *Define conditions for Automated QM, Speech Analytics, or Interaction Analytics Export rule*: Updated the warning, removing reference to retention time that is not relevant.
2.02	In *Define settings for Interaction Data Export with Processing rule* and in *Exported media format*, added a note about exported audio files.
2.01	Minor updates.
2.00	• *Define settings for Interaction Data Export with Processing rule*: Added new options for exporting captured screen as MP4 for users with the required role permission. • For release 2024R1, archived prior document revision history to a new appendix.

Related topics

Revision history from prior releases (page 182)

Chapter 1

Interactions and Analytics setup

Topics

Interactions and Analytics workflow

Procedure

1. Install and configure servers.

   See the following guides for more information:

   - Workforce Optimization Installation Guide
   - Enterprise Manager Configuration and Administration Guide
2. Configure the default Interactions and Analytics settings for your organization.

   See Interactions and Analytics settings (page 22) for more information.
3. Create users and assign them to roles.

   See *Roles and Privileges Reference*
4. Set up Interactions entities:

   a. Create forms to evaluate employee performance and customer experience under Form Designer.

      See the *Quality Management Form Designer User Guide* for more information.

   b. Create evaluation and contact flags with the Flag Manager (optional—the system is installed with some default flags).

      See Flags and Folders (page 25) for more information.

   c. Optional: If you are using Custom Data, edit and configure Custom Data fields with the Custom Data Manager.

      See Custom Data (page 39) for more information.

   d. (Optional) If you are using Conditional Custom Data, edit and configure Conditional Custom Data fields with the Conditional Custom Data Manager.

      See Conditional Custom Data (page 45) for more information.

   e. Change Custom Data and Conditional Custom Data captions with the Caption Editor.

      See Caption Editor (page 32) for more information.

   f. Optional: If you are using a shared inbox, define which interactions reach Interactions evaluators with the Shared Inbox Manager.

      See Shared Inboxes (page 59) for more information.
5. Assign entities to groups and roles with Assignment Manager.

   Add permission for a user to use:

   - A form, flag, or folder
   - Custom Data and Conditional Custom Data fields

   See Assignment Manager (page 69) for more information.
6. Define and configure a Speech Analytics cluster.

   See *Enterprise Manager Configuration and Administration Guide* for more information.

7. Set up Speech Analytics by defining rules for transcribing, deleting, and performing custom actions on interactions with the Project Rules Manager. See Project Rules Manager (page 81) for more information.

   For additional optional Speech Analytics administrative tasks, refer to:

   - Speech Analytics process tracking (page 155): Monitors the entire lifecycle of all interactions that enter your system.
   - Speech Analytics indexing statistics (page 164): Presents the two reports that show detailed index statistics for each Speech Analytics Index build process. This includes statistics regarding both the Incremental build and the Full Index build.
   - Transcription server performance tracking (page 170): Tracks Transcription Server performance statistics under the ITS Statistics category (object) in Windows Performance Counters.

8. Set up interactions alert rules to trigger alerts to specified users when interactions/contacts or evaluations are added or deleted in flagged folders.

   See *Working with organization alert rules* (Framework Administration Guide) for more information.

Interactions and Analytics users

Interactions and Analytics have two types of users: leaders and employees.

User	Description	Visibility	Settings
Leader	A user that is assigned scope over an organization(s)/group(s) and has privileges under the **Interactions** category, in **Interactions**, **Evaluations**, **Assessments**, **Administration** and/or **Analytics** sub-categories. Example: Supervisor role, Manager role.	Access to interactions, evaluations and assessments related to employees that are members in the organizations/sub-organizations/groups/subgroups over which the leaders have scope (depending on their privileges).	Users are defined as leaders in the **User Management**.
Employee (Member)	A user that is assigned as a member in a leaf group or leaf organization and has privileges under the **Interactions** category, in the **My Interactions** and/or **My Evaluations** sub-categories. Example: Agent role.	Access to their own interactions and evaluations (depending on their privileges)	Members are defined in one or both of the following areas: • Users are defined as members in a leaf *group* in the **User Management** and/or **Organization Management**. • Users are defined as members in a leaf *organization* in the **User Management** (by assigning them to a leaf organizations and selecting **Assign employee as group member of current organization** (default)).

Combined user scope

A user that is assigned different roles, is assigned with a combined set of privileges from all assigned roles. As result, if the users has scope over more than one organization, the combined privileges apply to all these organizations.

Example: User with different roles and scopes

In the diagram below, a user is an **Administrator** with scope over the Root Organization, a **Supervisor** with scope over Organization A and a **Manager** with scope over Organization B. This results in the user being assigned with the combination of all three roles' privileges, with scope over all three organizations and sub-organizations (Organization A.1 and B.1).

Interactions and Analytics privileges

The Interactions and Analytics applications contain roles and privileges that allow you to access specific data and perform defined actions.

The applications’ privileges are categorized as follows:

- **Interactions**: Apply to interactions in your visibility, that is, interactions performed by employees that are assigned to organizations/groups/subgroups over which you have scope (not including your own interactions).
- **Evaluations**: Apply to evaluations in your visibility, that is, evaluations performed on employees that are assigned to organizations/groups/subgroups over which you have scope (not including evaluations performed on you).
- **Assessments**: Apply to assessments in your visibility, that is, assessments performed on contacts related to employees that are assigned to organizations/groups/subgroups over which you have scope.
- **My Interactions**: Apply to your own interactions that you performed.
- **My Evaluations**:Apply to evaluations performed on you.
- **Administration**: Apply to the administrative applications that are used to set up the Interactions application.
- **Analytics**: Apply to the Speech Analytics application.

Related information

Roles and privileges Reference.

Interactions and Analytics entity updates

In User Management and Organization Management, you can delete and deactivate groups, organizations, evaluators/assessors, and employees, and move employees from one group or organization to another.

Updating entities behave as follows:

- Deactivated entities: Objects associated with deactivated entities (interactions, evaluations and assessments) remain in the system and can be searched for and viewed in reports and forms. Deactivated entities can also be reactivated at any time in the system.

  This option can be useful, for example, when hiring seasonal employees during holidays. These employees can be assigned to a group/organization that is active only for certain periods of time during the year. In this way, there is no need to define the new group/organization when hiring temporary workers.

- Deleted entities: The entities are permanently removed from the system and their objects retrieval is limited.

  This option can be useful when there is no need to keep its data any longer, for example, following some organization changes.

- Moved employees: Visibility to interactions or evaluations/assessments associated with employees who moved to a different group or organization is according to the updated scope. Only users with current scope over the employee can search for and view their associated objects, including historical objects from the previous group or organization.

Both deleted and deactivated entities are non actionable, that is, no actions can be performed on these entities such as evaluations and flag assignments.

The following details how entity updates impact the Interactions application:

- Impact of deleting and deactivating groups and organizations (page 17)
- Impact of deleting and deactivating evaluators/assessors (page 18)
- Impact of deleting, deactivating, and moving employees (page 19)

Impact of deleting and deactivating groups and organizations

The table details the differences between deactivating and deleting a group or an organization and how this affects the Interactions application.

> You can delete and deactivate groups. You can delete organizations, but you cannot deactivate organizations.

	Deactivated Groups	Deleted Groups/Organizations
Interactions:		

	Deactivated Groups	Deleted Groups/Organizations
Can I search for this specific group?	No	No
Can I view the group's evaluations?	Yes. You can retrieve evaluations and assessments of this group if you do not specify any group in the search parameters. Such searches retrieve evaluations and assessments of all users, including those of deactivated groups.	No
Can I perform evaluations on the group?	No. You can only edit evaluations that were made before the group was deactivated.	No
Reports:		
Will the group's/organization’s statistics appear in reports?	Yes. You can run reports per specific deactivated group and see the group's data in other reports as well.	Deleted groups/organizations do not appear on the X axis of reports. Yet, you can see statistics of deleted groups/organizations in reports that do not focus on groups/organizations. For example, deleted groups/organizations cannot be displayed in the Average Evaluation Scores per Group report, but their statistics will be included in the Average Evaluation Scores per Evaluator report. To be able to view deleted groups'/organizations’ data in reports, you need to be assigned the **Filter by All Groups** privilege in the User Management application.

Impact of deleting and deactivating evaluators/assessors

The table details the differences between deactivating and deleting an evaluator/assessor and how this affects Interactions applications.

	Deactivated Evaluators/Assessors	Deleted Evaluators/Assessors
Interactions:		

	Deactivated Evaluators/Assessors	Deleted Evaluators/Assessors
Can I search for this specific user?	No. You cannot search for this user, since deactivated users are not displayed in search parameters.	No. You cannot search for this user, since deleted users are not displayed in search parameters.
Can I see the evaluations and assessments made by this user?	Yes. You can retrieve the user's evaluations and assessments if you do not specify any users in the search parameters. Such searches retrieve evaluations and assessments made by all users, including those of deactivated users.	Yes. You can retrieve the user's evaluations and assessments if you do not specify any users in the search parameters. Note that the evaluator's or assessor's name will appear empty. To be able to view data of deleted users you need to be assigned the **Search for any Evaluator/Assessor** privilege in the User Management application.
Reports:		
Will the user's statistics appear in reports?	Yes. You can run reports per specific deactivated users and see their data in other reports as well.	Deleted users do not appear on the X axis of reports. Yet, you can see data of deleted users in reports that do not focus on these entities. For example, deleted evaluators cannot be displayed in the Average Evaluation Scores per Evaluator report, but their statistics will be included in the Average Evaluation Scores per Group report. To be able to view data of deleted users, you need to be assigned the **Filter by All Evaluators/Assessors**privilege in the User Management application.

Impact of deleting, deactivating, and moving employees

The following table details the differences between deactivating, deleting, and moving an employee and how this affects Interactions applications.

	Deactivated Employees	Deleted Employees	Moved Employees
Interactions:			

	Deactivated Employees	Deleted Employees	Moved Employees
Can I search for an interaction made by this specific user?	Not directly. You cannot search for this user, since deactivated users are not displayed in search parameters. But results of that user can be displayed when you search, for example, for a group to which this employee used to belong.	You can search for this user's interactions, provided you have been assigned the **Search for Interactions Outside My Role Scope** privilege in the User Management application. Note that the employees' names appear empty.	Yes (including interactions from the previous group or organization). You can search for this user's interactions, provided the employee is in your role scope.
Can I see evaluations and assessments of interactions handled by this user?	Yes. You can retrieve evaluations and assessments of the user's interactions if you do not specify any users in the search parameters. Such searches retrieve evaluations and assessments made by all users, including those of deactivated users.	Yes. You can retrieve evaluations and assessments of the user's interactions, provided you have been assigned the **Search for Interactions Outside My Role Scope** privilege in the User Management application. Note that the employees' names appear empty.	Yes. You can retrieve evaluations and assessments performed on the employee (including evaluations and assessments from the previous group or organization), provided the employee and the group or organization tagged to the evaluation are in your role scope.
Can I evaluate interactions of this user?	No	No	Yes, provided the employee is in your role scope.
Can I assess contacts of this user?	Yes	No	Yes, provided the employee is in your role scope.

	Deactivated Employees	Deleted Employees	Moved Employees
Can I play back interactions handled by this user?	Yes	Yes. You can play back this user's interactions, provided you have been assigned the **Search for Interactions Outside My Role Scope** privilege in the User Management application. Note that the employees' names appear empty.	Yes. You can play back this user's interactions (including interactions from the previous group or organization), provided the employee is in your role scope.
Reports:			
Will the user's statistics appear in reports?	Yes. You can run reports per specific deactivated employees and see the employees' statistics in other reports as well.	You cannot run reports per deleted employees, but you can see statistics of deleted employees in other reports. For example, deleted employees cannot be displayed in the Average Talk Time per Employee report, but their statistics will be included in the Average Talk Time per Group report.	Yes. You can run reports on the employee (including historical data from the previous group or organization), provided the employee is in your role scope.

Interactions and Analytics settings

In the **Interactions and Analytics Settings** page under Interactions, you configure the default Interactions and Analytics settings for your organization. The configured settings are inherited by all users in the organization. If different settings are configured for specific users in User Management, the user's settings override the default organization settings.

The following settings can be configured for your organization:

- **Filters:** Set filters to restrict user access to interactions, allowing users to access only those interactions that meet the organization's filter definitions. Filters definitions are in addition to access rights assigned to users in User Management. Any limitation set by the filter is in addition to the limitation that exists for a user based on the access rights assigned to them.
- **Playback Contact Gathering:** Configure the settings used to gather interactions belonging to the same contact so that an entire contact can be played back at once. Interactions can be gathered to a single contact based on the ANI, Contact ID (default), Custom Data field, or Switch Call ID assigned to an interaction. If Playback Contact Gathering settings are not defined for your organization, the settings are inherited from the parent organization.
- **Recording Properties:** If associated business rules are defined, specify the percentage of interactions for which associated audio, video, and screen activity is recorded.
- **Conditional Custom Data:** Select conditional custom data field values to tag to interactions.

Organization settings and employee settings

- When a new employee is first added to an organization, the employee inherits the default organization settings defined in the **Interactions and Analytics Settings** page under **Interactions**.
- When employees move to another organization, their original settings are retained; they do not inherit the settings of their new organization. To change their settings to match that of the new organization, you must manually customize their settings on the **Interactions** page under **User Management**.
- When the default organization settings change, existing employees retain their original settings. To change employee settings to match the organization settings, you must manually customize their settings on the **Interactions** page under **User Management**.

Related topics

Interactions and Analytics Settings reference (page 22)

Interactions and Analytics Settings reference

In the Interactions and Analytics Settings page, you configure the default Interactions and Analytics settings for your organization.

Setting	Description
Filters	

Setting	Description
Data Source	The data source to use in the filter. You can associate filters to one specific phone data source, or to all phone data sources in the system.
Filter Type	The attribute to base the filter on: ANI (dialing number), DNIS (dialed number), Extension, PBX ID, Channel, or Custom Data Fields. Only the *first three* Custom Data Fields are available for filtering. In Real-Time Monitoring, only the filters defined based on Extension or PBX ID apply. *No other filters apply*.
# From To	The filters for the selected parameter. If you select **Extension** as the filter type, you can *only* use numeric values, to a maximum of nine (9) digits. • You can assign any number of filters to a user, but they all must be based on the same parameter. Example: You create a filter that uses the DNIS parameter. For this filter, you define a range of numbers or extensions. You can add more filters that define other ranges for the selected DNIS parameter.
Playback Contact Gathering	
Unique Contact ID	Select the parameter according to which contacts are gathered for playback. The default setting is Contact ID.
Key cycle (minutes)	This parameter appears whenever the Unique Contact ID value is NOT Contact ID. Set the time range relative to an interaction's start time, from which the system searches for interactions related to the same contact. For example, when accessing a specific interaction in the Interactions application whose start time is 12:00, and the Key cycle (minutes) value is 30, the system searches for the related contact's interactions that were recorded between 11:30 and 12:30. • Min value: 30 (default) • Max value: 480
Recording Properties	These percentages are *only* used if there is an associated business rule.
Audio Recording Percentage	Set the percentage of calls recorded. Select whether to inherit the default value from the parent organization or specify a custom percentage (0–100).
Video Recording Percentage	Set the percentage of video recorded. Select whether to inherit the default value from the parent organization or specify a custom percentage (0–100).

Setting	Description
Screen Recording Percentage	Set the percentage of screens recorded. Select whether to inherit the default value from the parent organization or specify a custom percentage (0–100).
Conditional Custom Data	Select the conditional custom data and associated value to tag interactions. If a **By User Default** rule is defined, the value is used to tag interactions. Only conditional custom data fields and values assigned in the Assignment Manager are displayed.

Flags and Folders

In the Flags and Folders workspace you create flags which are used to mark contacts and evaluations for further attention, and set the retention of predefined evaluation folders.

Topics

Flags and Folders overview

In the Flags and Folders workspace, you create flags, which are used to mark contacts and evaluations for further attention, and manage the retention of flagged folders and predefined evaluation folders.

Flags and flagged folders

For each flag you create, a corresponding flagged folder is created when the flag is assigned to a contact or evaluation.

To view a flag, users must be assigned the flag in the Assignment Manager.

The following predefined flags are available:

- Contact flags: **Customer Complaints**
- Evaluations flags: **Forward to Employee** and **Require Attention**.

You can set the number of days that items are retained in the corresponding flagged folder that is created when a flag is assigned to a contact or an evaluation. After the retention period passes, items are deleted from the folder but remain available in searches and in other folders unless the flag is also unassigned from the contact or evaluation.

Predefined Evaluation folders

Set the retention for predefined evaluation folders to keep evaluations in the folder until the retention period passes. After the retention period passes, evaluations are deleted from the folder, but remain available in searches and other folders (according to the retention defined for the folder).

You can set the retention for the following predefined evaluation folders:

- Waiting for review
- Accepted evaluations
- Disputed evaluations
- Resolved evaluations

Add a flag

When you add a new flag, you can set the flag to be visible, or hidden if the flag is for future use. You can also set the number of days that items are retained in the corresponding flagged folder that is created when the flag is assigned to a contact or an evaluation.

Procedure

1. Select the **Contact Flags** or **Evaluation Flags** tab depending on the type of flag you want to add.
2. Click **+ Add flag**.
3. Enter a unique flag name and an optional description.

   The name of a flag must not end in "\".
4. Set the flag's visibility.

   Any flags not currently in use but which may be of use in the future can be hidden. Hidden flags are not visible in the Assignment Manager, in searches or when flagging a contact or an evaluation.

   By default, Flags and Folders displays only visible flags in the flag list.
5. In the **Retention Period** field, set the number of days that items are retained in the flagged folder.
   - The maximum number of days that contacts and evaluations can be retained in flagged folders is 180 days.
   - The default retention is 30 days.
   - After the retention period passes, items are deleted from the folder but remain available in searches and in other folders (depending on a folder's retention) unless the flag is also unassigned from the contact or evaluation.
6. Click **Apply** to save the new flag.

Edit a flag

You can edit any of the existing flags. Multiple users can edit the same flag simultaneously. In such cases, the most recent changes made to the flag are those saved.

Historical data is not lost when you change the name of a flag. You can still perform searches and generate reports based on the previous flag name, but this flag name no longer appears in Flags and Folders.

Procedure

1. Select the Evaluation Flags or Contact Flags tab.
2. In the **Actions** column of the flag you want to edit, select .
3. Edit any of the flag's settings.
4. To reset the number of days that items are retained in the flagged folder to the system's default value (30 days), click .
5. To save the changes, click **Apply**.

Delete a flag

Deleting a flag removes the flag across the system. You cannot perform searches or generate reports for a deleted flag.

You cannot delete the **Forward To Employee** and **Require Attention** evaluation flag, or the **Customer Complaints** contact flag.

Procedure

1. In the **Actions** column of the flag you want to delete, click .
2. Select **Delete** to confirm the deletion and to remove the flag from the list of defined flags.

Display hidden flags

Any flags not currently in use but which may be in use in the future can be hidden. Hidden flags are not visible in the Assignment Manager, in searches, or when flagging a contact or an evaluation.

By default, Flags and Folders displays only visible flags.

Procedure

1. Select the **Contact Flags** or **Evaluation Flags** tab.
2. Turn on the **Show hidden** toggle.
   Any flags that are set to hidden are now displayed in the list.

Set the retention of predefined evaluation folders

The default number of days that evaluations are retained in evaluation folders is 30 days. You can modify this setting to up to 180 days.

Procedure

1. Select the **Evaluation Folders** tab.
2. In the **Actions** column of the folder, click .
3. Set the new retention, and click **Apply**.
4. To reset the retention to the system's default value (30 days), click .
5. To save the changes, click **Apply**.

Chapter 3

Caption Editor

The Caption Editor enables you to modify the captions that appear in the various applications and administrative tools to reflect the terminology used in your organization.

Topics

Caption Editor overview

The system has a default set of captions that appear across various applications and administrative tools. The Caption Editor lets you modify the default captions to reflect the terminology used in your organization. You can also set custom captions for a specific organization in your organization tree, to reflect the terminology used in that specific organization. The custom captions are displayed in the Interactions application only.

The Caption Editor displays the default set of editable captions, their current value, and messages where these terms appear.

Modifying captions requires restarting some system components, which may interfere with user activity. Therefore, it is recommended that you edit the captions during non-business hours.

Related topics

Captions per organization (page 33)

Captions per organization

The Caption Editor lets you set custom captions in the Interactions application for organizations within your visibility. By default, each organization inherits the default captions from the root organization. You can modify the default captions inherited from the root organization to reflect the terminology used in each individual organization.

When you modify the default captions for a particular organization, a custom caption set is created for that organization. All organizations on the same branch in the organization tree inherit the custom caption set. A branch consists of an organization and its sub-organizations.

Only one custom caption set can be defined per branch. If a custom caption set is defined for a particular organization, the captions of all other organizations on the same branch and the organizations above it in the tree (not including the root organization) become read-only and cannot be edited. You can only edit the captions of the organization where the custom caption set is defined.

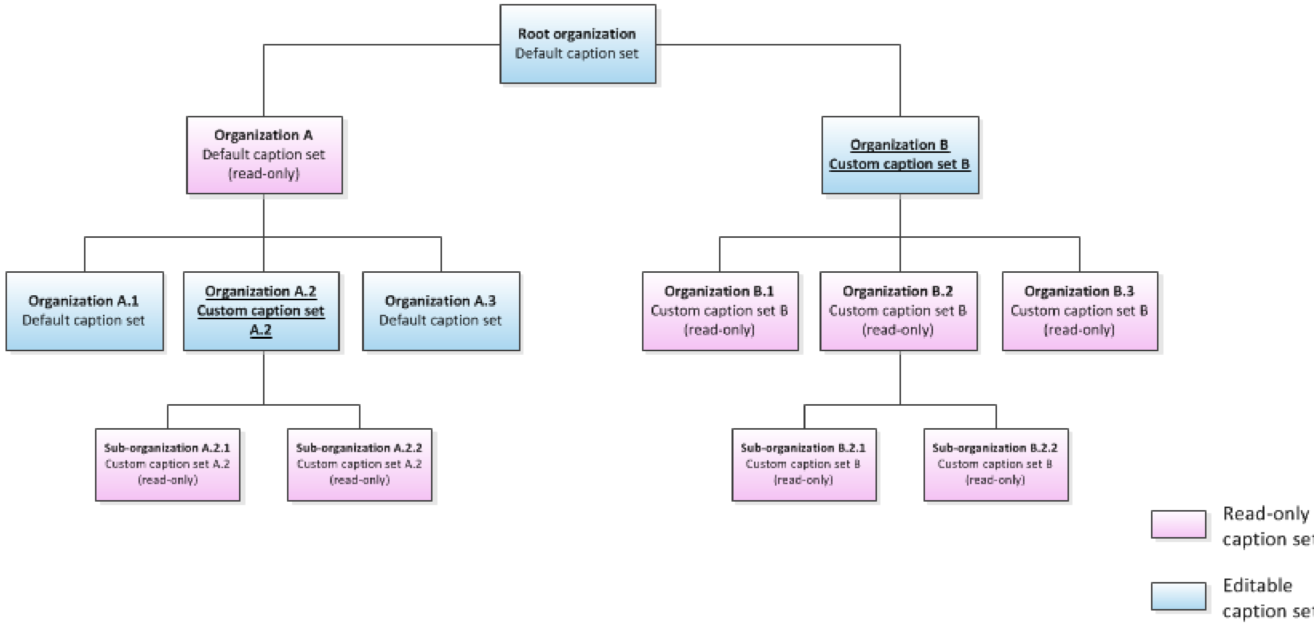
Example 1: Custom caption set in a sub-organization

- Organization A and all of its sub-organizations inherit the default caption set from the root organization (system default).
- A custom caption set is defined for organization A.2. The custom caption set is inherited by all of its sub-organizations (A.2.1 and A.2.2).
- The caption sets for organization A and all of the sub-organizations under A.2 become read-only and cannot be edited.

Example 2: Custom caption set in a top-level organization

- Organization B and all of its sub-organizations inherit the default caption set from the root organization (system default).
- A custom caption set is defined for organization B. The custom caption set is inherited by all of its sub-organizations (B.1, B.2, and B.3) and their respective sub-organizations.

- The caption sets for all of organization B's sub-organizations are set to read-only and cannot be edited.



Edit default captions for root organization

Use the Caption Editor to edit default captions for terms that appear across various applications and tools in the system. The captions are edited at the root organization and are inherited by all organizations in the organization tree.

Before you begin

- Verify that you have privileges to the Caption Editor.
- To retain a copy of the current caption set while making changes (because the field context is not always obvious from the field name), print the current settings and keep it for reference.

Procedure

1. Go to **Interactions**. Under **Administration**, select **Caption Editor**.

   The Organizations pane displays the list of organizations within your visibility.
2. In the Organizations pane, select the **root** organization.
3. From the **Caption set language** list, select the language of the caption you want to edit.
4. From the **Caption to modify** list, select the term you want to modify.

   The Caption Editor displays all the captions that contain the selected term. Each caption must be edited individually.

   Captions that were edited previously and no longer display the default caption are indicated by an enabled **Display Default** icon.
5. To display and edit only captions in a particular application, from the **Application** list, select the application.

   To edit captions in the Custom Data Manager, Conditional Custom Data Manager, and Assignment Manager, you must edit the captions both in the Interactions Application *and* in the Interactions Legacy Application.
6. To edit a caption across all affected applications, click **Find and Replace** to replace all instances, or change each instance as needed.

   If a colon (:) or comma (,) appears in the field name, you must add the punctuation marks to the edited caption as well.

