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# Genesys Engage On-Premises Use Cases

Genesys Voice Recording (EE07) for Genesys Engage on premises

6/2/2023

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## Record voice interactions

### 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.

### What's the solution?

Monitor quality to continuously improve performance and experiences. Be compliant. Genesys Voice 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.

### **Other offerings:**

PureConnect

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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 will enable the modern contact center to record the entire customer interaction, allowing the contact center to meet quality or regulatory compliance requirements.

### 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 integrated approach with Genesys Interaction Recording
Reduced Penalties and Fines	Records 100% of calls with no lost calls

### Summary

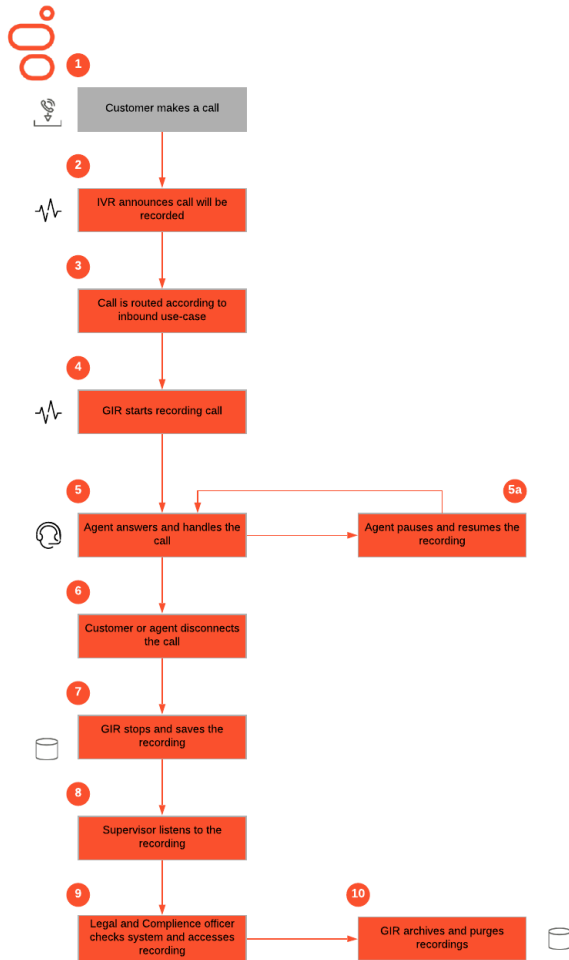
100% voice recording of customer conversations with an agent for compliance and regulatory requirements.

## Use Case Definition

### Business Flow

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 Description Step 1:** Customer makes a call to one of the service lines of the company.

Step 2: An announcement will be played to the customer that the call is going to be recorded.

Step 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.

Step 4: Genesys Interaction Recording starts the recording.

Step 5: Agent answers the call from any desk within the site.

Step 5a: The agent may (if enabled) pause/resume the recording manually via the standard integration with Genesys Workspace when sensitive data needs to be entered.

Step 6: Customer or Agent disconnects the call.

Step 7: Genesys Interaction Recording stops and stores the recording.

Step 8: Supervisor searches for, retrieves and listens to a recording made by one of their agents.

Step 9: Legal and Compliance officer checks the system for compliance and retrieves recordings for legal purposes.

Step 10: Genesys Interaction Recording archives and purges recordings according to the rules defined in the system.

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## Business and Distribution Logic

### Business Logic

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 are available depend 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 purged 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 will be configured during the set-up of this use case. Within the scope of this use case, we will set up one set of rules which will be valid for all recorded calls. Archived files are not managed by GIR. It is customer's responsibility to set up lifecycle policy of these archives and purge them after the lifecycle 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 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 will be enabled or disabled based on customer requirements.

### Distribution Logic

N/A

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## User Interface & Reporting

### Agent UI

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

### Reporting

#### Real-time Reporting

N/A

#### Historical Reporting

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

As this is a compliance use-case, it is not relevant how many calls per service/business line/customer segment are recorded. Assumption is that 100% of calls are recorded.

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><li>Genesys Personalized Routing (CE02)</li></ul>	None	None

### General Assumptions

- The Record Interactions – Base package supports 100% voice recording at the DN level only (no other recording methods).
- Apache is the only load balancer currently supported for GIR.
- GIR MCP's will not be shared with GVP
- The following activities are out of scope:
  - Configuration of Network at its final state: SBC, Media Gateways, VLANs, Firewalls, NAT, Trunking services, etc.
  - Configuration or Setup of additional Load Balancer software/hardware (DNS method or other)
  - Load balancing or cluster for API Servers
  - Configuration of External Storage system (e.g. SAN / NAS)
  - Set up of lifecycle policy for archived files
  - Installation of the standard out of the box WDE
  - Customization of other desktop application to enable Dynamic Recording
  - High Availability for the Apache load balancer
  - Provisioning of recordings from other vendors



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## Document Version

- Version **v 1.0.2** last updated **June 2, 2023**