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# Genesys Multicloud CX Use Cases

Genesys Voice and Screen Recording (WF05) for Genesys Multicloud CX

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## Record voice and screen interactions

### What's the challenge?

You need to meet contact center compliance and quality needs, within budget and strategy. When complete voice and screen recordings are too expensive, complicated or don't fit your technology vision, that exposes you to unnecessary costs and risks.

### What's the solution?

Get end-to-end interaction recordings by capturing calls and screen activity. Genesys Voice and Screen Recording, already available on your Genesys Customer Experience platform, is simple and cost-effective to add, use and manage. Boost quality, reduce risk and help the contact center improve performance.

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## Use Case Overview

### Story and Business Context

Recording calls and agent screens are important for quality management purposes. Simultaneous playback of recorded calls and agent screens helps to identify issues with agent efficiency, desktop applications, and to identify the training needs of each agent. 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 provides organizations with reliable, high-quality recordings of both audio communications and related desktop screen activity.

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### 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
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 Penalties and Fines	Record 100 percent of calls with no lost calls,

### Summary

100 percent voice recording of customer conversations for compliance and regulatory requirements, with a subselection of screens being recorded.

## Use Case Definition

### Business Flow

#### Business Flow Description

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1. Customer calls one of the service lines of the company.
  2. The IVR announces 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 one of the existing Inbound Voice use cases (please see the documents of these use cases for more detail). The Inbound Voice routing strategy isn't within the scope of this use case.
    - Based on a percentage, which is set in Genesys by the administrator, it's determined if the screen needs to be recorded.
  4. Genesys Interaction Recording starts the voice recording.
    - If in Step 3b, it's determined that the screen needs to be recorded, Genesys starts screen recording when the agent answers the call.
  5. The agent can answer the call from a single, dedicated desk within the site (product limitation).
    - The agent may (if enabled) pause/resume the recording manually via the standard integration with Genesys Workspace when sensitive data needs to be entered. This pauses both voice and screen recording.
  6. Customer or agent disconnects the call.
  7. Genesys Interaction Recording stops the voice recording. Screen recording will be stopped after the ACW period has ended.
  8. Genesys uploads the screen recording files to the central system immediately, or at configured intervals.
  9. Genesys Interaction Recording combines audio and screen into single files.
  10. Supervisor searches for, retrieves, and listens to a recording made by one of their agents.
  11. Legal and Compliance officer checks the system for compliance and retrieves

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recordings for legal purposes.

12. Quality Manager searches for, retrieves, and listens to recordings to use in agent evaluations.
13. Genesys Interaction Recording archives and purges recordings according to the rules configured.

## Business and Distribution Logic

### Business Logic

### Parameters and Business Rules

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

#### **Metadata**

Metadata are tags which will be added to the recording and allow precisely targeted interaction search and selection for evaluation and analysis. What data is available depend on the distribution logic implemented in your environment and will be defined with you during the implementation project. Genesys Professional Service configures up to 10 metadata elements within the scope of this use case.

#### **Archiving and Purging Criteria**

Recordings can be archived and / or purged from the system after a specified time. After recordings have been purged, they're no longer available for supervisors or compliance officers via the Genesys user interface. The corresponding policies will be configured during the set up of this use case. Within the scope of this use case, we set up one set of rules which are valid for all recorded calls. Archived files are not managed by GIR. It is the customer's responsibility to set up the 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 the default set of roles that can be provided upon request.

#### **Pause / Resume recording**

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

#### **Screen Recording Percentage**

Screen recording will be done for a percentage of calls only. The system will be set up with a fixed

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percentage. Audio will be recorded in 100 percent of the cases.

### 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 his agent desktop.
- IT installs the Screen Recording Service on the agent's desktop.

### 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 logs for recording access. These audit logs contain the following information:

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

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## 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> <ul style="list-style-type: none"><li>Genesys Call Routing (CE01)</li></ul>	None	None

### General Assumptions

- The Record Voice and Screen Interactions Use Case supports 100 percent voice and 20 percent screen 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)

### Document Version

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