   If the caption you are editing appears in displayed system messages, ensure that you update the caption without changing the meaning of the message.
7. Click **Save**.

   The edited caption is saved. For the changes to take effect, follow the steps in the confirmation message to restart some system components.

   The edited caption is inherited by all organizations below the root organization.
8. Optional: To view the default captions for edited captions:

- To view the default caption for an edited caption, click **Display Default** (this icon is only enabled for captions that were edited).
- To view the default captions for all captions, click **Display All Defaults**.

  Loading default captions only affects the page display. It does not override the current saved caption. Only if you click **Save**, the edited caption is saved.

Set custom captions per organization

Set custom captions for terms that appear in the **Interactions** application. The custom captions are set for a selected organization and are inherited by all organizations below it in the organization tree.

Before you begin

- Verify that you have privileges to the Caption Editor.
- To retain a copy of the current caption set while making changes (because the field context is not always obvious from the field name), print the current settings and keep it for reference.

Procedure

1. Go to **Interactions**. Under **Administration**, select **Caption Editor**.

   The Organizations pane displays the list of organizations within your visibility.
2. In the Organizations pane, select the organization for which you want to create custom captions.
3. From the **Caption set language** list, select the language of the caption you want to edit.
4. From the **Caption to modify** list, select the term you want to modify.

   The Caption Editor displays all the captions that contain the selected term. Each caption must be edited individually.
5. From the **Application** list, select **Interactions Application**.

   The Caption Editor displays all the captions in the Interactions application where the term is displayed.

   Captions that were edited previously and no longer display the default caption are indicated by an enabled **Display Default** icon.
6. To modify a caption across all affected instances, click **Find and Replace** to modify all instances, or modify each instance as needed.

   If a colon (:) or comma (,) appears in the field name, you must add the punctuation marks to the caption as well.

   If the caption you are editing appears in displayed system messages, ensure that you update the caption without changing the meaning of the message.
7. Click **Save**.

   For the changes to take effect, follow the steps in the confirmation message to restart some system components.

   A lock icon appears next to the name of the organization to indicate that a custom caption set exists for this organization. All organizations below it in the organization tree inherit the custom caption set. The captions for all organizations below the selected organization and above it in the tree (not including the root organization) are set to read-only and cannot be modified. You can only modify the captions for the organization that holds the custom caption set.
8. Optional: To view default captions:

- To view the default caption for an edited caption, click **Display Default** (this icon is only enabled for captions that were edited).
- To view the default captions for all captions, click **Display All Defaults**.

  Displaying the default caption only affects the page display. It does not affect the current saved custom caption set. Only if you click **Save**, the change is saved to the custom caption set.

9. To delete the custom caption set and revert to the default caption set, in the Organizations pane, select the organization with the lock icon and click **Delete Set** (the Delete Set icon is only displayed if a custom caption set exists for the selected organization).

   The lock icon is no longer displayed next to the organization name and all captions for organizations on the same branch and above it in the tree are available again for editing.

Chapter 4

Custom Data

In the Custom Data Manager, you enable Custom Data (CD) fields for use in the system. Custom Data fields are used for interaction marking, alongside with the data obtained from the customer's recording environment.

Topics

Custom Data overview

The system lets you configure Custom Data fields that are used to attach additional data to an interaction's record. Custom Data fields are used for searching interactions, reporting, and business analytics across all applications.

Custom Data fields contain data according to the customer's unique requirements and data model and are in addition to the data obtained from the customer’s recording environment. For example, an organization may want to tag interactions with an indication of the line of business to which they belong, when this data is not available by default from the recording environment.

There are 300 Custom Data fields available for use in the system, each with a preassigned field type. By default, Custom Data fields are disabled. To use a Custom Data field to tag interactions, there are several steps that you need to perform. The first step is to enable the Custom Data field you want to use in the Custom Data Manager.

A single interaction can be tagged with up to 300 Custom Data fields, depending on the number of enabled Custom Data fields in your system.

Custom Data in Real-Time Agent Assist

Real-Time Agent Assist (RTAA) monitors interactions while they are in progress and triggers actions based on the content of an interaction. For example, when RTAA detects that specific words or phrases are spoken in a call, an action can be triggered to store information about the call in a Custom Data field.

Related topics

Custom Data configuration workflow (page 42)

Custom Data window

The Custom Data window displays a grid with the available Custom Data fields in the system. In the grid, you can view information about each Custom Data field.

Parameter	Description
Enabled	Displays whether a field is enabled or disabled. By default, all Custom Data fields are disabled. Only enabled Custom Data fields appear in the system’s applications. Disabled fields remain hidden in all the applications. The grid is sorted by default according to the Enabled column.
Display Name	Displays the name of a Custom Data field. The display name is read-only. To assign a meaningful name to a Custom Data field, modify the field's caption in the Caption Editor.
Type	Displays the field type (varchar, int, or unicode) assigned to a Custom Data field. The field type is read-only.

Parameter	Description
Indexed	Indicates whether a field is indexed in the database. The Indexed field is read-only. Custom Data fields 1-8 and 24-300 are indexed fields. Indexed fields return faster search results. If the field is set to True, you can use the Custom Data field as the sole criteria for searches or report generation. If the field is set to False, you can use the Custom Data field to filter data only when coupled with at least one indexed field.
Values	When searching for interactions according to a Custom Data field, the configured values are displayed in the system as predefined values.
Description	Displays a description of the Custom Data field.

Custom Data configuration workflow

To configure a Custom Data field for use in your system, there are several steps that you need to perform. The first step is to enable the Custom Data field you want to use in the Custom Data Manager.

Workflow: Custom Data configuration

1. In the **Custom Data Manager**: Enable Custom Data fields.
2. In the **Caption Editor**: Set the Custom Data captions to reflect the terminology used in your enterprise.
3. In the **Assignment Manager**: Assign the enabled Custom Data fields to the required groups and roles.
4. Under **Recording Management**: Create custom attributes and map them to the enabled Custom Data fields.
5. In the relevant system application: Identify the data that you want to populate in the Custom Data field (either from the CTI switch, DPA triggers, or external adapters) and map it to a custom attribute.

   For a list of supported attributes, see *Avaya Contact Recorder Planning, Installation, and Administration guide*. Note that in the Avaya Contact Recorder, custom data is called private data.

Related topics

Enable Custom Data fields (page 43)

Caption Editor (page 32)

Assignment Manager (page 69)

Related information

Custom Data configuration workflow

Enable Custom Data fields

In the Custom Data Manager grid, enable Custom Data fields for use in your system.

> Custom Data fields 1-8 and 24-300 are indexed fields. Using indexed fields in searches and filters returns faster results, and allows you to use the fields as the sole search or filter criteria. When enabling Custom Data fields, it is recommended to enable Custom Data fields that are indexed.

Procedure

1. Go to **Interactions**. Under **Administration**, select **Custom Data**.
2. To quickly locate a Custom Data field in the grid, use the search function at the top of the grid.
3. In the row of the Custom Data field you want to enable, click Edit.

   > The Indexed column in the Custom Data row indicates whether the field is indexed.

4. Optional: Type a meaningful description for the Custom Data field.
5. Select **Enabled**.
6. Optional: In the **Value List**, enter values that correlate to actual values received from the applications providing this information, such as the CTI switch:
   a. To add a value, type the value name and click +.
   b. To remove a value, select the value in the list and click ✖.

   > The values that you add are used as search filters in the system when searching for interactions.

7. To save the Custom Data settings, click **Update**.
8. Optional: To change the order in which enabled Custom Data fields appear in the system, use the arrows in the Up/Down columns.

Related topics

Custom Data field types (page 44)
Custom Data configuration workflow (page 42)

Custom Data field types

The Custom Data Manager displays 300 Custom Data fields that can be enabled in the system. Each Custom Data field is preassigned a field type.

Field Type	Use
int	Stores non-decimal numeric values within the following range: **-2,147,483,648** to **2,147,483,647** If the value exceeds the max int, it will be converted to 1234567890.
varchar	Returns a varying-length character string.
unicode	Returns a unicode character string. All unicode character strings can consist of up to **256** characters.

Field types are assigned to Custom Data fields as follows:

Physical Custom Data Fields	Database Name	Field Type	Length
1	p1_value	varchar	128
2 through 16	p2_value through p16_value	varchar	64
17 through 23	p17_value through p23_value	varchar	32
24 and 25	p24_value and p25_value	int	
26 through 48	p26_value through p48_value	unicode	256
49 and 50	p49_value and p50_value	int	
51 through 73	p51_value through p73_value	unicode	256
74 and 75	p74_value and p75_value	int	
76 through 281	p76_value through p281_value	unicode	256
282 through 300	p282_value through p300_value	int	

Related topics

Enable Custom Data fields (page 43)

Conditional Custom Data

Conditional Custom Data (CCD) allows you to tag interactions with additional information not available directly from other sources, such as a CTI, but derived from the values in other data fields.

> CCDs are only supported by the Avaya Contact Recorder Advanced.

Topics

Conditional Custom Data overview

Conditional Custom Data allows you to tag interactions with additional information not available directly from other sources, such as a CTI, but derived from the values in other data fields. That is, the system enables you to attach additional data to an interaction's record by defining Conditional Custom Data (CD) fields. Conditional Custom Data fields contain data according to the customer's requirements and data model and are in addition to the data obtained from the customer's recording environment. They are fields that contain predefined values that are based on customized rules defined by administrators. For example, an enterprise may want to tag an interaction with an indication of the line of business to which it belongs, when this data is not available from a CTI. A single interaction can be tagged with up to 5 Conditional Custom Data fields.

You can also set Conditional Custom Data from a value configured in an employee profile, thus enabling you to tag each interactions associated with that employee with details about the employee.

It may be possible to determine the line of business based on the dialed number (DNIS). For instance, a Conditional Custom Data field can be dedicated to the “Line of Business” information. Users can configure rules that determine how this field is populated, for example, if DNIS is 1800-222555 then Line of Business is Car Insurance or if DNIS is 1800-333555 then Line of Business is Health Insurance.

Conditional Custom Data fields are managed in the Conditional Custom Data Manager. The Conditional Custom Data Manager displays a list of the Conditional Custom Data fields and allows you to determine which of them will be enabled in the system.

The Conditional Custom Data Manager is used to:

- Plan how to best utilize the fields (CCD1 is the only field that will be available when generating historical reports).
- Enable the fields you need.
- Set some values for quick search.
- Set the rules for populating these fields with data.

Configure Conditional Custom Data

Procedure

1. In the Conditional Custom Data Manager, enable Conditional Custom Data fields and set the Conditional Custom Data values and tags for recorders.

   By default, all fields are disabled.
2. In the Caption Editor, set the Conditional Custom Data captions to reflect the terminology used in your enterprise, for example, “Line of Business” or “Contact Center”.

   > After you add a new Conditional Custom Data field to the system and assign it in the Assignment Manager, it can take a few minutes until the field is available for search and for external evaluation. This is because the Conditional Custom Data field value is stored in the Interactions application’s cache which is renewed once an hour.

3. In User Management, optionally assign employees default values for the various Conditional Custom Data fields. These values are then used to tag the employee’s interactions.

Related topics

Edit a Conditional Custom Data field value (page 52)

Caption Editor (page 32)

Assignment Manager (page 69)

Related information

Assigning Conditional Custom Data Filters (Enterprise Suite User Management Guide)

Conditional Custom Data visibility logic

This table illustrates the impact of Conditional Custom Data field values on the visibility of interactions to users.

CCD values assigned	"Access any value" assigned	Results
No	No	Users can access any interaction. Users cannot perform searches or use CCD values as Inbox selection criteria, report criteria, external evaluations' fields, and Speech Analytics filters. In the results set, users cannot see CCD values assigned to an interaction.
1 or more	No	Users can access only interactions tagged with the assigned CCD values. Users can use the assigned CCD values as search criteria, Inbox selection criteria, report criteria, external evaluations' fields and Speech Analytics filters. In the results set, users can see only assigned CCD values.
1 or more	Yes	Users can access any interaction, including interactions tagged with blank CCD values. Users can use all CCD values as search criteria, Inbox selection criteria, report criteria, external evaluations' fields and Speech Analytics filters. In the results set, users can see all CCD values.
All	No	Users can access all interactions tagged with any of the assigned CCD's values, but not interactions tagged with blank CCD values. Users can use all CCD values as search criteria, Inbox selection criteria, report criteria, external evaluations' fields and Speech Analytics filters. In the results set, users can see all CCD values.
All	Yes	Users can access any interaction, including interactions tagged with blank CCD values. Users can use all CCD values as search criteria, Inbox selection criteria, report criteria, external evaluations' fields and Speech Analytics filters. In the results set, users can see all CCD values.

CCD values assigned	"Access any value" assigned	Results
No	Yes	Users can access any interaction, including interactions tagged with blank CCD values. Users cannot use CCD values as search criteria, Inbox selection criteria, report criteria, external evaluations' fields and Speech Analytics filters. In the results set, users can see all CCD values.

Add a value to a Conditional Custom Data field

You can add up to 3000 values to a Conditional Custom Data field.

Procedure

1. Sign in to the system, and go to **Interactions**. Under **Administration**, select **Conditional Custom Data**.
2. If applicable, verify that the relevant data set is selected.
3. In the row of the Conditional Custom Data field to which you want to add a value, click **Edit**.
4. In the **Values** tab, click **Add Value** and type a value.

   To hide the field value from all users, select **Hide Value**.

   Users cannot access hidden Conditional Custom Data field values when defining search criteria or creating reports.

   By default, all values are visible.
5. To add the new Conditional Custom Data value to the list of values, click **OK**.
6. Click **OK**.

   Defining a large number of values for a single Conditional Custom Data (such as 3000) may slow the system's performance when:

   - Clicking the **Edit** icon for a Conditional Custom Data with a large number of values
   - Accessing the Assignment Manager**General** tab/folder for a Group or Role containing the Conditional Custom Data with a large number of values

Conditional Custom Data field information

In the Conditional Custom Data window, you can view information about the Conditional Custom Data fields.

Parameter	Description
Enabled	Enabled Conditional Custom Data fields appear in the system's applications. Disabled fields remain hidden in all applications. By default, all Conditional Custom Data fields are disabled.
Display Name	The display name of the Conditional Custom Data field is read-only. You can assign a meaningful name to a Conditional Custom Data field using the Caption Editor.
Field Name	The name defined for this field when the Custom Data Planner tool is used. In all other cases, this field is empty and cannot be edited.
Description	A description of the Conditional Custom Data field.
Historical Reports	Indicates the Conditional Custom Data that is included in Historical Reports.
Edit	Enables you to change the specific Conditional Custom Data properties.

Related topics

Conditional Custom Data field specifications (page 58)

Edit a Conditional Custom Data field value

Edit a value for a Conditional Custom Data field.

Procedure

1. In the row of the Conditional Custom Data field for which you want to edit a value, click **Edit**.
2. In the **Values** tab, locate the row of the value you want to edit and click **Edit**.
3. Modify the value as required.
4. Click **OK** to save the edited value.
5. Click **OK**.

Print Conditional Custom Data parameters

You can print a table of Conditional Custom Data fields including the display name, whether or not the field is enabled, conditional custom data field values, and description.

Procedure

1. In the Conditional Custom Data Manager, click **Print**.
2. Click **Print** at the top of the page.
3. Select a printer and click **Print**.

Conditional Custom Data rules

The Recorder Integration Service applies the Conditional Custom Data rules and values, which match the conditions defined, when updating the CTI information for each interaction.

Rules can be created for specific switch types (at a given site), as defined in the Switch Manager, and the Recorder Integration Service verifies only those rules relevant to the selected switch. Alternatively, rules for all switch types can be defined.

Related topics

Add a rule to a Conditional Custom Data field (page 54)
Conditional Custom Data rule comparison conditions (page 55)
View Conditional Custom Data rules (page 56)
Edit a Conditional Custom Data rule (page 56)
Delete a rule from a Conditional Custom Data field (page 56)

Add a rule to a Conditional Custom Data field

You can add up to 500 rules to each Conditional Custom Data field. These rules determine how the Acquisition Integration Service will populate the Conditional Custom Data field.

You can add a rule to a specific switch or to all switches in the system. Switch-specific rules are always considered before global switch rules. Use the switch-specific option only if the new rule is dependent on a value from a specific switch.

When creating a rule based on a Custom Data field, only custom data fields 1-75 are available for selection (if enabled in the system).

Procedure

1. In the row of the Conditional Custom Data field to which you want to add a rule, click **Edit**.
2. Select the **Rules** tab.
3. Do one of the following:
    - To apply a rule to a specific switch type, from the **Rules for switch type** drop-down list, select a switch type.
    - To apply a rule to all switches, locate the **Rules for all switch types** table.
4. Click **Add Rule**.
5. Do one of the following:
    - From the **Set field value to** drop-down list, specify a value and condition for your rule and go to Step 6.
    - Select the **By User Default** radio button to use the default value for this user, defined in the User Management application and go to Step 8.
6. From the **When** drop-down list, select the Custom Data field (or standard CTI data) on which you want to base the rule.
7. Do one of the following:

- From one of the comparison drop-down lists, select a condition and type a value (or values) with which to compare the custom data field.

  You can use the wildcard character to replace any number of characters in the **LIKE** conditions. If the wildcard replaces multiple characters, add ***** to the beginning, middle or end (or multiple times) of a value. If the wildcard replaces a single character, add **?** to the beginning, middle or end (or multiple times) of a value.

  The maximum number of values that can be defined in the Value List is 1200 values.
- Select **BETWEEN** and type two integer values to indicate the allowed range for the specified Custom Data field (available only when you select an *integer* option from the **When** drop-down list).

8. Click **Add**.
9. Click **OK** to save the Conditional Custom Data field rule.

Related topics

Conditional Custom Data rule comparison conditions (page 55)

Conditional Custom Data rule comparison conditions

The following comparison conditions are available:

Condition	Description
LIKE	Compares a Custom Data field with a single condition value of type *String*. Numeric values are treated as strings. Manually enter the condition value. LIKE supports two special characters: **?** matches any single character. ***** matches any multiple characters. This comparison is not case-sensitive.
IN	Compares a Custom Data field with condition values of type *Integer* or *String* that are within the selected list of values. Either import the condition values from a text file containing values separated by a carriage return or manually enter the list of condition values, each value separated by a comma. For string values, this comparison is case-sensitive.
NOT IN	Compares a Custom Data field with condition values of type *Integer* or *String* that are not within the selected list of values. Either import the condition values from a text file containing values separated by a carriage return or manually enter the list of condition values, each value separated by a comma. For string values, this comparison is case-sensitive.
= (equal) **<>** (not equal)	Compares a Custom Data field with a single condition value of type*Integer* or *String*. Manually enter the condition value. For string values, this comparison is case-sensitive.

Condition	Description
< (less than) **<=** (less than or equal) **>** (greater than) **>=** (greater than or equal)	Compares Custom Data fields with a single condition value of type *Integer*. Manually enter the condition value.

View Conditional Custom Data rules

View the rules defined for a Conditional Custom Data field.

Procedure

1. In the row of the Conditional Custom Data field for which you want to view its rules, click **Edit**.
2. Select the **Rules** tab.
3. To view the rules applied to the specified switch type, from the **Rules for switch type** drop-down list, select a switch type.

   To view the rules applied to all switches, locate the **Rules for all switch types** table.

Edit a Conditional Custom Data rule

Edit any of the rules defined for a specific switch or for all switch types.

Procedure

1. In the row of the Conditional Custom Data field for which you want to edit a rule, click **Edit**.
2. Select the **Rules** tab.
3. Do one of the following:
   - To edit a rule for a specific switch type, from the **Rules for switch type** drop-down list, select a switch type.
   - To edit the rules applied to all switches, locate the **Rules for all switch types** table.
4. In the row of the rule you want to edit, click **Edit**.
5. Modify the rule as required.
6. Click **OK**.
7. Click **OK**.

Related topics

Conditional Custom Data rule comparison conditions (page 55)

Delete a rule from a Conditional Custom Data field

Deleted rules are removed from the database and the Acquisition Integration Service no longer uses them to populate Conditional Custom Data fields.

Procedure

1. In the row of the Conditional Custom Data field for which you want to delete a rule, click **Edit**.
2. Select the **Rules** tab.
3. In the row of the rule you want to delete, click  .
4. Click **Yes** to confirm the deletion.
5. Click **OK**.

Conditional Custom Data field specifications

You can customize each Conditional Custom Data field to your specific needs.

Each Conditional Custom Data field is represented by the *varchar* field type:

Field Type	Use
varchar	Returns a varying-length character string.

The following table describes the available Conditional Custom Data fields.

Physical Conditional Custom Data Fields	Database Name	Field Type	Length
1	p1_value	varchar	64
2	p2_value	varchar	64
3	p3_value	varchar	64
4	p4_value	varchar	64
5	p5_value	varchar	64

Shared Inboxes

With the Shared Inbox Manager, you create Shared Inboxes that are available for assignment to multiple users. A Shared Inbox contains interactions that can be evaluated by anyone who is assigned to the Shared Inbox.

Topics

Shared Inboxes overview

A Shared Inbox is a pool of interactions that share the same set of characteristics (such as interactions made to a specific DNIS, interactions of a certain length, or from a particular line of business), that can be accessed by multiple users.

The system pushes interactions to the Shared Inbox pool using the settings that you defined for the Shared Inbox in the Shared Inbox Manager. The settings include a set of rules that define the interactions' characteristics and the number of interactions to push.

Interactions that are pushed to the Shared Inbox can be evaluated by anyone who is assigned to the Shared Inbox in the Assignment Manager application. Users can only view and evaluate interactions that are in their visibility. An interaction can be evaluated by one user only; no two users can evaluate the same interaction.

Because the Shared Inbox's interactions have similar characteristics, it provides for more balanced employee evaluations across the enterprise. It also enables users to more efficiently manage quotas across teams, evaluate an optimum number of interactions, and ensure that the most important interactions are addressed in a consistent, effective manner. This significantly improves leaders' workflow.

Shared Inbox folder functionality

The system uses a lottery mechanism to deliver interactions to the Shared Inbox (the same mechanism used to push interactions to the Inbox folder). Every hour, the system checks if the number of interactions in the Shared Inbox meets its defined rules quota requirements. If not, the system automatically provides the required number of interactions for the required time period to ensure that the rules quota is filled.

The number of new interactions that the system pushes is the number required for the relative period, minus the number of interactions already in the Shared Inbox.

If evaluations are completed for interactions when performing a search or accessing a folder (and *not* when accessing the Shared Inbox), the system does not consider these when calculating the remaining Shared Inbox quota. In addition, if interactions are pushed to the Shared Inbox from an external system using the Shared Inbox Web Service API, these interactions are also not considered during quota calculations.

A user has the option to reject a specific interaction from the Shared Inbox pool. In this case, the system automatically replaces the rejected interaction with a new interaction to meet the rules quota requirements.

The interactions are pushed evenly, on a first-in first-out basis, during the rule's defined period of time. So if the Shared Inbox requires five interactions per week, the system pushes one interaction at the end of the first day, another at the end of the second day, and so on.

> For systems enabled with the Enterprise Cradle-To-Grave feature, there is a delay of up to three hours from the start time of the first interaction of the contact until it reaches the Shared Inbox.

Related topics

Shared Inbox scope (page 61)

Shared Inbox modes (page 61)

Shared Inbox time range (page 62)

Inbox and Shared Inbox lottery mechanism (page 174)

Shared Inbox scope

Each Shared Inbox can be associated with one or more organizations/groups. These organizations/groups define the scope for the Shared Inbox (that is, the organizations/groups from which interactions are selected for the Shared Inbox).

If the Shared Inbox scope is not defined in the Shared Inbox settings, no interactions are pushed to the Shared Inbox.

Shared Inbox modes

The system supports the following modes for selecting which interactions to push to a Shared Inbox:

- **Fulfill quota per employee**: In this mode, you define one or more rules for selecting which interactions to push to the Shared Inbox, and you define a quota which defines the number of interactions to push to the Shared Inbox per employee.

  The system processes the first rule you define first. If the quota is filled using only this rule, the system ignores any subsequent rules. If the quota is not filled using the rule, the system continues processing interactions using the next available rules until the quota for each employee is fulfilled.

  If all defined rules are processed and the quota is still not met, the system can be forced to push the required number of interactions to the Shared Inbox, even if they don't match any of the defined rules.

  Use **Fulfill quota per employee** mode to get the same number of interactions in the Shared Inbox for each of the participating employees (depending on the Shared Inbox scope), and to make sure that these interactions have the same properties.

  > The Shared Inbox has no limitation on the number of employees that can be defined per rule.

- **Fulfill quota per rule**: In this mode you define one or more independent rules for selecting interactions to push to the Shared Inbox, and you define a quota per rule.

  The system processes all the rules and tries to fulfill the quota for each rule.

  In this mode you may get different numbers and types of interactions for each employee, depending on the type of rules you define.

  This mode is useful if you want to analyze interactions of particular interest, such as very long interactions, or interactions with many holds.

  The number of employees and their interactions in the Shared Inbox depend on interaction properties. You can view any number of employees and their interactions that meet the rule definition.

  The Shared Inbox has a default set of rules, according to which ten interactions are pushed per employee (depending on the Shared Inbox scope), whose duration is between 5-10 minutes and contain recorded screens. The interactions are evenly distributed over the course of a week, that is, two interactions on each weekday.

- **Fulfill quota per rule per employee**: In this mode, you define one or more rules for selecting which interactions to push to the Shared Inbox, and you define a quota that determines the number of interactions to push to the Shared Inbox per employee for each rule that you defined.

