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# Genesys Multicloud CX Use Cases

Genesys Interaction Recording (WF04) for Genesys Multicloud CX

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Record all interactions to improve training, compliance and efficiency.

## What's the challenge?

You need to reliably record calls to help agents get better, enhance the customer experience and manage risk. When recordings are not complete or available, you risk being out of compliance and lose valuable information that could be used to improve efficiency and make customers happier.

You need selective recording of agents for review purposes based on metadata such as percentage-based, business-unit based, and customer type-based interactions. Without this, you can't monitor and improve team performance.

## What's the solution?

Monitor quality to continuously improve performance and experiences. Be compliant. Genesys Interaction Recording, natively integrated with the Genesys Customer Experience Platform, reliably records 100% of calls, makes it easy to search and access recordings, and doesn't lose a beat with transfers - even across sites.

With Selective Recording, you can define recording rules to capture the interactions that matter most to you.

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## Use Case Overview

### Story and Business Context

Businesses need to reliably record calls to improve customer experience and employee performance, be compliant, and manage risk.

Genesys Interaction Recording is a compliance and control platform that reliably records 100% of calls — even across multiple sites — and makes it easy to search and access recordings regardless of location. Through voice recording, customer service operations can analyze the quality of voice conversations, identify training needs and help to continuously improve the performance of employees. The payoff is a better customer experience.

Fully integrated to the CIM platform, Genesys Interaction Recording provides economies and powerful recording control via a host of integrations across the suite. This powerful solution enables the modern contact center to record the entire customer interaction, allowing the contact center to meet quality or regulatory compliance requirements.

Genesys Interaction Recording is a compliance and control platform based on Genesys SIP, the T-Lib protocol, and the Genesys proprietary event model. Fully integrated to the CIM platform, Genesys Interaction Recording provides economies and powerful recording control via a host of integrations across the suite.

This solution enables the modern contact center to record selective customer interaction, allowing the contact center to improve recording control and target discreet interactions for recording.

### Use Case Benefits\*

The following benefits are based on benchmark information captured from Genesys customers and may vary based on industry, lines of business or Genesys product line:

Use Case Benefits	Explanation
Improved Customer Experience	Provides consumer protection, trust, and transparency.
Reduced Administration Costs	Target recording by percentage, type of call or customer according to business need.
Reduced Deployment Costs	Eliminate the need to purchase additional hardware, software, and the associated maintenance and support services through an integrated approach with Genesys Interaction Recording.
Reduced IT Operational Costs	Lower hardware footprint and storage requirements than for "blanket" recording.
Reduced Penalties and Fines	Recording 100% of calls with no lost calls reduces compliance risk and penalties.

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## Summary

This use case provides 100% voice recording of customer conversations with an agent for compliance and regulatory requirements, including access control, encrypted communications, and long-term storage.

This use case also allows for selective recording of the agent for review purposes based on metadata such as percentage-based, business-unit based, and customer type-based interactions.

## Use Case Definition

### Business Flow

#### **Voice Recording**

The following describes the main actors of the business flow below and their goals:

- The customer makes the call
- The supervisor needs to be able to listen to recordings
- The agent needs to be able to pause/resume recordings
- The Legal and Compliance officer needs to be able to access the system to audit and protect recordings

