Manager Users Training Manual

REPLAY SYSTEMS RECORDING SOLUTIONS

LEARNING AND DEVELOPMENT

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Intended Audience

This document is designed for all your personnel using the Capture 911 recording system, your PSAP's Supervisor and Management level and System Admin, who would need access to the retrieval of recordings, Instant recall, and setting up other features of the recording system.

This handbook will be their primary resource for detailed information about HigherGround Capture 911 Recording system. Your role as a Telecommunicator and Supervisor or managerial role includes the following:

- Retrieving calls
- Playback and Search
- Looping
- Creating Flags
- Flagging Calls
- Creating Tags
- Tagging Calls
- Creating Attachments
- Redaction

Much of this information is confidential and proprietary, and use of this document is restricted to your PSAP.

Understanding Capture 911

What is Capture 911?

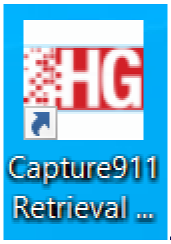
Capture911 is a multi-channel interaction/call recording application built for mission-critical public safety communications. Capture911 records data from multiple sources and enables rapid retrieval for playback of a single, synchronized incident. Capture records 100% of every call and radio transaction including the associated metadata – time, date, ANI, ALI, radio ID, alias, Talkgroup ID, text, video, GIS data, vehicle telemetry data, TTY/TTD, CAD screens and IDs, incident reports, and more. The system is compliant and secure to meet current and proposed mandates of recording, storing, and transmitting all interactions.

Capture911 provides digital incident reconstruction through virtual chronological recreation with an easy-to-use interface for effective investigative analysis. The application ensures regulatory compliance and improved performance with quality assurance tools (Quality 911). These tools enable performance assessment for effective training of call takers and dispatchers.

Log In and Sign Out

To access Capture 911 go to: Insert hyperlink for clients Browser Interface For the browser interface (BI) Log In and enter your credentials when prompted.

For users using the Client UI follow the link on your desktop



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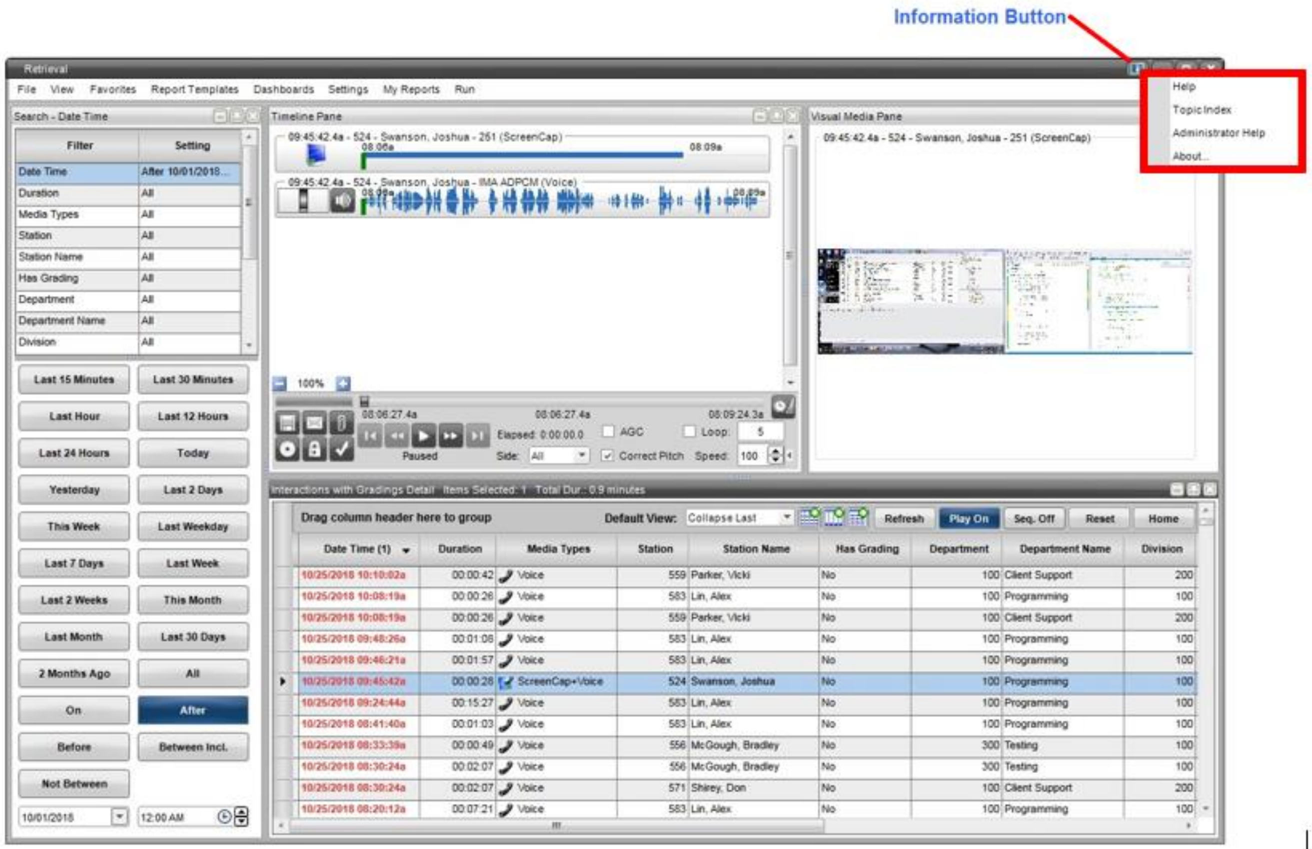
Once access is granted to the application, you will enter your individual user name and password; then, click the **Log In** button.

Change Password: Users have the ability to change their password from the **Log In** window, by simply selecting the **Change Password** button.

On Screen Help

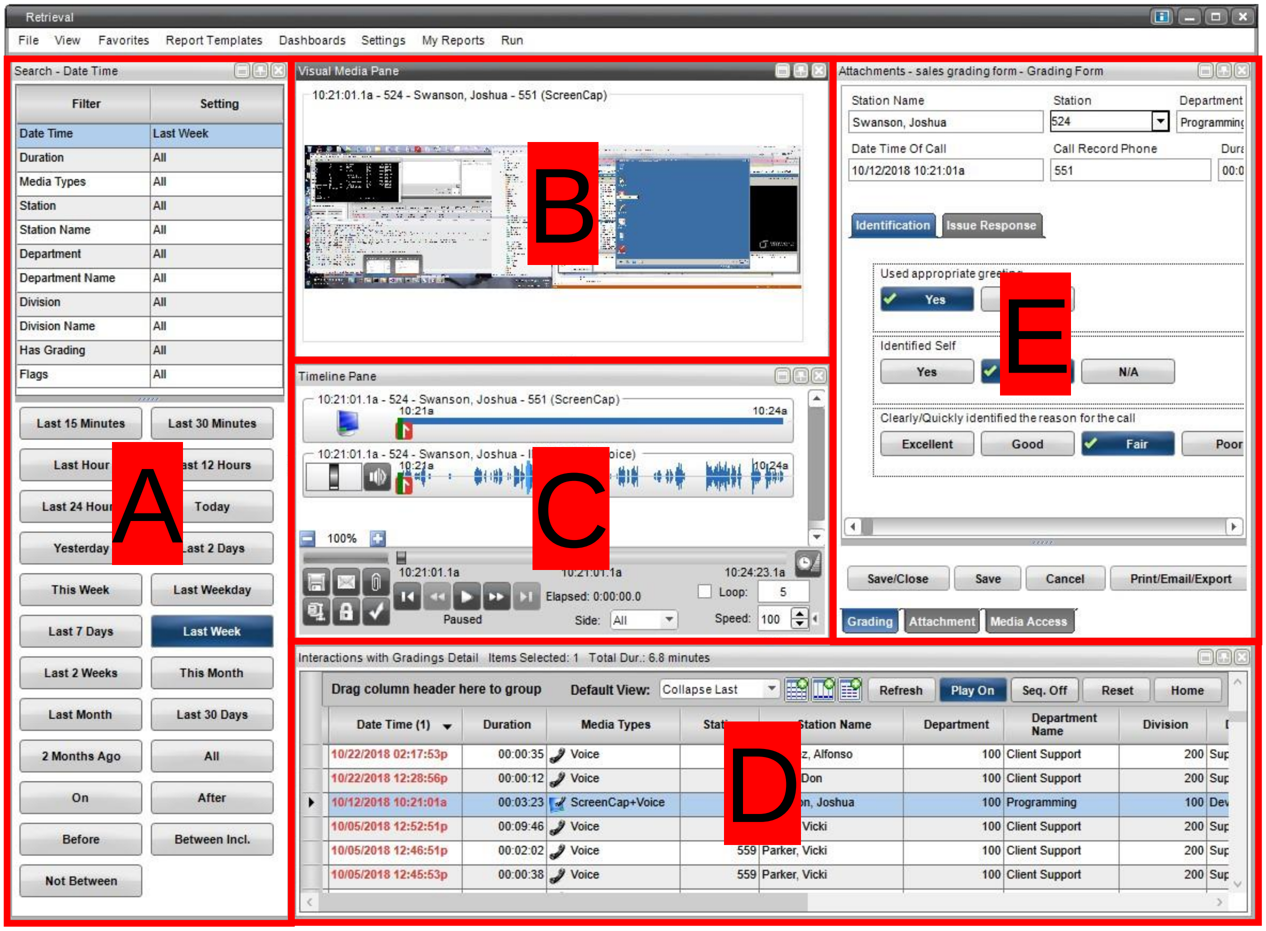
Users can access documentation on program features directly from the application by clicking on the information button located in the top right corner of the application. The **On-Screen**



Help file can be accessed by selecting either the **Help** or the **Topic Index** options. Selecting **Help** opens the Help file to the topic based on which screen the user has open or which docking pane is the currently selected pane.

Docking Panes

The user interface is made up of docking panes that can be customized to suit the user's preferences. Docking panes can be resized, moved, undocked, hidden, or closed and re-added later in order to fit the specific needs or role of any user.



RetrieveDocking

Docking Panes (continued)

There are **five** different docking panes in the window:

A **Search Pane:** Allows you to specify the filters used to locate and select the interactions for the Interactions grid.

B **Visual Media Pane:** Displays any media from the selected interactions that have a visual component. The Visual Media Pane will show emails, screenshots, photos, text messages, and other recorded data.

C **Timeline Pane**: Displays the audio waveform from the selected interactions in the pane. You can also control playback of the interaction, save and email interactions, open or assign an attachment to the interaction, grade or review a grading on an interaction (with the appropriate user permissions), and verify the interaction's digital signature by clicking on the appropriate buttons on the audio playback panel. By right-clicking on the audio waveform in the Timeline Pane, the user can tag a section of the interaction in the waveform.

D **Interactions Grid:** Lists interactions in table format, and provides data about each interaction including the date and time of the interaction, duration of the interaction, the specific media type, the dispatcher name, attached text data, and additional information. The columns displayed in the Interactions grid are fully configurable.

E **Attachments Pane:** Allows the user to grade an interaction, view a grading form or an attachment form, if either have been previously created, or retrieve the Media Access File Log.

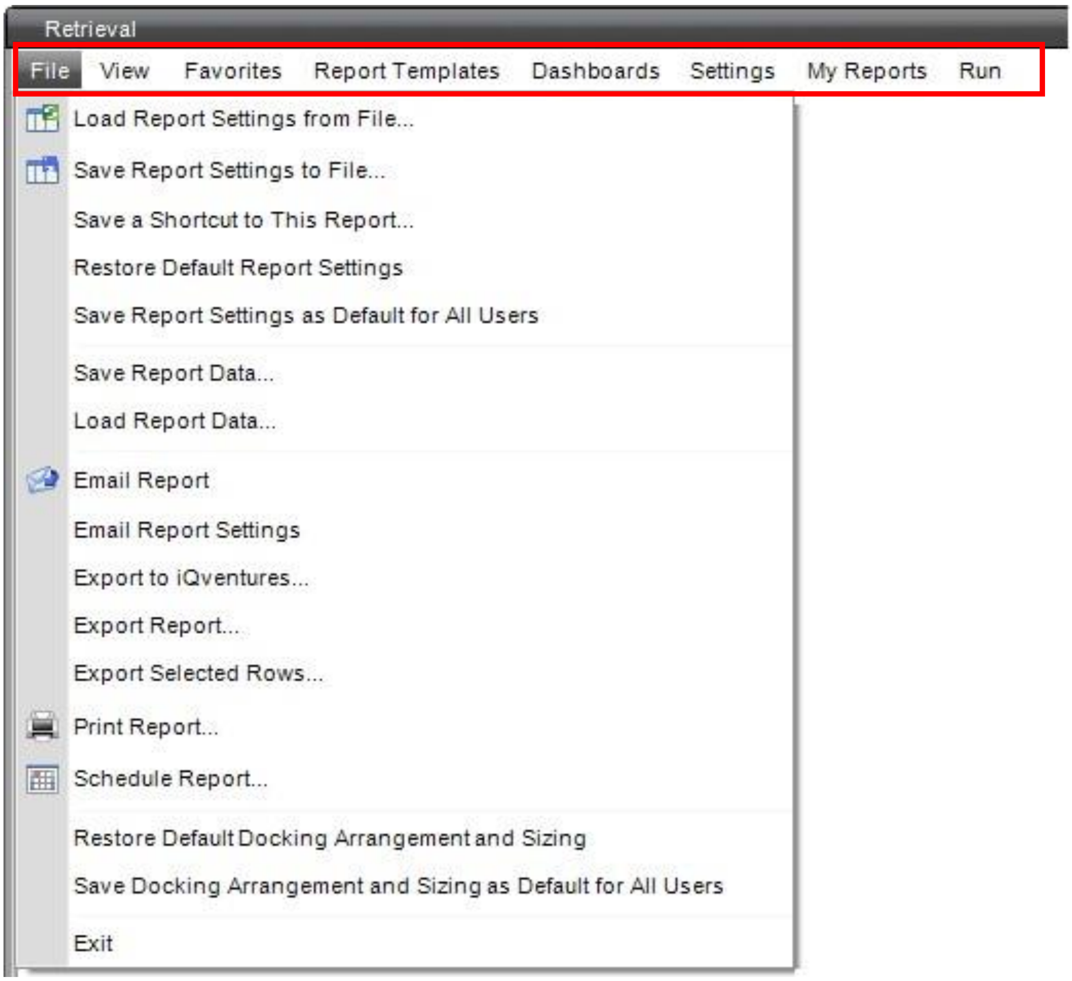
TOP TIPS

The HigherGround Capture 911 Solution is intuitive and easy to use. The system relies heavily on the **Right Click** of your mouse to provide its users with a drop-down sensitive menu of options for each Docking Pane.