  The system processes each rule until the quota per employee is filled or no more interactions that match the rule can be found. If all defined rules are processed and the total quota (the sum of the quotas for each defined rule) per employee is not met, the system can be forced to push the required number of interactions to the Shared Inbox for each employee that has not reached the total quota, even if the interactions don't match any of the defined rules.

Shared Inbox time range

The Shared Inbox supports weekly or monthly quotas.

Quotas fulfilled on a **weekly** basis use interactions recorded from the first day of the current week (where the first day of the week is the day defined in the First Day of the Week setting in *Enterprise Settings* under *System Management*).

Quotas fulfilled on a **monthly** basis use interactions recorded from the first day of the current month.

Add a Shared Inbox

Create a Shared Inbox instance for each organization/group scope.

Before you begin

Verify that you have the Shared Inbox Manager privilege assigned to you.

Procedure

1. Go to **Interactions**. Under **Administration**, select **Shared Inboxes**.
2. From the Shared Inboxes window, click **Add Shared Inbox**.
3. Type a unique name and description (optional) in the relevant fields.
4. Set the Shared Inbox **Status** to either **Visible** or **Hidden**.

   Set status to **Hidden** for Shared Inboxes that are not currently in use in the system but which may be used in the future. Only visible inboxes are available for allocation to users.
5. Click **Add** to add the new Shared Inbox to the list of defined inboxes.

> By default, the Shared Inbox Manager displays only visible inboxes in the Shared Inbox list. To also display Shared Inboxes that are hidden, select **Show Hidden Shared Inboxes**.

Edit a Shared Inbox

You can edit an existing Shared Inbox's name, description, and status.

Procedure

1. In the row of the Shared Inbox you want to edit, click .
2. Edit the Shared Inbox's parameters as required.
3. Click **OK**.

Delete a Shared Inbox

You can permanently delete a Shared Inbox that is no longer being used.

Procedure

1. In the row of a Shared Inbox you want to delete, click .
2. Click **Yes** to permanently delete the Shared Inbox.

Define the Shared Inbox settings

Define a Shared Inbox's settings by specifying the scope of the Shared Inbox. Set the mode and time period in which the defined quota should be fulfilled, and create rules to determine which types of interactions are pushed to the inbox.

The Shared Inbox has a default set of rules, according to which 10 interactions are pushed per employee (depending on the Shared Inbox scope). The interactions are between 5-10 minutes and contain recorded screens. The interactions are evenly distributed over the course of a week, that is, two interactions on each weekday. If you define your own Shared Inbox rules, remember to delete the default Shared Inbox rules, otherwise irrelevant interactions will be pushed to the Shared Inbox.

> The Shared Inbox does not consider user filters or assigned CCD values. Therefore, to ensure that the Shared Inbox is populated only with interactions you can access, update the Inbox rules with any filter or CCD value restrictions that apply to you.

Procedure

1. In the row of the Shared Inbox you want to customize, click .
2. Define the scope of the Shared Inbox: Move one or more organizations/groups from the **Available Organizations/Groups** box to the **Selected Organizations/Groups** box.

   If no scope is defined, interactions are not pushed to the Shared Inbox.
3. In the **Mode** field, select the Shared Inbox mode:
   - If you select **Fulfill quota per employee**, the system pushes to the Inbox the same number of interactions with the same attributes, per each employee. The total number of users assigned to the Selected Organizations/Groups should not exceed 1000, otherwise the system can experience slow performance and time out.
   - If you select **Fulfill quota per rule**, the system pushes to the Inbox a different number of interactions with different attributes, per each rule.
   - If you select **Fulfill quota per rule per employee**, the system pushes to the Shared Inbox the same number of interactions for each rule per each employee.

   > If you switch modes, any rules that you defined for the previous mode are deleted.
4. From the **Time Range** list:
   - To define a quota that is fulfilled each week, select **Current Week**
   - To define a quota that is fulfilled each month, select **Current Month**
5. If you selected **Fulfill quota per employee** mode: In the **Quota** field, enter the number of interactions to push to the Shared Inbox per employee (depending on the Shared Inbox scope), for the defined time range.
6. To define rules for determining which types of interactions to push to the Shared Inbox, click **Add Rule**. By default, up to five rules (configurable) can be created (the **Add Rule** option is not displayed if the maximum number of rules is already defined).

   a. Set the relevant interactions fields according to which you want interactions to be pushed to the Shared Inbox.
   b. Click **Save Rule**.
   c. To change the default name of the rule, in the Rule column, click the rule name and type a new name for this rule.
7. If you selected **Fulfill quota per employee** mode: If you defined more than one rule, to increase or decrease a rule's priority, drag and drop the rule so it appears in the correct order in the list.
8. If you selected **Fulfill quota per rule** or **Fulfill quota per rule per employee** mode, click the **Quota** column for each rule and enter the quota.
9. If you selected **Fulfill quota per employee** or **Fulfill quota per rule per employee** mode: To force the system to always meet the total quota that you defined for all the rules combined, select **Fulfill total quota when rules cannot be met**. This option forces the system to meet the total quota after all rules are processed and the total quota is still not met, even if the interactions don't match any of the defined rules.
10. When an employee accesses the Shared Inbox, by default interactions are retrieved on a first-in first-out basis. To retrieve interactions on a last-in first-out basis instead, select **Retrieve most recent interactions first**.
11. Click **Save**.

Related topics

Shared Inbox modes (page 61)

Related information

Interactions fields (*Interactions User Guide*)

Assignment Manager

The Assignment Manager is a user management tool that enables administrators to define the access rights to Interactions entities.

Topics

Assignment Manager overview

The Assignment Manager is a user management tool that enables administrators to define the access rights to Interactions entities. This is done by affiliating the entities to users' organizations/groups and roles.

The Assignment Manager users thus assign Interactions entities such as forms, flags, folders, Speech Analytics projects, and Analysis reports to organizations/groups and roles.

After assigning entities to organizations/groups and roles, to view the changes in the system, sign out and then sign in again.

Assignment Manager Terms

- **Hierarchy**—Refers to both the organization and group structure in the Enterprise. The Hierarchy is used to define user's role scope and entity assignments.
- **Roles**—Controls the access to all functions in the system. A role defines user access rights. Each user must be assigned a role in order to log on to the system, and the system displays or enables only those functions a user role provides access to.

  Each role in the system has a preconfigured set of privileges that determine what actions employees can perform on the system.
- **Entities**—An organization measure defined by the administrator for use by application users. For example, flags, forms, reports, projects and folders.

  Entities must be assigned to roles and organizations/groups.

All organizations/groups, roles and entities displayed are those which have already been defined in the system.

Entity assignment in Assignment Manager

You use the Assignment Manager to assign Interactions entities to users through a combination of organizations/groups and roles.

By default, Assignment Manager assigns the **All Roles** setting to all entities. This enables Assignment Manager to manage the availability of an entity at the level of the organization/group. You can change the default behavior and manage the availability of an entity by role.

The system provides these levels of permissions and availability for using an entity:

- Associate a user with a role that grants privileges for using the entity
- Associate a user with a organization/group with which the entity is associated
- Associate a user with a role with which the entity is associated

The following table shows the entities that Assignment Manager manages.

Tab	Entity
Evaluations	Evaluation Flags Evaluation Forms Folders Shared Inbox Instance
Assessments	Assessment Forms Folders
General	Custom Data Conditional Custom Data
Interactions	Contact Flags Folders Cases
Reports	Analysis Reports: Cross Correlation Interaction Metrics Distribution
Speech Analytics	Projects

Recommended workflow

We recommend the following workflow:

1. Select the **Entities** tab to gain an overall view of the current assignments in your applications.
2. By default, Assignment Manager assigns the **All Roles** setting to all entities.
3. Once you are familiar with your current entity assignments, select the **Hierarchy** tab to make any necessary changes.

   It is recommended that you do not make extensive changes in one round.
4. Return to the **Entities** tab to review your changes.
5. Make any further changes in the **Hierarchy** tab.
6. After you complete and save your changes, to view the changes in the system, sign out and then sign in again.

Assignment Manager interface

Overview of the Assignment Manager interface

The following table describes the major elements of the Assignment Manager application.

Panel	Interface Element	Description
Left	Hierarchy tab	A hierarchical tree representation of all organizations/groups configured in the system. You can view, copy and modify entity assignment settings for each organization/group.
Left	Roles tab	A hierarchical tree representation of all roles configured in the system. You can view, copy and modify entity assignment settings for each role.
Left	Entities tab	A folder-based view of all licensed applications' entities in the system mainly used for viewing purposes. For more information see View and modify entity assignments in the Entities tab (page 78).
Left	Copy button	Used for copying assignments between organizations/groups, roles or entities. See Copy assignments (page 79) for more information.
Right	Application tabs	Each tab holds specific entities of the different applications. Tabs are preloaded and static, and visible according to license.
Right	Legend	Displays the different states available for a check box. See Check box assignment states (page 74) for more information.

Check box assignment states

The legend at the bottom of the application shows the different states available for a check box at any given position in the hierarchical tree view in each of the Hierarchy, Roles, and Entities tabs.

Icon	State	Impact on Hierarchy	Impact on Role
☑	Assigned	The entity is assigned to the specified organization/group. The entity is *not* assigned to any of the organization's/group's subgroups or sub-organizations.	The entity is assigned to the specified role. If **All Roles** option is selected, the entity is assigned to all the roles.
☐	Not Assigned	The entity is not assigned to a specified organization/group.	The entity is not assigned to a specified role.
☑	Inherited	The specified organization/group receives its entity assignment from a parent organization/group in the tree. The parent organization/group is in the **Assign to Subgroups** state.	The specified role receives its entity assignment from the **All Roles** option.
	Assign to Subgroups (Hierarchy and Entities tabs only)	An entity is assigned to the specified organization/group, and to its current and future subgroups/sub-organizations.	N/A

Add entity assignments

This section describes how to assign entities to organizations/groups and roles.

- Assign entities to organizations/groups (page 74)
- Assigning entities to roles (page 76)

Assign entities to organizations/groups

By default, Assignment Manager assigns the **All Roles** setting to all entities.

Before you begin

Verify that you have the relevant privilege to the Assignment Manager.

Procedure

1. Go to **Interactions**. Under **Administration**, select **Assignment Manager**.
2. In the **Hierarchy** tab, expand the top-level node.
3. Select the organization/group to which you want to assign an entity.
4. At the top of the right panel, select the tab you want from the set of tabs .
5. Locate the entity area containing the entity you want to assign.
6. Click the check box next to the entity until you see the state you want.

   The check box state toggles between:

   - Assigned
   - Not Assigned
   - Assign to

Organization/Group Assignments in the Assignment Manager and User Management

In the **User Management**, when assigning to a user scope over an organization/group, the user is assigned scope only over the specific organization/group you selected, although the organization's/group's subgroups/sub-organizations are automatically selected in the system.

The automatic selection of sub-groups/sub-organizations is done in order to indicate that the user, although having scope over the selected organization/group, can access the recordings and evaluations that took place in the selected organization/group and its subgroups/sub-organizations.

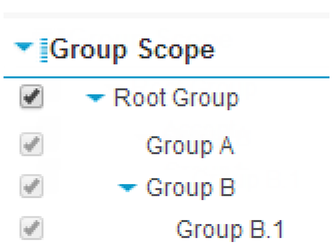
For information on user visibility in the hierarchy see *Workforce Optimization User Management Guide*.

In the **Assignment Manager**, when assigning an entity to an organization/group for a specific role, the rights to the entity are granted to a user having the specific role privileges, and is directly assigned scope over that organization/group in **User Management** or is a member of that organization/group.

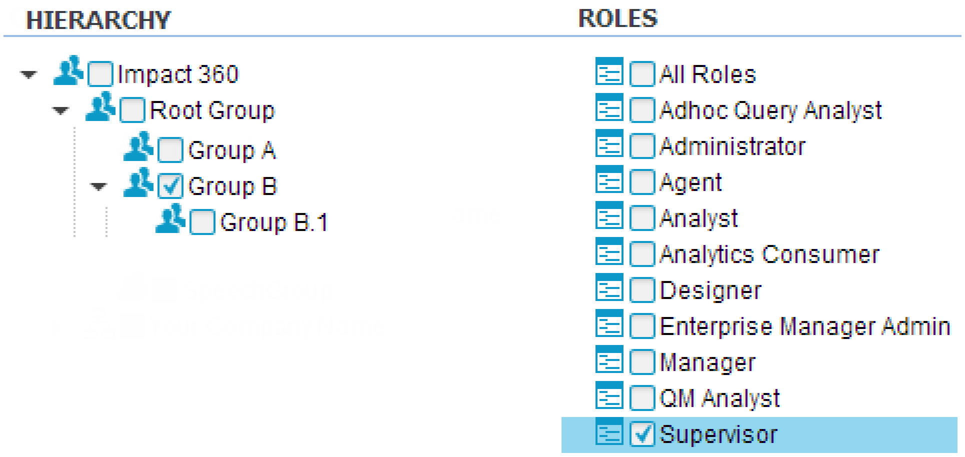
If the entity is assigned in the **Assignment Manager** to one of the organization's/group's sub-organizations/sub-groups, or to an organization/group higher up in the hierarchy, the user having the specific role privileges, who is directly assigned scope over the organization/group or is a member of the organization/group, is not granted rights to the entity.

Example:

1. In the **User Management** the user Maria has scope over the **Root Group**. Its sub-groups (**Group A**, **Group B** and **Child Group B.1**) are automatically selected to show Maria's visibility in the hierarchy.

2. In the **Assignment Manager**, in the **Entities** tab, the **Inbox** entity privilege is assigned to the **Supervisor** role and **Group B**.



As result, the user Maria is NOT granted rights to the **Inbox** entity. This is because, although maria has visibility in **Group B**, Maria's scope is over the **Root Group** in the **User Management**.

Only users having the **Supervisor** role privileges and have scope directly over **Group B** are granted rights to the **Inbox** entity.

Related topics

Check box assignment states (page 74)

Assigning entities to roles

Procedure

1. Select the **Roles** tab in the left panel.
2. Select the role to which you want to assign an entity, or select **All Roles**.
3. Select the tab you want from the set of tabs at the top of the right panel.
4. Locate the entity area containing the entity you want to assign.
5. Click the check box next to the entity you want to assign until you see the state you want.

   The check box state toggles between

   - Assigned
   - Not Assigned
6. Optional: Click **Select All Assigned** to assign all the entities in this area to the specified role.
7. Click **Save** at the bottom of the screen.

Related topics

Check box assignment states (page 74)

Remove entity assignments

Remove assignments from organizations/groups

Procedure

1. Select the **Hierarchy** tab in the left panel.
2. Expand the top-level node entry.
3. Select the organization/group from which you want to remove an entity assignment.
4. Select the tab you want from the set of tabs at the top of the right panel.
5. Locate the entity area containing the entity you want to unassign.
6. Clear the check box next to the entity you want to unassign.
7. Optional: Click **Clear All** to remove assignments from all the entities in this area.
8. Click **Save** at the bottom of the screen.

Remove assignments from roles

Procedure

1. Select the **Roles** tab in the left panel.
2. Select the role from which you want to remove an entity assignment, or select **All Roles**.
3. Select the tab you want from the set of tabs at the top of the right panel.
4. Locate the entity area containing the entity you want to unassign.
5. Clear the check box next to the entity you want to unassign.
6. Optional: Click **Clear All** to remove assignments from all the entities in this area.
7. Click **Save** at the bottom of the screen.

Remove auto assignments

Procedure

1. Select the organization/group or role from which you want to remove auto assignments as follows:

   For organizations/groups:

   - Select the **Hierarchy** tab in the left panel
   - Expand the top-level node entry
   - Select a organization/group

   For roles:

- Select the **Roles** tab in the left panel
- Select a role, or select **All Roles**

2. Select the tab you want from the set of tabs at the top of the right panel.
3. Locate the entity area containing the auto assignments you want to remove.
4. Click the check box next to each of the auto assigned entities to select a new state for each entity.
5. Click **Save**.
6. If you selected a organization/group or **All Roles**, the **Save Inheritance Changes** dialog box opens. Select one of these options:
   - **Change all to Not Assigned—**For organizations/groups, removes assignments from all the specified entities in the organization/group and from the same entities in the children of the organization/group. For All Roles, removes the entity assignment from all roles defined in the system.
   - **Keep Inheritances**—Retains existing auto assignments for all the current and future children of the specified entity.
   - **Revert all to previous values**— Returns the assignments of all specified entities to the status currently listed in the system.
7. Do one of the following:
   - Click **OK** to apply your changes only to the entity specified in the first line of the **Save Inheritance Changes** dialog box
   - Click **Applyto All** to apply your changes to all specified entities.

Related topics

Check box assignment states (page 74)

View and modify entity assignments in the Entities tab

The **Entities** tab provides a view of all the entities in the system, and the organizations/groups and roles to which they are assigned.

The procedure for modifying an assignment in the **Entities** tab is slightly different to the procedure used in other tabs.

Procedure

1. Select the **Entities** tab in the left panel.
2. Select the organization/group from which you want to remove an assignment.
3. Click the check box next to the entity you want to assign until you see the state you want.

   The check box state toggles between
   - Assigned
   - Not Assigned
   - Auto Assign
4. In the **Save Inheritance Changes** dialog box, select one of these options:

- **Change all to Not Assigned—**Removes assignments from all the specified entities in the organization/group and from the same entities in the children of the organization/group.
- **Keep Inheritances**—Retains existing auto assignments for all the current and future children of the specified entity.
- **Revert all to previous values**— Returns the assignments of all specified entities to the status currently listed in the system.

5. Click **OK**.
6. Click **Save**.

Related topics

Check box assignment states (page 74)

Copy assignments

You can copy assignments between two organizations/groups, two roles or two entities. Assignment Manager adds assignments from the source to the target. Assignment Manager does not delete existing assignments from the target.

Procedure

1. Select the source organization/group, role or entity from which you want to copy assignment values.
2. Select **Copy**.

   The **Copy Hierarchy**, **Copy Roles** or **Copy Entities** dialog box opens.
3. Select the target organization/group, role or entity to which you want to copy assignment values.
4. Click **Copy**.

View former entity assignment states

After changing an entity assignment, you can see how the state of that entity differs from the state currently stored in the system.

This is useful, for example, when removing auto assignments because you can verify what the state of an entity was before the application of auto assignment.

Procedure

1. Locate the entity for which you want to view the previous assignment state.
2. Place the cursor over the check box next to the entity name.

   A tool tip shows the assignment state for that entity as it is currently stored in the system.

Assignment Manager frequently asked questions

How do changes in Assignment Manager affect a new user added to the system?

The user is assigned an initial role and scope (organization/group visibility) in the database. Any later changes made to the role or organization/group in Assignment Manager automatically affect the new user.

How does Assignment Manager reflect changes to the users present in the system, such as employees leaving the company?

Assignment Manager does not operate at the user level. Users are removed from the system. The roles and organizations/groups of the removed users remain in Assignment Manager.

What happens if a role is removed from the system?

That role is no longer available in Assignment Manager.

What happens to the children of a organization/group if an auto assignment is removed from that organization/group?

Removing auto assignments opens the **Save Inheritance Changes** dialog box where you can select one of the following options:

- **Change all to Not Assigned**—Removes assignments from all the specified entities.
- **Keep Inheritances**—Retains existing auto assignments for all the current and future children of the specified entity.
- **Revert all to previous values**— Returns the assignments of all specified entities to the status currently listed in the system.

After changing an assignment, can I revert to the status currently defined in the system?

If you have not yet saved your changes, you can cancel them by clicking **Discard Changes**. If you have saved your changes, the **Discard Changes** option is no longer available.

Project Rules Manager

In the Project Rules Manager, you create rules to perform specific actions and assign conditions to specify under which conditions the rule's actions trigger.

Topics

Project Rules Manager overview

In Project Rules Manager, create rules to perform specific actions in the system, and set the conditions under which the actions defined for the rule run.

The types of rules that you can create in the Project Rules Manager depend on the privileges assigned to you. Rules are either one-time rules that perform their assigned action when the rule is created, or ongoing rules that perform their assigned action for the duration of the rule.

In multi-tenant deployments, tenants configure their own rules, and Service Providers have read-only access to view the status of configured rules per tenant.

Related topics

Automated QM rules (page 82)

Speech Analytics rules (page 82)

Interaction Analytics Export rules (page 83)

Transcription-only rules (page 83)

Interaction Data Export with Processing rules (page 83)

Add to Case rules (page 84)

Delete interactions for GDPR rules (page 85)

Delete interactions using a Recycle Bin rules (page 86)

Automated QM rules

To perform automated evaluations on interactions, interactions must be transcribed and enabled for Quality Bot using an **Automated QM** rule.

If you have the **Create Automated QM Rules** privilege, you can create ongoing **Automated QM** rules with the following actions:

- **Automated QM for voice:** Transcribes voice interactions that match the rule's conditions and enables them for Quality Bot evaluations.
- **Automated QM for text:** Enables Quality Bot evaluations for text interactions that match the rule's conditions.

Related topics

Workflow: Create an Automated QM rule (page 93)

Speech Analytics rules

To extract and analyze data from voice interactions in Speech Analytics, interactions must be transcribed and enabled for Speech Analytics using a **Speech Analytics** rule.

If you have the **Create Speech Analytics Rules** privilege, you can create ongoing Speech Analytics rules that transcribe voice interactions that match the rule's conditions and enable them for Speech Analytics.

Related topics

Workflow: Create a Speech Analytics rule (page 96)

Interaction Analytics Export rules

If you have the **Create Interaction Analytics Rules** privilege, you can create rules to export transcriptions in bulk so they can be analyzed in external applications.

Transcriptions of interactions that match the rule's conditions are automatically exported in JSON format to a specified secure FTP site or a shared folder on a network server.

If you have multiple languages, you must create a separate rule to export transcriptions in each language, and the rule's conditions must filter out interactions that are not in the selected language.

Related topics

Workflow: Create an Interaction Analytics Export rule (page 99)

Interaction Analytics Export (page 139)

Transcription-only rules

If transcription-only rules are enabled for your organization, you can create rules that automatically transcribe voice interactions.

These transcriptions can then be used with transcription-based features that do not require a Speech Analytics or Quality Management license, such as PII Redaction Bot.

Transcriptions generated from transcription-only rules are stored for seven (7) days (default).

Related topics

Workflow: Create a Transcription-only rule (page 103)

Interaction Data Export with Processing rules

Users with the **Create Interaction Data Export with Processing Rules** privilege can create rules to export interactions media and associated metadata to a storage destination (for example, SFTP or S3). The exported data can be used for compliance or internal purposes or used in third-party applications.

> Native Storage and SFTP are available to all customers, regardless of whether they use cloud recording or hybrid recording.

- Select the media types to include in the export. For audio and screen recordings, you can select the format in which the files are exported.
- The recording metadata is exported as a JSON file.
- Define conditions for the rule so that only the media and metadata of interactions that match the conditions are exported.

Enabling Interaction Data Export with Processing

The use of Interaction Data Export with Processing requires enabling one or more features that are not enabled by default. Access to the following features is required:

- To export interactions, the **2021R1 - Interaction Data Export** feature must be enabled on your system.
- To use SFTP storage targets, the **2021R1 - Allow SFTP Storage Targets in Interaction Data Export with Processing rules** feature must be enabled on your system.

Contact your support representative for assistance with enabling these features.

Required role permissions

- To create rules: **Create Interaction Data Export with Processing Rules**
- To use storage targets: **View Storage Targets**

Related topics

Workflow: Create an Interaction Data Export with Processing rule (page 106)

Exported media format (page 150)

Interaction metadata file format (page 151)

Add to Case rules

The Risk Management application is used by administrators and compliance teams to analyze and manage the compliance and risk life cycle of recorded interactions. Within Risk Management, cases are used to group interactions according to the needs of the enterprise, for example to group and investigate calls for (non) compliance.

You can manually copy interactions to cases in Risk Management, or you can create Add to Case rules in the Project Rules Manager to automatically copy interactions in bulk to cases. An Add to Case rule should be created when you need to copy more than 2000 interactions to a case at once, or if you need to copy historical and future interactions to a case on an ongoing basis.

A Legal Hold lock can be placed on a case for compliance or legal purposes. Interactions added to a Legal Hold case cannot be deleted, either by manual deletion, as a result of a Delete Interactions rule in the Project Rules Manager, or as a result of a scheduled purge job. When the Legal Hold lock is removed from a case, interactions in the case can be deleted again.

To create Add to Case rules, the following privileges must be assigned to you in User Management:

- **View Cases:** Enables you to view the list of existing cases assigned to you in the Assignment Manager.
- **Edit Cases:** Enables you to create a rule to add interactions to a case.

Related topics

Workflow: Create an Add to Case rule (page 113)

Delete interactions for GDPR rules

If you have the **Create Delete Interactions Rules** privilege, you can create one-time rule that permanently deletes interactions. For example, customers or employees request to have their data deleted per Global Data Protection Regulation (GDPR) or for any other type of privacy regulation.

When you create a rule to delete interactions, Project Rules Manager retrieves interactions that match the conditions of the rule and displays them for review:

- You can review each interaction and decide which ones to include in the rule. For example, you can decide not to delete certain interactions that need to be retained for legal reasons, or evaluated interactions that have business value.
- Up to 2,000 interactions are retrieved per rule. If more interactions match the conditions in the rule, only the first 2000 interactions are retrieved. To delete the remaining interactions, create another rule with the same conditions.
- Project Rules Manager retrieves only interactions that are within your visibility. If you are assigned the **Search for Interactions Outside my Role Scope** privilege, Project Rules Manager retrieves *all* matching interactions, including those interactions outside your visibility.
- You can optionally set the rule to export interactions marked for deletion to a secure FTP site before the deletion.

