Genesys Recording, Quality Management, and Speech Analytics User's Guide

Get started

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Genesys Recording, Quality Management, and Speech Analytics User's Gui

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- Administrator

This guide describes how you can use the SpeechMiner user interface to perform search and playback for voice and screen recordings, traditional quality management tasks such as evaluation of interactions through form-based scoring, or advanced speech analytics such as topic analysis or trending and exploration analysis of transcripts.

Related documentation:

Contents

- 1 Recording
- 2 Quality Management (QM)
- 3 Speech Analytics
- 4 Before you start
- 5 Access the application
    - 5.1 Multilingual support
    - 5.2 Before you log in to SpeechMiner UI consider the following:
- 6 Walk through the application
    - 6.1 Dashboard
    - 6.2 Explore
    - 6.3 Reports
    - 6.4 Quality Management
    - 6.5 Tools

SpeechMiner is the name of the user interface (UI) within Genesys Multicloud CX (PEC) that provides a single UI for all Recording, Quality Management and Speech Analytics functionality.

Recording

Recording, also referred to as Genesys Interaction Recording (GIR), provides cradle to grave dual channel voice recording for customer-ivr and customer-agent conversations as they occur within the Genesys Multicloud CX Contact Center. GIR is able to automatically stitch together call segments and capture all relevant call metadata to provide the information you need to fulfill important use cases within your business including Compliance, Dispute Resolution and Workforce Training. In addition, when enabled, GIR provides screen recording of the entire agent desktop for a subset or all voice interactions handled by your agents.

Quality Management (QM)

Quality Management (QM) enables you to monitor quality and evaluate agent performance on a periodic and consistent basis while minimizing effort through automated interaction selection to improve customer experience and engage with your staff. QM includes a robust and feature rich form designer along with a number of evaluation schedule types to meet the SLAs required by your business in providing core use cases around QM as well as input to Training through form based scoring of interactions.

> **Important**
> The processing of digital interactions is available only in Azure.

Speech Analytics

Speech Analytics, also referred to as Genesys Interaction Analytics (GIA), provides automated speech analytics capabilities on all recorded customer-agent interactions to provide deep insight into these conversations. GIA provides automated transcription and employs Topic tagging along with non-linguistic analysis of recordings to create meaning from otherwise unstructured data. Organizations can use this data to fulfill key use cases around Agent Performance Improvement (for example, decrease AHT, increase FCR, Sales Conversion, and so on.), Compliance and Customer Satisfaction (for example, NPS). Additionally, GIA employs advanced unsupervised machine learning algorithms to surface salient or unexpected terms to enable use cases around Uncovering Emerging Trends or Discovery of New Phrases and Intents. All analysis and discovery functionality is provided through the SpeechMiner UI.