(Test) While moving your cursor over all the different Docking Panes, press Rick Click on your mouse to see all the different options based on the Pane you are over.

Applications Menu Bar

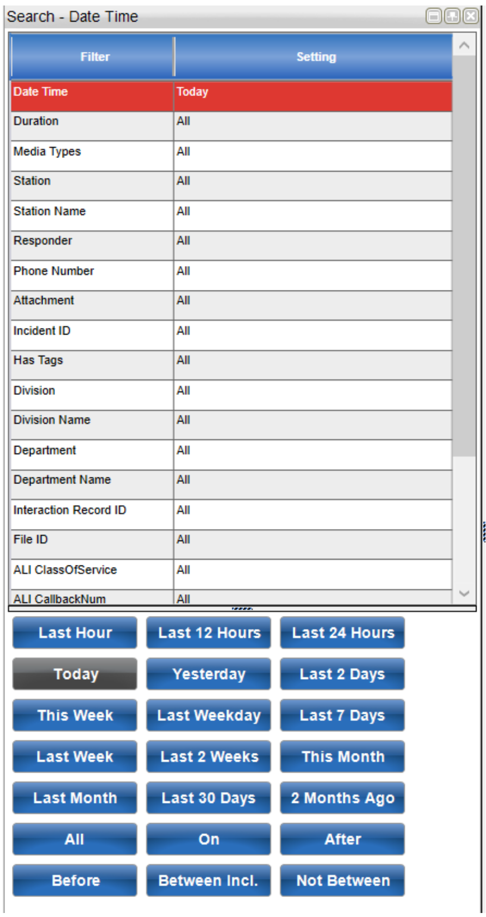
An application menu bar places often-used commands in an easy-to-use menu format, resulting in a less cluttered right-click menu. This includes a **Favorites** menu choice allowing users to **Add** a report or to open Windows Explorer in the Favorites folder to **Organize Favorites**. A **Report Templates** menu option contains basic reports on different database tables that can be used as a starter to form custom reports.



Searching and Retrieving Interactions

Search Pane

The **Search Pane** consists of the Filter List and the Filter Details panel. Using the Search Pane, you can create a filter set that displays the desired set of interactions in the Interactions grid. A filter set could return only a few interactions or all the interactions in the database.



The **Filter List** shows all the fields available in the database for which you can define a search.

Each item in the list shows the Filter or field name and the current setting for that filter. A filter setting of **All** indicates that there is no filter on that field, or that the search results will contain all values for that particular field.

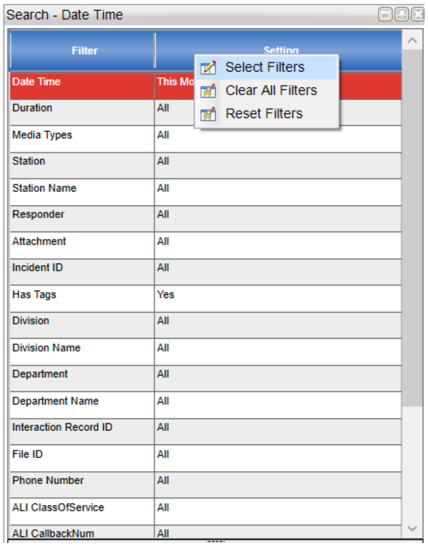
When all the Filter items have a setting of **All**, then no filters are in place and all the interactions in the database are returned in the Interactions grid.

Selecting a **Filter** item in the Filter List causes the Filter Details pane to change to the display of the filter selection panel for that filter. There are several different types of filters and they each have their own user interface panel for specifying the details of that filter.

Selecting Filters

There are a few ways that you can select which columns and filters you want visible in the **Interactions Grid** and **Search Pane** which columns you wish to hide, as well as the order in which the columns appear in the grid.

Right-click on any Column Header, then click **Setting or Filter** tab and from the pop-up menu that appears click on **Select Filter.**

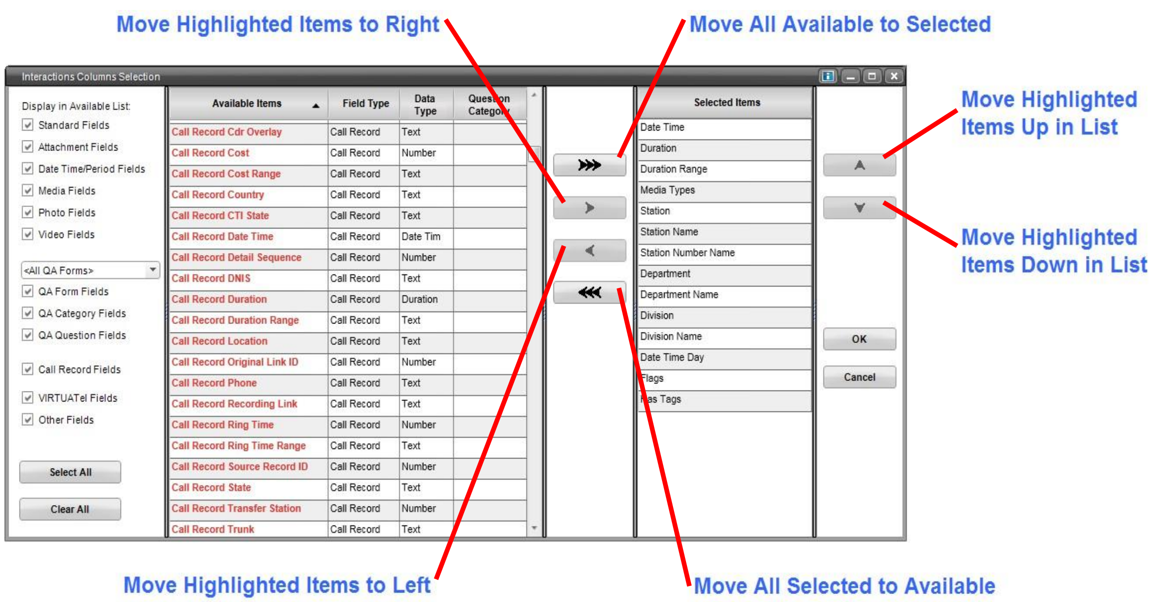


The **Available Items** list, or interactions columns, in the Interactions Columns Selection dialog

is the list of all the columns that are currently not being displayed in the Interactions grid. The last column in the Available Items list shows the category of QA Question Fields.

For all other field types, the corresponding Question Category cell will be blank.

The right side of the form shows the **Selected Items** list, the list of all the interaction columns that appear in the Interactions grid in the order in which they appear.



Interactions Columns Selection

There are two ways to move the column names from one list to the other: Either by selecting and dragging the column names from one list to the other or by selecting the desired names and using the buttons in the center of the form to move them. Multiple column names can be selected by holding down either the **<CTRL>** key or the **<SHIFT>** key while clicking items in the list.

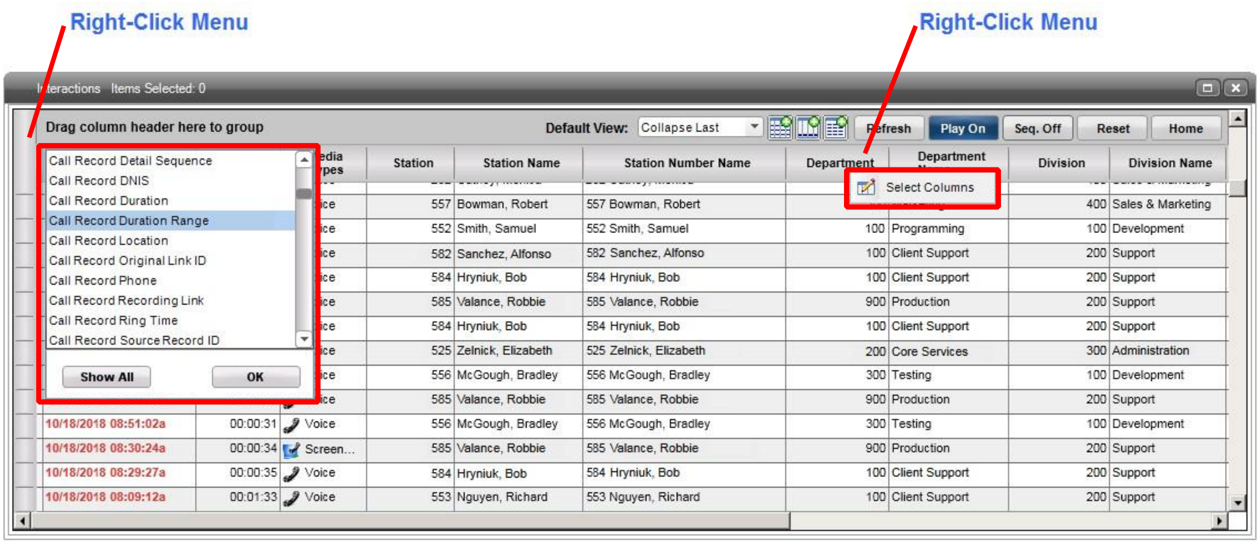
If the QA fields you want are not available, please check the Report Settings dialog.

Setting Columns Filters from Interactions Grid

The same procedures as listed above can be used from the **Interactions Grid**, Right-click on any Column Header, then click **Select filters** from the pop-up menu that appears. The **Interactions Columns Selection** window is displayed and from here, columns can be added, removed, and rearranged.

Within the Interactions grid, existing column headers can be drag-and dropped around to reorder them in the grid header row.

Right-click on the blank cell to the left of the column header row and select from the list of available columns. The new selection gets placed as the last column to the far right in the Interactions grid.



Column HeadersClick

QA Columns

Please note that the availability of the QA columns in the Columns Selection dialog depends on the settings on the QA tab of the Report Settings dialog. See the *Report Settings QA Tab* section later in this manual.

Setting a Filter

To set a filter, first select the appropriate field in the Filter List. You can scroll down through the list to see the entire list of filters. The Setting column displays the current filter selection for each filter in the list. Once the Filter is selected, the details pane below the Filter List will change to the type of data entry panel appropriate to that filter.

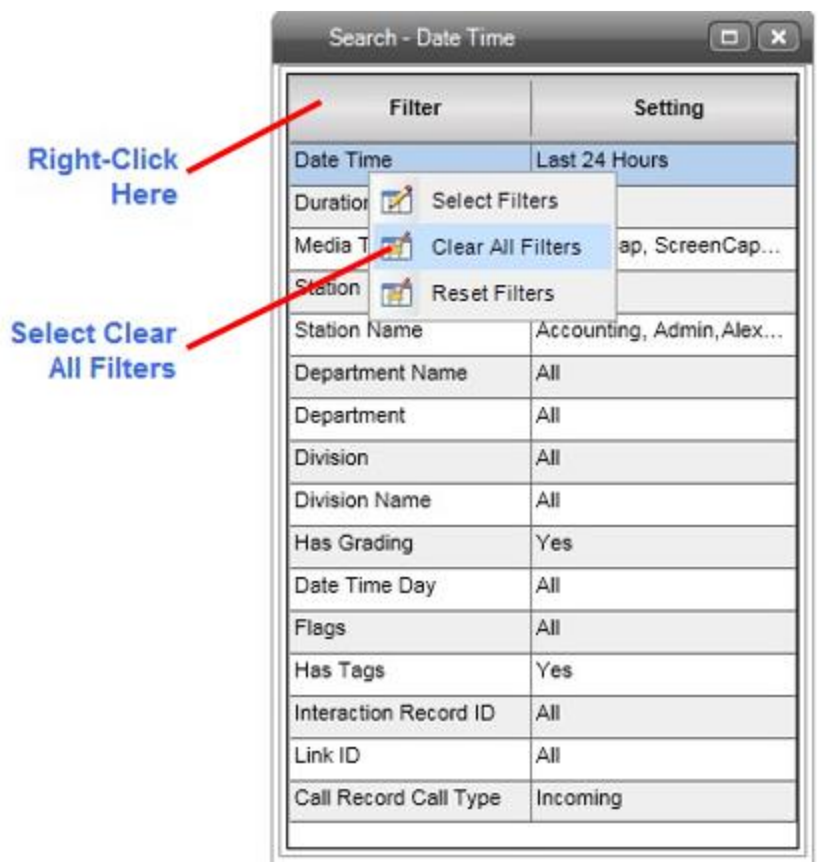
You can set several filters in any combination to achieve the desired search results. The combination of Filters is always an AND search. In other words, interaction records must satisfy all filters in order to be returned as the search results in the Interactions grid.

The Interactions grid does not update until you have finished setting all the filters and move the cursor off the Search Pane. As long as the cursor is over the Search Pane, you can continue setting different filters without triggering a search.

Note: that if checkbox is checked, then you must always click the Refresh button after changing filters.

