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PureConnect Use Cases

Genesys Voice and Screen Recording (EE08) for PureConnect

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.

Other offerings:

Genesys Engage on-premises

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Use Case Overview

Story and Business Context

Recording calls and agent screens is 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 will enable 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.

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 Agent Competency	Use screen recordings with audio to identify quality issues and optimize the agent's use of back-end systems, and to identify compliance and risk factors. Monitor ACW via screen recordings to identify areas to train and optimize
Improved Customer Experience	Combine recording into training which results in reduced handle time, improved first contact resolution and improved employee attrition
Reduced Penalties and Fines	Record 100% of calls with no lost calls. Improve security by making parties aware they are being recorded

Summary

PureConnect can provide 100% voice recording of customer conversations with agents for compliance and regulatory requirements, with a sub-selection of agent screens being recorded.

Use Case Definition

Business Flow



Business Flow Description

1. Customer makes a call to one of the service lines of the company.
2. The IVR announces that the call will 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 (see these use cases for more details). The inbound voice routing strategy is not within the scope of this use case.
 - Based on initiation policies, which the administrator sets in Genesys, it is determined if the screen needs to be recorded.
4. Genesys Interaction Recorder starts the voice recording.
 - If step 3a determines that the screen needs to be recorded, Genesys Interaction Recorder starts screen recording as soon as 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 or resume the recording manually via the standard configuration with the Genesys Customer Interaction Center client when sensitive data is required.
6. The customer or agent disconnects the call.
7. Genesys Interaction Recorder stops the voice recording. Screen recording stops after the configured ACW period has ended.
8. Genesys uploads the screen recording files to the central system immediately or at configured intervals.
9. The supervisor searches for, retrieves, and

listens to a recording made by one of their agents.

10. The legal and compliance officer checks the system for compliance and retrieves recordings for legal purposes.
11. The quality manager searches for, retrieves, and listens to recordings to use in agent evaluations.
12. Genesys Interaction Recorder archives and purges recordings according to the configured rules.

Business and Distribution Logic

Business Logic

Details of the business flow described above depend on how the system is configured for your environment. This section describes the available options and how the initial set-up will be configured for your environment by Genesys Professional Services, within the scope of this use case.

Metadata

Metadata are attributes that can be added to the recording to allow precisely targeted interaction search and selection for evaluation and analysis. The available attributes depend on the distribution logic implemented in your environment and are defined with you during the implementation project.

Retention 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 retention policies are configured during the implementation of this use case. This use case includes implementation of 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 a lifecycle policy for these archives and to purge them after the lifecycle period.

User Access

Access to recordings is managed by GIR security policies, which includes 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 the client application can be enabled or disabled based on customer requirements.

Screen Recording Percentage

Screen recording occurs only for a percentage of calls. The system will be configured with a percentage or other criteria-based policies. Audio will be recorded in 100% of the interactions.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

- The agent will have the optional capability to pause or resume a recording when confidential information is passed via the call via his agent desktop.
- The Screen Capture Client is installed on the agent's desktop by IT.

Reporting

Real-time Reporting

The supervisor will have the ability to monitor active calls and which are being recorded.

Historical Reporting

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

- Who accessed a recording
- Which recording
- When
- Deletions
- Playback requests
- Exports
- Interaction Type
- Wrap-up Code
- All attached attributes, when archived
- Archive 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	Inbound <ul style="list-style-type: none">Genesys Call Routing (CE01)Genesys Personalized Routing (CE02)	None	None

General Assumptions

- The Record Interactions – Base package supports 100% voice recording.
- Media Servers are sized appropriately based on PureConnect sizing calculator.
- Remote Content Servers will be used as required by system load.
- The following activities are out of scope:
 - Configuration of Network at its final state: SBC, Media Gateways, VLANs, Firewalls, NAT, Trunking services, etc.
 - Configuration of External Storage system (e.g. SAN / NAS)
 - Set up of retention policy for archived files
 - Installation of the standard out of the box CIC Clients
 - Screen recording client is installed and configured on each agent machine.
 - Customization of other desktop application to enable Snippet Recording
 - Provisioning of recordings from other vendors

PureConnect Cloud

- Customer will follow standard PureConnect Cloud network topology
- Customer will open all necessary ports
- PureConnect Cloud based storage sized appropriately (RCM customers) as required by system load

Use Case Inter Dependencies

This use case can be used on top of

- Genesys Call Routing (CE01) for PureConnect OR
- Genesys Personalized Routing (CE02) for PureConnect (**on-premises only**)

Customer Responsibilities

N/A

Document Version

- Version **v 1.0.1** last updated **September 20, 2024**