When the rule executes, Project Rules Manager starts deleting the metadata, transcriptions, and media of interactions included in the rule. The media for the interaction are immediately deleted from the call buffer on the recorder and supported third-party archives such as Amazon S3, Azure, SAN, and EMC. The metadata and transcriptions are added to the Database Purger queue and are permanently deleted during the nightly run of the purger.

Interactions are not deleted when:

- Stored on WORM (Write Once Read Many) drives, removable media, or archive drives where the maintenance job lacks permission to delete files
- Under legal hold

The Delete Interactions rule is marked as completed in the Project Rules Manager when:

- The media of the selected interactions is deleted from the call buffer of the recorder and supported third-party archives.
- The transcriptions and metadata of the selected interactions are added to the Database Purger queue. While the metadata and transcriptions are in the queue, the interactions can still be searched for until the transcriptions and metadata are permanently deleted during the nightly run of the purger.
- If set, interactions included in the rule are exported to a secure FTP site.
- A summary email is sent to you with the number of successful deletions, number of failed deletions, and an error summary for failed deletions.

Benefits of interaction deletion using the Recycle Bin over GDPR rule deletion

Deleting interactions using the Recycle Bin offers several advantages over the use of the GDPR interaction deletion rule. The advantages of using the Recycle Bin are:

- Process an unlimited number of interactions. A GDPR deletion rule supports a maximum of 2,000 interactions.
- Application of a grace period to the deletion process. During the grace period, which you define as a period of days, you can review interactions scheduled for deletion in the Recycle Bin. If you find interactions that are not candidates for deletion, you can remove them from the Recycle Bin. A GDPR deletion rule does not support a grace period and requires review of the interactions at the time that the rule executes.
- Automation of interaction deletion based on conditions that you define. Conditions apply to interactions already captured and can include interactions captured in the future. A GDPR deletion rule requires that you define and run the rule to delete already captured interactions.

Related topics

Workflow: Create a delete interactions (GDPR) rule (page 116)

Delete interactions using a Recycle Bin rules (page 86)

Delete interactions using a Recycle Bin rules

If you have the **Delete interactions using a Recycle Bin** privilege, you can create rules that permanently delete any number of interactions. Reasons for deleting interactions include requests by customers or employees to have their data deleted, for privacy regulations, or if interactions were captured that should have been omitted from capture.

In a **Delete interactions using a Recycle Bin** rule, you define:

- An action, in which you select the recycle bin that the rule populates with interactions.
- The conditions, which enable you to define the criteria used to find interactions and the start and end date for the rule. If there is no end date, the rule runs indefinitely.
- Whether the rule is enabled or disabled for execution.

When the rule finds interactions which match the condition criteria, Project Rules Manager copies the interactions to the recycle bin configured in the rule.

How recycle bins work

A recycle bin is a special case type in Risk Management which enables you to group interactions for bulk deletion. Each recycle bin serves as a temporary location for interactions before removal occurs. A recycle bin has a configured number of days before deletion occurs. The days until deletion is a period from a minimum of one day up to a maximum of 10 years. The period begins to count down for an interaction when it is added to the recycle bin. To learn more about recycle bins, see the related information section.

> To create, update, or delete recycle bins, use Risk Management. From Project Rules Manager, you can only select a recycle bin to use.

How deletion works

After the expiration of the days until deletion for an interaction, the Purger maintenance job deletes it permanently. The Purger maintenance job runs at regular intervals and deletes metadata and media for expired interactions. Media are immediately deleted from the call buffer on the Recorder and supported third-party archives such as Amazon S3, Azure, SAN, and EMC.

- Interactions are not deleted from WORM (Write Once Read Many) drives, removable media, or archive drives where the maintenance job lacks permission to delete files.
- An interaction deleted using the Recycle Bin does not delete information from the Speech Analytics index. Although the Speech Analytics portal shows the deleted interaction, users cannot replay the interaction or view the interaction transcription.
- An interaction deleted using the Recycle Bin remains visible in the Text Analytics portal until it expires, according to the Text Analytics retention policy.

Completed rules

The **Delete interactions using a Recycle Bin** rule is marked as completed in the Project Rules Manager after the end date of the rule.

Related topics

Workflow: Create a delete interactions using a recycle bin rule (page 120)

Related information

About recycle bins (*Risk Management Administration and User Guide*)

Purge databases (*Maintenance Guide*)

Project Rules Manager at a glance

The **Project Rules Manager** displays a grid with the rules that are configured in your system:

- In the **toolbar** at the top of the grid, perform actions such as create a new rule and modify a rule.
- In the **grid**, view information about each rule, and expand a rule to view the actions that it performs.
- In the **Rule Details** pane on the right, view the description of the rule (if entered), and the rule status.

Related topics

Project Rules Manager toolbar (page 88)
Project Rules Manager grid (page 89)
Rule Details pane (page 90)

Project Rules Manager toolbar

Use the Project Rules Manager toolbar to perform actions in the grid.

Action	Description
	Add a new rule
	Modify an existing rule
	Clone an existing rule
	Delete a rule
	Import a rule from a file
	Export a rule to an .iid file
Include completed and expired rules	Selected by default, use this option to show or hide rules with a *Completed* or *Expired* status. • Only rules completed or expired in the past six months are included for display. • *Completed* status applies only to *Delete Interactions* (GDPR) rules.

Related topics

Project Rules Manager at a glance (page 88)
Project Rules Manager grid (page 89)
Rule Details pane (page 90)

Project Rules Manager grid

The columns in the Project Rules Manager grid display information about each rule.

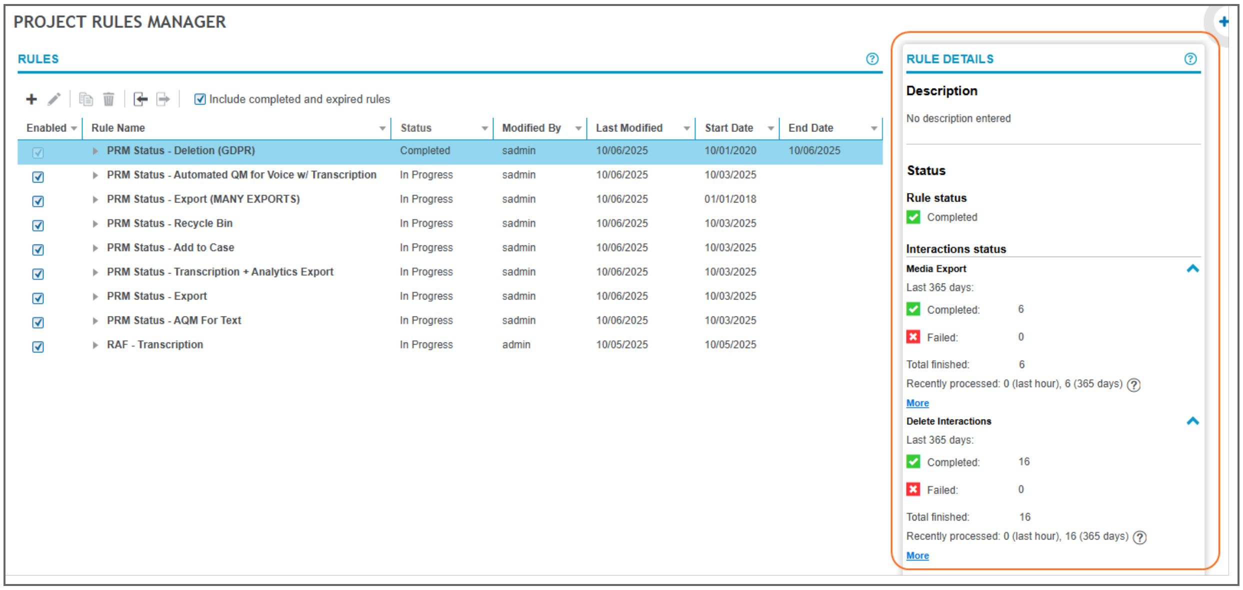
Column title	Description
Enabled	Select to toggle whether the rule is enabled (selected) or disabled (cleared). • Not available for rules with a status of *Expired*. • Display only for completed Delete Interactions rules (GDPR).
Rule name	Displays the rule name.
Status	The following status is displayed for each rule: • **In Progress**: The rule is running. This status includes rules still running for 30 days after reaching the optional end date as it awaits interactions inserted with a start date on or later than the rule *Start Date*. • **Not Started**: The start date of the rule is in the future. • **Completed**: For *Delete Interactions (GDPR)* rules only, the rule reached the optional *End Date* configured in the rule settings. If no end date is specified, the rule uses the rule creation date as the effective *End date*. • **Disabled**: The rule is configured as inactive. • **Expired**: If an optional *End Date* is configured, more than 30 days have elapsed after the end date, expiring the rule.
Modified by	Name of the user that modified the rule.
Last modified	Date the rule was last modified.
Start date	Start date from when the rule starts to run. • If you select a **Start Date** *earlier* than the current date, the rule applies to interactions that have a start date as of the specified date. • If you select a **Start Date** *in the future*, the rule applies only to interactions with a start date after the specified future date.
End date	(Optional) Expiry date for the rule. • If you set the **End Date**, the rule applies to interactions that exist as of the specified **Start Date** up until the specified **End Date**. When the **End Date** passes, the rule continues to run for 30 days as it awaits interactions inserted with a **Start Date** matching the specified date window for the rule. • If you leave the **End Date** blank, the rule runs indefinitely. For **Delete Interactions (GDPR)** rules, if no end date is specified, interactions are selected from the specified start date until the rule creation date.

Related topics

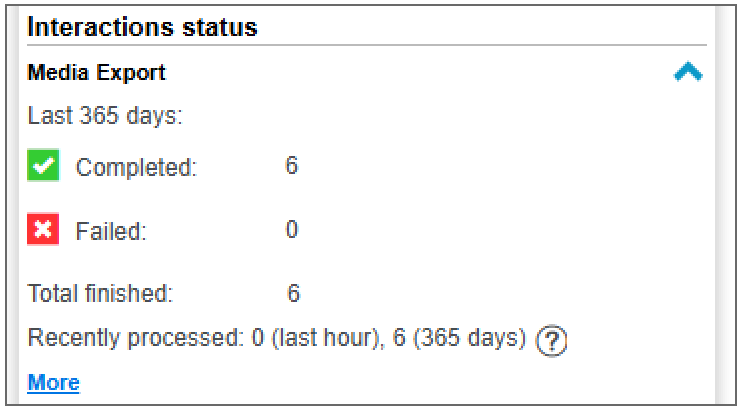
[Project Rules Manager at a glance (page 88)]
[Project Rules Manager toolbar (page 88)]
[Rule Details pane (page 90)]

Rule Details pane

The **Rule Details** pane displays status information about a selected rule in the grid.



Field title	Description
Description	Description of the rule (if entered).
Status	For *enabled* rules, one of the following statuses displays: • **In Progress**: The rule is running. This status includes rules still running for 30 days after reaching the optional end date as it awaits interactions inserted with a start date on or later than the rule *Start Date*. • **Not Started**: The start date of the rule is in the future. • **Completed**: For *Delete Interactions (GDPR)* rules only, the rule reached the optional *End Date* configured in the rule settings. If no end date is specified, the rule uses the rule creation date as the effective *End date*. • **Disabled**: The rule is configured as inactive. • **Expired**: If an optional *End Date* is configured, more than 30 days have elapsed after the end date, expiring the rule.

<table>
<tr><th>Field title</th><th>Description</th></tr>
<tr><td>Interactions status</td><td>
For every action defined for the selected rule, view the status of the progress of the action.


The following status information displays:

Action name, which you can identify from the bold text. In the example shown, the action name is "Media Export".
Processing statistics: The system displays the statistics available at the time that you access the rule.

Figures shown do not update in real time. To see updated statistics, do one of the following:

Select another rule and then return to the rule you are viewing.
Refresh the page.
Switch to another area of the suite and then return to Project Rules Manager.

Depending on how long the action has been running, indicates the elapsed number of days to which the statistics apply since the Start Date of the rule. Elapsed days accumulate to a maximum of 365 days from the current date.
The total number of interactions processed by the action for each of the following statuses:

Completed: The number of interactions processed successfully.
Failed: The number of interactions for which processing failed.

Total finished: The total number of completed and failed interactions processed by the action.
Recently processed: Displays the number of interactions processed during

</td></tr>
</table>

Field title	Description
	the past 60 minutes followed by the total number of interactions processed since the rule Start Date, up to a maximum of 365 days. ■ **More**: Used by services and support, provides information used when troubleshooting rules. If the system cannot retrieve processing statistics, the system displays the following message: *Processing statistics not yet available for this rule.*
Max number of interactions to export	For Interaction Data Export with Processing Rules only, displays the maximum number of interactions that the rule can export. This setting is optional.

Related topics

Project Rules Manager at a glance (page 88)
Project Rules Manager toolbar (page 88)
Project Rules Manager grid (page 89)

Workflow: Create an Automated QM rule

Create an Automated QM rule to enable Quality Bot to perform automated evaluations on voice and text interactions.

Before you begin

To create an Automated QM rule you must be assigned the **Create Automated QM Rules** privilege.

Workflow

1. Set the Automated QM rule attributes (page 93)

   Set the Automated QM rule's name, description, and priority.
2. Define settings for an Automated QM rule (page 94)

   Add **Automated QM for Voice** or **Automated QM for Text** as an action to the rule and define the action's settings.
3. Define conditions for an Automated QM rule (page 94)

   Define conditions for Automated QM rules to ensure that the rule's action is only performed on interactions that meet the rule's conditions.

Related topics

Automated QM rules (page 82)

Set the Automated QM rule attributes

Set the Automated QM rule's name, description, and priority.

Procedure

1. In the **Project Rules Manager** toolbar, click + .
2. In the **General** pane, set the rule's attributes:
   - **Name:** Set a unique rule name.
   - **Description:** Describe the purpose of the rule.
   - **Priority**: Set to **Normal** by default.

     To change the priority, select a priority level from the list.

     If High is selected, interactions that meet the rule's conditions will be processed before interactions that meet another rule's conditions with a Medium priority
3. Click **Next**.

What to do next

Define settings for an Automated QM rule (page 94)

Related topics

Automated QM rules (page 82)

Define settings for an Automated QM rule

Add **Automated QM for Voice** or **Automated QM for Text** as an action to the rule and define the action's settings.

Procedure

1. In the **Actions** drop-down menu, select **Automated QM for Voice** or **Automated QM for Text**, and then select **Add Action**.
2. To add additional actions to the rule, in the drop-down menu select the action and select **Add Action**.

   You can only add actions that do not include transcription to an Automated QM for Text rule.

3. If you are adding an Automated QM for Voice rule:

   Set the **Transcribe** action settings:

   - **Transcription Language:** Select the transcription language of the interactions included in the rule.
   - **Transcription Vocabulary:** Select the required vocabulary.
   - **Percentage:** Specify the **Percentage** of interactions (out of the interactions that match all the rule's conditions) on which to apply the action.
4. Click **Next**.

Related topics

Automated QM rules (page 82)

Define conditions for an Automated QM rule

Define conditions for Automated QM rules to ensure that the rule's action is only performed on interactions that meet the rule's conditions.

- If multiple conditions are defined for a rule, the operator between the conditions is AND. The AND operator means that the rule is executed only on interactions that meet *all* the conditions.
- If multiple values are defined within a parameter, the operator between the values is OR. The OR operator means that the condition is met when an interaction matches one of the values.
- If both employees and organizations are selected in the **Employees** tab, both values must be met.

Example: Define conditions for a Speech Analytics rule

- To apply the rule to voice interactions dialed to a specific contact center, define the organization/group, Direction, DNIS, and interaction type.
- To apply a rule to voice interactions that are at least one minute long, set the Duration to more than one (1) minute.

When defining conditions for an Automated QM rule, ensure that no more than 100 values are defined for all enabled Automated QM rules combined. If more than 100 values are defined, interactions set creation can fail when creating an automated evaluation form.

Before you begin

Review the conditions available in the Project Rules Manager.

Procedure

1. In the **Conditions** pane, select the **Date** tab.
2. Set the **Start Date** and **End Date** (optional) for the rule in your regional date format. For example, in the United States, use mm/dd/yyyy.
   - **Start Date:**
     - If you select a **Start Date** *earlier* than the current date, the rule applies to interactions that have a start date as of the specified date.
     - If you select a **Start Date** *in the future*, the rule applies only to interactions with a start date after the specified future date.
   - (Optional) **End Date**:
     - If you set the **End Date**, the rule applies to interactions that exist as of the specified **Start Date** up until the specified **End Date**. When the **End Date** passes, the rule continues to run for 30 days as it awaits interactions inserted with a **Start Date** matching the specified date window for the rule.
     - If you leave the **End Date** blank, the rule runs indefinitely.
3. To set more conditions, select the relevant tabs.
   - To assign more than one value or range of values to a condition field, click + (where applicable).
   - To use wildcards in alphanumeric condition fields, use the asterisk (*) character to represent numerous characters, or use the question mark (?) character to represent one character. For example:
     - For all DNIS numbers beginning with 1800, enter 1800*. Calls with DNIS 18001111 and 18002222 qualify for the condition.
     - For all DNIS numbers in which all the digits are constant except for the fifth digit, enter 1800?1111. Calls with DNIS 180091111 and 180061111 qualify for the condition.
4. When you have finished defining the conditions for the rule, select **Next**.
5. In the Review pane, review the attributes, actions, and conditions for the rule.
6. (Optional) To create the rule without activating it, clear the **Enable rule** check box at the bottom of the Review pane.
7. Select **Create**.

Related topics

Automated QM rules (page 82)

Workflow: Create a Speech Analytics rule

Create a rule with a Speech Analytics action to automatically transcribe voice interactions to be extracted and enabled for Speech Analytics.

Before you begin

To create a Speech Analytics rule, you must be assigned the **Create Speech Analytics Rules** privilege.

Workflow

1. Set the Speech Analytics rule attributes (page 96)

   Set the Speech Analytics rule's name, description, and priority.
2. Define settings for a Speech Analytics rule (page 97)

   Add Speech Analytics as an action to the rule and define the action's settings.
3. Define conditions for a Speech Analytics rule (page 97)

   Define conditions for Speech Analytics rules to ensure that the rule's action is only performed on interactions that meet the rule's conditions.

Related topics

Speech Analytics rules (page 82)

Set the Speech Analytics rule attributes

Set the Speech Analytics rule's name, description, and priority.

Procedure

1. In the **Project Rules Manager** toolbar, click + .
2. In the **General** pane, set the rule's attributes:
   - **Name:** Set a unique rule name.
   - **Description:** Describe the purpose of the rule.
   - **Priority**: Set to **Normal** by default.

     To change the priority, select a priority level from the list.

     If High is selected, interactions that meet the rule's conditions will be processed before interactions that meet another rule's conditions with a Medium priority
3. Click **Next**.

What to do next

Define settings for a Speech Analytics rule (page 97)

Related topics

Speech Analytics rules (page 82)

Define settings for a Speech Analytics rule

Add Speech Analytics as an action to the rule and define the action's settings.

Procedure

1. In the **Actions** drop-down menu, select **Speech Analytics**, and then select **Add Action**.
2. To add additional actions to the rule, in the drop-down menu select the action and select **Add Action**.
3. Set the relevant action settings:
   - Set the **Transcribe** action settings:
     - **Transcription Language:** Select the transcription language of the interactions included in the rule.
     - **Transcription Vocabulary:** Select the required vocabulary.
     - **Percentage:** Specify the **Percentage** of interactions (out of the interactions that match all the rule's conditions) on which to apply the action.
   - Set the **Speech Analytics** action settings:
     - Select the Speech Application projects for which the transcriptions are enabled.

       The project list is filtered according to the selected transcription language in the Transcribe settings.
4. Click **Next**.

What to do next

Define conditions for a Speech Analytics rule (page 97)

Related topics

Speech Analytics rules (page 82)

Define conditions for a Speech Analytics rule

Define conditions for Speech Analytics rules to ensure that the rule's action is only performed on interactions that meet the rule's conditions.

- If multiple conditions are defined for a rule, the operator between the conditions is AND. The AND operator means that the rule is executed only on interactions that meet *all* the conditions.
- If multiple values are defined within a parameter, the operator between the values is OR. The OR operator means that the condition is met when an interaction matches one of the values.
- If both employees and organizations are selected in the **Employees** tab, both values must be met.

Example: Define conditions for a Speech Analytics rule

- To apply the rule to voice interactions dialed to a specific contact center, define the organization/group, Direction, DNIS, and interaction type.
- To apply a rule to voice interactions that are at least one minute long, set the Duration to more than one (1) minute.

Before you begin

Review the conditions available in the Project Rules Manager.

Procedure

1. In the **Conditions** pane, select the **Date** tab.
2. Set the **Start Date** and **End Date** (optional) for the rule in your regional date format. For example, in the United States, use mm/dd/yyyy.
   - **Start Date:**
     - If you select a **Start Date** *earlier* than the current date, the rule applies to interactions that have a start date as of the specified date.
     - If you select a **Start Date** *in the future*, the rule applies only to interactions with a start date after the specified future date.
   - (Optional) **End Date**:
     - If you set the **End Date**, the rule applies to interactions that exist as of the specified **Start Date** up until the specified **End Date**. When the **End Date** passes, the rule continues to run for 30 days as it awaits interactions inserted with a **Start Date** matching the specified date window for the rule.
     - If you leave the **End Date** blank, the rule runs indefinitely.
3. To set more conditions, select the relevant tabs.
   - To assign more than one value or range of values to a condition field, click + (where applicable).
   - To use wildcards in alphanumeric condition fields, use the asterisk (*) character to represent numerous characters, or use the question mark (?) character to represent one character. For example:
     - For all DNIS numbers beginning with 1800, enter 1800*. Calls with DNIS 18001111 and 18002222 qualify for the condition.
     - For all DNIS numbers in which all the digits are constant except for the fifth digit, enter 1800?1111. Calls with DNIS 180091111 and 180061111 qualify for the condition.
4. When you have finished defining the conditions for the rule, select **Next**.
5. In the Review pane, review the attributes, actions, and conditions for the rule.
6. (Optional) To create the rule without activating it, clear the **Enable rule** check box at the bottom of the Review pane.
7. Select **Create**.

Related topics

Speech Analytics rules (page 82)

Workflow: Create an Interaction Analytics Export rule

Create an Interaction Analytics export rule to export transcriptions in bulk so they can be analyzed in external applications.

Transcriptions of interactions that match the rule's conditions are automatically exported in JSON format to a specified secure FTP site or a shared folder on a network server.

Before you begin

To create an Interaction Analytics Export rule you must be assigned the **Create Interaction Analytics Rules** privilege.

Workflow

1. Set the Interaction Analytics Export rule attributes (page 99)

   Set the Interaction Analytics Export rule's name, description, and priority.
2. Define settings for an Interaction Analytics Export rule (page 100)

   Add Interaction Analytics Export as an action to the rule and define the action's settings.
3. Define conditions for an Interaction Analytics Export rule (page 101)

   Define conditions for Interaction Analytics Export rules to ensure that the rule's action is only performed on interactions that meet the rule's conditions.

Related topics

Interaction Analytics Export rules (page 83)

Set the Interaction Analytics Export rule attributes

Set the Interaction Analytics Export rule's name, description, and priority.

Procedure

1. In the **Project Rules Manager** toolbar, click + .
2. In the **General** pane, set the rule's attributes:
   - **Name:** Set a unique rule name.
   - **Description:** Describe the purpose of the rule.
   - **Priority**: Set to **Normal** by default.

     To change the priority, select a priority level from the list.

     If High is selected, interactions that meet the rule's conditions will be processed before interactions that meet another rule's conditions with a Medium priority
3. Click **Next**.

What to do next

Define settings for an Interaction Analytics Export rule (page 100)

Related topics

Interaction Analytics Export rules (page 83)

Define settings for an Interaction Analytics Export rule

Add Interaction Analytics Export as an action to the rule and define the action's settings.

Procedure

1. In the **Actions** drop-down menu, select **Interaction Analytics Export**, and then select **Add Action**.
2. To add additional actions to the rule, in the drop-down menu select the action and select **Add Action**.
3. Set the relevant action settings:
   - Set the **Transcribe** action settings:
     - **Transcription Language:** Select the transcription language of the interactions included in the rule.
     - **Transcription Vocabulary:** Select the required vocabulary.
     - **Percentage:** Specify the **Percentage** of interactions (out of the interactions that match all the rule's conditions) on which to apply the action.
   - Set the **Interaction Analytics Export** action settings:
     a. **Type:**
        a. **SFTP:** To export the transcriptions to a secure FTP site, select this option.
        b. **UNC:** To export the transcriptions to a shared folder on a network server, select this option.
     b. **Host:** (For secure FTP only) Enter the host name of the secure FTP site or the network server.
     c. **Port:** (For secure FTP only) Enter the port number to connect to the secure FTP site.
     d. **User Name:** Enter the user name to access the secure FTP site or the network server.
     e. **Password:** Enter the password to access the secure FTP site or the network server.

        To display the characters on the screen, select the **Display** button.
     f. **Path:** Enter the path to the folder on the secure FTP site or to the shared folder on the network server.