Clear all Filters

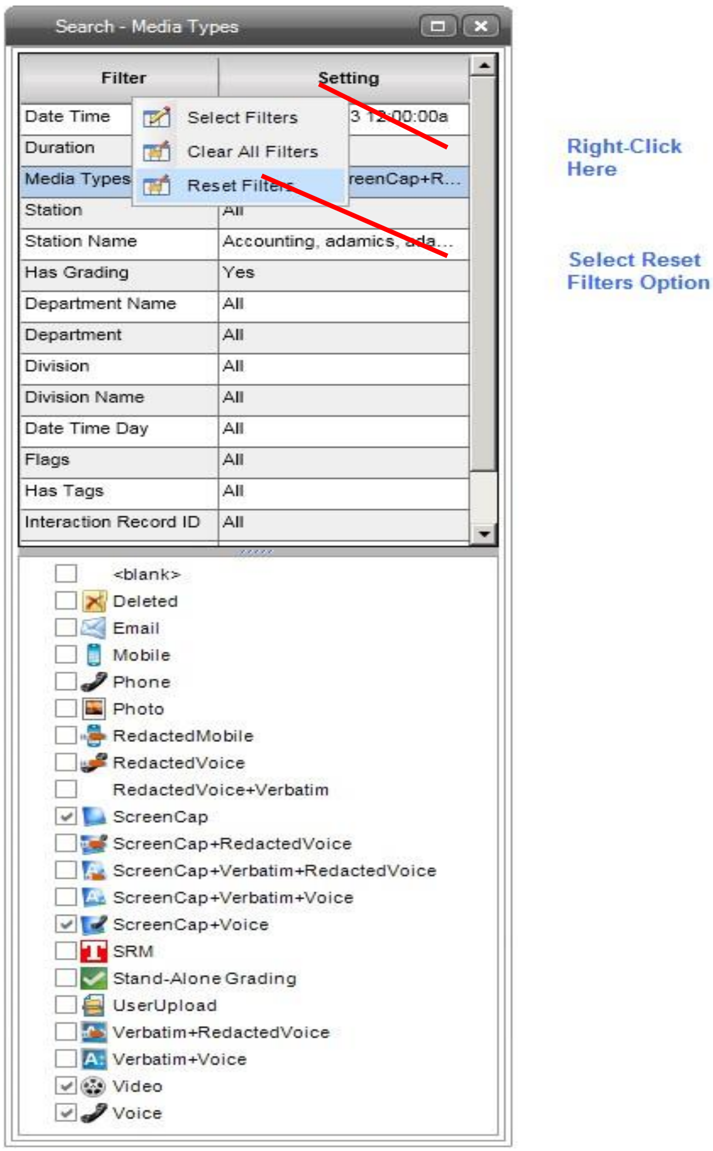
If you would like to remove all previously set filters, simply right-click on any of the column headers within the **Search Pane** and select the **Clear All Filters** option from the menu. Click on this option and the **Date Time** filter will be reset to **Today** and every other filter will be cleared and set to **All**.



Reset Filters to Default

After making changes to filters, settings can be reset to their original default configurations from the last report by right-clicking on any of the column headers in the **Search Pane** and selecting the **Reset Filters** option.

Users are now able to load Retrieval and make any number of changes to the filters, while having the ability to easily revert the filters back to the way they were loaded during the last report. This feature is particularly useful when the user loads a report and wants to modify the report slightly to look at something in particular. Instead of having to reload the report or remember how the filters were set before the changes were made, the user can simply **right click** on the Filters Pane and select this new option.

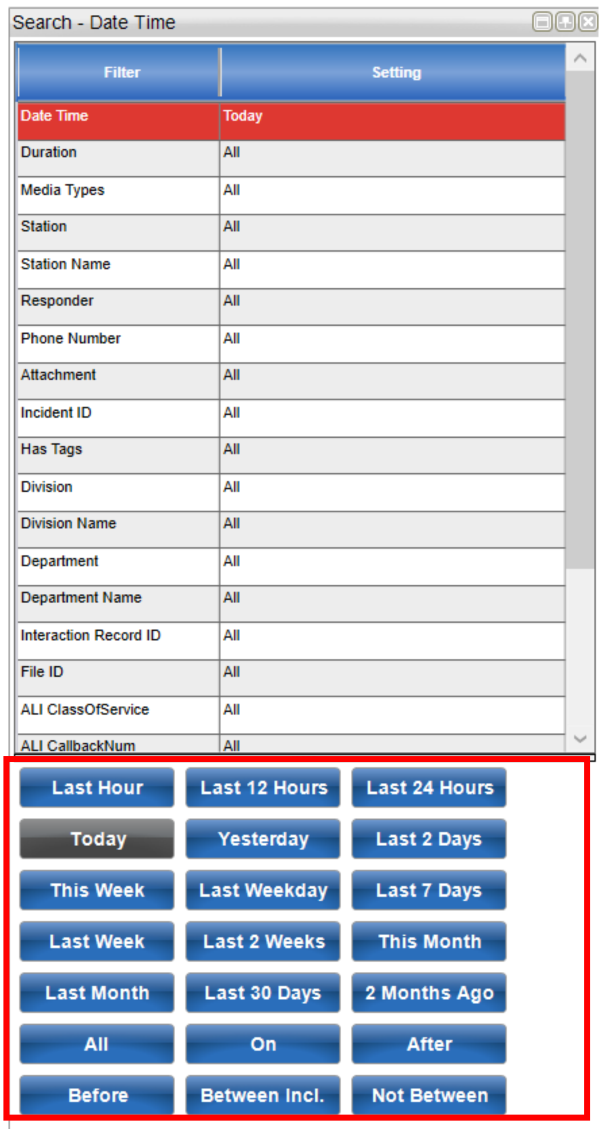


Date Filters

All Date Filters are defined using a set of buttons and Date/Time entry boxes. Selecting a Date Time filter from the Filter List brings up the panel of filter buttons. Most Date Filters are self-explanatory and require only clicking on that button. These include:

The Date Filter **All** returns all the interactions in the database. On new systems, this might be feasible. But, on older systems with a large number of interactions in the database, the **All** filter might return more records than the software can handle.

For more specific filters, use one of these buttons at the bottom of the panel:



On: Enter one specific date for which you wish to see interactions. You can also specify the time range for the interactions on that date.

After: Search for interactions that occurred after a certain date and time.

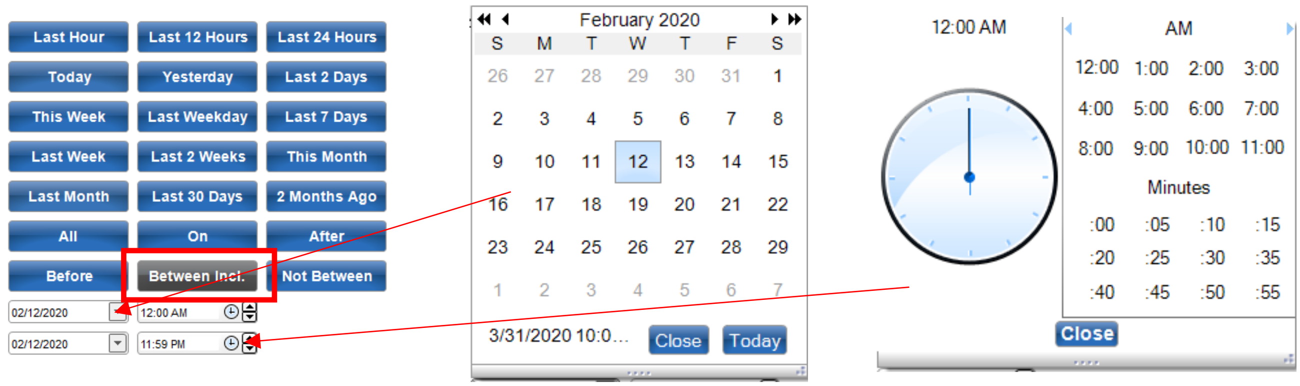
Before: Search for interactions that occurred before a certain date and time.

Between Incl: Search for interactions within a certain date range.

Not Between: Search for interactions outside of a certain date range.

There are several other shortcut buttons to speed up your search, yet the most effective ones are the ones listed above.

When using the shortcuts, the system will provide you with Pop-up calendars to select your date range and time. You can also click on the box and type your date and time.



String Filters

String filters allow you to type in one or more strings to match in that field to search for specific values or to exclude specific values from the search. Click on the **Only** or **Excluding** buttons as desired. Follow these guidelines when entering search strings:

Strings are case-sensitive.

The search results must match the entire string unless a wildcard or Substring Search is used. In other words, don't type a partial string and expect to match longer strings.

You can type in more than one string by placing each on a separate line in the text box.

Type in **<blank>** to search for or exclude those interactions in which the field has no value or is blank.

Click on the Substring Search box to search anywhere within the result strings for a match.

Use wildcard characters to do partial matches on the result string.

The wildcard character asterisk **(*)** is used to indicate any number of characters. The wildcard character question mark **(?)** is used to indicate a single character wildcard. Here are some examples of using wildcards:

Search String	Matches	Does Not Match
6142 J*	6142 JORDAN 6142 JEFFRIES 6142 JOHNS HOPKINS	6143 JORDAN 6142 N JORDAN 6142 MAIN ST
212?? MAIN * (only matches 5 digit addresses)	21247 MAIN ST 21288 MAIN AVE 21200 MAIN BLVD	2121 MAIN ST 212323 MAIN ST 21247 MAINE ST
???? MAIN ??	1247 MAIN ST 2209 MAIN CT 2125 MAIN DR	21265 MAIN ST 2288 MAIN AVE 1200 MAIN BLVD

Default Filters

Filters that have a **Substring Search** checkbox when the options **Only** or **Excluding** are chosen can be set with a system-wide default for the state of that checkbox, either checked by default or unchecked. This box no longer needs to be manually checked every time a new report is created if the user desires.

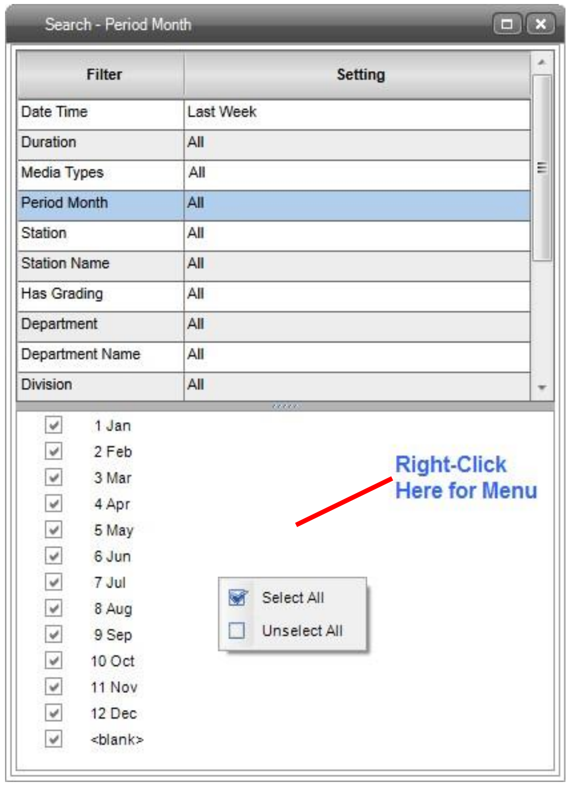
Checkbox Filters

Checkbox Filters, or pick lists, are used where there is a finite list of values in the database and you are presented with that list as checkboxes that you can use to select or deselect the values you wish to include or exclude from the search results. By default, any non-Interactions pick lists are disabled and Interactions pick lists will remain on.

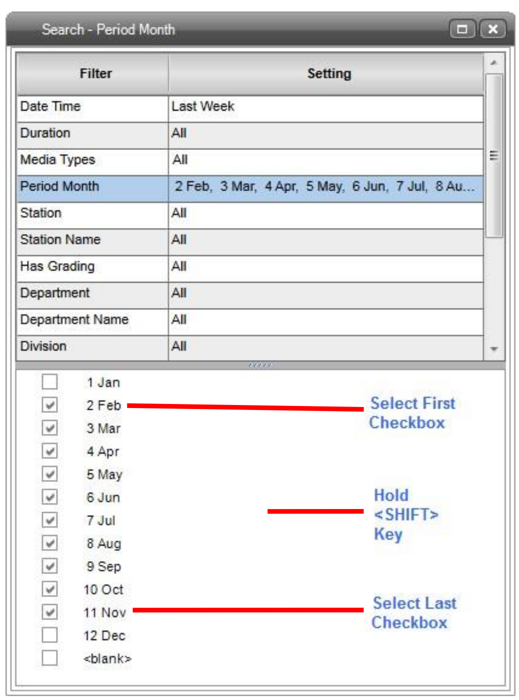
The checkbox listed as **<blank>** is used to include or exclude those interactions where this column has no value or is blank. Uncheck this box to exclude any interactions that have no value in that field in the data grid.

When the selected filter is a checkbox, you can right-click in the Filter Details panel and from the menu choose to **Select All** checkboxes or **Unselect All** checkboxes. Once that is complete, you can then manually select or deselect any individual checkboxes as appropriate.

Alternatively, you can double-click on a checkbox in the filter tree to select that specific item only and deselect the rest of the entire list at the same time.



Multiple selection for a range of checkboxes can easily be accomplished by clicking on the checkbox of the first item, then holding the **<SHIFT>** key down, and clicking on the last checkbox desired.