### Business Flow

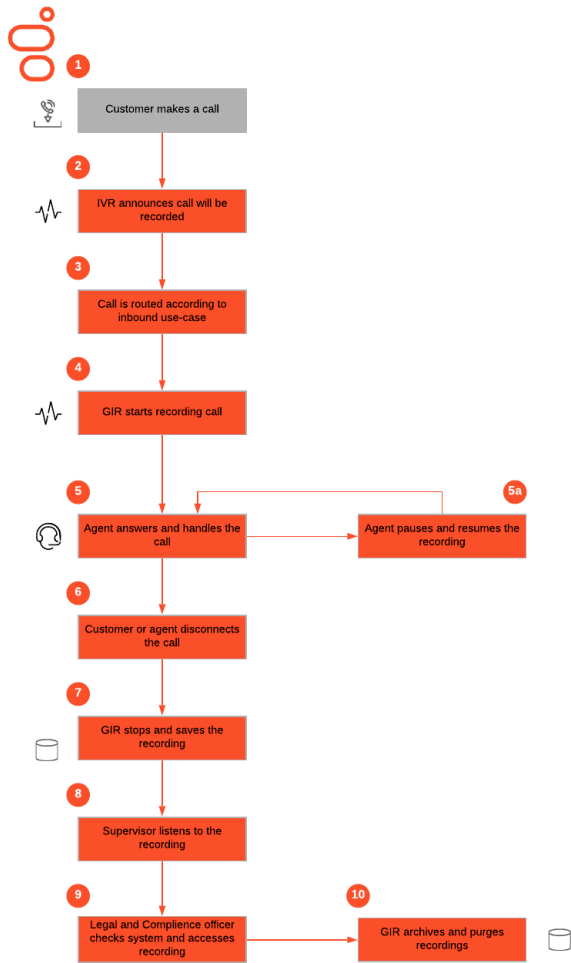
#### **Compliance Recording**

### Business Flow

#### **Selective Recording**

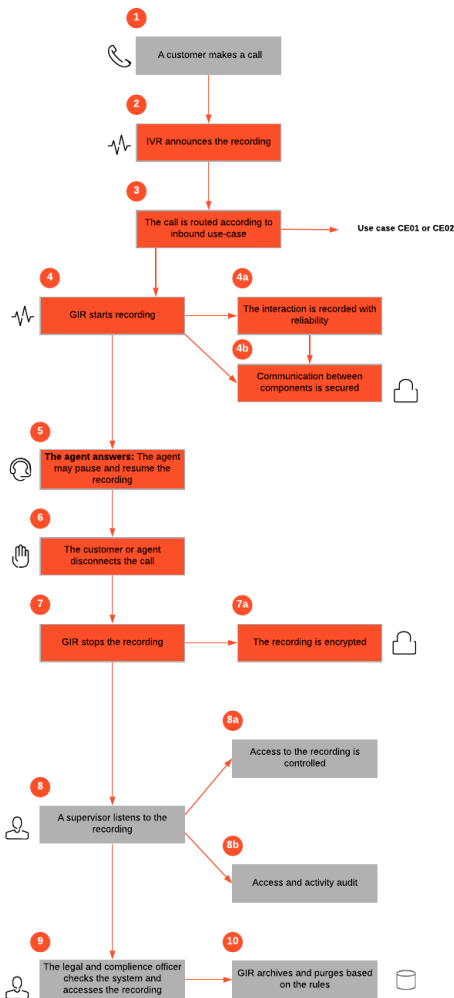
### Business Flow

#### **Compliance Recording**



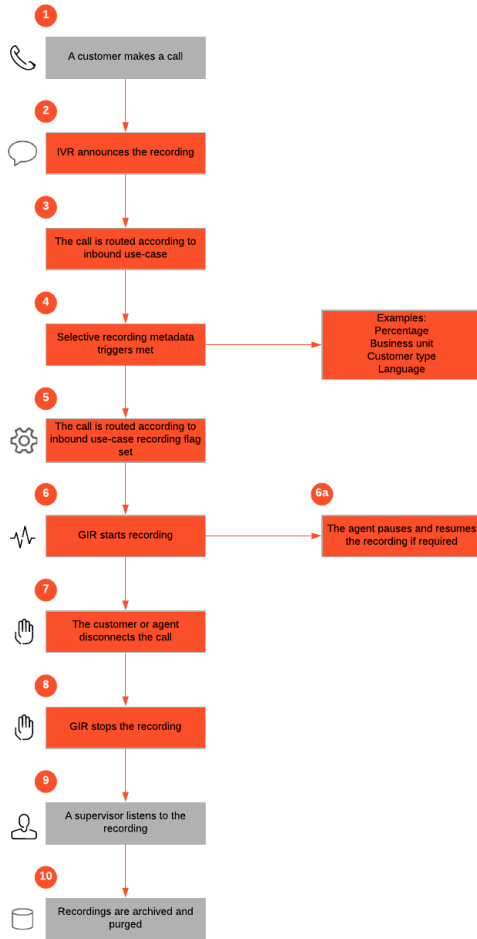
## Business Flow Description

1. Customer calls one of the service lines of the company.
2. An announcement is played to the customer that the call is going to be recorded.
3. The call is handled and routed to an agent following the logic of the Inbound Voice distribution strategy which is implemented for the Service Line. This can be either the use case "Genesys Call Routing (CE01)" or "Genesys Personalized Routing (CE02)." The Inbound Voice routing strategy is not within the scope of this use case.
4. Genesys Interaction Recording starts the recording.
5. Agent answers the call from any desk within the site. The agent may (if enabled) pause/resume the recording manually via the standard integration with Genesys Workspace when sensitive data needs to be entered.
6. Customer or Agent disconnects the call.
7. Genesys Interaction Recording stops and stores the recording.
8. Supervisor searches for, retrieves, and listens to a recording made by one of their agents.
9. Legal and Compliance officer checks the system for compliance and retrieves recordings for legal purposes.
10. Genesys Interaction Recording archives and purges recordings according to the rules defined in the system.



## Business Flow Description

1. Customer calls one of the service lines of the company.
2. An announcement is played to the customer that the call is going to be recorded. (\*Compliance step)
3. The call is handled and routed to an agent following the logic of the Inbound Voice distribution strategy that is implemented for the Service Line. This can be either the use case or [[UseCases/Current/GenesysEngage-cloud/CE02]].