        For UNC, the path must be in the following format: **\\<hostname>\<path>**
     g. **Container Password:** (Optional) Enter the password to extract the ZIP files. If you do not define a password, no password is needed to extract the files.
     h. If licensed for redaction and your role has the **Export without redaction** privilege, choose whether to use **Redaction** for exported media. Redaction protects sensitive customer information found in captured interaction media. The system analyzes interaction transcriptions to identify personally identifiable information (PII) and then redacts those

portions of the media. Examples of sensitive customer information include debit and credit card details and medical information.

Choose from the following options:

- **As configured**: Export the media as configured in the data source that captured the interaction.
- **Unredacted**: Export the original media. Exporting unredacted media is audited.

> Users without the **Export without redaction** privilege export media as configured in the data source that captured the interaction.

4. Click **Next**.

What to do next

Define conditions for an Interaction Analytics Export rule (page 101)

Related topics

Interaction Analytics Export rules (page 83)

Define conditions for an Interaction Analytics Export rule

Define conditions for Interaction Analytics Export rules to ensure that the rule's action is only performed on interactions that meet the rule's conditions.

- If multiple conditions are defined for a rule, the operator between the conditions is AND. The AND operator means that the rule is executed only on interactions that meet *all* the conditions.
- If multiple values are defined within a parameter, the operator between the values is OR. The OR operator means that the condition is met when an interaction matches one of the values.
- If both employees and organizations are selected in the **Employees** tab, both values must be met.

Example: Define conditions for a Speech Analytics rule

- To apply the rule to voice interactions dialed to a specific contact center, define the organization/group, Direction, DNIS, and interaction type.
- To apply a rule to voice interactions that are at least one minute long, set the Duration to more than one (1) minute.

Before you begin

Review the conditions available in the Project Rules Manager.

Procedure

1. In the **Conditions** pane, select the **Date** tab.
2. Set the **Start Date** and **End Date** (optional) for the rule in your regional date format. For example, in the United States, use mm/dd/yyyy.

- **Start Date:**
  - If you select a **Start Date** *earlier* than the current date, the rule applies to interactions that have a start date as of the specified date.
  - If you select a **Start Date** *in the future*, the rule applies only to interactions with a start date after the specified future date.

  > For Interaction Analytics Export rules, it is not recommended to set a start date more than 365 days in the past.

- (Optional) **End Date**:
  - If you set the **End Date**, the rule applies to interactions that exist as of the specified **Start Date** up until the specified **End Date**. When the **End Date** passes, the rule continues to run for 30 days as it awaits interactions inserted with a **Start Date** matching the specified date window for the rule.
  - If you leave the **End Date** blank, the rule runs indefinitely.

3. To set more conditions, select the relevant tabs.
   - To assign more than one value or range of values to a condition field, click + (where applicable).
   - To use wildcards in alphanumeric condition fields, use the asterisk (*) character to represent numerous characters, or use the question mark (?) character to represent one character. For example:
     - For all DNIS numbers beginning with 1800, enter 1800*. Calls with DNIS 18001111 and 18002222 qualify for the condition.
     - For all DNIS numbers in which all the digits are constant except for the fifth digit, enter 1800?1111. Calls with DNIS 180091111 and 180061111 qualify for the condition.
4. When you have finished defining the conditions for the rule, select **Next**.
5. In the Review pane, review the attributes, actions, and conditions for the rule.
6. (Optional) To create the rule without activating it, clear the **Enable rule** check box at the bottom of the Review pane.
7. Select **Create**.

Related topics

Interaction Analytics Export rules (page 83)

Workflow: Create a Transcription-only rule

Create a Transcription-only (PRM option: **Transcribe**) rule to enable users to use transcription based services, such as PII Redaction, without requiring a Speech Analytics or Automated QM license.

Before you begin

To create a **Transcription-only** rule, you must be assigned the **Project Rules Manager** privilege.

Workflow

1. Set the Transcription-only rule attributes (page 103)

   Set the Transcription-only rule's name, description, and priority.
2. Define settings for a Transcription-only rule (page 104)

   Add Transcribe as an action to the rule and define the action's settings.
3. Define conditions for a Transcription-only rule (page 104)

   Define conditions for Transcription-only rules to ensure that the rule's action is only performed on interactions that meet the rule's conditions.

Related topics

Transcription-only rules (page 83)

Set the Transcription-only rule attributes

Set the Transcription-only rule's name, description, and priority.

Procedure

1. In the **Project Rules Manager** toolbar, click + .
2. In the **General** pane, set the rule's attributes:
   - **Name:** Set a unique rule name.
   - **Description:** Describe the purpose of the rule.
   - **Priority**: Set to **Normal** by default.

     To change the priority, select a priority level from the list.

     If High is selected, interactions that meet the rule's conditions will be processed before interactions that meet another rule's conditions with a Medium priority
3. Click **Next**.

What to do next

Define settings for a Transcription-only rule (page 104)

Related topics

Transcription-only rules (page 83)

Define settings for a Transcription-only rule

Add transcribe as an action to the rule and define the action's settings.

Procedure

1. In the **Actions** drop-down menu, select **transcribe**, and then select **Add Action**.
2. To add additional actions to the rule, in the drop-down menu select the action and select **Add Action**.
3. Set the **Transcribe** action settings:
    - **Transcription Language:** Select the transcription language of the interactions included in the rule.
    - **Transcription Vocabulary:** Select the required vocabulary.
    - **Percentage:** Specify the **Percentage** of interactions (out of the interactions that match all the rule's conditions) on which to apply the action.
4. Click **Next**.

What to do next

Define conditions for a Transcription-only rule (page 104)

Related topics

Transcription-only rules (page 83)

Define conditions for a Transcription-only rule

Define conditions for Transcription-only rules to ensure that the rule's action is only performed on interactions that meet the rule's conditions.

- If multiple conditions are defined for a rule, the operator between the conditions is AND. The AND operator means that the rule is executed only on interactions that meet *all* the conditions.
- If multiple values are defined within a parameter, the operator between the values is OR. The OR operator means that the condition is met when an interaction matches one of the values.
- If both employees and organizations are selected in the **Employees** tab, both values must be met.

Example: Define conditions for a Speech Analytics rule

- To apply the rule to voice interactions dialed to a specific contact center, define the organization/group, Direction, DNIS, and interaction type.
- To apply a rule to voice interactions that are at least one minute long, set the Duration to more than one (1) minute.

Before you begin

Review the conditions available in the Project Rules Manager.

Procedure

1. In the **Conditions** pane, select the **Date** tab.
2. Set the **Start Date** and **End Date** (optional) for the rule in your regional date format. For example, in the United States, use mm/dd/yyyy.
   - **Start Date:**
     - If you select a **Start Date** *earlier* than the current date, the rule applies to interactions that have a start date as of the specified date.
     - If you select a **Start Date** *in the future*, the rule applies only to interactions with a start date after the specified future date.
   - (Optional) **End Date**:
     - If you set the **End Date**, the rule applies to interactions that exist as of the specified **Start Date** up until the specified **End Date**. When the **End Date** passes, the rule continues to run for 30 days as it awaits interactions inserted with a **Start Date** matching the specified date window for the rule.
     - If you leave the **End Date** blank, the rule runs indefinitely.
3. To set more conditions, select the relevant tabs.
   - To assign more than one value or range of values to a condition field, click + (where applicable).
   - To use wildcards in alphanumeric condition fields, use the asterisk (*) character to represent numerous characters, or use the question mark (?) character to represent one character. For example:
     - For all DNIS numbers beginning with 1800, enter 1800*. Calls with DNIS 18001111 and 18002222 qualify for the condition.
     - For all DNIS numbers in which all the digits are constant except for the fifth digit, enter 1800?1111. Calls with DNIS 180091111 and 180061111 qualify for the condition.
4. When you have finished defining the conditions for the rule, select **Next**.
5. In the Review pane, review the attributes, actions, and conditions for the rule.
6. (Optional) To create the rule without activating it, clear the **Enable rule** check box at the bottom of the Review pane.
7. Select **Create**.

Related topics

Transcription-only rules (page 83)

Workflow: Create an Interaction Data Export with Processing rule

Create an Interaction Data Export with Processing rule to export media and metadata of interactions that match the rule's conditions to a storage destination.

Before you begin

To create Interaction Data Export with Processing rules, you must be assigned the following privileges:

- **View storage targets**
- **Create Interaction Data Export with Processing Rules**

Workflow

1. Set the attributes for an Interaction Data Export with Processing rule (page 106)
   Set the rule's name, description, and priority.
2. Define settings for Interaction Data Export with Processing rule (page 107)
   Add the Interaction Data Export with Processing action to the rule, and define the rule's export settings.
3. Define conditions for Interaction Data Export with Processing rule (page 110)
   Define conditions for the rule to ensure that only the media and metadata of interactions that match the rule's conditions are exported.

Related topics

Interaction Data Export with Processing rules (page 83)

Set the attributes for an Interaction Data Export with Processing rule

Set the rule's name, description, and priority.

Procedure

1. In the **Project Rules Manager** toolbar, click + .
2. In the **General** pane, set the rule's attributes:
   - **Name:** Set a unique rule name.
   - **Description:** Describe the purpose of the rule.
   - **Priority**: Set to **Normal** by default.
     To change the priority, select a priority level from the list.
     If High is selected, interactions that meet the rule's conditions will be processed before

interactions that meet another rule's conditions with a Medium priority

3. Click **Next**.

What to do next

Define settings for Interaction Data Export with Processing rule (page 107)

Define settings for Interaction Data Export with Processing rule

Add the Interaction Data Export with Processing action to the rule, and define the rule's export settings.

Select the media types to include in the export. For audio and screen recordings, select the format in which to export the files.

Once a rule is activated, output files are automatically exported to the specified destination folder on the destination media using the following directory structure: **yyyy/mm/dd/hh/[output file name]**.

Example of output file names and paths:

2021/01/14/10/202101140952931239382831092912.json

2021/01/14/10/202101140952931239382831092912.wav

2021/01/14/10/202101140955939120918209382191.json

2021/01/14/10/202101140955939120918209382191.wav

2021/01/14/10/202101140955939120918209382191_screen_1.scn

2021/01/15/08/202101150832102398129148124123.json

2021/01/15/08/202101150832102398129148124123_text.json

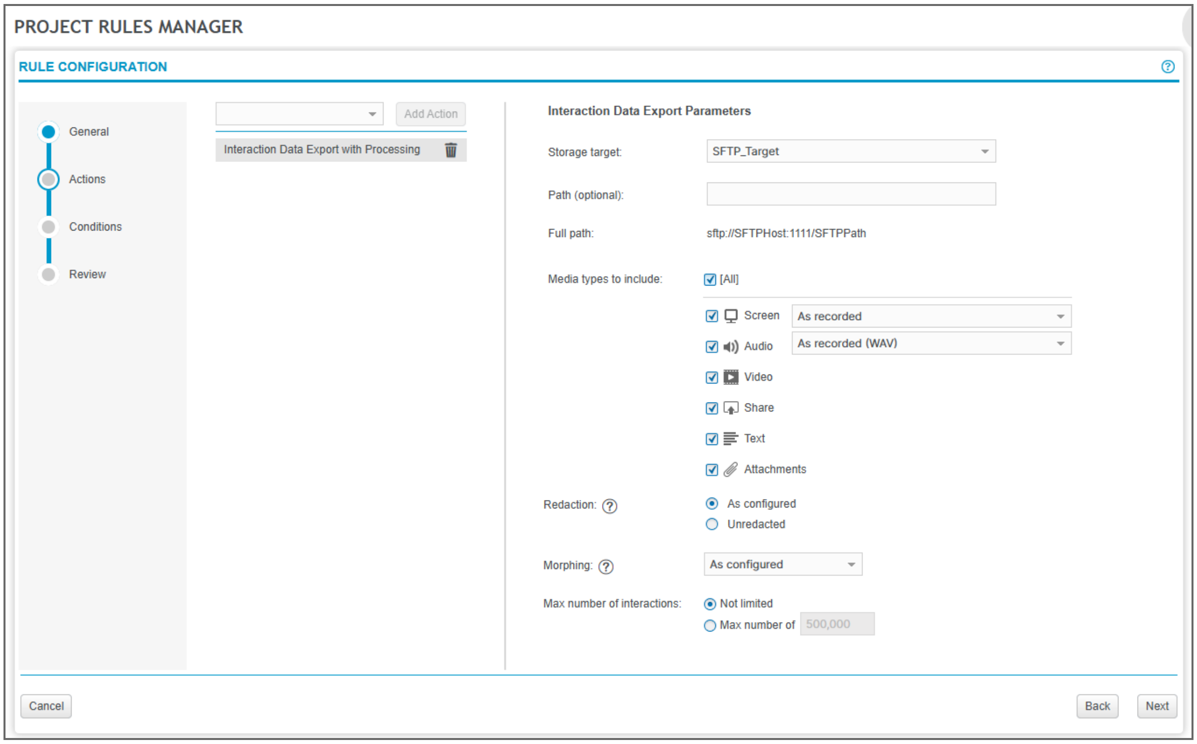
Before you begin

Verify that you have a storage target configured on the **Storage Targets** page in **System Management**.

For information on configuring storage targets, see Create a storage target (*Enterprise Manager Configuration and Administration Guide*).

Procedure

1. In the **Actions** drop-down menu, select the **Interaction Data Export with Processing** action, and then select **Add Action**.



2. Under **Storage target**, select an available storage target from the list.

> Verint Cloud customers who use Interaction Export can only export to cloud native storage (S3 for AWS, Azure Blob for Azure, Cloud Storage for GCP) or SFTP.

- The list displays the storage targets configured on the **Storage Targets** page in **System Management**.
- After selecting a target, the full path to the destination folder on the storage target is displayed.

3. (Optional) To export the data to a specific subfolder on the storage target, enter the folder name.

   The full path is updated with the specified subfolder.

4. Select the media types to include in the export:

   - **Screen**

     If Screen is selected, select the format in which to export the files:

     - **As recorded**: Export in the format used to capture the screen activity.
     - **As recorded combined with Audio (AVI)**: Combine screen and audio media and export in AVI format. Selection of this option disables **Audio** as a separate media type.
     - **Portable combined with Audio (AAC + H.264/MP4)**: When assigned the role privilege to *Export screen capture as MP4*, combines audio and screen into a portable MP4 format (AAC audio and H.264/MP4 video). Users can play back the media using any application that supports MP4. Selection of this option disables **Audio** as a separate media type.

- **Portable (H.264/MP4)**: When assigned the role privilege to *Export screen capture as MP4*, exports screen (H.264/MP4) to a portable MP4 format. Users can play back the media using any application that supports MP4.

> To play back **As recorded** or **As recorded combined with Audio (AVI)** formats in **Windows Media Player**, the **Multimedia Support Package** must be installed. Alternatively, after export you must convert the media to a codec supported by Windows Media Player. Other third-party tools that do not require installing the Multimedia Support Package can also be used for playback.

- **Audio**

  If Audio is selected, select the format in which to export the files:

  - **WAV**: Export in the recorded WAV format.
  - **G.711/WAV**: Convert and export in G.711/WAV format.
  - **AAC/MP4**: Convert and export in AAC/MP4 format.

> When the files are exported, the audio is separated into two channels:
>
> - Left channel (channel 0): This contains the agent side voice.
> - Right channel (channel 1): This contains the external parties' voice.
>
> This separation is based on the system correctly identifying each side of the voice during the recording process.
>
> Also note that in the trunk side capture solutions, the left channel (agent's voice) will contain a mix of all internal parties' voices (for example, all agents).

> To play back **WAV** files in **Windows Media Player**, the **Multimedia Support Package** must be installed. Alternatively, after export you must convert the media to a codec supported by Windows Media Player. Other third-party tools that do not require installing the Multimedia Support Package can also be used for playback.
>
> Playback of **G.711/WAV** or **AAC/MP4** files in Windows Media Player does not require installing the Multimedia Support Package.

- **Video** (as recorded in MP4 format)
- **Share** (as recorded in MP4 format)
- **Text** (exported in CIV format)
- **Attachments** (exported as is)

5. If licensed for redaction and your role has the **Export without redaction** privilege, choose whether to use **Redaction** for exported media. Redaction protects sensitive customer information found in captured interaction media. The system analyzes interaction transcriptions to identify personally identifiable information (PII) and then redacts those portions of the media. Examples of sensitive customer information include debit and credit card details and medical information.

   Choose from the following options:

a. **As configured**: Export the media as configured in the data source that captured the interaction.

b. **Unredacted**: Export the original media. Exporting unredacted media is audited.

> Users without the **Export without redaction** privilege export media as configured in the data source that captured the interaction.

6. If licensed for morphing and your role has the **Export without morphing** privilege, choose whether to use **Morphing** for exported media. Morphing protects the identity of persons speaking on the interaction by changing the voice heard. The anonymity of the speaker is preserved while the audio remains intelligible.

   Choose from the following options:

   a. **As configured**: Export the audio as configured in the data source that captured the interaction. A data source can be configured to use no morphing, morph the employee/agent channel only, or morph the employee/agent channel and the customer channel.

   b. **Agent and customer**: Apply morphing to anonymize both audio channels.

   c. **Agent only**: Apply morphing to the employee/agent channel only. The customer voice is the original audio as captured.

   d. **Not morphed**: Export the original audio for both the employee/agent channel and the customer channel.

   > Users without the **Export without morphing** privilege export audio as configured in the data source that captured the interaction.

7. (Optional) Define the **Max number of interactions**.
   - With no maximum number defined (default), the rule can export an unlimited number of interactions.
   - If you define a maximum number, it must be 1 or more, with a maximum value of 500,000.
8. Select **Next**.

What to do next

Define conditions for Interaction Data Export with Processing rule (page 110)

Related information

Create a storage target (*Enterprise Manager Configuration and Administration Guide*)

Desktop Applications Deployment Reference and Installation Guide

Define conditions for Interaction Data Export with Processing rule

Define conditions for the rule to ensure that only the media and metadata of interactions that match the rule's conditions are exported.

- When you define multiple conditions for a rule, the operator between the conditions is AND. The AND operator means that the rule is executed only on interactions that meet *all* the conditions.
- When you define multiple values within a parameter, the operator between the values is OR. The OR operator means that the condition is met when an interaction matches one of the values.
- When both employees and organizations are selected on the **Employees** tab, both values must be met.

Before you begin

Review the conditions available in the Project Rules Manager.

Procedure

1. In the **Conditions** pane, select the **Date** tab.
2. Set the **Start Date** and **End Date** (optional) for the rule in your regional date format. For example, in the United States, use mm/dd/yyyy.
   a. **Start Date:**
      - If you select a **Start Date** *earlier* than the current date, the rule applies to interactions that have a start date as of the specified date.
      - If you select a **Start Date** *in the future*, the rule applies only to interactions with a start date after the specified future date.

   b. (Optional) **End Date**:
      - If you set the **End Date**, the rule applies to interactions that exist as of the specified **Start Date** up until the specified **End Date**. When the **End Date** passes, the rule continues to run for 30 days as it awaits interactions inserted with a **Start Date** matching the specified date window for the rule.
      - If you leave the **End Date** blank, the rule runs indefinitely.
3. To export interactions based on employees, organizations, and groups:
   a. From the **Conditions** list, select **Employees**.

   b. From **Employee Parameters**, select which organizational entities you want to use in the rule. Select from:
      - Employees: View employees by last name
      - Employees by organization: View employees by organization
      - Employees by group: View employees by group
      - Organizations: View organizations by name
      - Groups: View groups by name

   c. To refine what displays, you can use the filtering and search tools from the top of the **Employee Parameters**.

   d. You can select multiple organizational entities in any of the lists:

- To select multiple items sequentially, hold down the SHIFT key and select the first and last entity you need.
- To select multiple items individually, hold down the CTRL key and select each entity you need.

e. Use the arrow keys after having made your selection or selections in a list:

- Move selected entities to **Selected Employees** or **Selected Organizations / Groups**.
- Remove selected items from the **Selected Employees** or **Selected Organizations / Groups** lists.

f. (Optional) After adding one or more organizations from the Organizations list, configure how the rule handles organizational membership for the employee. In **Export based on employee organizational membership**, select from:

- **At the time of interaction capture** (default for new rules)

  The rule exports interactions based on the organizational membership for the employee when the interaction occurred.

  Example: You select the New York organization. John Smith was a member of the New York organization last month. He is now assigned to the London organization. The rule includes his interactions from last month as a New York team member.

- **As currently configured**

  The rule exports interactions based on the organizational membership for the employee at the time of export.

  Example: You select the Paris organization. Jane Smith was a member of the Paris organization last month. She is now assigned to the Moscow organization. The rule *excludes* her interactions from last month as a Paris team member.

4. To set more conditions, select the relevant tabs. Choose from *Interactions*, *Contacts*, *Recorders*, *Switches*, *Conditional Custom Data*, or *Custom Data*.
   - To assign more than one value or range of values to a condition field, click + (where applicable).
   - To use wildcards in alphanumeric condition fields, use the asterisk (*) character to represent numerous characters, or use the question mark (?) character to represent one character. For example:
     - For all DNIS numbers beginning with 1800, enter 1800*. Calls with DNIS 18001111 and 18002222 qualify for the condition.
     - For all DNIS numbers in which all the digits are constant except for the fifth digit, enter 1800?1111. Calls with DNIS 180091111 and 180061111 qualify for the condition.
5. When you have finished defining the conditions for the rule, select **Next**.
6. In the **Review** pane, review the attributes, actions, and conditions for the rule.
7. (Optional) To create the rule without activating it, clear the **Enable rule** check box at the bottom of the **Review** pane.
8. Select **Create**.

Related topics

Workflow: Create an Interaction Data Export with Processing rule (page 106)

Workflow: Create an Add to Case rule

Create an Add to Case rule to copy interactions that match the rule's criteria to a case.

Before you begin

- To create Add to Case rules, the following privileges must be assigned to you in User Management:
  - **View Cases**
  - **Edit Cases**
- Verify in the Assignment Manager that you are assigned an existing case, or create a new case in Risk Management.

Workflow

1. Set the attributes for an Add to Case rule (page 113)

   Set the rule's name, description, and priority.
2. Define settings for Add to Case rule (page 114)

   Add the Add to Case action to the rule, and select a case to which to copy interactions.
3. Define conditions for Add to Case rule (page 114)

   Define conditions for the rule to ensure that only interactions that match the rule's conditions are copied to the case.

Related topics

Add to Case rules (page 84)

Set the attributes for an Add to Case rule

Set the rule's name, description, and priority.

Procedure

1. In the **Project Rules Manager** toolbar, click + .
2. In the **General** pane, set the rule's attributes:
   - **Name:** Set a unique rule name.
   - **Description:** Describe the purpose of the rule.
   - **Priority**: Set to **Normal** by default.

     To change the priority, select a priority level from the list.

     If High is selected, interactions that meet the rule's conditions will be processed before interactions that meet another rule's conditions with a Medium priority
3. Click **Next**.

What to do next

Define settings for Add to Case rule (page 114)

Define settings for Add to Case rule

Add the Add to Case action to the rule, and select a case to which to copy interactions.

Only existing cases assigned to you in the Assignment Manager are visible to you.

Procedure

1. In the **Actions** drop-down menu, select **Add to Case**, and then select **Add Action**.
2. Select a case from the list.
   Only existing cases assigned to you in the Assignment Manager are displayed in the list.
3. Select **Next**.

What to do next

Define conditions for Add to Case rule (page 114)

Define conditions for Add to Case rule

Define conditions for the rule to ensure that only interactions that match the rule's conditions are copied to the case.

- If multiple conditions are defined for a rule, the operator between the conditions is AND. The AND operator means that the rule is executed only on interactions that meet *all* the conditions.
- If multiple values are defined within a parameter, the operator between the values is OR. The OR operator means that the condition is met when an interaction matches one of the values.
- If both employees and organizations are selected in the **Employees** tab, both values must be met.

Example: Define conditions for an Add to Case rule

To investigate potential fraud in a contact center, create an Add to Case rule for interactions handled by a specific group. Leave the end date open to apply the rule indefinitely to all future interactions dialed to that group.

Before you begin

Review the conditions available in the Project Rules Manager.

Procedure

1. In the **Conditions** pane, select the **Date** tab.
2. Set the **Start Date** and **End Date** (optional) for the rule in your regional date format. For example, in the United States, use mm/dd/yyyy.

a. **Start Date:**

- If you select a **Start Date** *earlier* than the current date, the rule applies to interactions that have a start date as of the specified date.
- If you select a **Start Date** *in the future*, the rule applies only to interactions with a start date after the specified future date.

b. (Optional) **End Date**:

- If you set the **End Date**, the rule applies to interactions that exist as of the specified **Start Date** up until the specified **End Date**. When the **End Date** passes, the rule continues to run for 30 days as it awaits interactions inserted with a **Start Date** matching the specified date window for the rule.
- If you leave the **End Date** blank, the rule runs indefinitely.

3. To set more conditions, select the relevant tabs.
   - To assign more than one value or range of values to a condition field, click + (where applicable).
   - To use wildcards in alphanumeric condition fields, use the asterisk (*) character to represent numerous characters, or use the question mark (?) character to represent one character. For example:
     - For all DNIS numbers beginning with 1800, enter 1800*. Calls with DNIS 18001111 and 18002222 qualify for the condition.
     - For all DNIS numbers in which all the digits are constant except for the fifth digit, enter 1800?1111. Calls with DNIS 180091111 and 180061111 qualify for the condition.
4. When you have finished defining conditions for the rule, select **Next**.
5. In the **Review** pane, review the attributes, actions, and conditions for the rule.
6. (Optional) To create the rule without activating it, clear the **Enable rule** check box at the bottom of the Review pane.
7. Select **Create**.