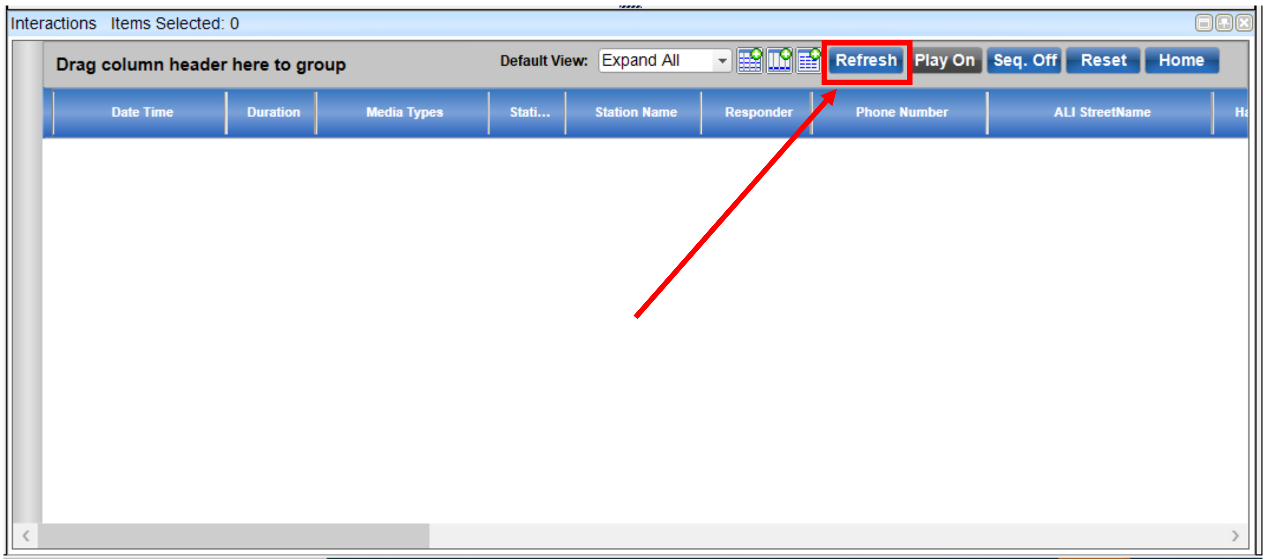
Finding Interactions

Interactions Grid

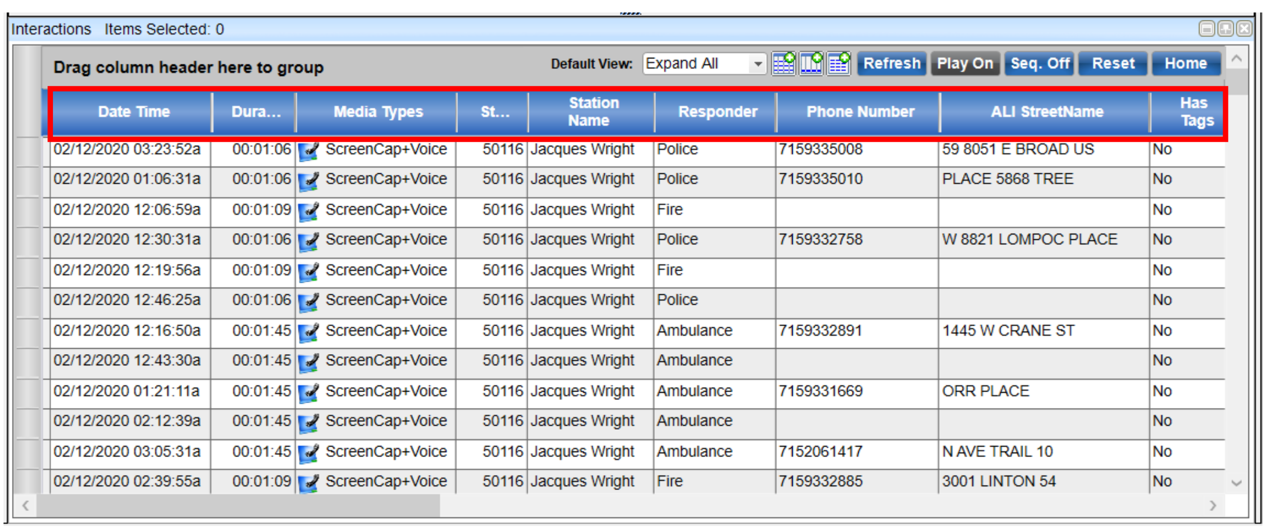
When Retrieval is launched, the Interactions grid shows whatever interactions pass the current filters in the **Search Pane**. These filters are set as they were when you last saved them. You can search for other interactions by date range or any other parameters by using the **Search Pane** and **Filter List**.

NOTE: If the Interactions grid is empty when the program is launched, check the Filter List, clear any unwanted filters, and make sure the Date Time filter is appropriate.

Once you have made your search selection by applying the filters on the **Search Pane**, move the cursor to the **Interactions Grid** and select **Refresh**

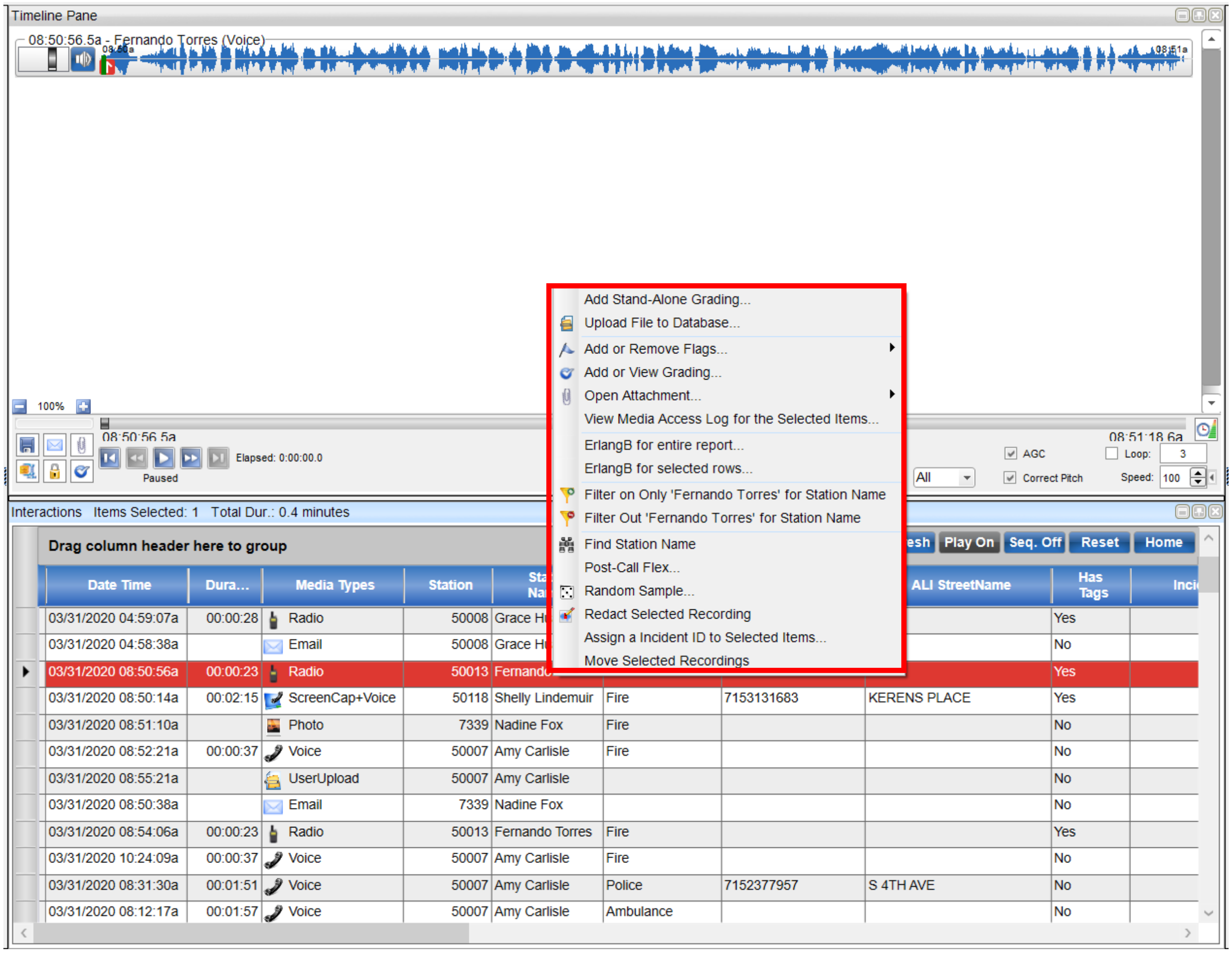


All the recordings based on your selections on the **Search Pane** are displayed on the **Interactions Grid**. All of these records can be then sort further by clicking on the top **Tabs.**



Date Time	Dura...	Media Types	St...	Station Name	Responder	Phone Number	ALI StreetName	Has Tags
02/12/2020 03:23:52a	00:01:06	ScreenCap+Voice	50116	Jacques Wright	Police	7159335008	59 8051 E BROAD US	No
02/12/2020 01:06:31a	00:01:06	ScreenCap+Voice	50116	Jacques Wright	Police	7159335010	PLACE 5868 TREE	No
02/12/2020 12:06:59a	00:01:09	ScreenCap+Voice	50116	Jacques Wright	Fire			No
02/12/2020 12:30:31a	00:01:06	ScreenCap+Voice	50116	Jacques Wright	Police	7159332758	W 8821 LOMPOC PLACE	No
02/12/2020 12:19:56a	00:01:09	ScreenCap+Voice	50116	Jacques Wright	Fire			No
02/12/2020 12:46:25a	00:01:06	ScreenCap+Voice	50116	Jacques Wright	Police			No
02/12/2020 12:16:50a	00:01:45	ScreenCap+Voice	50116	Jacques Wright	Ambulance	7159332891	1445 W CRANE ST	No
02/12/2020 12:43:30a	00:01:45	ScreenCap+Voice	50116	Jacques Wright	Ambulance			No
02/12/2020 01:21:11a	00:01:45	ScreenCap+Voice	50116	Jacques Wright	Ambulance	7159331669	ORR PLACE	No
02/12/2020 02:12:39a	00:01:45	ScreenCap+Voice	50116	Jacques Wright	Ambulance			No
02/12/2020 03:05:31a	00:01:45	ScreenCap+Voice	50116	Jacques Wright	Ambulance	7152061417	N AVE TRAIL 10	No
02/12/2020 02:39:55a	00:01:09	ScreenCap+Voice	50116	Jacques Wright	Fire	7159332885	3001 LINTON 54	No

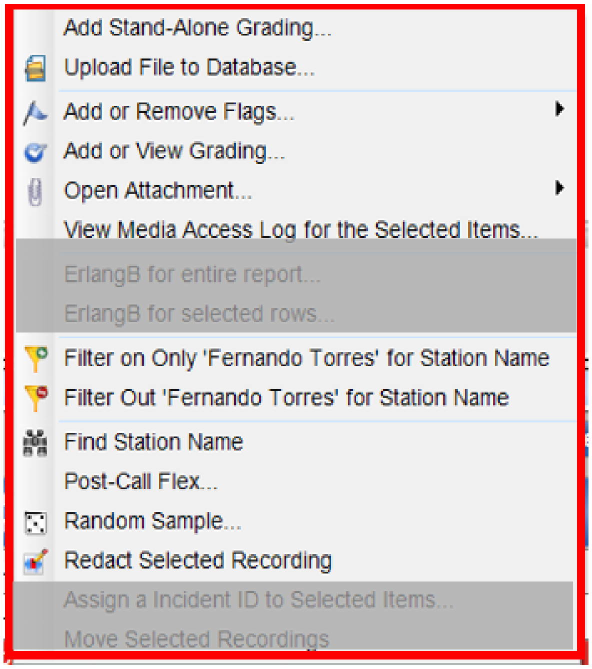
From the Integrations Grid, users can find additional options by pressing down the **right click** on their mouse, this will open a different drop-down sensitive menu that will provide the user with options for the specific call highlighted.



Interactions Dropdown

When the cursor is located on the **Interactions Pane**, users can **Right Click** in order to see the dropdown menu of options for the selected call. This dropdown menu will have a combination of options based on your user permission level.

NOTE: Int is important to understand that some of the options that will populate depend on the location of the cursor, for example: I f the cursor is located over the **Station Name** Tab, then the menu will give you an option to filter UP or Down by Station Name.



Add Stand-Alone Grading: You can add a Quality Assurance evaluation to a different agent from this selection.

Upload File to Database: From this selection you can add any type of file such as; Reports, images, videos to a recording.

Add or Remove Flags: from this dropdown menu you can add up to 16 different customizable flags, that later can be search.

Add or View Grading: Users can view their Quality Assurance grading or start a new grading to the selected recording.

Open Attachment: User have the ability to add customizable attachment notes, to enter pertinent information in relation to the call.

View Media Access Log: Supervisors can access a full detailed report that shows who has done what on the recording selected.

Filter on or Out: User can **Filter On** the specific selected filter tab or **Filter Out**

Find Tab (Ex. Station Name): You can retrieve calls for only the specified tab were the cursor is placed over, in this example the mouse was over the Station Name.

Post Call Flex: The post call flex option is used to change the station name, agent name or channel name for the specific call selected.

Random Sample: Supervisors can use this option to retrieve random calls for the specific agent, position or station.

Redact: Users can redact the selected call from here. (see Redaction on page.)

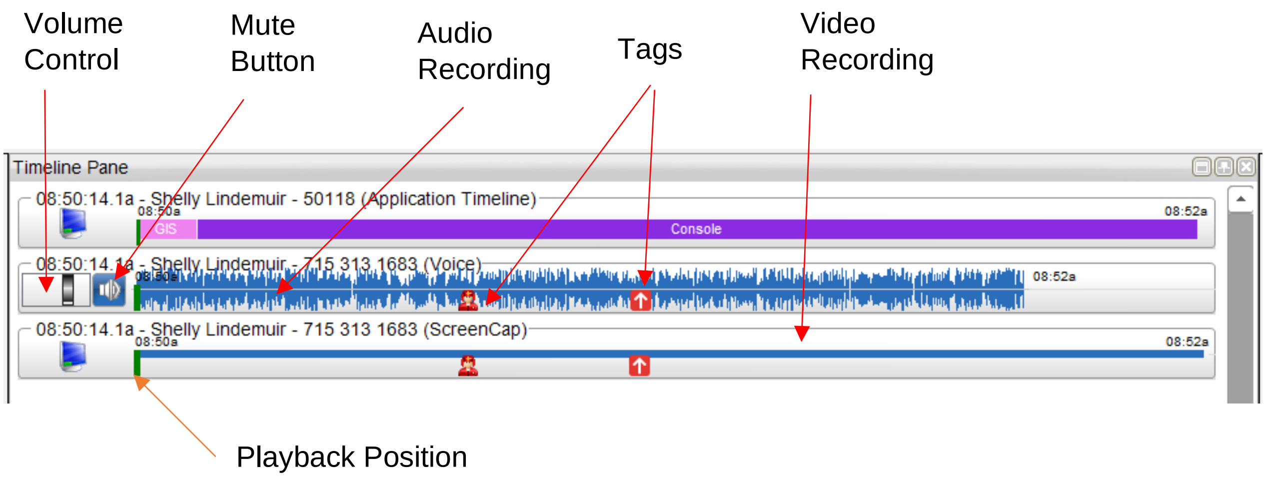
Playing Back/Viewing Interactions

Selecting an Interaction

To listen to a Voice recording, or view a visual media file, select the desired interaction in the Interactions grid by clicking on it with the mouse to highlight it. When an interaction is selected in the grid, the details of that interaction appear in either the **Visual Media** pane or the **Timeline** pane, depending on the media associated with the selected interaction.