Before you start

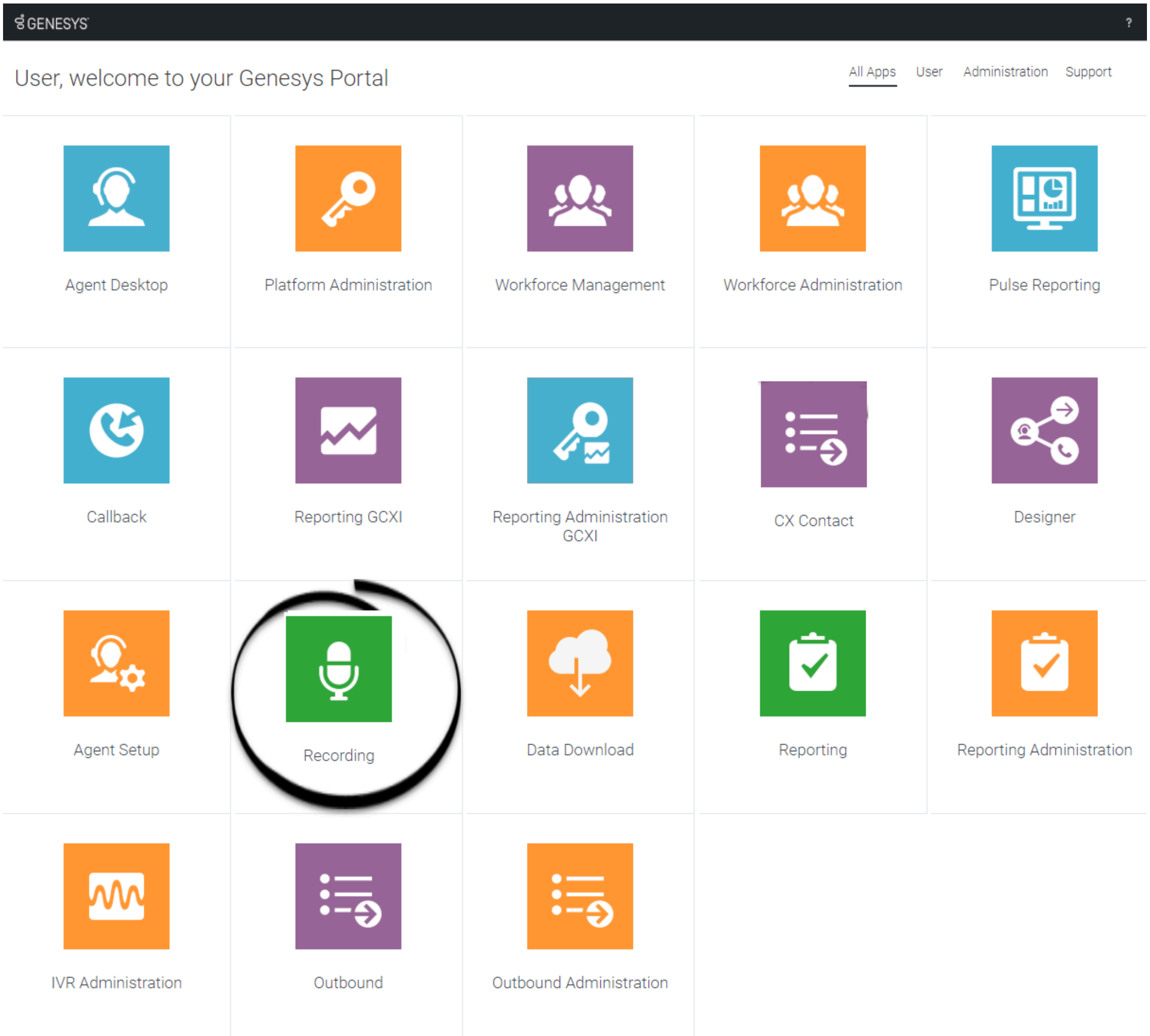
SpeechMiner UI provides a single user interface (UI) across different products within the Genesys Workforce Optimization suite in Genesys Multicloud CX, including Recording, Quality Management and Speech Analytics. Each product is sold separately. Recording is a prerequisite. Quality Management and Speech Analytics can be added based on the specific needs of your business.

Screen recording is available only for voice interactions. SpeechMiner supports export of voice transcripts.

The Genesys Multicloud CX Recording, QM and Speech Analytics solution does not include:

- Screen recording of digital interactions
- Access to SMART for Topics/Category creation
- Export of digital transcripts or analytics data
- Distinct retention periods for Transcripts, Analytics and QM data; the retention period for all data is tied to the retention period of the underlying call recording

Access the application



Once your Genesys Multicloud CX environment is up and running and you've checked that you meet the necessary requirements, log in to your Genesys Portal to access Recording. Click the Recording icon and enter your username and password.

When you log in to the system, SpeechMiner UI automatically verifies the roles and groups assigned to your account.

The roles assigned to your account signify what SpeechMiner UI features you are allowed to access.

Only the features you have permissions to view are displayed in the interface when you log in to the system.

Multilingual support

SpeechMiner web application supports multiple languages. When you log in to SpeechMiner, the web UI is displayed in a language that you selected in the browser. If you select an unsupported language in the browser, the SpeechMiner Web UI defaults to en-US.
For more information about the supported languages, refer to SpeechMiner language support.

Before you log in to SpeechMiner UI consider the following:

The SpeechMiner UI address will be given to you by your system administrator. Alternatively, when your account was created you may have received an automated email notification with the same information.

You can log in to SpeechMiner UI from any of the currently supported browsers. A list of supported browsers can be found in the latest SpeechMiner UI PureConnect Release Notes.

> **Important**
> If you are having problems viewing SpeechMiner UI, refer to Configure the browser.

Walk through the application

The SpeechMiner UI contains the following menus.

Dashboard

Enables you to create one or more dashboards. Each dashboard can contain a selection of one or more widgets. The widgets show the various reporting data related to Recording, Quality Management or Speech Analytics. With Speech Analytics, this data provides insights into the content and nature of agent-customer interactions.

Explore

Enables you to drill down and examine information about your contact center and agents by searching for specific groups of interactions. The filters available are dependent on whether Speech Analytics is enabled. With Recording and Quality Management, the following filters are available:

- Date Range
- Agents & Workgroups
- Metadata
- Duration

With Speech Analytics, the following additional filters are available:

- Terms & Topics

From the Media Player and Interaction Transcript (with Speech Analytics), you can drill further down to investigate the potential root causes of the business trends that appear in the resulting interaction list.