Related topics

Condition parameters (page 130)

Workflow: Create a delete interactions (GDPR) rule

Create a delete interactions GDPR rule to permanently delete interactions for employees and customers that request to have their data deleted.

Define the attributes, settings, and conditions used to identify interactions for the employee or customer, and optionally set the export parameters to export the interactions to an FTP site before they are permanently deleted.

Before you begin

To create Delete Interactions rules, you must be assigned the **Create Delete Interactions Rules** privilege.

Workflow

1. Set the attributes for a GDPR interaction deletion rule (page 116)

   Set the rule's name, description, and priority.
2. Define settings for a GDPR interaction deletion rule (page 117)

   Add the Delete Interactions action to the rule and, optionally, set export parameters to export interactions to a secure FTP site before deletion.
3. Define conditions for a GDPR interaction deletion rule (page 117)

   Define conditions to filter the rule for a specific customer's or employee's interactions (for example, ANI or a custom data field).
4. Review interactions before GDPR deletion (page 118)

   Before executing the rule, review the list of matching interactions and decide which ones to include in the rule. Drill down to an interaction to play back its recordings, review its metadata, or view its chat or transcriptions.

Related topics

Delete interactions for GDPR rules (page 85)

Workflow: Create a delete interactions using a recycle bin rule (page 120)

Set the attributes for a GDPR interaction deletion rule

In the General tab, define the rule's name, description, priority.

Procedure

1. In the **Project Rules Manager** toolbar, click ✚ .
2. In the **General** pane, set the rule's attributes:
   - **Name:** Set a unique rule name.
   - **Description:** Describe the purpose of the rule.
   - **Priority**: Set to **Normal** by default.

To change the priority, select a priority level from the list.

If High is selected, interactions that meet the rule's conditions will be processed before interactions that meet another rule's conditions with a Medium priority

3. Click **Next**.

What to do next

Define settings for a rule to delete interactions using a recycle bin (page 121)

Define settings for a GDPR interaction deletion rule

Add the Delete Interactions action to the rule and, optionally, set export parameters to export interactions to a secure FTP site before deletion.

Procedure

1. In the **Actions** drop-down menu, select **Delete Interactions**, and then select **Add Action**.
2. To export interactions to a secure FTP site before they are deleted, select **Export before delete**, and then set the export parameters:
   - **Container Password:** Enter the password to extract the ZIP file. If you do not define a password, no password is needed to extract the files.

     To display the characters on the screen, click the **Display** icon.
   - **SFTP Host:** Enter the host name of the secure FTP site.
   - **Port:** Enter the port number to connect to the secure FTP site.
   - **Path:** Enter the path to the folder on the secure FTP site.
   - **User Name:** Enter the user name to access the secure FTP site.
   - **Password:** Enter the password to access the secure FTP site.

     To display the characters on the screen, click the **Display** icon.
3. Click **Next**.

What to do next

Define conditions for a GDPR interaction deletion rule (page 117)

Define conditions for a GDPR interaction deletion rule

Define conditions to filter the rule for a specific customer's or employee's interactions (for example, ANI or a custom data field).

- If multiple conditions are defined for a rule, the operator between the conditions is AND. The AND operator means that the rule is executed only on interactions that meet *all* the conditions.
- If multiple values are defined within a parameter, the operator between the values is OR. The OR operator means that the condition is met when an interaction matches one of the values.
- If both employees and organizations are selected in the **Employees** tab, both values must be met.

Example: Define conditions for a Delete Interactions rule

To delete all interactions handled by an employee named Ron Peters, define the DNIS, Extension, and Employee information.

Before you begin

Review the conditions available in the Project Rules Manager.

Procedure

1. In the **Conditions** pane, select the **Date** tab.
2. Set the **Start Date** and **End Date** (optional) for the rule in your regional date format. For example, in the United States, use mm/dd/yyyy.
   a. **Start Date:**
      - If you select a **Start Date** *earlier* than the current date, the rule applies to interactions that have a start date as of the specified date.
      - If you select a **Start Date** *in the future*, the rule applies only to interactions with a start date after the specified future date.

   b. (Optional) **End Date**:

      If no end date is specified, the rule is applied to interactions from the specified start date until the current date.
3. To set more conditions, select the relevant tabs.
   - To assign more than one value or a range of values to a condition field, click + (where applicable).
   - To use wildcards in alphanumeric condition fields, use the asterisk (*) character to represent numerous characters, or use the question select (?) character to represent one character. For example:
     - For all DNIS numbers beginning with 1800, enter 1800*. Calls with DNIS 18001111 and 18002222 qualify for the condition.
     - For all DNIS numbers in which all the digits are constant except for the fifth digit, enter 1800?1111. Calls with DNIS 180091111 and 180061111 qualify for the condition.
4. When you have finished defining conditions for the rule, select **Next**.

What to do next

Review interactions before GDPR deletion (page 118)

Related topics

Condition parameters (page 130)

Review interactions before GDPR deletion

After you set the Delete Interactions rule's attributes, action, and conditions, Project Rules Manager retrieves matching interactions and displays them in a grid for review.

Before executing the rule, review the list of matching interactions and decide which ones to include in the rule. Drill down to an interaction to play back its recordings, review its metadata, or view its chat or transcriptions.

Procedure

1. In the grid, click an interaction's Start Date to review the interaction and decide whether it should be deleted.

   The interaction opens in a separate Interaction Review window, where you can review the interaction's details and play back the interaction.
2. To include an interaction in the rule, in the grid, select the interaction's check box.
3. When you have finished reviewing the interactions, and have selected the interactions that should be deleted, click **Create Rule**.

   Project Rules Manager immediately starts deleting the selected interactions.
   - In the Project Rules Manager grid, the rule's status displays **In Progress**.
   - When the rule is completed, the status displays **Completed**. An email notification is sent to you with the number of interactions that were deleted, and the number of failed deletions.

If a Delete Interactions rule displays status Completed, the selected interactions are added to the database's purger queue. Interactions are still searchable until the purger's nightly run, when they are deleted permanently.

Related information

Workflow: Create a delete interactions (GDPR) rule (page 116)

Workflow: Create a delete interactions using a recycle bin rule

You can use the Project Rules Manager to populate a recycle bin with interactions. Once assigned to a recycle bin, the interactions remain accessible to users for the duration of the grace period. The grace period is the number of days until deletion. After the grace period for an interaction expires, the interaction is removed permanently.

Define the attributes, settings, and conditions used to assign interactions to the recycle bin.

Before you begin

To create a **Delete interactions using a Recycle Bin** rule, you must be assigned the **Delete interactions using a Recycle Bin** privilege.

Workflow

1. Set the attributes for a rule to delete interactions using a recycle bin (page 120)

   Set the rule's name, description, and priority.
2. Define settings for a rule to delete interactions using a recycle bin (page 121)

   Add the Delete interactions using a Recycle Bin action to the rule.
3. Define conditions for a rule to delete interactions using a recycle bin (page 121)

   Define conditions to filter the rule for a specific customer's or employee's interactions (for example, ANI or a custom data field).
4. Review settings for the rule to delete interactions using a recycle bin (page 123)

   After you set the rule's attributes, action, and conditions, the system provides a summary of the configuration settings displayed in three columns.

Related topics

Delete interactions using a Recycle Bin rules (page 86)

Set the attributes for a rule to delete interactions using a recycle bin

In the General tab, define the rule's name, description, priority.

Procedure

1. In the **Project Rules Manager** toolbar, click + .
2. In the **General** pane, set the rule's attributes:

- **Name:** Set a unique rule name.
- **Description:** Describe the purpose of the rule.
- **Priority**: Set to **Normal** by default.

  To change the priority, select a priority level from the list.

  If High is selected, interactions that meet the rule's conditions will be processed before interactions that meet another rule's conditions with a Medium priority

3. Click **Next**.

What to do next

Define settings for a rule to delete interactions using a recycle bin (page 121)

Define settings for a rule to delete interactions using a recycle bin

Add the Delete interactions using a Recycle Bin action to the rule.

Procedure

1. In the **Actions** drop-down menu, select **Delete Interactions using a Recycle Bin**, and then select **Add Action**. Once selected, no more actions are allowed for the rule. You cannot combine the **Delete Interactions using a Recycle Bin** action with other actions.
2. Select one recycle bin to which the rule adds the interactions that it finds.

   After you select a recycle bin, the page displays how long interactions remain in the recycle bin before eligible for deletion. For example, *Interactions will be added to the recycle bin and permanently deleted after 30 days.*
3. Click **Next**.

What to do next

Define conditions for a rule to delete interactions using a recycle bin (page 121)

Define conditions for a rule to delete interactions using a recycle bin

Define conditions to filter the rule for a specific customer's or employee's interactions (for example, ANI or a custom data field).

- If multiple conditions are defined for a rule, the operator between the conditions is AND. The AND operator means that the rule is executed only on interactions that meet *all* the conditions.
- If multiple values are defined within a parameter, the operator between the values is OR. The OR operator means that the condition is met when an interaction matches one of the values.
- If both employees and organizations are selected in the **Employees** tab, both values must be met.

Example: Define conditions for a rule to delete interactions using a recycle bin

To delete all interactions handled by an employee named Ron Peters, define the DNIS, Extension, and Employee information.

Before you begin

Review the conditions available in the Project Rules Manager.

Procedure

1. In the **Conditions** pane, select the **Date** tab.
2. Set the **Start Date** and **End Date** (optional) for the rule in your regional date format. For example, in the United States, use mm/dd/yyyy.
   a. **Start Date:**
      - If you select a **Start Date** *earlier* than the current date, the rule applies to interactions that have a start date as of the specified date.
      - If you select a **Start Date** *in the future*, the rule applies only to interactions with a start date after the specified future date.

   b. (Optional) **End Date**:
      - If you set the **End Date**, the rule applies to interactions that exist as of the specified **Start Date** up until the specified **End Date**. When the **End Date** passes, the rule continues to run for 30 days as it awaits interactions inserted with a **Start Date** matching the specified date window for the rule.
      - If you leave the **End Date** blank, the rule runs indefinitely.
3. To set more conditions, select the relevant tabs.
   - To assign more than one value or a range of values to a condition field, click + (where applicable).
   - To use wildcards in alphanumeric condition fields, use the asterisk (*) character to represent numerous characters, or use the question select (?) character to represent one character. For example:
      - For all DNIS numbers beginning with 1800, enter 1800*. Calls with DNIS 18001111 and 18002222 qualify for the condition.
      - For all DNIS numbers in which all the digits are constant except for the fifth digit, enter 1800?1111. Calls with DNIS 180091111 and 180061111 qualify for the condition.
4. When you have finished defining conditions for the rule, select **Next**.

What to do next

Review settings for the rule to delete interactions using a recycle bin (page 123)

Related topics

Condition parameters (page 130)

Review settings for the rule to delete interactions using a recycle bin

After you set the rule's attributes, action, and conditions, the system provides a summary of the configuration settings displayed in three columns.

- **General**: The name of the rule, its description, and the rule priority.
- **Actions**: The recycle bin that the rule uses.
- **Conditions**: Any criteria used to locate interactions.

Procedure

1. To see configuration details for the **Actions** and the **Conditions** columns, expand any of the actions or conditions shown.

   Drop-down text with the details displays for the selected item.
2. To make changes to any of the rule settings, use the **Back** button to revisit the configuration steps.
3. To disable rule execution, clear the **Enable rule** check box. By default, new rules are enabled.
4. To complete the creation of the rule, click **Create Rule**.

Related information

Workflow: Create a delete interactions using a recycle bin rule (page 120)

Enable and disable a rule

Enable or disable a rule to start or stop executing the rule.

When you enable a rule, the rule is executed according to the rule's start and end date.

New rules are enabled by default but they do not necessarily need to be enabled at all times. If you disable a rule, the rule is still displayed in the grid and can be enabled when required.

Before you begin

- You cannot enable or disable a **Delete Interactions rule** (GDPR) because they execute immediately upon rule creation. After a **Delete Interactions** rule completes, it cannot run again and displays for informational purposes only.
- You cannot enable or disable rules that have expired, which display for informational purposes only.

Procedure

1. In the Project Rules Manager grid, locate the rule you want to enable or disable.
2. Select or clear the **Enabled** check box.

Modify a rule

Modify an existing rule to update its rule settings or conditions.

The modified rule applies to interactions recorded from the current start date onwards. It does not apply retroactively to interactions processed since the original start date.

> ⚠ To apply a modified rule retroactively to interactions already processed by the rule, create a new rule with the original start date and the modified conditions.

Delete Interactions rules cannot be modified because they are executed as soon as the rule is created, and cannot be executed again.

Example: Modify an Add to Case rule

If an Add to Case rule included all interactions for September and October 2020, and the rule is modified to include August, September, and October, then interactions from August will be added to the case, and also any interactions from September and October that were previously manually deleted are re-added to the case.

Before you begin

You cannot modify a **Delete Interactions rule** (GDPR) because they execute immediately upon rule creation. After a **Delete Interactions** rule completes, it cannot run again and displays for informational purposes only.

Procedure

1. In the Project Rules Manager grid, select the rule you want to modify, and click ✎ .
2. Modify the rule's settings as needed.
   - If you modify a rule's **Start Date** to an earlier date, the rule is reapplied from the new **Start Date** onwards. In case of transcription, interactions that were already transcribed are not transcribed again. If you set a percentage quota for the rule, the quota is recalculated, and new interactions are selected for transcription to meet the new quota.
   - If you modify a rule's transcription language, previously selected Speech Analytics projects are removed and you must select new Speech Analytics projects for the selected language.
   - If you modify an **Add to Case** rule, the modified rule does not affect interactions already in the case (for example, it will not delete interactions already in the case that are no longer part of the rule due to modified conditions). Interactions that are no longer relevant to the case need to be deleted manually.
3. Select **Save**.

   The modified rule is applied to interactions that are processed after the modified rule is saved.

Clone a rule

Clone an existing rule to use the existing rule's settings as a baseline for a new rule.

Before you begin

You cannot clone a **Delete Interactions rule** (GDPR) because they execute immediately upon rule creation. After a **Delete Interactions** rule completes, it cannot run again and displays for informational purposes only.

Procedure

1. In the Project Rules Manager grid, select the rule you want to clone and select .
2. In the **General** pane, enter a name for the cloned rule.

   If you do not enter a name, the default name is assigned to the rule (**Cloned from [rule name]**).
3. Edit the actions and conditions as needed, and select **Next**.
4. When you have finished, select **Create**.

   The cloned rule appears as a new rule in the Project Rules Manager grid.

Import a rule

Import a rule from an external file and create a new rule from the imported rule.

Procedure

1. In the Project Rules Manager toolbar, select .
2. Select **Browse** to locate the file, and then select **Import File**.
3. In the **General** tab, enter a name for the imported rule.

   If you do not enter a new name, the default name is assigned to the rule (**Imported from [rule name]**).
4. Edit other settings as needed, and select **Next**.
5. Select **Create**.

   The imported rule appears in the Project Rules Manager grid.

Export a rule

Export a rule to reuse the rule elsewhere as a baseline for new rules or for troubleshooting purposes.

Before you begin

You cannot export a **Delete Interactions rule** (GDPR) because they execute immediately upon rule creation. After a **Delete Interactions** rule completes, it cannot run again and displays for informational purposes only.

Procedure

1. In the Project Rules Manager grid, select the rule you want to export, and in the toolbar select .
2. In the **File Download** box, select **Save** to save the **.iid** file in the required directory.

Delete a rule

Delete an existing rule if the rule is no longer required and will not be enabled again in the future.

Before you begin

You cannot delete a **Delete Interactions rule** (GDPR) because they execute immediately upon rule creation. After a **Delete Interactions** rule completes, it cannot run again and displays for informational purposes only.

Procedure

1. In the Project Rules Manager grid, select the rule and in the toolbar select .
2. Select **OK** to delete the rule.

Condition parameters

Familiarize yourself with the available conditions in the Project Rules Manager before setting conditions for your rules. For detailed information on the conditions, see *Interactions User Guide, Appendix A Interactions Fields*.

Condition	Description
Date	
Start Date	• If an *earlier* **Start Date** is set than the current date, the rule is applied to interactions that exist as of the specified date. • If a *future* **Start Date** is set, the rule is only applied to interactions that are recorded on or after the specified future date. For Delete Interactions rules, you can only set an earlier start date.
End Date	• If you set the **End Date**, the rule is applied to interactions that exist as of the specified start date up until the specified end date. When the end date passes, the rule becomes expired. • If you leave the **End Date** blank, the rule runs indefinitely. For Delete Interactions rules, if no end date is specified, the rule is applied to interactions from the specified start date until the current date.
Employees	
Employee/Group/Organization	Indicates the employee(s), group(s), or organization associated with the rule. Up to 1000 employees can be selected in a rule. Filtering is done according to the PBX ID associated with an employee.
Interactions	

Condition	Description
Extension	Indicates the employee's alphanumeric extension number or range of extension numbers from which the interaction originated. • To set a value, select the relevant operator from the list box and enter the value. • To define a range of values, use the **Between (excluding)** or **Between (including)** operator. • To add additional values, click + to add a new row below the existing row. The operator between the values is OR, meaning the system searches for interactions that match one of the values. NOTE: If you select the **Between (excluding)** operator, the first and the last value in the range are excluded from the condition. For example, if you enter a range from 1-5, only 2, 3, and 4 are included in the condition. If you select the **Between (including)** operator, all the values in the range, including the first and the last value (for example, 1 and 5), are included in the condition.
Direction	Indicates where the interaction originated: • **Incoming:** Interactions originating from outside the organization. • **Outgoing:** Interactions originating from inside the organization. • **Internal:** Interactions performed within the organization. You can select multiple directions.

Condition	Description
ANI	Indicates the Automatic Number Identification (ANI) or Caller ID associated to the first recorded interaction of a contact. ANI is derived from CTI and is specific to the switch and contact scenario. The value can contain up to 15 alphanumeric characters. • To set a value, select the relevant operator from the list box and enter the value. • To define a range of values, use the **Between (excluding)** or **Between (including)** operator. • To add additional values, click + to add a new row below the existing row. The operator between the values is OR, meaning the system searches for interactions that match one of the values. NOTE: If you select the **Between (excluding)** operator, the first and the last value in the range are excluded from the condition. For example, if you enter a range from 1-5, only 2, 3, and 4 are included in the condition. If you select the **Between (including)** operator, all the values in the range, including the first and the last value (for example, 1 and 5), are included in the condition.
DNIS	Indicates the Dialed Number Identification Service (DNIS) associated to the first recorded interaction of a contact. DNIS identifies the number that the caller dialed. This is useful in contact centers to which contacts to multiple numbers may be directed. The value can contain up to 15 alphanumeric characters. • To set a value, select the relevant operator from the list box and enter the value. • To define a range of values, use the **Between (excluding)** or **Between (including)** operator. • To add additional values, click + to add a new row below the existing row. The operator between the values is OR, meaning the system searches for interactions that match one of the values. NOTE: If you select the **Between (excluding)** operator, the first and the last value in the range are excluded from the condition. For example, if you enter a range from 1-5, only 2, 3, and 4 are included in the condition. If you select the **Between (including)** operator, all the values in the range, including the first and the last value (for example, 1 and 5), are included in the condition.

Condition	Description
Duration	Indicates the minimum and/or maximum interaction duration in a seconds format. • To set a value, select the relevant operator from the list box and enter the value. • To define a range of values, use the **Between (excluding)** or **Between (including)** operator. • To add additional values, click + to add a new row below the existing row. The operator between the values is OR, meaning the system searches for interactions that match only one of the values. IMPORTANT: For the transcribe action, a minimum duration of 30 seconds is recommended. If you enter a duration less than 30 seconds, interactions are transcribed only if they include a few seconds of speech. Otherwise, they are considered empty and not processed. NOTE: If you select the **Between (excluding)** operator, the first and the last value in the range are excluded from the condition. For example, if you enter a range from 1-5, only 2, 3, and 4 are included in the condition. If you select the **Between (including)** operator, all the values in the range, including the first and the last value (for example, 1 and 5), are included in the condition.
Interaction Age	Indicates how long the interaction exists in the system. Interaction Age is defined in minutes and up to a maximum of 5 years (2,628,000 minutes). • To set a value, select the relevant operator from the list box and enter the value. • To add additional values, click + to add a new row below the existing row. The operator between the values is OR, meaning the system searches for interactions that match one of the values. This condition is not available for Delete Interactions rules.
Has CTI	Identifies interactions captured based on CTI signaling data from the switch. Selecting Yes for this field excludes VOX recordings. When not specified, the rule includes interactions for both VOX and CTI recording methods.
Muted	Identifies interactions where the employee used the mute button. Use of the mute button results in a portion of the interaction being inaudible due to partial recording.

Condition	Description
Media Type	Identifies interactions containing the type of media capturedduring the interaction. Use the radio buttons to include, exclude, or make optional each type of media supported. By default, all media types are optional. For each media type, you can perform the media search for Must Include, Must Exclude, or Optional. Select from the types shown: • Audio: Recorded voice for the employee and the customer • Screen: Employee screen activity • Attachment: Attached documents, such as those exchanged during a text chat • Text: Text-based chat between the employee and the customer • Video: Video of the people speaking during the interaction when using a supported video-capable telephone • Share: Video recording of a screen share during an interaction with multiple participants (for example, a Microsoft Teams meeting) • Contributions: Back-office contributions from one or more employees connected to a single customer or account captured by DPA Use the Include All, Exclude All, and All Optional links to select all types according to your search needs.
Contacts	
Exceptions	Interactions are marked as exceptions based on defined recording rules (for example, any interaction whose duration is more than 10 minutes). • **Non exception contacts:** Applies the rule only to interactions that are not marked as exceptions. • **Only exception Contacts:** Applies the rule only to interactions marked as exceptions.
Recorders	

Condition	Description
Channel Number	Indicates the channel from which the interaction originated. • To set a value, select the relevant operator from the list box and enter the value. • To define a range of values, use the **Between (excluding)** or **Between (including)** operator. • To add additional values, click + to add a new row below the existing row. The operator between the values is OR, meaning the system searches for interactions that match one of the values. NOTE: If you select the **Between (excluding)** operator, the first and the last value in the range are excluded from the condition. For example, if you enter a range from 1-5, only 2, 3, and 4 are included in the condition. If you select the **Between (including)** operator, all the values in the range, including the first and the last value (for example, 1 and 5), are included in the condition.
Recorder	Indicates the Recorder that recorded the interaction. • To set a value, select the relevant operator from the list box and enter the value. • To define a range of values, use the **Between (excluding)** or **Between (including)** operator. • To add additional values, click + to add a new row below the existing row. The operator between the values is OR, meaning the system searches for interactions that match one of the values. NOTE: If you select the **Between (excluding)** operator, the first and the last value in the range are excluded from the condition. For example, if you enter a range from 1-5, only 2, 3, and 4 are included in the condition. If you select the **Between (including)** operator, all the values in the range, including the first and the last value (for example, 1 and 5), are included in the condition.

Condition	Description
Screen Unit	Indicates whether to perform the rule on interactions that contain screen recordings. If the rule should only be performed on interactions with screen recording, set the Screen Unit to not equal to zero (Screen Unit !=0). This will exclude interactions without screens. • To set a value, select the relevant operator from the list box and enter the value. • To define a range of values, use the **Between (excluding)** or **Between (including)** operator. • To add additional values, click + to add a new row below the existing row. The operator between the values is OR, meaning the system searches for interactions that match only one of the values. NOTE: If you select the **Between (excluding)** operator, the first and the last value in the range are excluded from the condition. For example, if you enter a range from 1-5, only 2, 3, and 4 are included in the condition. If you select the **Between (including)** operator, all the values in the range, including the first and the last value (for example, 1 and 5), are included in the condition.
Switches	
Switch Call ID	Indicates a unique call identifier for the interaction. This value is typically received through CTI or from signaling. The Switch Call ID field can contain up to 16 alphanumeric characters. • To set a value, select the relevant operator from the list box and enter the value. • To define a range of values, use the **Between (excluding)** or **Between (including)** operator. • To add additional values, click + to add a new row below the existing row. The operator between the values is OR, meaning the system searches for interactions that match only one of the values. NOTE: If you select the **Between (excluding)** operator, the first and the last value in the range are excluded from the condition. For example, if you enter a range from 1-5, only 2, 3, and 4 are included in the condition. If you select the **Between (including)** operator, all the values in the range, including the first and the last value (for example, 1 and 5), are included in the condition.
Conditional Custom Data	

<table>
<tr><th>Condition</th><th>Description</th></tr>
<tr><td>Conditional Custom Data</td><td>Applies the rule to interactions that are tagged with the specified Conditional Custom Data field value.
Select one or more Conditional Custom Data fields, and for each field, select one or more values.
If multiple Conditional Custom Data fields are selected, the operator between the fields is AND, meaning an interaction must be tagged with all of the selected Conditional Custom Data fields. If multiple values are selected for a Conditional Custom Data field, the operator between the values is OR, meaning the selected Conditional Custom Data field must contain one of the comma-separated values.</td></tr>
<tr><td colspan="2">Custom Data</td></tr>
<tr><td>Custom Data</td><td>Applies the rule to interactions tagged with the selected Custom Data field value.
From the list box, select a Custom Data field, and set the value:
For Custom Data fields of type integer, from the list box select the relevant operator, and then select one or more predefined values, or click Other to manually enter one or more comma-separated values .
For Custom Data fields of type string, select one or more predefined values, or click Other to manually enter one or more comma-separated values.
If using wildcards to apply the rule to interactions that contain valid data (field is not empty), from the list of operators, select 'contains'.
Wildcards are not permitted in comma-separated values.
To add an additional Custom Data field to the rule, click + to add a new row below the existing row.
If multiple Custom Data fields are selected, the operator between the fields is AND, meaning an interaction must be tagged with all of the selected Custom Data fields. If multiple values are selected for a field (either predefined values or comma-separated values), the operator between the values is OR, meaning the selected Custom Data field must contain one of the values.</td></tr>
</table>

Related topics

Define conditions for an Automated QM rule (page 94)

Define conditions for an Interaction Analytics Export rule (page 101)

Define conditions for a Speech Analytics rule (page 97)

Define conditions for a Transcription-only rule (page 104)

Define conditions for Interaction Data Export with Processing rule (page 110)

Define conditions for Add to Case rule (page 114)

Define conditions for a GDPR interaction deletion rule (page 117)

Related information

Interactions fields (*Interactions User Guide*)

Interaction Analytics Export

Export transcribed interactions to a specified secure FTP site or shared folder on a network server, and analyze them in external applications.