Timeline Pane

The Timeline pane is used to display and control playback of time-oriented media, such as Voice, Radio, or other audio files, Screen Captures, and Video files. Audio files are represented in the Timeline pane as a waveform panel that includes a visual representation of the volume of the recording over time. Video and Screen Capture files are represented in the Timeline pane as a waveform panel that just has a straight line indicating the time period of the media file in relation to other selected media. For example, the Timeline pane below indicates that the Screen Capture continued on after the phone call was over, capturing post-call wrap-up in the users screen.



Each audio recording waveform contains its own **Volume Control** and **Mute** button, so these can be adjusted for each audio recording individually.

Volume: Use the **Volume** slider to control the sound level of the playback. The volume can be adjusted dragging the slider from left to right. Moving the slider to the right increases the volume, and moving the slider to the left decreases the volume.

Mute: The user can also mute or un-mute a call by clicking the **Mute** icon next to the Volume slider.

Audio Recording: The Audio recording is represented by a Wave file format and is displayed for the duration of the call

Tags: Tags are Visual representation on screen that show an specific note for the incident. Tags can be created by selecting with your **Left Click** on your mouse the point where the specific tag needs to be placed, then **Right Click**. A drop-Down menu will pop, then select **Tags.** All tags have a open field where the users can add any annotations they would like, spoken annotations are available as well.

Video Recording: The Video recording is represented by a bar, this bar normally continues after the call ends giving supervisors a post call recording to visualize additional data entry after the call.

Playback Position: During playback of a call, the **Playback Position** slider indicates the current position of playback relative to the overall length of the call. The slider can be moved forward, or backward, to quickly change the playback position. An audio waveform representation of the call is also displayed.

Playback Controls

If configured, audio and video files can begin playing as soon as they are selected.

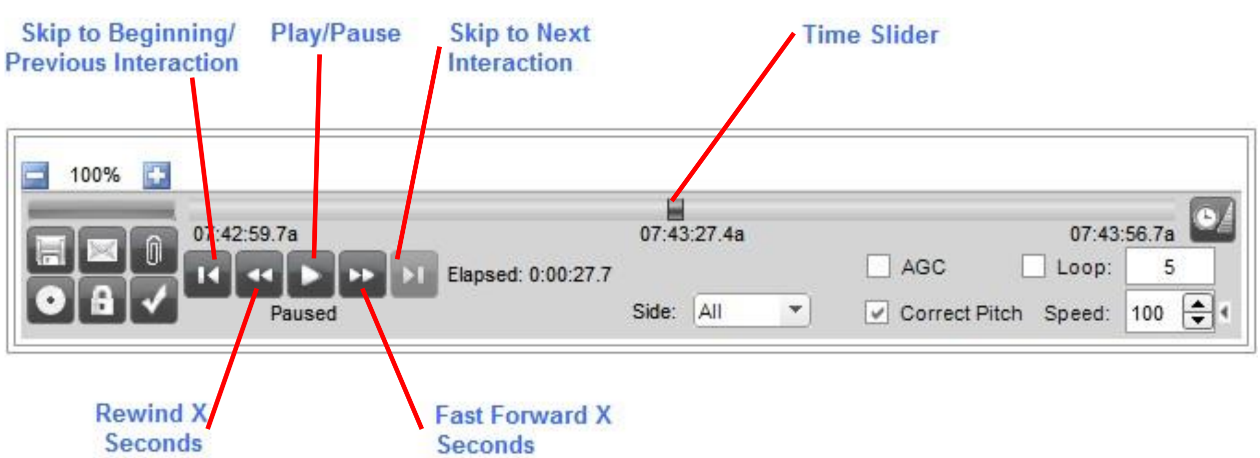
Click on the **Play/Pause** button to temporarily pause the playback. Select a different interaction to begin playback of that media. While the interaction is paused or playing, you can use the **Time Slider** bar to scroll back and forth through the recording. You can also use the green **Playback Position** bar on any waveform to scroll back and forth through the media file.

Skip to Beginning of this Interaction/Skip to Previous Interaction: Click this button to stop the current media playback and either go to the beginning if only one interaction has been selected or jump to the previous interaction in the list if more than one interaction has been selected.

Rewind X Seconds: Click this button to rewind X seconds during the current media playback.

Fast Forward X Seconds: Click this button to fast forward X seconds during the current media playback.

Skip to Next Interaction: Click this button to stop the current media playback and jump to the following interaction in the list.



Recording and Playback

Additional Playback Controls

During playback, there are additional controls available to the user, also located in the Playback Control section of the window, which include:

Progress Bar: If a new recording is selected that takes more than a few seconds to load up, the progress bar lights up indicating that the program is working on loading the media file.

Time Index: The time index indicates the elapsed time from the beginning of the recording. The starting time, current playback position and ending time are also shown in the recording display as well as below the **Position** slider.

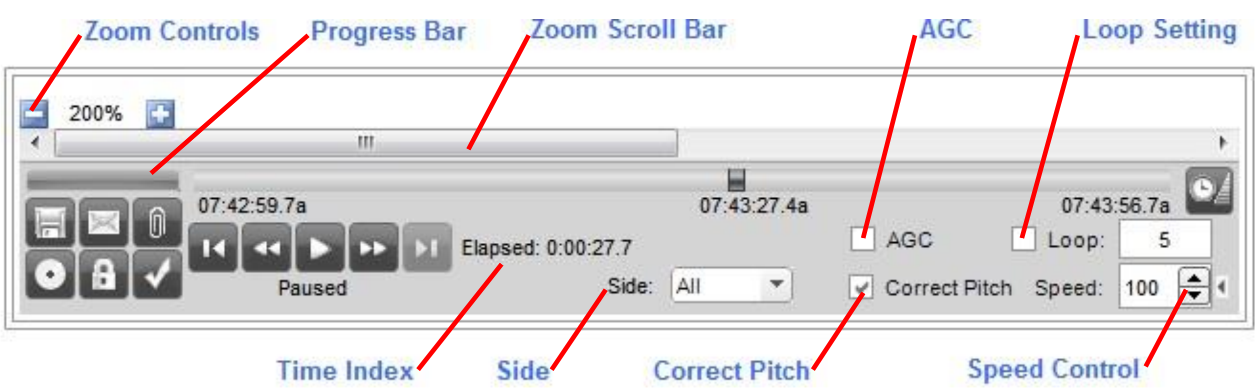
AGC: The **Automatic Gain Control** option compresses the dynamic range of the call by lowering the volume of the loudest parts of the call and raising the volume of the quietest parts. This can be helpful if the two parties on the recording have very different volume levels. A potential downside to enabling this is that you may not get all the emotion in the conversation. To enable the Automatic Gain Control function, click the **AGC** checkbox.

Side: The **Playable Side** feature allows the user to control which audio channel is heard during playback in Retrieval for 2-channel recordings. Options include **All**, **Left**, and **Right**.

The Playable Side channel captions displayed in Retrieval can be customized in the Policies.CFG file:

PlayableSideLabelForLeft=Voice

PlayableSideLabelForRight=IRIG-B



Additional Playback Controls (continued)

Loop: Enabling **Loop** during playback causes the recording to play for the specified number of seconds, then loop back and replay the same portion of the call over and over until the Loop box is unchecked or the playback stopped. This can be helpful if the user is taking notes from a specific point of the call.

Speed: The speed of playback can be controlled with the **Speed** control. The speed can be adjusted by either clicking on the up and down arrows or inputting a specific number. A playback speed of 100% indicates that the recording is played back at normal speed. Higher values indicate faster playback, and lower values slower playback.

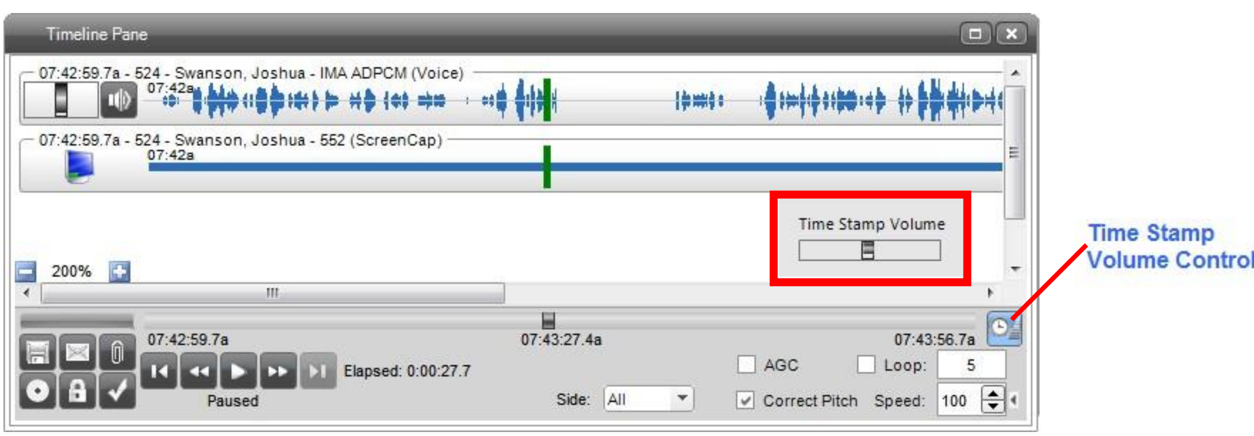
Controls in the right-hand side of the playback controls pane are only visible when the Timeline Pane is wide enough. If these controls do not appear, drag the edge of the pane to the right to increase the amount of space. This applies to the AGC, Correct Pitch, Loop, and Speed controls.

Zooming and Scrolling: The Timeline Pane has the ability to zoom in and scroll the waveform using the controls located in the bottom left-hand corner of the Timeline Pane. This allows users to zoom in on the waveform to better place redaction markers and tags. This is especially helpful on long recordings, where the user may have trouble locating the exact point they wish to place a redaction marker or tag.

When the recording is zoomed in on, slider scroll bars will appear that allow the user to scroll from side-to-side in the waveform

Auto-Pitch Correction: Note that when the **Speed** of the playback is changed, an **Auto-Pitch Correction** filter is used to adjust the pitch of the voices to remain in the same range as normal playback speed. This prevents the voices from becoming very high-pitched during faster playback and very low-pitched during slow playback. The Auto-Pitch Correction is automatic and cannot be turned off.

Time Stamp Volume Control: Volume control is added to the player control panel to adjust the volume of the spoken Time Stamps relative to the audio. Now, each audio track has its own volume control and the Time Stamps have their own separate volume control. The volume control works for playback of audio and when saving or sending recordings.



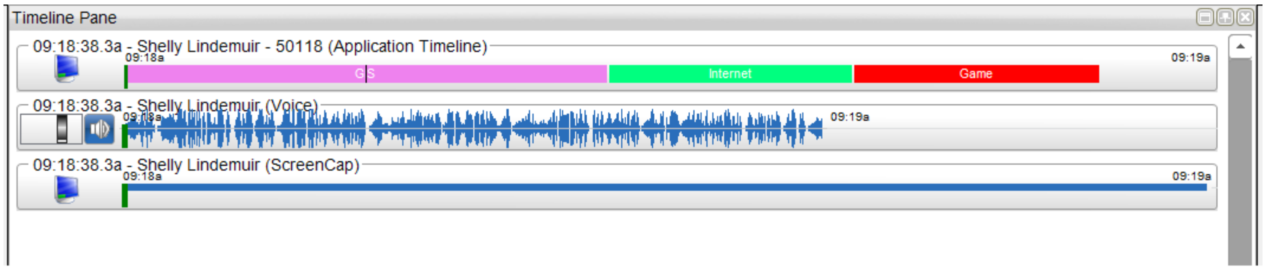
Time Stamp Volume

Agent Application Usage Timeline

When an interaction is selected, the Timeline Pane will display a Gantt-type visualization of what applications an agent is using on their desktop during calls.

Supervisors will be able to review an agents activity more closely and view how they are spending their time during phone calls. Categories can be customized with different titles and colors to easily identify specific activities. The Application Usage Categories and Colors are utilized only on systems which are doing Window Title Logging so Window Title Logging must be enabled on the system in order for the Agent Application Usage details to be displayed.