Reports

Enables you to analyze statistical data about agent-customer interactions according to a specific report (for example, Agent Comparison, Team Comparison, and so on). By analyzing a reports, details and status, you can gain intelligence about your organization.

Quality Management

Enables you to monitor agent-customer interactions, to improve agent productivity and customer satisfaction. The key features such as Forms Manager and Evaluations Manager can be used for evaluating agent productivity and targeted agent training. Quality Management offers insight that has the potential to increase employee productivity, resolve future customer disputes and subsequently enhance customer service.

Tools

Provides access to an administrative level SpeechMiner UI functions. You can use Tools to view detailed information about Topics and Phrases in the system.

Contents

- 1 Reports menu
- 2 Create a new report
- 3 Edit an existing report
- 4 Control the data set for analysis
  - 4.1 Configure a report to analyze data for the current user
- 5 Run a report
  - 5.1 Run the report and view the results in the browser
  - 5.2 Run a report from the Edit Report tab
  - 5.3 Run the report and send the results via email
  - 5.4 Run the report and export the results

- 6 Schedule a report
    - 6.1 Create a report schedule for a specific report
    - 6.2 Create a report schedule for a group of reports
    - 6.3 Send the report to specific recipients
    - 6.4 Schedule a report to run when an event is detected
    - 6.5 Deactivate a report schedule
- 7 Drill down a report
    - 7.1 Drill down to the underlying data of a report component
    - 7.2 Play back an interaction from a drill-down list
    - 7.3 Close the drill-down list and return to the report results
    - 7.4 Sort the data in a table
- 8 Analyze Report Data

- Administrator

Use Reports to create a summary and analyses of interaction, speech, and external metadata. This page describes how to set up and generate reports and what you can do with them.

Related documentation:

You can generate reports for analysis, view report details and status, and share the data with users throughout the enterprise. You can view reports in your browser, print them or send them via email.

To help you monitor your business, SpeechMiner offers a wide range of standard reports that can be customized to better suit your needs.

Depending on the type of report, the results may be presented as lists or data and/or in graphic form.

In this section you will learn how to:

- Create and run a report - To review and analyze interaction, speech and external metadata.
- Edit saved reports - To modify the report data to suit your needs.
- Work with saved reports - To periodically view data for business issues that may reoccur.
- Understand report layouts and parameters - To better absorb the report information.

Reports menu

The Reports menu includes the following items:

- Templates - Enables you to select to create a report from a wide variety of report templates.
- Saved Reports - Enables you to run the same report numerous times on different dates and times
- Edit Report - Enables you to change an existing report.

Create a new report

New reports are based on an existing template.

1. Select **Reports > Templates.**

2. Decide which report template will act as the basis of your new report.
3. Click the **Preview** link to see an example of the report template.
4. Click the **Edit** link associated with the template on which you want to base your new report. The **Edit Report** tab is opened. The name of the selected template appears in the Template list.

> **Important**
> You can change the template by selecting a different template from the Template list.

5. Configure the report as necessary using the available parameters at the top of the screen and under **Interactions Filter** on the left side of the screen. For additional information about each parameter refer to Report parameters.

> **Important**
> Not all templates include Interactions Filter on the left side of the screen.

6. Click **Run Report**. The report appears at the bottom of the screen under that report parameters.
7. Optional: Click **Save** to save the report. You do not have to save a report to run it.

   To create a report based on a saved report click **Save As** .

Link to video

Edit an existing report

After a report is created you can change its properties.

1. Select **Reports > Saved Reports**. The Saved Reports tab is opened.
2. Click the **Edit** icon . The Edit Report tab is opened.
3. Configure the report as necessary using the available parameters at the top of the screen and under **Interactions Filter** on the left side of the screen. For additional information about each parameter, refer to Report parameters.
4. Click **Save** to save your changes to the existing report. If you are creating a report based on a saved report, click **Save As** .
5. Click **Run Report**. The report appears at the bottom of the screen under the report parameters.

Important

Not all templates include an Interaction filter on the left side of the screen.

Control the data set for analysis

Report templates that include the **Agents Data Set** filter can be configured to analyze data for the current user or work group, rather than a specific user or work group.

When the report runs, the data set used changes depending on which user runs it. For example, if the user is agent 12, the report will only include interactions that were handled by agent 12.

This feature will work only if the user's profile includes mapping. For instance:

- If the user is an agent, the mapping gives the name of the agent. The reports that are filtered for the current user only include data about that agent.
- If the user is a manager, the mapping gives the name of the manager's work group. The reports that are filtered for the current user include data for the entire work group.