4. Genesys Interaction Recording starts the recording.
  - The interaction is recorded with reliability. (\*Compliance step)
  - The communication between components is secured. (\*Compliance step)
5. Agent answers the call from any desk within the site.
  - The agent may (if enabled) pause and resume the recording manually via the standard integration with Genesys Workspace when sensitive data needs to be entered.
6. Customer or Agent disconnects the call.
7. Genesys Interaction Recording stops and stores the recording.
  - The recording is encrypted, and is stored encrypted at rest. (\*Compliance step)
8. Supervisor searches for, retrieves, and listens to a recording made by one of their agents.
  - Access to the recording is controlled. (\*Compliance step)
  - User access and activity are available for audit. (\*Compliance step)
9. Legal and Compliance officer checks the system for compliance and retrieves recordings for legal purposes.
10. Genesys Interaction Recording archives and purges recordings according to the rules

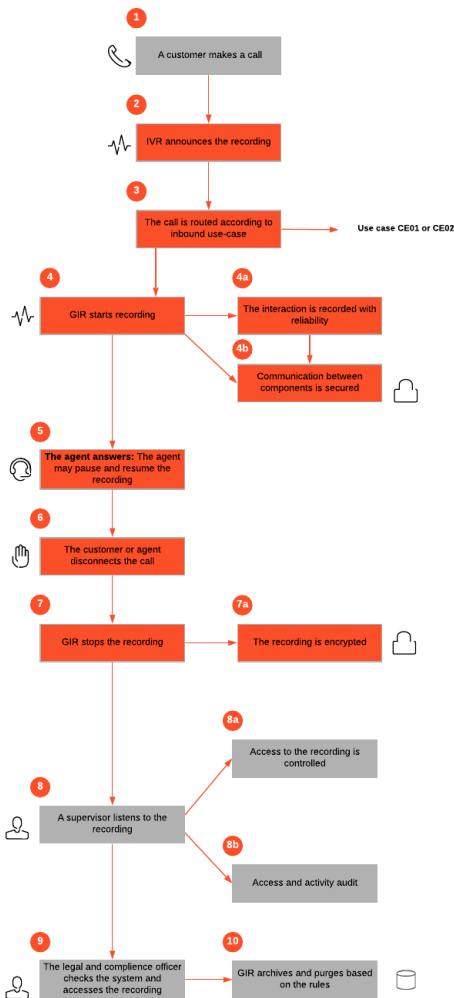


defined in the system.

## Business Flow Description

1. Customer makes a call.
2. IVR announces recording.
3. Call is processed according to the inbound use case.
4. Selective recording metadata triggers are met: percentage, business unit, customer type, language.
5. Call is routed according to the inbound use case, with the recording flag set.
6. Interaction Recording starts recording.
  - Agent pauses or resumes the recording.
7. Customer or agent disconnects the call.
8. Interaction Recording stops and stores the recording.
9. Supervisor listens to the recording.
10. Interaction Recording archives and purges the recordings.





## Business Flow Description

1. Customer calls one of the service lines of the company.
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## Business and Distribution Logic

defined in the system.