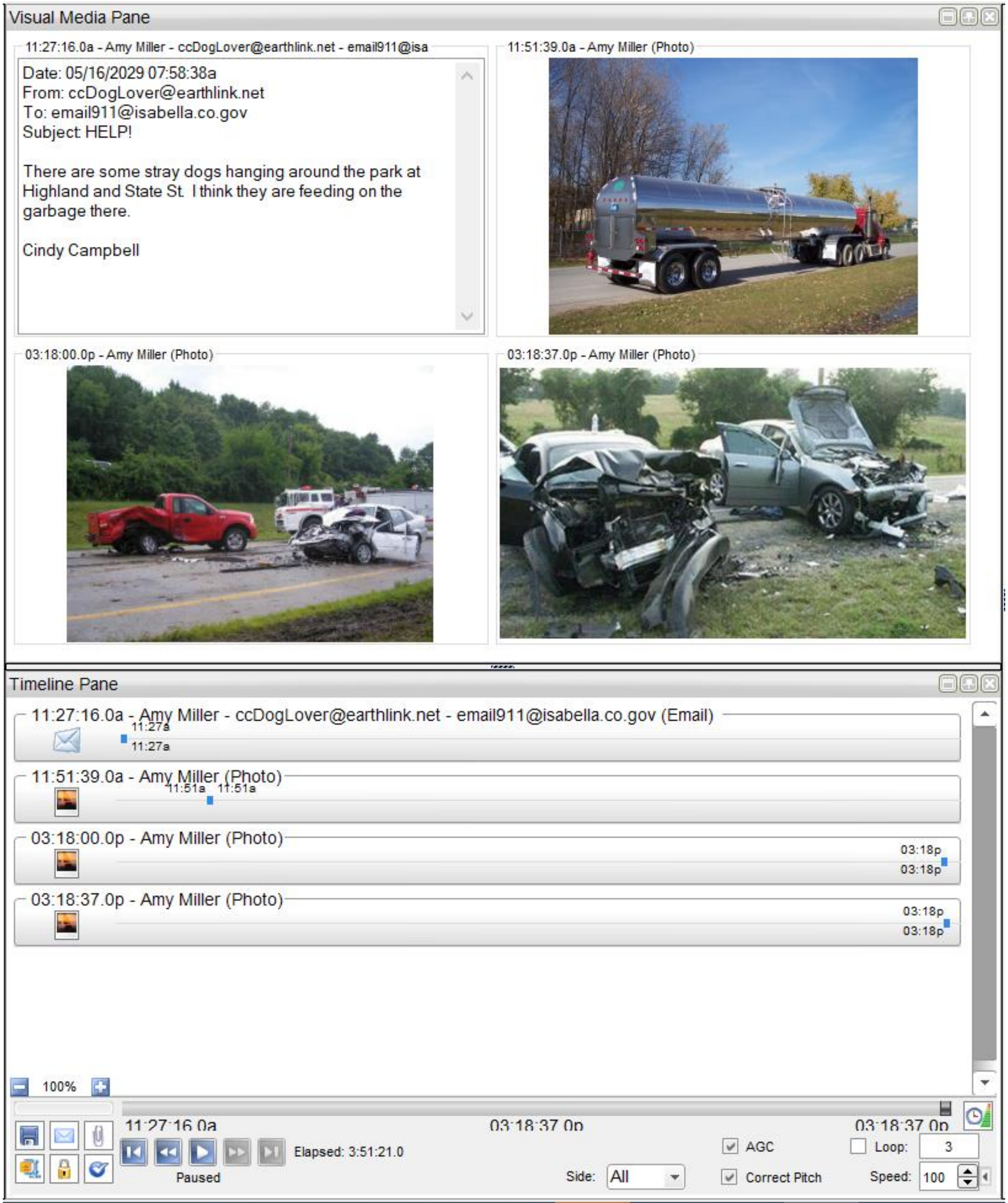
NOTE: Application Timeline information will only appear for users who are running an Auto-Record task at the time of the call.



Visual Media Pane

Visual media and text-based media are displayed in the **Visual Media Pane**. This includes video files, screen captures, photos, emails, text messages, and other types of visual media. The Visual Media Pane displays each selected visual Interaction in a separate panel. These panels can be arranged in the Visual Media Pane in a variety of different layouts according to your preference.

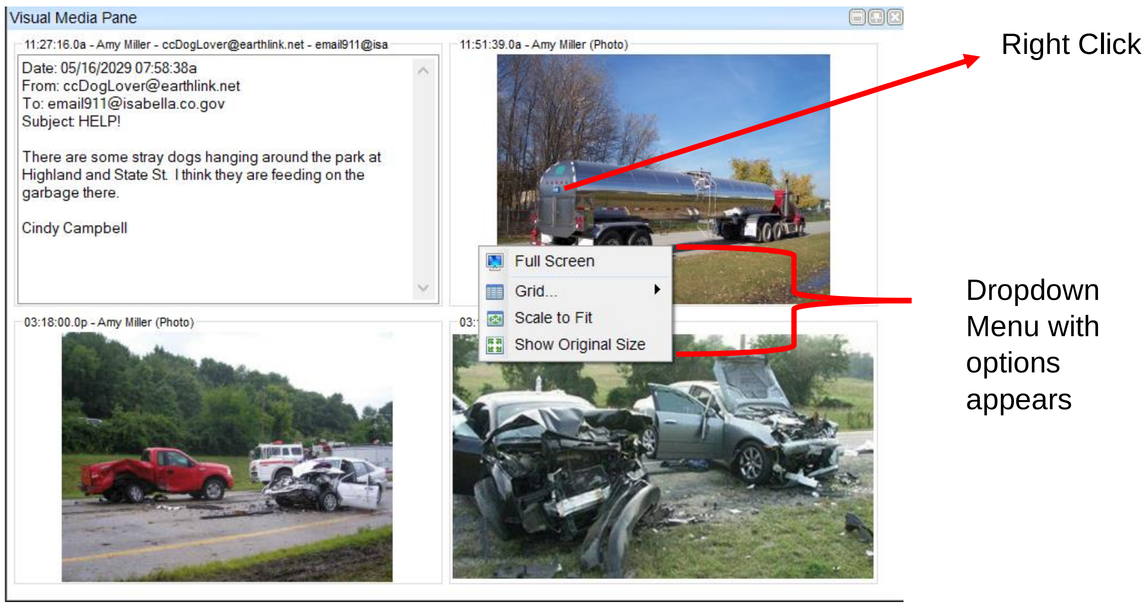
The screen shot below shows four photos selected in the Interactions grid. The Timeline shows the relative times that each was received into the system.


Visual Media Pane
11:27:16.0a - Amy Miller - ccDogLover@earthlink.net - email911@isa
Date: 05/16/2029 07:58:38a
From: ccDogLover@earthlink.net
To: email911@isabella.co.gov
Subject: HELP!
There are some stray dogs hanging around the park at Highland and State St. I think they are feeding on the garbage there.
Cindy Campbell
11:51:39.0a - Amy Miller (Photo)
03:18:00.0p - Amy Miller (Photo)
03:18:37.0p - Amy Miller (Photo)
Timeline Pane
11:27:16.0a - Amy Miller - ccDogLover@earthlink.net - email911@isabella.co.gov (Email)
11:51:39.0a - Amy Miller (Photo)
03:18:00.0p - Amy Miller (Photo)
03:18:37.0p - Amy Miller (Photo)
100%
11:27:16.0a
03:18:37.0p
03:18:37.0p
Elapsed: 3:51:21.0
Paused
AGC
Loop: 3
Side: All
Correct Pitch
Speed: 100

Visual Media Pane Settings

For the highest viewing quality in the Visual Media Pane, set the visual media to **Original Size**. When the media is too large to fit in the docking pane, drag the mouse to pan the media around and see the entire area.

Right-click anywhere in the Visual Media Pane to see the choices for arranging the visual components. These include:



Full Screen: The visual media will become undocked and viewed at full screen.

Grid: The visual media will be arranged in a grid of the size you select, such as 1 x 1, 2 x 2, etc. There is also an **Automatic** choice, for which the visual media will automatically be arranged in an X by X grid that is most appropriate to the number of visual media selected.

Scale to Fit: The visual media will be scaled to fit inside the panel with its original aspect ratio.

Show Original Size: The visual media will be show at its original size, centered in the pane. This may cause cropping of the image. You can pan around in the media pane by holding the mouse down on the image and dragging or by using the scroll bars.

NOTE: that the **Scale to Fit** and **Show Original Size** choices only appear on the right-click menu when you are pointing to a specific item in the Visual Media pane.

Fast Forward 0:10 seconds: When selected, visual media that are time-based will have the time slider moved forward 10 seconds.

Play/Pause: Starts the playing or pausing of visual media that are time-based using this function.

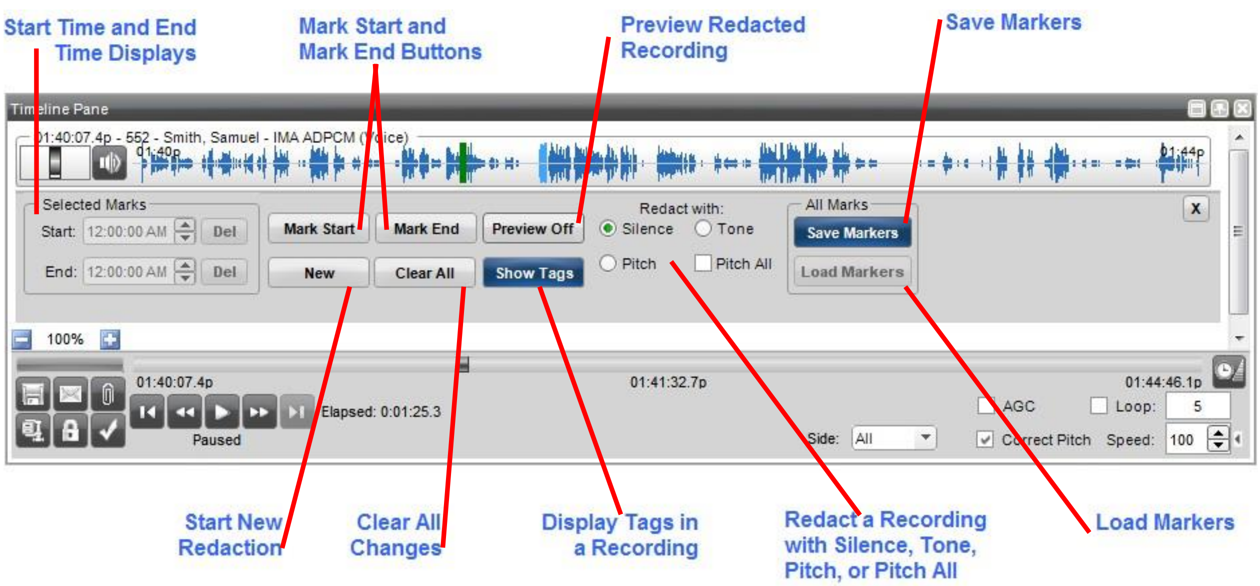
Rewind 0:10 seconds: When selected, visual media that are time based will have the time slider moved back 10 seconds.

Stop: Stops the playing of the selected visual media that are time-based using this function.

Redacting a Recording

Once the Redact Panel is open, listen to the recording and find the beginning of the first portion of the audio that needs redacting. Click the **Mark Start** button to indicate the beginning of the first redaction section. Select **Silence**, **Tone**, or **Pitch** as the method to use for the redaction. Continue listening until you find the end of the section that needs redaction. Click the **Mark End** button to mark the end of the redaction section. You can click the **Preview On** button then play the redacted portion to hear how the final redaction will sound.

To create another redaction section in a different portion of the audio, click the **New** button, then follow the steps above again.



Redact Panel/Panel

Redaction Controls

To redact a recording, select the desired interaction, then use the following controls:

Mark Start: Click this button to mark the starting point of a redaction within the recording. When you click **Mark Start**, an icon appears in the waveform panel that indicates where the redaction begins.

Mark End: Marks the end point of a redaction in the recording. Clicking this button also adds an icon within the waveform display that shows where the redacted portion of the recording ends.

Preview Off/On: Lets you preview the redacted item and any recent changes.

New: Allows you to create a new redaction within a single recording. If you do not click **New** before clicking on the **Mark Start** and **Mark End** buttons again, you will simply move the starting and ending points of the current redaction.

Clear All: Clears all redactions in an interaction.

Show/Hide Tags: Lets you display or hide any tags that have been added to an interaction. To see if a recording has tags added, check the Has Tags column for that recording in the Interactions Grid.

Redact with: Gives you the option to fill the redacted space in the recording with either **Silence**, **Tone**, or **Pitch** by clicking on one of the available radio buttons. Redacting a file with Pitch allows the user to alter the pitch of the audio in order to disguise the voices in the recording.

Pitch All: Enabling this feature allows the user to pitch-shift the entire recording while also using silence or tone to redact certain parts of the pitch-shifted recording.

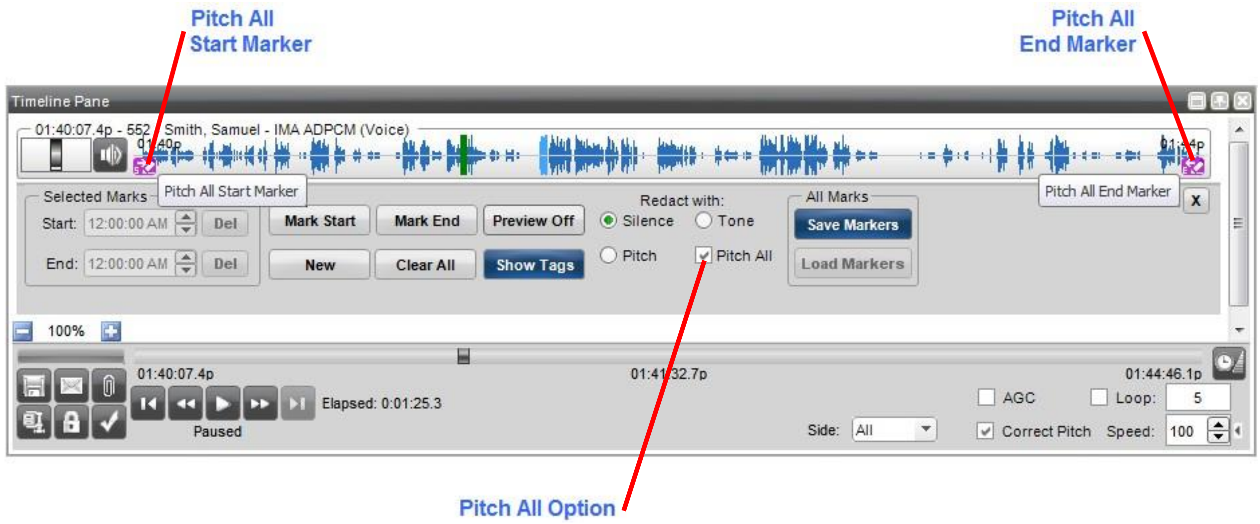
Save Markers: The redact markers and settings can be saved to the server's database for later recall. Multiple sets of redact markers can be saved for any given recording.

Load Markers: Saved redact markers and settings can be retrieved from the server's database and edited and then used to redact the recording.

Pitch-Shift Option Control

A number of combination options are available for the redaction of recordings. Users can perform redaction on a recording and pitch-shift the entire recording, if they desire, while also redacting certain parts of the pitch-shifted recording with silence or tone.

Users can easily pitch-shift the entire recording while also using silence or tone to redact certain parts of the pitch-shifted recording. This allows users a greater amount of flexibility when it comes to redacting recordings through Retrieval.