Topics

Interaction Analytics Export overview

The Interaction Analytics Export Service (IAES) allows you to export transcriptions in bulk and analyze them in external applications. Transcriptions are selected for export based on rules you define in the Project Rules Manager (PRM). The selected transcriptions are exported to a secure FTP site or a shared folder on a network server in JSON format.

If you have multiple languages in your organization, you will need a separate rule to export each language, and the rule's conditions must filter out interactions that are not in the selected language.

Interaction Analytics Export

To configure export for transcriptions, create a rule in the Project Rules Manager, and select the **Interactions Analytics Export** action. Specify the location on a secure FTP site or shared location on a network server. It is optional to add a password to control who can open the exported files. It is also optional to create an organization-wide rule to send notifications about the transcriptions that were exported.

Once the rule is activated, the transcriptions are automatically exported to the specified SFTP/UNC location. Each day, depending on the rule's configuration, a new folder is created in that location and the exported files, compressed in zip format, are deposited in the current day's folder. The zip file is named after the rule that was created in the Project Rules Manager to export the transcriptions, followed by an underscore and a unique GUID. Each zip can contain up to 100 exported JSON files.

There may be multiple zip files in a given day's folder.

You can then unzip the exported files and import the transcriptions into an external application.

Related topics

Workflow: Create an Interaction Analytics Export rule (page 99)

Interaction Analytics Export transcript formats (page 141)

Interaction Analytics Export call and metadata information (page 143)

Set up Interaction Analytics Export notifications (page 147)

Interaction Analytics Export transcript formats

Each exported transcription file contains a number of JSON files, one for each transcribed interaction that is included in the export. The name of each JSON file corresponds to the call's transaction ID. Each JSON file has three versions of the same transcription, each in a different format.

> Open the JSON file in a JSON formatting application to display the content on the screen.

plainText

In this format, the whole transcription appears as a single sequence, without additional details. This format uses \n as a separator when the speaker changes.

For example:

plainTextTime

In this format, the transcription includes the details of the speaker and start and end time, and the sections are separated for each speaker.

For example:

transcript_detailed

In this format, each word is presented separately, with details such as the speaker, the word's position, and start and end time.

For example:

Key name	Definition	Example	Meaning of the example
"p"	The index in which the word appears in the transcript. 1 is the first word, 2 is the second, and so on.	"p":14	This is the 14th word of the call
"c"	A value between 0 and 1 that indicates the confidence that this is the correct word	"c":0.88	There is 88% probability that this word is correct
"s"	Start time (in milliseconds)	"s":2200	The start time of this word was 2200 milliseconds from the start of the recording
"e"	End time (in milliseconds)	"e":2300	The end time of this word was 2300 milliseconds from the start of the recording
"w"	The transcribed word\words	"w":"Hello"	The transcribed word is "Hello"
"sp"	The speaker—for example, agent, customer, simultaneous	"sp":"Agent"	The speaker is the agent

Related topics

Condition parameters (page 130)

Interaction Analytics Export call and metadata information (page 143)

Interaction Analytics Export call and metadata information

The JSON file also includes call information and metadata.

Call information

Call information field	Description
`mediaId`	The transaction ID.
`status`	The status of the transcription export: • success: The transcription was created and exported *with metadata* • transcript only: The transcription was created and exported *without metadata*
`dateCreated`	The date of the transcription export (not the date of the call).
`channels`	In future versions, this will indicate mono or stereo.
`length`	The duration of the call in seconds. If the status is set to transcript only, the length has a value of -1.

Metadata information

The **metadata** section includes additional data on the interaction.

Metadata field	Description	Type
`Sid`	The session identifier key.	long
`Site_id`	The ID of the site where the interaction is recorded.	int
`Audio_ch_num`	The channel number of the recording module that recorded the interaction.	int
`Audio_module_num`	The acquisition module that recorded the interaction.	int
`Audio_start_time_gmt`	The start time of the interaction in GMT.	string
`Transaction_id`	The transaction identifier, same as the media ID.	string
`ContactID`	The number assigned to the contact by the CTI. Every interaction that is part of the contact has the same Contact ID.	string
`Personal_id`	The ID of the employee who answered the call. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string

Metadata field	Description	Type
`Org_id`	The organization ID of the employee associated with the interaction. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`Direction`	The direction of the interaction: • 0 = unknown • 1= incoming interaction • 2 = outgoing interaction • 3 = internal	int
`Local_audio_start_time`	The local start time of the interaction in GMT.	string
`Local_audio_end_time`	The local end time of the interaction in GMT.	string
`Agent_name`	The name of the employee associated with the interaction. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`Total_hold_time`	The duration, in seconds, during which a customer was put on hold for the interaction. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`Pbx_login_id`	The ID or the name of the employee used to log on to the switch. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`Ani`	The automatic number identification (ANI) or Caller ID associated with the interaction. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`Extension`	The extension number of the employee associated with interaction. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`String_extension`	Identical to Extension, the number of the employee associated with interaction. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string

Metadata field	Description	Type
`Switch_call_id`	The unique call identifier for the interaction received through CTI or from signaling. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`Duration_seconds`	The duration of the interaction in seconds.	int
`Wrapup_time_in_seconds`	The duration between the end of the current interaction and the beginning of the next interaction that the employee is handling in seconds. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`Dnis`	The dialed number identification service (DNIS) associated with the interaction. An empty string within quotation marks indicates that the field was not defined.	string
`Percent_of_agent_call`	The total employee talk time for the interaction, in seconds. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`Percent_of_other_call`	The total customer talk time for the interaction, in seconds. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`Percent_of_mutual_silence`	The total time during the interaction when both the customer and the employee did not speak, in seconds. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`Num_of_agent_cross`	The number of times the employee interrupted the customer in an interaction. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`Num_of_other_cross`	The number of times the customer interrupted the employee in an interaction. An empty string within quotation marks indicates that the field was not calculated for this interaction.	string
`Cd`	The value of the Custom Data field. CD fields are exported only if they have values. Null CD fields are not exported.	string
`Pcd`	The value of the Conditional Custom Data field. CCD fields are exported only if they have values. Null CCD fields are not exported.	string

For example:

Related topics

Condition parameters (page 130)
Interaction Analytics Export transcript formats (page 141)

Set up Interaction Analytics Export notifications

After setting a rule in PRM for transcription export, you can set up an organization-wide rule to notify when transcriptions are exported. This alert can be triggered on a weekly, daily or hourly basis.

Example: Weekly email to site manager

You want to send a weekly email to the site manager with a summary of all the transcriptions that were exported that week.

Procedure

1. Go to **Tracking**. Under **Notifications**, select **Organization Rules** and then select **Create** to create a new rule.
2. In the **Rule Name** field, enter a meaningful name for the rule.
3. From the **Rule** list, select **Interactions Analytics Export Notifications**.
4. From the **Project Rule Name** list, select the PRM rule that was used to export the transcriptions.
5. From the **Interval** list, select whether this alert should occur on a daily, weekly, or hourly basis:
   - **Weekly**: Every week, on the day specified in the **Day of Week** field and at the UTC time specified in the **Notification Time** field, the rule checks for exports and sends a notification. This begins on the day that the notification is created (there is no delay of a week).
   - **Daily**: Every day, at the UTC time specified in the **Notification Time** field, the rule checks for exports and sends a notification. This begins on the day that the notification is created (there is no delay of a day).
   - **Hourly**: The rule immediately sends a notification about exports that occurred during the previous hour.
6. If you selected **Weekly** from the **Interval** list, select the day of the week for the notification.
7. If you selected **Weekly** or **Daily** from the **Interval** list, enter the time of day (in UTC time) for the notification in the **Notification Time** field. The notification will occur within an hour of the specified time.
8. Select the **Action: Send Email** check box.
9. Enter the subject line and recipients of the email. The notification will be sent to user that created the PRM rule and any other users that you enter into the **Additional users by usernames**, **Additional users by role**, and **Additional email targets** fields.

Related information

Creating or editing an organization alert rule (*Framework Administration Guide*)

Interaction Data Export with Processing

You can export interaction media and metadata in bulk to an external storage destination for use in external applications. Interactions are selected for export based on rules you define in the Project Rules Manager (PRM). The selected interactions are exported to a specified storage target.

Topics

Interaction Data Export with Processing overview

You can export interaction data in bulk for use in external applications. Interactions are selected for export based on **Interaction Data Export with Processing** rules defined in the Project Rules Manager (PRM). The selected interactions are exported to a specified storage target.

Interaction Data Export with Processing offers extended bulk export capabilities and supports multiple simultaneous export rules. Each rule can be configured with a comprehensive set of selection criteria. You can opt to normalize (transcode) the interaction media during export and choose Amazon S3, Server Message Block (SMB), or Secure File Transfer Protocol (SFTP) as the storage target.

> Verint Cloud customers who use Interaction Export can only export to cloud native storage (S3 for AWS, Azure Blob for Azure, Cloud Storage for GCP) or SFTP.

Once a rule is activated, output files are automatically exported to the specified destination folder on the destination media using the following directory structure: **yyyy/mm/dd/hh/[output file name]**.

Example of output file names and paths:

2021/01/14/10/20210114095293123938283109 2912.json

2021/01/14/10/202101140952931239382831092912.wav

2021/01/14/10/202101140955939120918209382191.json

2021/01/14/10/202101140955939120918209382191.wav

2021/01/14/10/202101140955939120918209382191_screen_1.scn

2021/01/15/08/202101150832102398129148124123.json

2021/01/15/08/202101150832102398129148124123_text.json

Related topics

Workflow: Create an Interaction Data Export with Processing rule (page 106)

Exported media format

The format of the exported interaction data depends on the settings defined in the rule.

In the rule, you can select which media types to include in the export, and for audio and screen recordings, you can select the format in which to export the files.

If Audio is selected, you can export the files in one of the following formats:

- **WAV:** Export in the recorded WAV format.
- **G.711/WAV:** Convert and export in G.711/WAV format.
- **AAC/MP4:** Convert and export in AAC/MP4 format.

> When the files are exported, the audio is separated into two channels:
>
> - Left channel (channel 0): This contains the agent side voice.
> - Right channel (channel 1): This contains the external parties' voice.
>
> This separation is based on the system correctly identifying each side of the voice during the recording process.
>
> Also note that in the trunk side capture solutions, the left channel (agent's voice) will contain a mix of all internal parties' voices (for example, all agents).

If Screen is selected, you can export the files in one of the following formats:

- **As recorded**: Export in the format used to capture the screen activity.
- **As recorded combined with Audio (AVI)**: Combine screen and audio media and export in AVI format.
- **Portable combined with Audio (AAC + H.264/MP4)**: Combine audio and screen into a portable MP4 format (AAC audio and H.264/MP4 video).
- **Portable (H.264/MP4)**: Export screen (H.264/MP4) to a portable MP4 format.

Other media types are exported as follows:

- **Video:** As recorded in MP4 format
- **Share:** As recorded in MP4 format
- **Text:** Exported in CIV format
- **Attachments:** Exported as is

Interaction metadata file format

The main JSON file for an interaction has metadata containing information about the recording itself and the supplemental media files that exist in the directory.

Field	Type	Description
contents[]	Array of Elements	An array containing all the media content for this interaction
contents[].type	String	Indicates the type of media for this content. One of: Audio, Screen, Video, Share, Chat, Email, Attachment
contents[].start_time	DateTime	Start time of this specific media file
contents[].duration	Number (Int32)	Duration of media in milliseconds
contents[].verint_mime_type	String	Internal Mime type of the content media file provided. Optional. Not available for audio export in MP4, screen export in MP4 and combining audio with screen in MP4 / AVI.
contents[].mime_type	String	Mime type of the content media file provided
contents[].filename	String	Name of the content media file provided
id	Number (38 digits)	Unique identifier for the interaction
interaction_type	String	Indicates the type of interaction: Phone or Desktop
start_time	DateTime	Start time of the interaction in the agent's local time
end_time	DateTime	End time of the interaction in the agent's local time
direction	String	Direction of the interaction which is one of: Inbound, Outbound, Internal, Unknown
ani	String	Automatic number identification (ANI) or Caller ID
dnis	String	Dialed Number Identification Service (DNIS). Identifies the number that the caller dialed.
extension	String	The extension number of the employee associated with interaction
pbx_login_id	String	The ID or the name of the employee used to log on to the switch
agent_id	Number (Int32)	Ultra/External Id of the employee associated with the interaction
agent_name	String	The name of the employee associated with the interaction

Field	Type	Description
organization_id	Number (Int32)	The ID number of the organization assigned to the employee associated with the interaction
organization_ name	String	The name of the organization assigned to the employee associated with the interaction
switch_id	Number (Int32)	The internal Verint identifier of the data source the interaction is associated to
switch_name	String	The name of the data source associated with the interaction
switch_call_id	String	The unique call identifier for the interaction received through CTI or from signaling
number_of_ holds	Number (Int32)	The number of holds that occurred during this interaction
total_hold_time	Number (Int32)	The total amount of time, in seconds, that the customer was on hold during the interaction
sid	Number (Int32)	The segment id associated with the content file
dbs_id	Number (Int32)	The site id associated with the content file
wrapup_time	Number (Int32)	The duration between the end of the current interaction and the beginning of the next interaction that the employee is handling.
is_no_cti	Boolean	
n2_sibling_ interaction	Number (38 digits)	
n2_better_ interaction	Boolean	
custom_data	Element	
custom_ data.###	Varies	The Type depends on the CD type (Number or String).
calculated_ custom_ data.###.id	Number (Int32)	
calculated_ custom_ data.###.value	String	
contact_id	Number (Int64)	The number assigned to the interaction by the CTI

Example file


```
{
  "contents": [
    { "type": "audio", "start_time": "2020-11-30T12:36:46.123Z", "verint_mime_type": "audio/vnd.verint.wav", "mime_type": "audio/wav", "filename": "20210114095293123938283109291 2.wav" },
    { "type": "screen", "start_time": "2021-01-14T22:06:08.392-04:00", "verint_mime_type": "screen/vnd.verint.capb", "mime_type": "witness/screen", "filename": "202101140952931239382831092912_screen_1.scn" }
  ],
  "id": 202101140952931239382831092912,
  "start_time": "2020-11-30T04:36:46.123",
  "end_time": "2020-11-30T04:40:58.123",
  "duration": 120,
  "direction": "Inbound",
  "ani": "7702938123",
  "dnis": "18003929328",
  "interaction_type": "Phone",
  "extension": "3000",
  "pbx_login_id": "BSmith@Corp.com",
  "agent_id": 850002921,
  "agent_name": "Bob Smith"
  "switch_id": 850000002,
  "switch_name": "DallasACD",
  "organization_id": 850000324,
  "organization_name": "CorpMain",
```

```
  "switch_call_id", "b882f4dd-806f-4300-8503-4a366dab4681",
  ...
  "custom_data": {
    "1": "customer_account_ID",
    "29": "account_name"
  }
  "calculated_custom_data": {
    "1": { "id": 850000932, "value": "Sales" }
  }

  ...
  "contact_id": 98102912312740121
}
```

Chapter 11

Speech Analytics process tracking

Speech Analytics allows you to keep track of the entire life cycle of all contacts that enter your system.

Topics

Speech Analytics process tracking overview

Speech Analytics allows you to keep track of the entire life cycle of all contacts that enter your system. System administrators can track contacts at any stage of processing for the purposes of troubleshooting, and to enable customers to develop their own process monitoring mechanisms.

At each stage (that is, subsystem) of the Speech Analytics process, contact activity is monitored by the Log Manager. An .ltf log file is created for each subsystem. The .ltf file contains information about all the contact events (for example, call routing), that occurred in the specific subsystem. To learn more about identifying a specific contact throughout the Speech Analytics process, see Contact identification (page 161).

The .ltf files can be queried to obtain data such as tracking data, history, and statistics. To learn more about how to access the .ltf files, see Log Manager file (page 163).

Speech Analytics process subsystems

Speech Analytics processes contacts according to the following Speech Analytics Process Tracking sequence subsystems in the order they appear below and as shown in the following diagram:

1. Import Manager - Contact Retrieval Tracking (page 157)
2. Import Manager - Agent Resolution (page 157)
3. Import Manager - Audio Processing (page 158)
4. Import Manager - Job Statistics (page 159)
5. Import Manager - Call Import (page 159)

Import Manager - Contact Retrieval Tracking

When a contact is identified by the Import Manager, the following information is logged:

- Date and time of contact retrieval attempt
- Subsystem step

  This is a constant value that is logged by the infrastructure, using category mechanism category ID 2.

  For example, Import Manager
- Tracking Category: Contact Retrieval Tracking
- Import Manager ID
- External System Contact ID
- Associated job
- Adapter name (Generic Adapter or V7 Recorder)
- Contact retrieval status
  - Successful Retrieval
  - Failed with error

Import Manager - Contact Retrieval Tracking Log Sample:

03/21/11 14:43:20.547 (+01);;;Import Manager;;;Contact Retrieval Tracking;;;Import Manager instance 1;;;Contact123Nice;;;job name;;;Generic Adaper 1;;;successful retrieval;;;

Import Manager - Agent Resolution

When a contact is processed by the Import Manager, the agent resolution/creation is tracked for every contact extracted by the Import Manager. The following information will be logged at this stage of the process:

- Date/time of agent resolution attempt: will be logged by the infra-structure.
- Subsystem step

  This is a constant value that is logged by the infrastructure, using category mechanism category ID 12.

  For example, Import Manager
- Tracking Category: Agent Resolution
- Import Manager Identifier
- External system Contact ID
- Channel
- Module
- local start time - the date and time at which the contact started (MM/dd/yyy HH:mm:ss).
- Event (Resolution [by Extension, pbxLogin or Agent Name] or Creation)
- Resolution Value (Extension, pbxLogin or Agent Name)

  If this value is not known, it should be empty.
- Switch Name / DataSource Name

  If this value is not known, it should be empty.
- Agent Name

  If this value is not known, it should be empty.
- Agent Resolution status (successful or failed with error)

Import Manager - Agent Resolution Log Sample:

07/11/11 15:17:58.737 (-01);;;Import Manager;;;Agent Resolution;;;717001;;;633524002696692;;;1692;;;717001;;;07/05/2011 02:30:44;;;Agent Resolution by Extension;;;70048;;;GenericFixedSeating;;;70048,70048;;;Successful;;;

Import Manager - Audio Processing

The Audio process is tracked for every contact extracted by the Import Manager. This stage of the process logs the following events for the audio compression and Speaker Separation features:

- Date/time of agent resolution attempt: will be logged by the infra-structure.
- Subsystem step

  This is a constant value that is logged by the infrastructure, using category mechanism category ID 12.

  For example, Import Manager
- Tracking Category: Audio Processing

- Import Manager Identifier
- External system Contact ID
- Channel
- Module
- local start time - the date and time at which the contact started (MM/dd/yyy HH:mm:ss).
- Event (Speaker Separation or Compression)
- Agent Processing status (successful or failed with error)

Import Manager - Audio Processing Log Sample:

07/11/11 15:47:57.987 (-01);;;Import Manager;;;Audio Processing;;;717001;;;633524002696685;;;1685;;;717001;;;07/05/2011 02:30:43;;;Speaker Separation;;;Successful;;;

Import Manager - Job Statistics

When a contact is run by the Import Manager, the following information is tracked:

- Date and time of Import Manager run
- Subsystem step

  This is a constant value that is logged by the infrastructure, using category mechanism category ID 1.

  For example, Import Manager
- Tracking Category: Job Statistics
- Rule ID/Name
- Available contact count prior to filtering or sampling
- Available contact count after filtering logic
- Final contact count

Import Manager - Job Statistics Log Sample:

03/21/11 14:43:20.547 (+01);;;Import Manager;;;Job statistics;;;Rule1;;;100;;;90;;;88;;;

Import Manager - Call Import

The Process Auditing event captures the action of importing the call into the recorder. For each event, the following parameters are logged:

- Date and time of importing the call: will be logged by the infrastructure.
- Subsystem step

This is a constant value that is logged by the infrastructure, using category mechanism category ID 3.

For example, “Extraction Engine;;;Call Import”

- Extraction Engine Identifier
- External system Contact ID
- INum
- Channel
- Module
- Local Start Time - the date and time at which the contact started (MM/dd/yyy HH:mm:ss).
- Call Import Status (Successful or Failed with error)

Import Manager - Call Import Log Sample:

Success Message:

09/14/11 11:15:31.422 (-03);;;Import Manager;;;Contact Marking;;;441001;;;Agent636_5_26_2011 11_17_38 AM_608100675;;;259;;;441001;;;08/10/2011 11:37:33;;;TLWSENG2;;;169.254.139.116;;;Successful Call Import;;;

Unsuccessful Message:

08/28/12 16:22:47.865 (-04);;;Extraction Engine;;;Call Import;;;868001;;;14;;;868001000000135;;;000000135;;;868001;;;08/27/2012 13:25:00;;;Unsuccessful Call Import: Contact [14] could not be resolved to an Agent using Data Source Name [GenericFixed] and Extension [2000];;;

Contact identification

Using the data logged for each subsystem (see Speech Analytics process subsystems (page 157)), you can identify a specific contact in each subsystem log file.

The following table shows how the same specific contact data is processed in each subsystem log file to identify a specific contact:

Subsystem Name	External System Contact ID	Channel	Module	Local Start Time
Import Manager - Contact Retrieval Tracking				
Import Manager - Call Import				
Import Manager - Agent Resolution				
Import Manager - Audio Processing				

Contact identification example

The following sections show how the contact ID's Unique Identifier (red text) and its External System Contact ID (blue text) are transferred from one subsystem to the other.

Generic Adapter/Import Manager

Contact retrieval

07/06/11 07:58:15.656 (+03);;;Import Manager;;;Contact Retrieval Tracking;;;455001;;;OmriAgent_1_4_2011 08_12_34 PM_512525408;;;Omri Generic Integration01;;;Omri Generic;;;Successful retrieval

Agent resolution

07/11/11 15:17:58.737 (-01);;;Import Manager;;;Agent Resolution;;;455001;;;OmriAgent_1_4_2011 08_12_34 PM_512525408;;;2938;;;455001;;;07/05/201111:12:34;;;Agent Resolution by Extension;;;70048;;;GenericFixedSeating;;;70048,70048;;;Successful;;;

Audio processing

07/11/11 15:47:57.987 (-01);;;Import Manager;;;Audio Processing;;;455001;;;OmriAgent_1_4_2011 08_12_34 PM_512525408;;;2938;;;455001;;;07/05/201111:12:34;;;Speaker Separation;;;Successful;;;

Call import

Success Message

09/14/11 11:15:31.422 (-03);;;Import Manager;;;Contact Marking;;;441001;;;Agent636_5_26_2011 11_17_38 AM_608100675;;;259;;;441001;;;08/10/2011 11:37:33;;;TLWSENG2;;;169.254.139.116;;;Successful Call Import;;;

Unsuccessful Message:

08/28/12 16:22:47.865 (-04);;;Extraction Engine;;;Call Import;;;868001;;;14;;;868001000000135;;;000000135;;;868001;;;08/27/2012 13:25:00;;;Unsuccessful Call Import: Contact [14] could not be resolved to an Agent using Data Source Name [GenericFixed] and Extension [2000];;;

Job statistics

07/06/11 07:58:15.742 (+03);;;Import Manager;;;Job statistics;;;All Calls;;;1;;;1;;;1

Log Manager file

In each subsystem in the Speech Analytics process a log file (.ltf) is created with a specific name and in a specific location.

By default, the .ltf files will be kept for a maximum of 30 days.

Log file naming convention

Each Speech Analytics process subsystem will contain a log file with the following naming convention:

SpeechProcessTracking_<subSystem>_<stepName>_TF

Log file location

All subsystem log files are located in their respective subsystem machines in the following location:

% IMPACT360DATADIR%\Logs\SpeechProcessTracking\

Speech Analytics indexing statistics

Reports are available showing detailed index statistics for each Speech Analytics Index build process.

Topics

Overview

Reports are available showing detailed index statistics for each Speech Analytics Index build process. This includes statistics regarding both the Incremental build and the Full Index build.

Two types of files are generated:

- Call Processing Summary report (page 166): this report includes a record of all the new calls that are loaded as part of the indexing process. A new file is generated every day, or if the configurable file size limit is reached.
- Index Statistics Summary XML report (page 167): this report displays a summary of the Index build process.

Call Processing Summary report

This report includes a record of all the new calls that are loaded as part of the indexing process. A new file is generated every day, or if the configurable file size limit is reached.

The Call Processing summary is generated in CSV format.