### Business Logic

Details of the business flow described in the previous chapter depend on how the system is set up for your environment. This chapter describes the options which are available and how the initial set-up is done for your environment by Genesys Professional Services within the scope of this Smart use case.

### Metadata

Metadata are tags which are added to the recording and allow precisely targeted interaction search and selection for evaluation and analysis. What data is available depends on the distribution logic implemented in your environment and will be defined with you during the implementation project.

### Archiving and Purging Criteria

Recordings can be archived and / or deleted from the system after a specified time. After recordings have been purged, they are no longer available for supervisors or compliance officers via the Genesys user interface. The corresponding policies are configured during the set-up of this use case. Within the scope of this use case, we set up one set of rules which is valid for all recorded calls. Archived files are not managed by GIR. It is the customer's responsibility to set up a life-cycle policy of these archives and purge them after the life-cycle period.

### Access Control

Access control to recordings is managed by user roles and associated permissions as well as by the organizational hierarchy defined for the individual agents. The scope of this use case includes a default set of roles that can be provided upon request.

### Pause / Resume recording

The ability for an agent to pause / resume a recording from their agent desktop can be enabled or disabled based on customer requirements.

### Encrypted Recordings

When configuring encryption, you are responsible for backup of the private key. If the private key becomes lost or corrupted, any recording encrypted using that key become unusable.

If screen recording is also used in the deployment, a screen recording certificate must also be provisioned. ===== Encrypted Communications ===== Communications between GIR components occur on a secure channel.

When configuring encrypted communications, TLS, you should follow your own company's security policies for creating and signing certificates.

### Health and Alarming

Log level alarming is present for the critical components within GIR. MCP utilizes the SNMP MA for trap capture and upstream messaging.

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## Routing Rule

The rule by which the decision to record is set. Requires a decision block within the routing strategy prior to the TRouteCall.

Configure the TRouteCall request in the routing strategy to include the key record, with the values:

- **destination** for agent-side recording—Recording stops when the agent transfers the call, unless recording is set up on the new routing point.
- **source** for customer-side recording—Recording stops when the customer leaves the call.

## Attached Data

Add the following attached data key to prescribe the partitions with which the recording is to be associated.

- GRECORD\_PARTITIONS

## Distribution Logic

There is no applicable content for this section.

## User Interface & Reporting

### Agent UI

The agent has the optional capability to pause/resume a recording when confidential information is passed via the call via their agent desktop.

For Compliance Recording Auditing is provided by templates in the SpeechMiner UI (business interface), which is part of Genesys Interaction Recording. Genesys Interaction Recording provides audit trails for recording access. These audit trails contain the following information:

- Who accessed a recording
- Which recording
- When accessed
- Deletions
- Playback requests
- Exports
- Report exports
- Customer ID
- Interaction Type
- Reason Code

- All attached metadata
- Archive and Purging logs

## Reporting

### Real-time Reporting

There is no applicable content for this section.

### Historical Reporting

Historical reporting is provided by templates in the SpeechMiner UI (business interface), which is part of Genesys Interaction Recording.

In addition to the historical reporting, Genesys Interaction Recording provides audit trails for recording access. These audit trails contain the following information:

- Who accessed a recording
- Which recording
- When accessed
- Deletions
- Playback requests
- Exports
- Report exports
- Customer ID
- Interaction Type
- Reason Code
- All attached metadata
- Archive and Purging logs

## Customer-facing Considerations

### Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

All of the following required:	At least one of the following required:	Optional	Exceptions
None	<b>Inbound</b>	None	None

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All of the following required:	At least one of the following required:	Optional	Exceptions
	<ul style="list-style-type: none"> <li>Genesys Call Routing (CE01)</li> </ul> <p><b>Workforce Engagement</b></p> <ul style="list-style-type: none"> <li>Genesys Voice and Screen Recording (WF05)</li> </ul>		

## General Assumptions

- The Record Interactions Base package supports 100% voice recording at the DN level only (no other recording methods).
- The following activities are out of scope:
  - Configuration of the Network at its final state: SBC, Media Gateways, VLANs, Firewalls, NAT, Trunking services, etc.
  - Configuration of External Storage system (for example SAN / NAS)
  - Provisioning of recordings from other vendors

## Document Version

- Version **1.0.0** last updated **January 24, 2022**