-

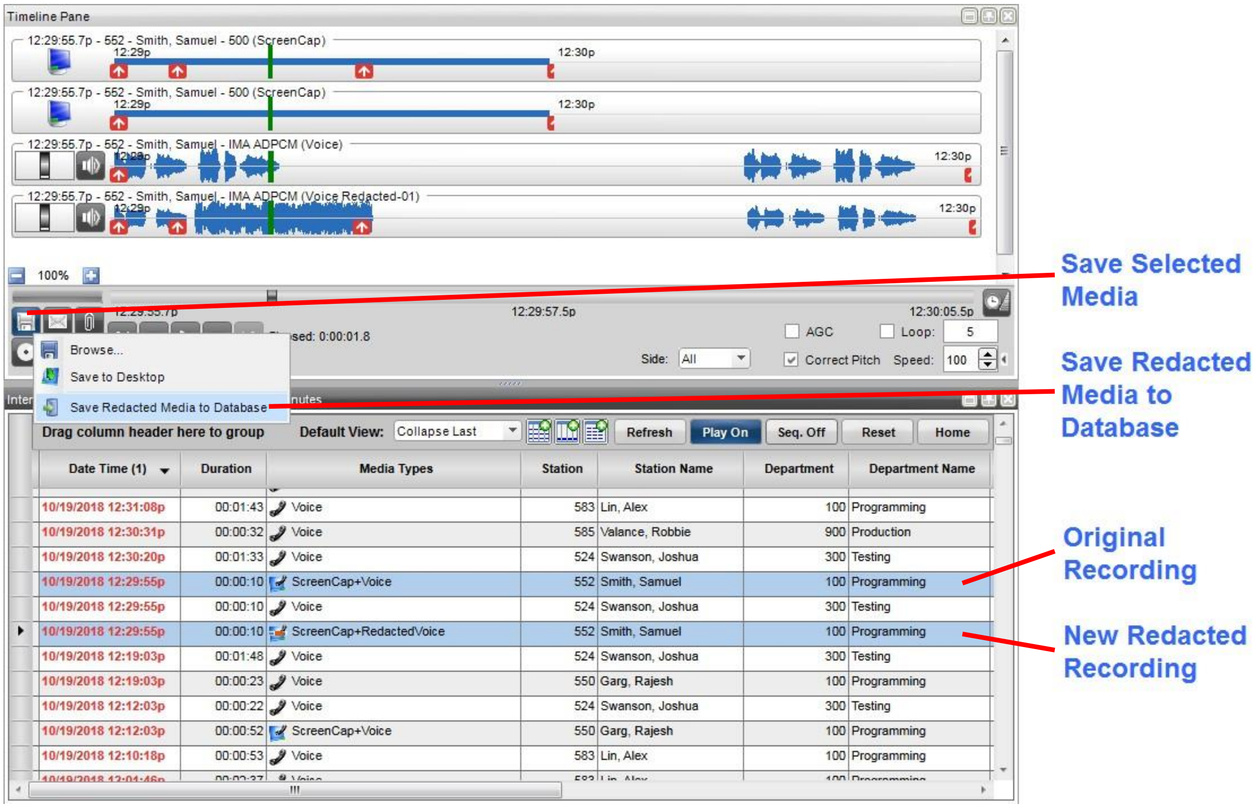
Redacted Recordings Saved as New Interactions

Recordings that have been redacted can be saved, added to the database, and displayed in Retrieval as a new interaction in the Interactions Grid.

After a recording has been redacted, click the **Save Selected Media** button and select the **Save Redacted Media to Database** option. This will create a new interaction and save the interaction to the grid as either a **RedactedVoice** or **ScreenCap+RedactedVoice** media type.

When the redacted recording is played back, the redaction markers are indicated on the recording as tags.

A new permission level has also been created in Manage that restricts assigned users to only view and playback interactions that have been redacted. Users can generate reports on redacted interactions as well as save the redacted recordings with other interactions, regardless of whether they have been redacted.

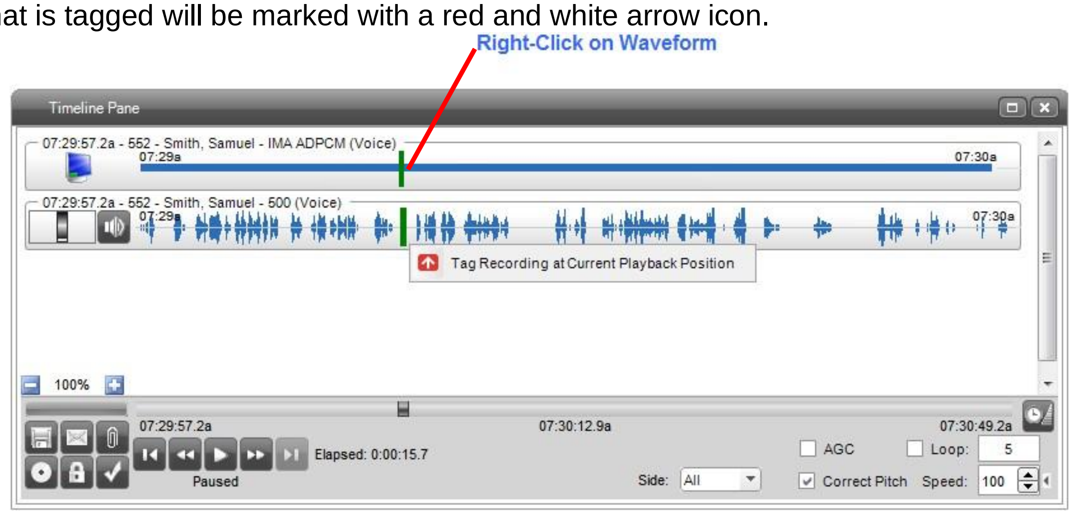


Redacted Recordings Saved as New

Tags

Tag Information:

You can use a tag to indicate a point during playback that you would like to refer to later or that you need to remember for any reason. You can tag a recording at any point, and the specific spot that is tagged will be marked with a red and white arrow icon.



Tagging a Recording During

Tag a recording at any specific point by right-clicking on the audio-waveform display of that recording. When you right-click, the menu has only one selection: **Tag Recording at Current Playback Position**.

Selecting that choice from the right-click menu brings up the **Add Tag** form, which displays the time and description of the interaction and the time in the recording that the tag is placed, and allows you to add a note to the Tag.

When you have completed the form click **OK** and a Tag icon will appear on the waveform. Clicking **Cancel** closes the form without adding the Tag to the recording.

Recording Tag Icons

If the System Administrator has defined a set of Tag Icons with labels, so that different tag icons have different purposes or indicate different things in the recording, when you tag a recording, you can select from the Tag Icon drop list which Icon you want to put on the recording for this playback position.

The software remembers which Tag Icon you last added and uses that as the default until you change it.

Spoken Tags

When the Spoken Tag box is checked, the text of the Tag Notation is spoken while the recording is played back. This feature follows the settings in the User Preferences for Voice Time Stamps to decide whether the recording is paused while the tag is spoken.

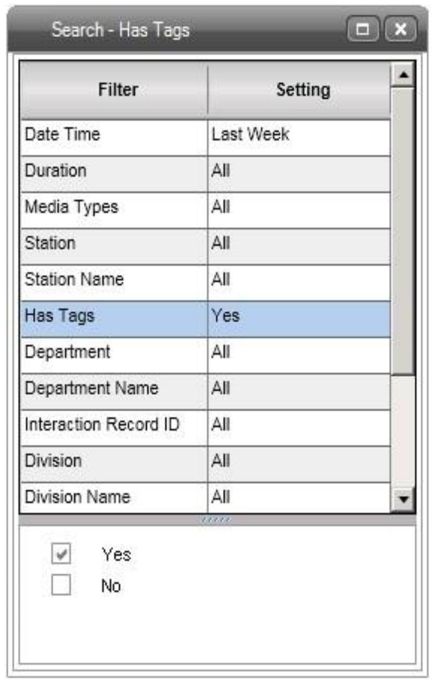
The Spoken Tag feature requires a text-to-speech synthesizer to be installed on the workstation. This is a common feature of recent Windows versions.

Tagging Multiple Interactions

You can also tag multiple interactions at the same time. When multiple interactions are selected, and a Tag is inserted, all the interactions whose duration overlaps the time at which the Tag is placed will have the Tag applied to that interaction.

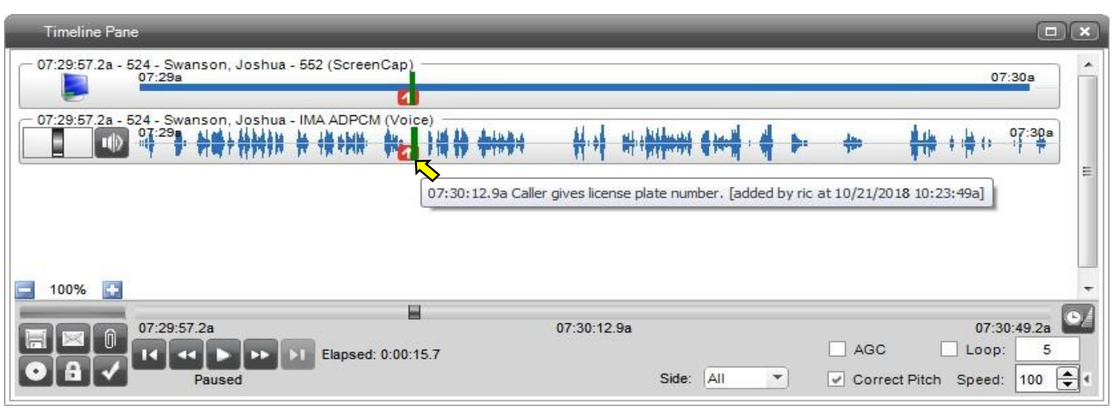
Finding Tagged Interactions

Once a recording has been tagged, the **Has Tags** column for that recording will display a **Yes** in the Interactions grid. You can search for any interactions that have tags by selecting the **Has Tags** filter in the Filter List and unchecking the **No** box.

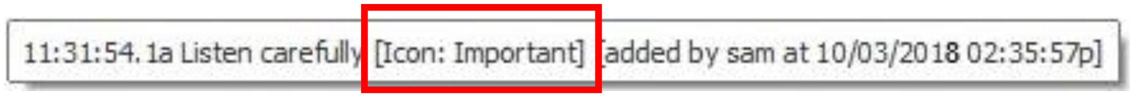


Viewing a Tag

When a recording is tagged, a small red and white arrow icon appears to mark at the tag's location. You can hover the cursor over the icon and a display appears that shows the time of the tag in the recording, the notation on the tag, and who added the tag.



:



Tag Icon Tooltip – Icon

Attachments

Attachment Columns

There are twenty user-defined Attachment fields in the system available as columns in the Interactions grid. It is up to the customer to decide how to use these columns. Any unused attachment fields can be used to store general text comments to interactions, details about the call, classification of calls by service type, account or incident numbers, or other information.

Professional Services can help you determine how best to use the Attachment columns. If any fields are to be used for hand entry of information, one or more Attachment forms can be designed to best facilitate entry of the text data.

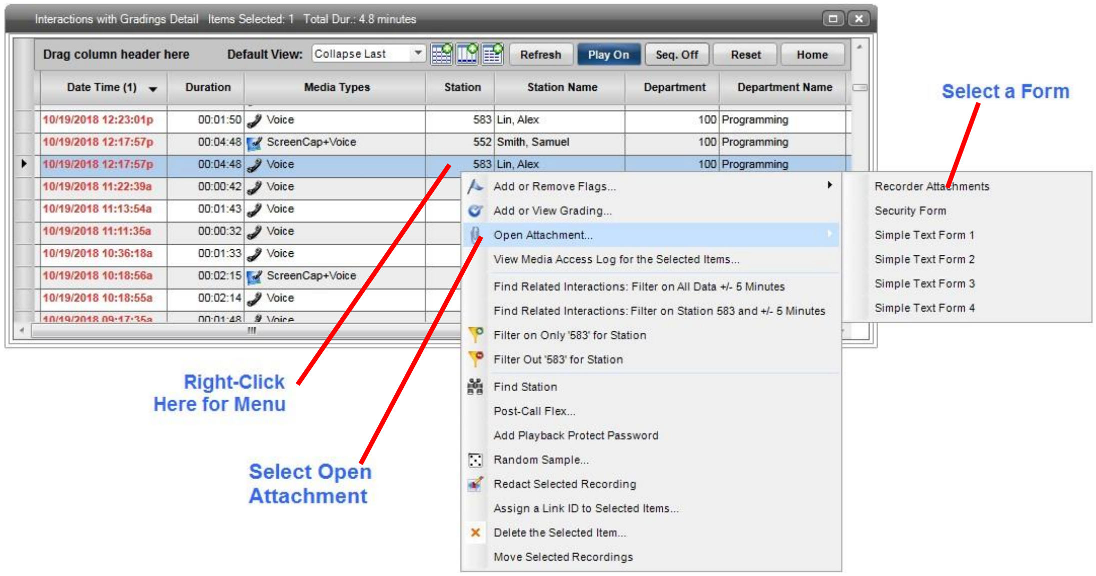
Attachment Forms

Attachment forms are custom-tailored for each installation, so your forms will not look exactly like the screen shots in this section of the manual. Forms generally have from 1 to 20 fields that you can enter text data into. There also might be one or more read-only fields that display information about the interaction but cannot be changed. Data entered into any one of the attachment fields will appear as columns in the Interactions grid and can be searched on and sorted. Note that the titles of these columns can be renamed to indicate what data is in them.