Configure a report to analyze data for the current user

1. Select **Reports > Saved Reports**.
2. Click the **Edit** icon for the report you would like to edit for the current user. The report is opened.
3. Under **Interactions Filter**, select the current user from the **Agents** list and click **Add**.
4. Click **Done**. Once the report is configured, different users can create the report to analyze their own data and the report can be shared with other users.

Run a report

You can run a report in a number of ways:

- Run the report and view the results in the browser
- Run the report from the Edit Report tab
- Run the report and send the results as an email attachment to selected recipients
- Run the report and export the results using a PDF or Excel file

Important

You do not have to save a report to run it.

Run the report and view the results in the browser

1. Select **Reports > Saved Reports** to run an existing report.
2. From the **Saved Reports** list click **Run** . The report results are displayed as you requested in the SpeechMiner Report Viewer window.

Run a report from the Edit Report tab

1. Select **Reports > Saved Reports** to run an existing report.
2. From the **Saved Reports** list, click the **Edit** icon . The **Edit Report** tab is opened.
3. Select how to view the report results in the browser:
   - To view the results in a new browser window, at the top of the form select **Open in new window**.
   - To view the results below the template form, clear the **Open in new window** check box.
4. Click Run report. The report results are displayed.

Run the report and send the results via email

Important

The results are sent as a PDF file. The .pdf file is opened in a browser and is linked to the SpeechMiner system.

1. Select **Reports > Saved Reports** to run an existing report.
2. From the **Saved Reports** list, select the report you want to run. From Edit Report configure the report you want to run.
3. At the top of the form, click **Email Report** . A dialog box opens.
4. Under **To** enter the required email addresses. Separate multiple addresses with semi-colons (**;**).
5. Under **Notes** type any text you want to include in the body of the email.
6. Click **Send**. The report runs and the results are sent to the recipients you specified. A confirmation message appears when the results are sent.

Run the report and export the results

1. Select **Reports > Saved Reports** to run an existing report.
2. From the **Saved Reports** list, select the report you want to run. From Edit Report configure the report you want to run.
3. At the top of the form, click 

. The report is created and appears at the bottom of the screen.
4. Click either the PDF or Excel icon to export the results to a PDF or Excel file. A dialog box opens and asks you if you want to open or save the file.
5. Select the desired option.
    - If you select **Open**, the file is opened in the application that is configured to open files of the selected type on your computer.
    - If you select **Save**, a **Save As** a dialog box opens. Navigate to the folder in which you want to save the file and click **Save**. The file is saved in the selected location.

Schedule a report

You can schedule a report to run automatically at specified times or in response to specific events. The results are automatically sent via email to the recipients.

The type of report schedule is indicated in the Schedule column.

- **Deactivated** - The report is not scheduled to run.
- **Time Based** - The report runs automatically at specific times.
- **Event Based** - The report runs automatically when specific events are detected.

> **Important**
> You can create or modify the report schedules only for the reports you created. The report database is configured according to UTC time. For this reason, reports are exported and emailed according to UTC time.

The report scheduling feature enables you to:

- Create a report schedule for a specific report.
- Create a report schedule for a group of reports.
- Send the report to specific recipients.
- Schedule a report to run when an event is detected.
- Deactivate a report schedule.

Create a report schedule for a specific report

1. Select **Reports > Saved Reports**.
2. Select the report you want to run according to a specific schedule.
3. Click the **Schedule** icon .
4. Click **Active** and select the **Schedule** tab.
5. From the **Schedule Type** list select **Time Based**.
6. From the **Date Range** fields select the start and end of the schedule.
7. Select the period of time for the scheduled report. For example, if you want to run the report every weekday, select week. If you want to run the report on specific days select Day and then the specific days. The parameters that appear on the right side of the window change according to your time period selection
8. Select the Recipient tab and configure the available parameters.
9. Click Schedule. The report is scheduled to automatically run according to the settings you configured.

Create a report schedule for a group of reports

1. Select **Reports > Saved Reports**.
2. Select the group of reports you want to run according to a specific schedule.
3. Click the **Schedule** icon .
4. Click **Active** and select the **Schedule** tab.
5. From the **Schedule Type** list select **Time Based**.
6. From the **Date Range** fields select the start and end of the schedule.
7. Select the period of time for the scheduled report. For example, if you want to run the report every weekday, select week. If you want to run the report on specific days, select Day and then the specific days. The parameters that appear on the right side of the window change according to the selected time period.
8. Select the Recipient tab and configure the available parameters.
9. Click Schedule. The report is scheduled to automatically run according to the settings you configured.