Generated reports have the following file names:

CallProcInfo_timestamp_instanceID.csv

Each record in the summary includes the following data:

Field	Description
Indexing Load Time	Time and date of the Index to which the call was loaded.
Index Type	Incremental or Full index.
Speech Instance ID	Speech Instance identifier for that call.
Session ID	Session ID
DBS ID	Unique identifier which shows a combination of the Session ID and the Destination ID.
Local Start Time	Time and date that the call started.
Module ID	Recording module ID.
Channel	Recording channel.
Call Index Success	Shows if the call segment was successfully loaded into the index, or not.

Example of Call Processing report

The following example shows each record for a contact that is successfully loaded into an index - either a Full or Incremental index.

07/12/2010 12:22:49#&&#Full Index#&&#1#&&#200100005340071#&&#2001#&&# 07/05/2010 17:46:34 #&&#1#&&#20726578#&&#Success

07/12/2010 13:22:49#&&#Incremental Index#&&#1#&&#200100005340069#&&#2001#&&# 07/05/2010 17:47:34 #&&#1#&&# 20726578#&&#Success

Index Statistics Summary XML report

This report displays a summary of the Index build process. A new file is created for each index build. The number of files to keep is configurable.

Each file is generated as an XML file.

Generated reports have the following file names:

IndexStat_timestamp_instanceID.xml

Each record includes the following data:

Field	Description
Indexing Load Time	Time and date of the Index to which the call was loaded.
Index Type	Incremental or Full index.
Speech Instance ID	Speech Instance identifier for that call.
Index Statistics	Three fields are displayed: • **Index Total Contact Count:** Total number of calls in the Index post build. • **Index Total Contact Hours:** Total number of hours of Calls in the Index post build. • **Index Contact Count per Day:** Total number of contacts for each day maintained in the index.

Example of Indexing Statistics Summary report XML

The following XML example shows the summary of the Indexing build:

```
<?xml version="1.0" encoding="utf-8"?>
<IndexStatisticsSummary>
<IndexLoadTime>07/12/2010 12:22:49.843</IndexLoadTime>
<IndexType>Incremental Index</IndexType>
<SpeechInstanceID>1</SpeechInstanceID>
<IndexTotalContactCount>54</IndexTotalContactCount>
<IndexTotalContactHours>5</IndexTotalContactHours>
<IndexContactCountPerDay>
<ContactsPerDay>
<Date>23/05/2010</Date>
<NumOfContacts>34</NumOfContacts>
</ContactsPerDay>

<ContactsPerDay>
<Date>20/06/2010</Date>
```

<NumOfContacts>12</NumOfContacts>
</ContactsPerDay>

<ContactsPerDay>
<Date>25/06/2010</Date>
<NumOfContacts>5</NumOfContacts>
</ContactsPerDay>

<ContactsPerDay>
<Date>01/07/2010</Date>
<NumOfContacts>3</NumOfContacts>
</ContactsPerDay>
</IndexContactCountPerDay>
</IndexStatisticsSummary>

Indexing reports configuration

The Indexing reports are configured using the following file in the Speech Data directory: Enhanced_Speech\IndexBuilder\Bin\Ibuild.prop.local

This file does not exist by default. If the file does not exist, you need to create it.

Set the following parameters as required:

Parameters	Values
GENERATE_INDEX_BUILD_REPORTS	Type: True / False Determines whether Index Build reports are generated. Default: False
INDEX_BUILD_REPORTS_PATH	Type: String Sets the path for the Index reports. Default: "../Logs" (Software Directory/Logs)
KEEP_LAST_X_INDEX_STAT_REPORTS	Type: Integer Sets the number of reports that are stored. Default: 10
INDEX_REPORTS_MAX_FILE_SIZE	Type: Integer Sets the maximum file size (in megabytes) of the Call Processing index build csv reports. Once this limit is reached, a new file is created. Default: 100 MB

The settings take effect after the next Incremental Index is built.

Transcription server performance tracking

The transcription server performance counters provide administrators with statistics about the efficiency and functional status of transcription engines.

Topics

Transcription server performance counters overview

The transcription server performance counters provide administrators with statistics about the efficiency and functional status of transcription engines. These statistics (such as the amount of audio volume transcribed during different time periods) are critical for performance analysis and troubleshooting.

Transcription server counters are reported directly to the Windows Performance Counters, and are added and viewed in the Windows Performance (see View transcription server performance counters (page 172)). For general information about the Windows Performance Monitor, refer to Microsoft's documentation.

View transcription server performance counters

You can view transcription server performance counters for performance analysis and troubleshooting purposes.

Procedure

1. Access Windows Performance by typing: **perfmon** at the Run prompt, and click **OK**.
2. In the Performance Monitor, right-click the **Add** button (), and then select **Add Counters**.
3. In the Add Counters dialog box, select the **Speech Transcription System** category.
4. Select all of the counters displayed in the Speech Transcription System category and click **Add**, and then **OK**.

   The category and its counters are added to the Performance Monitor:
5. To view the real-time statistics of the performance counters, select **Report**.

   The system displays the counters and their statistics, accordingly:

Counter	Description
Agents without an acoustic model	The number of agents for whom an acoustic model currently does *not* exist. An acoustic model is a statistical representation of the sounds in an agent's voice, which is used by the speech engine to recognize the speech in the audio recording. The existence of an acoustic model increases the quality of the transcription process for a specific call.
Audio volume transcribed in the last 24 hours [in hours]	Total amount of audio volume transcribed in the last 24 hours (in hours).
Audio volume transcribed in the last hour [in hours]	Total amount of audio volume transcribed in the last hour (in hours).
Average call duration [in seconds]	Average length of calls (in seconds) transcribed by the system.
Average call size [in KB]	Average size of calls (in KB) transcribed by the system.
Average transcription process duration [in seconds]	Average length of transcription process (in seconds) of calls transcribed by the system.
Calls transcribed in the last 24 hours	Total number of calls transcribed in the last 24 hours on the server (across all engines).
Calls transcribed in the last hour	Total number of calls transcribed in the last hour on the server (across all engines).

Counter	Description
Calls without an agent ID	Total number of calls transcribed whose metadata does *not* include an Agent ID.
Long-term historical net transcription rate (xRT)	Calculation of the transcription rate, where the transcription rate of the *older* calls in history receive a heavier weight than the transcription rate of the more recent calls. Transcription rate is calculated per CPU core.
Maximum call duration [in seconds]	Total duration of all calls transcribed on the server (across all engines).
Number of active engines	The current number of transcription engines actively transcribing a call.
Number of engines	The current number of transcription engines currently running on the server.
Number of errors while preparing media for transcription	Total number of errors that occurred while retrieving the media for the transcription process.
Number of errors while preparing the transcription language model	Total number of consecutive errors that occurred while attempting to prepare the transcription language model.
Percent of Speaker-Labeled Calls out of all transcribed calls in the last 24 hours	Indicates the percentage of calls that were successfully speaker-labeled in the transcription process, out of all calls that were transcribed in the last 24 hours. Note, the percentage may be low during a period in which the system handles a large number of new agents (typically during the post-installation period, or when adding agents to the system).
Short-term historical net transcription rate (xRT)	Calculation of the transcription rate, where the transcription rate of the *newer* calls in history receive a heavier weight than the transcription rate of the older calls. Transcription rate is calculated per CPU core.
Total failures	Total number of calls that have failed transcribing (for any reason) on the server (across all engines).
Total transcribed calls	Total number of calls that have been successfully transcribed on the server (across all engines).
Total volume of transcribed audio [in hours]	Total amount of audio volume that has been successfully transcribed on the server (in hours).
Transcription system-up time [in seconds]	Total duration of time that the system has been up and running (in seconds).

Inbox and Shared Inbox lottery mechanism

The system uses a lottery mechanism to deliver interactions to the Shared Inbox pool. This mechanism is also used to deliver interactions to the Inbox folder.

Topics

Frequency calculations

The lottery mechanism considers the Inbox's/Shared Inbox's defined quota and time range for fulfilling the quota when determining how often to push interactions to the Inbox/Shared Inbox. The lottery mechanism works according to the following formula:

Defined time range (in hours)/Defined quota = Frequency of delivery (in hours)

Related topics

Example: 5 day work week (page 175)
Example: 7 day work week (page 176)

Example: 5 day work week

In an enterprise that operates 5 days a week, Monday through Friday, where an Inbox/Shared Inbox is configured to deliver 10 interactions per employee per week, interactions are pushed once every 12 hours, based on the following calculation:

Defined period = 24 hours * 5 workdays = 120 hours

Defined quota = 10 interactions per employee per week

Defined period/Defined quota = 120/10 = Push an interaction every 12 hours

The time period in this example begins on Monday at midnight and the full quota must be filled by 11:59 pm the following Friday.

Thus, by the end of the first day of the week, the Inbox/Shared Inbox will have two interactions for each of the employees in your group. The first interaction will be pushed for the 00:00-12:00 time slice and the second will be pushed for the 12:00-11:59 time slice.

The following tables shows different delivery times based on different defined quotas, assuming a 5 day work week.

Per Week Quota	Number of Interactions to Deliver per Day	Delivery Times per Day
5 per employee	1	• 00:00 am
10 per employee	2	• 00:00 am • 12:00 pm
15 per employee	3	• 00:00 am • 8:00 am • 4:00 pm
20 per employee	4	• 00:00 am • 6:00 am • 12:00 pm • 6:00 pm

Per Week Quota	Number of Interactions to Deliver per Day	Delivery Times per Day
40 per employee	8	• 00:00 am • 03:00 am • 06:00 am • 09:00 am • 12:00 pm • 3:00 pm • 6:00 pm • 9:00 pm

Example: 7 day work week

In an enterprise that operates 7 days a week, where an Inbox/Shared Inbox is configured to deliver 10 interactions per employee per week, an interaction will be pushed once every 16 hours and 48 minutes, based on the following calculation:

- **Defined period =** 24 hours * 7 workdays = 168 hours
- **Defined quota =** 10 interactions per employee per week
- **Defined period/Defined quota =** 168/10 = Push an interaction every 16 hours and 48 minutes

Assuming the week starts on Sunday, the following table shows the times during which interactions are pushed to the Inbox/Shared Inbox.

Day	Delivery Time	Number of Interactions in the Inbox at That Time
Sunday	00:00	1
Sunday	16:48	2
Monday	09:36	3
Tuesday	02:24	4
Tuesday	19:12	5
Wednesday	12:00	6
Thursday	4:48	7
Thursday	21:36	8
Friday	14:24	9
Saturday	7:12	10

Interactions selection period

The lottery mechanism is scheduled to run once an hour (configurable by the administrator). It attempts to fulfill the quota the first time it is invoked for each time slice. This is in order to make sure the Inbox/Shared Inbox is populated with interactions as quickly as possible, to enable the evaluators to start evaluating the interactions without any delay.

The period from which the interactions are selected is determined by the following:

- **Full Period**: The time range selected for the quota – one month or one week.
- **Partial Period**: The time period between the most recent interaction (of any employee) in the Inbox/Shared Inbox and the current time.

The lottery performs the following until it finds the required number of interactions to push:

1. Searches for an interaction recorded during the partial period based on the defined rules and priorities. If none found, moves to the next step.
2. Searches for an interaction recorded during the full period based on the defined rules and priorities. If none found, moves to the next step.
3. If the **Fulfill quota when rules can't be met** check box is selected, search for an interaction from the full period regardless of the rules.

If not enough interactions are found, the lottery mechanism will attempt to fulfill the quota the next time it is scheduled to run.

Related topics

Example: 2 interactions per week (5 day work) (page 177)

Example: 2 interactions per week (5 day work)

In an enterprise that operates 5 days a week, Monday through Friday, where an Inbox/Shared Inbox is configured to deliver 2 interactions per employee per week, an interaction will be pushed once every 60 hours, based on the following calculation:

Defined period = 24 hours * 5 workdays = 120 hours

Defined quota = 2 interactions per employee per week

Defined period/Defined quota = 120/2 = Push an interaction every 60 hours

The time period in this example begins on Monday at midnight and ends by 11:59 pm the following Friday.

Assume that an employee works 8 hour shifts every day from 00:00 - 08:00.

The following table shows the employee's delivered interactions' recording times (assuming interaction were performed during all hours of the shift and match the rules):

Interaction to Deliver	Time slice	Interaction Selected	Flow
Interaction 1	Monday 00:00 - Wednesday 11:59	Any interaction that was recorded on Monday between 00:00 - 01:00.	The lottery mechanism attempts to deliver an interaction the first time it is invoked for the time slice at 00:00. If no matching interaction is found (as 00:00 is the beginning of the shift) it attempts to fulfill the quota the next time it is scheduled to run at 01:00.
Interaction 2	Wednesday 12:00 - Friday 00:00	Any interaction that was recorded between the following times (partial period): • The recording time of Interaction 1 (Monday between 00:00 - 01:00) and • The current time (Wednesday 12:00)	The lottery mechanism attempts to deliver an interaction the first time it is invoked for the time slice at 12:00. As interactions were recorded during the partial period, the second (and last) interaction will be delivered at 12:00.

Appendix B

Interactions folder retention

Interactions folders contain data on interactions, evaluations, and assessments that is retained for a set number of days.

Topics

Interactions folder retention

Interactions folders retain data for a set number of days according to internal database settings or Enterprise Manager settings. The retention period, and whether it is configurable, depends on the folder type.

Folder type	Folder name	Enterprise Manager setting	Default value
Predefined Views	All Evaluations	Default Time Range for Evaluations/Assessment Searches	Search from last 30 days. Evaluation retention is according to the Evaluations Retention Period (days) setting for QM Database server role (if set).
Predefined Views	Assessments	Default Time Range for Evaluations/Assessments Searches	Search from last 30 days. Evaluation retention is according to Evaluations Retention Period (days) setting for QM Database server role (if set).
Predefined Views	Draft Assessments	Internal database setting	Search from the last 180 days.
Predefined Views	Draft Evaluations	Internal database setting	Search from the last 180 days.
Predefined Views	Self-evaluations	Maximum Item Age in Workflow Folders (days)	From the last 30 days (default) but can be modified to up to 180 days.
Flagged Contacts	My Interactions Customer Complaints Custom flagged contact folders	Maximum Item Age in Workflow Folders (days)	From the last 30 days (default) but can be modified to up to 180 days.
Flagged Evaluations	My Evaluations Forward to Employee Require Attention Custom flagged evaluation folders	Maximum Item Age in Workflow Folders (days)	From the last 30 days (default) but can be modified to up to 180 days.

Folder type	Folder name	Enterprise Manager setting	Default value
	Inbox	Maximum Item Age in Workflow Folders (days)	From the last 30 days (default) but can be modified to up to 180 days.
	Shared Inbox	Internal database setting	From the last 30 days.

Related information

Interaction Applications Server Role (Enterprise Manager Configuration and Administration)

QM Database Server Role (Enterprise Manager Configuration and Administration)

Revision history from prior releases

The archived revision history for earlier releases of this guide is available for version 1.x changes.

Revisions from prior releases

Revision	Description of changes
1.57	*Delete interactions using a Recycle Bin rules*: Clarified that nothing gets removed from the Text Analytics index.
1.56	*Add a flag*: The maximum number of days that contacts can be retained in flagged folders is 180 days.
1.55	*Delete interactions using a Recycle Bin rules*: Clarified that nothing gets removed from the Speech Analytics index.
1.54	Updated the Project Rules Manager topics to explain how the *Start Date* and *End Date* fields of the rule conditions function for interaction selection: • *Start Date*: Applies to the start time for the captured interaction. Previously, field applied to the time when the interaction was added to the database. • *End Date*: After the optional End Date passes, the rule continues to run for 30 days. During the 30-day interval, the rule awaits interactions added with a Start Date within the specified date window for the rule. If no end date is defined, the rule runs indefinitely.
1.53	Added appendix *Interactions folder retention*.
1.52	Updated topics for interaction deletion using GDPR rules, which identified the feature as deprecated. Interaction deletion using GDPR rules is no longer deprecated.
1.51	*Define settings for AQM, Speech Analytics, or Interaction Analytics Export rule*: Removed message stating that redaction and morphing may not be available and are being rolled out to cloud customers.

Revision	Description of changes
1.50	• Changed name of *Entity deletion and deactivation* topic to *Interactions and Analytics entity updates*, and *Impact of deleting and deactivating employees* topic to *Impact of deleting, deactivating, and moving employees*. • Under *Interactions and Analytics entity updates* and under *Impact of deleting, deactivating, and moving employees*, added impact of moving employees to a different organization or group.
1.49	Removed message stating that redaction and morphing may not be available and are being rolled out to cloud customers.
1.48	Identified data sources as the trigger for redaction and morphing: • *Define settings for AQM, Speech Analytics, or Interaction Analytics Export rule* • *Define settings for Interaction Data Export with Processing rule*
1.47	• Added options for redaction to the following topics: ▪ *Define settings for AQM, Speech Analytics, or Interaction Analytics Export rule* ▪ *Define settings for Interaction Data Export rule* ▪ *Define settings for Interaction Data Export with Processing rule* • Added options for morphing to the following topics: ▪ *Define settings for Interaction Data Export rule* ▪ *Define settings for Interaction Data Export with Processing rule*
1.46	Minor update
1.45	Minor update
1.44	Under *Interaction Data Export with Processing rules*, identified specific feature flag names and role permissions required to use the feature.
1.43	Under *Define the Shared Inbox settings*, added note that the Shared Inbox does not consider user filters or assigned CCD values. Therefore, to ensure that the Shared Inbox is populated only with interactions you can access, update the Inbox rules with any filter or CCD value restrictions that apply to you.
1.42	Minor update
1.41	Under *Project Rules Manager*, added the **Rule Details** pane.
1.40	Under *Project Rules Manager*, clarified how conditions in a rule are met.
1.39	Minor updates
1.38	In the *Project Rules Manager* chapter, removed the *Workflow: Create an Interaction Data Export to EDM rule* section.

Revision	Description of changes
1.37	In the *Project Rules Manager* chapter, added the *Workflow: Create an Interaction Data Export to EDM rule* section for exporting interactions to Engagement Data Management in the cloud.
1.36	In the *Project Rules Manager* chapter, added the *Workflow: Create a rule to delete interactions using a recycle bin* section for the use of the recycle bin, which will replace the deprecated *Workflow: Create a rule to delete interactions (GDPR)* section.
1.35	For Interaction Data Export with Processing rules, described the output directory structure to which files are exported.
1.34	Minor updates
1.33	Added new section *Interaction Data Export with Processing* that describes the format of the data that is exported as part of an Interaction Data Export with Processing rule in the Project Rules Manager.
1.32	In *Define settings for Interaction Data Export with Processing rule*, fixed a typo: Changed ACC to AAC (Advanced Audio Coding).
1.31	In the *Project Rules Manager* chapter, under *Define conditions for AQM, Speech Analytics, or Interaction Analytics Export rule*, updated note on Interaction Analytics Export rule's start date.
1.30	In the *Project Rules Manager* chapter, under *Define conditions for AQM, Speech Analytics, or Interaction Analytics Export rule*, added that for Interaction Analytics Export rules, it is not recommended to set a start date more than 365 days in the past.
1.29	In *Project Rules Manager* section, under *Condition parameters*, added missing Start Date and End Date conditions.
1.28	Minor update
1.27	• In *Interactions and Analytics setup*, added *Interactions and Analytics settings* section that describes how to configure the default Interactions and Analytics settings for your organization. • In the *Project Rules Manager* section, under *Define settings for Interaction Data Export with Processing rule*, listed the available export formats for audio and screen recordings.
1.26	• *Project Rules Manager*: Renamed the *Interaction Data Export with Reconstruction* rule to *Interaction Data Export with Processing*. • *Shared Inboxes*: Specified that for quotas fulfilled on a weekly basis, the first day of the week is the day defined in the First Day of the Week setting in *Enterprise Settings* under *System Management*.

Revision	Description of changes
1.25	Updates for 2021R1: The following new rules can be created in the Project Rules Manager: • Add to Case rules • Interaction Data Export with Reconstruction rules
1.24	• *Interaction Analytics Export overview*: Added that there can be 100 JSON files in one ZIP file.
1.23	• *Interactions Analytics export file format*: Added note to Metadata section summarizing the changes from Hotfix Rollup 5. • *Conditional Custom Data visibility logic*: Updated the descriptions to reflect the system behavior. • *Assignment Manager*: Specified that users have access to entities assigned to an organization/group and role if they are assigned to the role, and are a member of the organization/group or have scope over the organization/group.

Revision	Description of changes

1.22	Updates for 2020R1:
	• Avaya rebranding
	• *Custom Data*:
	  ▪ In addition to the existing 25 Custom Data fields, an additional 275 Custom Data fields can be configured for use, for a total of up to 300 Custom Data fields.
	  ▪ Data sets and logical Custom Data fields are no longer supported.
	  ▪ Custom Data fields 26-300 are indexed fields.
	  ▪ Custom Data fields of type integer in the 26-300 range are unicode fields that can contain up to 256 characters.
	  ▪ If logical Custom Data fields were previously configured in your system, those fields were migrated to the corresponding new Custom Data fields 26-75.
	• *Conditional Custom Data*:
	  ▪ Data sets are no longer supported. Up to 5 Conditional Custom Data fields can be configured.
	  ▪ When creating a rule according to a Custom Data field, only Custom Data fields 1-75 are available for configuration.
	• *Shared Inboxes*: The Shared Inbox's settings can now be customized to retrieve the most recent interactions first when an employee accesses the Shared Inbox.
	• *Project Rules Manager*: Under *Define conditions for Delete Interactions rule/Define conditions for Speech Analytics, AQM, or Export rule*, specified that the operator between conditions is AND, and the operator between multiple values within a condition is OR. If multiple Custom Data or Conditional Custom Data fields are selected, the operator between the fields is AND.
	• Known limitations for automated language detection: Added limitation for Stereo Transcription as not supported.

1.21	• *Interactions Analytics export file formats*: Added section on metadata information, with table describing the metadata fields and updated example.

Revision	Description of changes
1.20	• *Interactions Analytics export file format*: Updated example of call and metadata information. • *Speech Analytics Automated Language Detection*: • *QM Database configuration*: New section on configuring QM Database to support automated language detection. • *Known limitations*: Added limitations for Phonetics Boosting in Connected mode.
1.19	• In *Project Rules Manager* chapter, under *Condition parameters*, specified that wildcards are not permitted in comma separated values in Custom Data and Conditional Custom Data fields. • *Interactions Analytics export file format*: Call information and metadata - added item on metadata and export behavior for CD and CCD fields in HFR5.

1.18	Under *Project Rules Manager*:
	• Under 'Condition parameters', specified where relevant that:
	    ▪ the Between operator is used to set a range of values for a parameter.
	    ▪ if more than one value is set, the system searches for interactions that match only one of the values.

1.17	In *Project Rules Manager* chapter, added description of new Include completed rules check box which indicates whether completed Delete Interactions rules are included in the grid.
1.16	In *Custom Data* chapter, described the use of the arrows in the Up/Down columns in the Custom Data Manager.

1.15	• Avaya renaming.
	• In the *Project Rules Manager* chapter:
	    ▪ Under *Define conditions for the AQM, Speech Analytics, or Export rule* added warning that when defining conditions for an AQM rule, the number of values defined for all enabled AQM rules combined should not exceed 100 values.
	    ▪ Under *Delete Interactions rules*, added list of supported 3rd party archives from which interaction media is deleted.
	• Under *Shared Inbox*, specified that if no Shared Inbox scope is defined in the Shared Inbox settings, no interactions are pushed to the Shared Inbox.

1.14	In the *Project Rules Manager* chapter, under *Condition parameters*, added explanation (where relevant) on how to use the **Between (excluding)** and **Between (including)** operators.
1.13	Section *Indexing reports configuration*: Fixed location of Ibuild.prop.local

<table>
<tr><th>Revision</th><th>Description of changes</th></tr>
<tr><td>1.12</td><td>In Caption Editor chapter, under Edit default captions for root organization, added that to display edited captions in the Custom Data Manager, Conditional Custom Data Manager, and Assignment Manager, you must set the relevant captions in the Interactions Application and in the Interactions Legacy Application.
In the Project Rules Manager, under Delete Interactions, added note to specify that the Delete Interactions rules does not delete interactions from WORM (Write Once Read Many) drives, removable media, and archive drives to which the system does not have permissions to delete files.</td></tr>
<tr><td>1.11</td><td>Updates for HFR5:
Rewrite of Project Rules Manager chapter as a result of new user interface.
New Delete Interactions rule in the Project Rules Manager.</td></tr>
<tr><td>1.10</td><td>Fixed incorrect terminology in Project Rules Manager and Interactions Analytics Export chapters: Transcription Export was changed to Interactions Analytics Export.</td></tr>
<tr><td>1.09</td><td>Minor typo updates and template updates</td></tr>
<tr><td>1.08</td><td>The following changes are new for HFR4:
In the Project Rules Manager chapter:
New option was added to export transcriptions to an FTP site or a server in our network.
Updated the behavior of some condition parameter fields.</td></tr>
<tr><td>1.07</td><td>Updated with new document template.
The following changes are new for HFR3:
Chapter 11: New chapter describing how to configure Automated Language Detection for Speech Analytics.
Custom Data and Conditional Custom Data: The CD Mapper is no longer supported and you can no longer create custom data sets.
Audit Trail chapter was moved to the System Monitoring, Messaging, and Alarms Guide.
Chapter 1: All Multi Tenant content removed as content already exists in the Multi-tenant SaaS Service Provider Reference Guide.</td></tr>
</table>

Related topics

About this guide (page 8)