Send the report to specific recipients

Regardless of the schedule type selected, you must specify one or more recipients for the report.

1. Select **Reports > Saved Reports**.
2. Select the group of reports you want to run according to a specific schedule.
3. Click the **Schedule** icon .
4. Select the Recipients tab and configure the fields as follows:
    - **To** - The email addresses of the report recipients. Separate multiple addresses with semi-colons (;).

- **Reply To** - The sender's address.
- **Subject** - The text that should appear in the subject line of the email.
- **Report Format** - Select Web archive to create the results in an MHT file that can be opened in Internet Explorer. Or, select PDF to create the results in a PDF file.

> **Important**
> If the Schedule Report does not produce expected results refer to the *Configuring the Reporting Services in the Administration Guide*.

5. **Priority** - Select the desired priority level for the email message.
6. Click **Schedule**. The reports are scheduled as specified in the Schedule tab and the recipients are set as specified in the Recipients tab.

Schedule a report to run when an event is detected

Event-based scheduling enables you to keep track of potentially significant trends. It also enables you to be alerted when significant changes in agent or customer behavior occur. In this context, the term event does not refer to an individual occurrence of an event, but to a specified number or percentage of interactions in which the event was detected. For example, the detection of caller agitation in more than 10% of interactions could be an event that causes a report to be generated.

1. Select **Reports > Saved Reports**.
2. Select the report(s) you want to schedule.
3. Click the **Schedule** icon .
4. At the top of the scheduling dialog box, select **Active**.
5. From the **ScheduleType** list select **EventBased**. The fields required to configure the schedule are displayed
6. In the **Condition** line, under **Categories** select the categories that must be identified in the interactions. For additional information, see Search Filter.
7. In the next field, select one of the following:
   - **Exceeds (>)** - Run the selected reports when the selected categories are identified in more than a specified number or percentage of interactions.
   - **Equals (=)** - Run the selected reports when the selected categories are identified in a specified number or percentage of interactions.
   - **Drops Below (- Run the selected reports when the selected categories are identified in fewer than a specified number or percentage of interactions.**
8. Under **Values**, fill in the number or percentage of interactions.
9. In the next field, select **Interactions** if the value refers to a number of interactions or **% of interactions** if the value refers to a percentage of interactions
10. Under **Duration**, fill in the number of time periods (of the unit specified in the next field) in which the condition must be met. For example, type 2 if the condition must be met within a 2-day period and

select Days in the next field.

11. Select the unit of time for the duration value you entered in the previous field.
12. Configure the **Recipients** tab and save the settings.

Deactivate a report schedule

1. Select **Reports > Saved Reports**.
2. Select the report(s) for which you want to deactivate the schedule.
3. Click the **Schedule** icon .
4. At the top of the scheduling dialog box, clear the **Active** check box.

> **Important**
> If you selected a group of saved reports before you opened the Scheduling window, the Active check box is not selected.

5. Click the **Schedule** checkbox.

Drill down a report

Depending on the type of report, the report results may be in the form of a graph, a histogram, or a table.

You can drill down to the underlying data on which any graphic component is based (graph bars, lines, or table headers).

When you do this, you will be presented with a new report that is based on the data point you clicked on.

Drill down to the underlying data of a report component

- Click the component.

Play back an interaction from a drill-down list

- Under **Open**, click the icon. The Media Player opens in a new browser window and begins to play back the interaction.

Close the drill-down list and return to the report results

- If the report was displayed in the **Edit Report** tab click **Back** at the bottom of the form.

- If the report was opened in a separate window or tab, use the browser's **Back** button or press **Backspace**.

Sort the data in a table

- Click the heading of the column by which you want to sort the table.

Analyze Report Data

Report templates that include the Agents Data Set filter can be configured to analyze data for the current user or work group, rather than a specific user or work group.

When the report runs, the data set used changes depending on which user runs it. For example, if the user is agent 12, the report will only include interactions that were handled by agent 12.

This feature will only work if the user's profile includes mapping. For instance:

- If the user is an agent, the mapping gives the name of the agent. The reports that are filtered for the current user only include data about that agent.
- If the user is a manager, the mapping gives the name of the manager's work group. The reports that are filtered for the current user include data for the entire work group.

To configure a report to analyze data for the current user:

1. Select **Reports > Saved Reports**.
2. Click the pencil **Edit** icon for the report you would like to edit for the current user. The reports opens in the **Edit Report**.
3. Under **Interactions Filter**, select the current user from the Agents list and click **Add**.
4. Click **Done**. Once the report is configured, different users can create the report to analyze their own data and the report can be shared with other users.