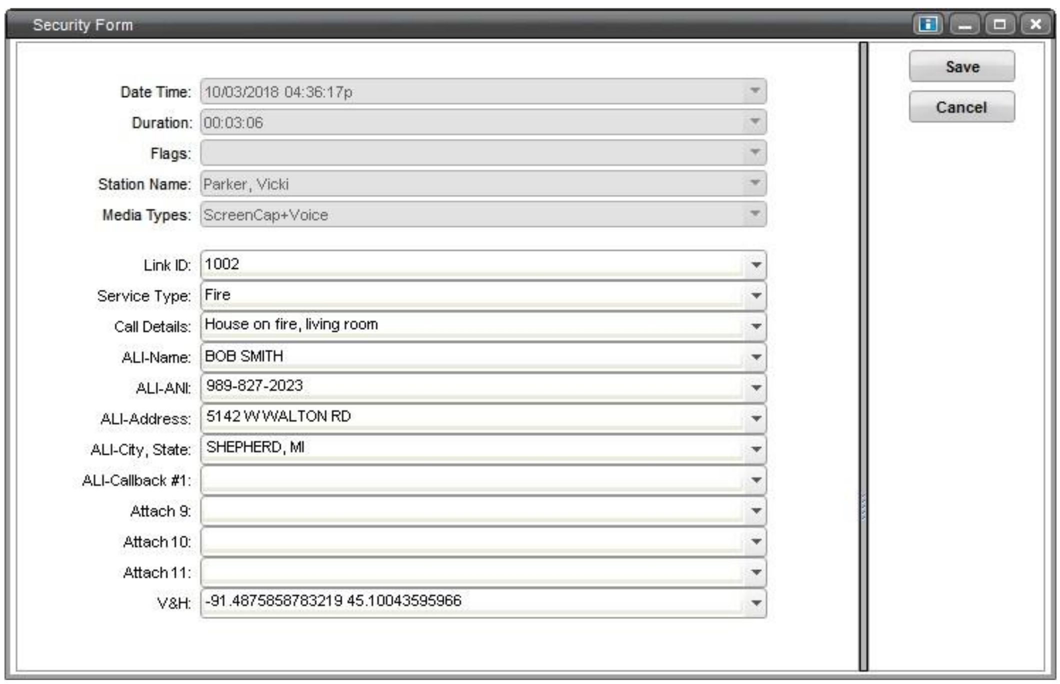
Adding an Attachment to an Interaction

To make an attachment to an interaction, right-click on the selected interaction and a pop-up menu will appear. In the menu, highlight the **Open Attachment** option. The right-click menu will expand to show any Attachment forms that can be used to attach text data to interactions.

If there are any grayed out fields in the Attachment form, these are read-only fields that can't be changed. You are free to type in new text in any available fields or edit existing text. Be careful in editing text that was attached automatically by the system. If you change this text, the previous information is deleted from the system and can't be recovered. It is best to leave these fields as read-only, when designing the forms with Professional services, or not available in the Attachment edit form at all.



Attachment Menu



Adding an Attachment to Multiple Interactions

Attachments can also be made on multiple interactions when they are selected in the Interactions grid.

To make an attachment to multiple interactions, hold either the **<CTRL>** or **<SHIFT>** key down while selecting the interactions. Right-click on the highlighted interactions and a popup menu will appear. In the menu, highlight the **Open Attachment** option. The right-click menu will expand to show any Attachment forms that can be used to attach text data to the interaction.

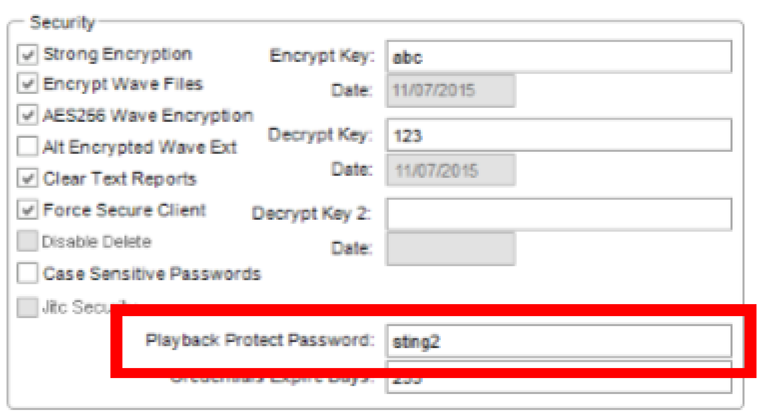
Reviewing Existing Attachments

To review existing attachments, right-click on the selected interaction, highlight **Open Attachment Form**, and select the appropriate Attachment form from the menu.

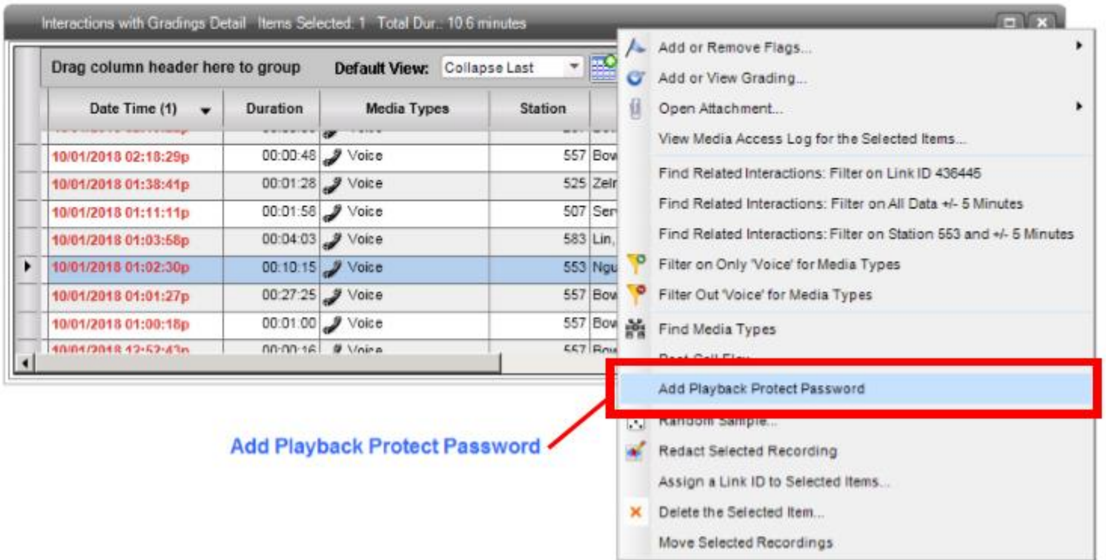
Preventing Unauthorized Playback

Individual interactions may be password protected from users who do not have permission to view and playback these recordings. Instead of limiting access to multiple recordings through group permissions, specific recordings that contain sensitive information can now be individually protected. This feature provides additional administrative flexibility as well as an increased level of security.

A master password must first be created in Manage in the Settings > Master Configuration > Security section. The password can then be given to users who are authorized to playback any recordings that have been password protected. To protect a recording, simply right-click on an interaction in Retrieval and select the Add Playback Protect Password option. After the recording has been password protected, users who wish to load and playback recordings will be prompted to enter in the correct password.



Manage



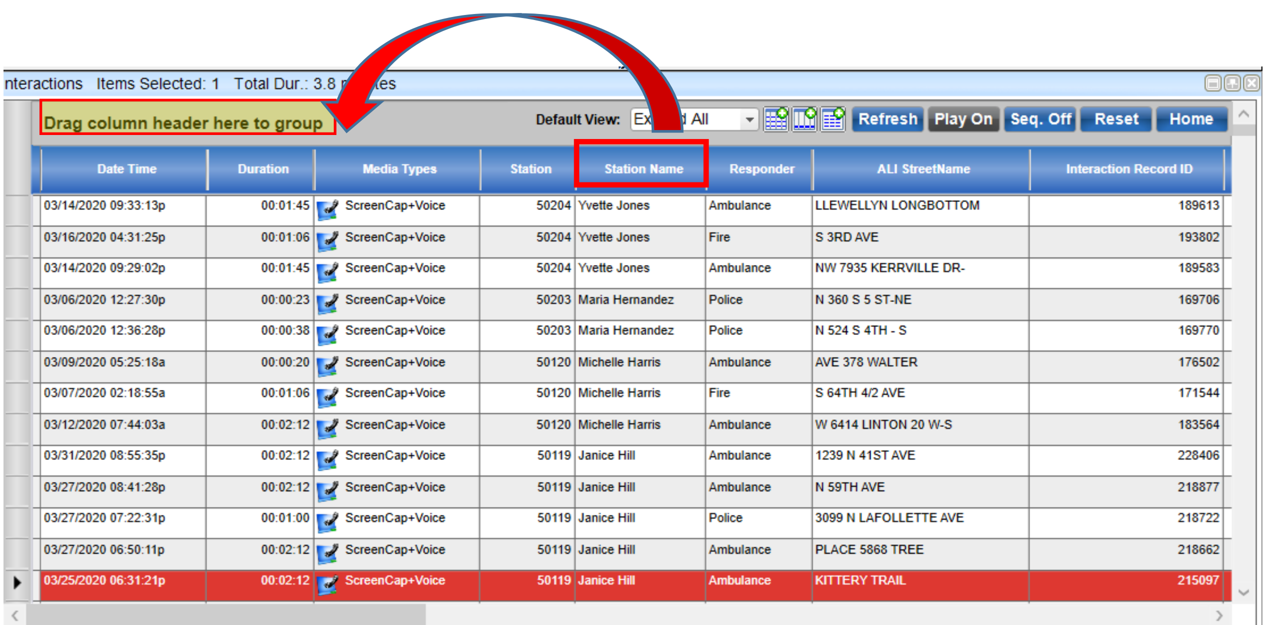
Playback Protect Password – Retrieval

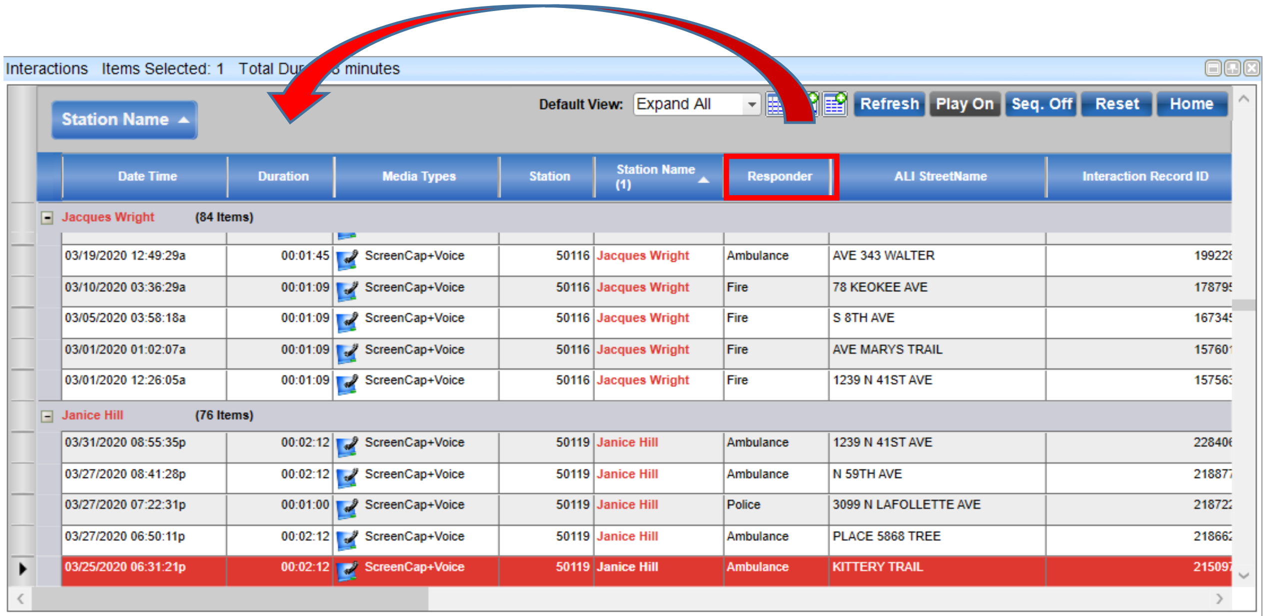
Building Reports

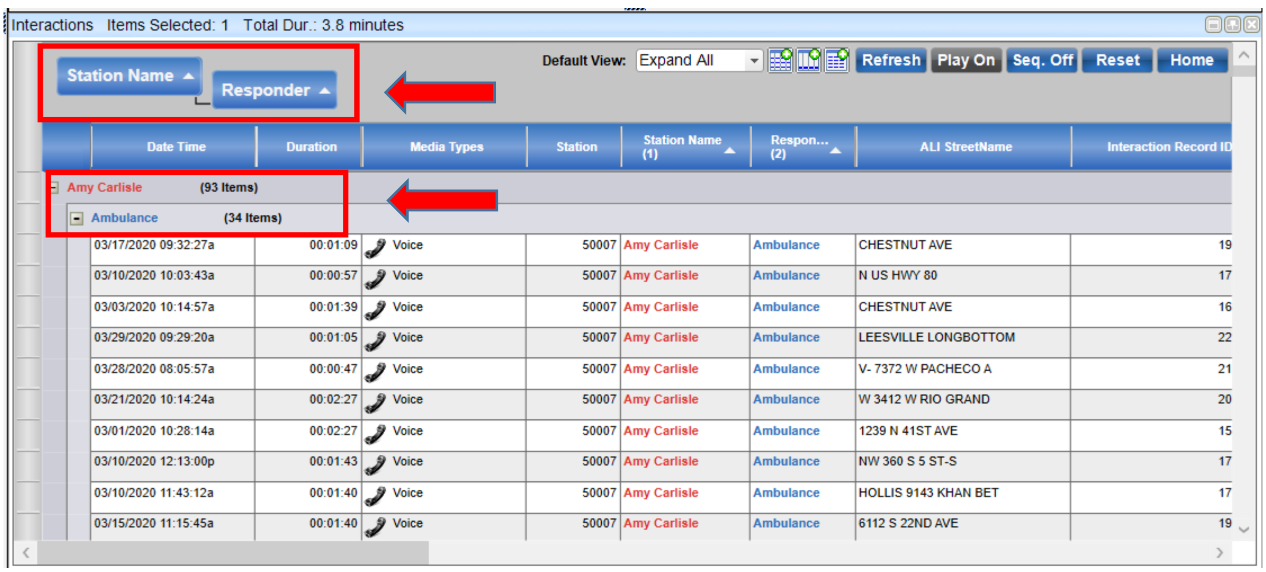
Grouping Columns

Interactions Summary Data

In Retrieval, columns can be grouped together to view summary data on certain fields in the Interactions grid. Click on the desired column header and drag it just below the title bar on the Interactions pane. Drag more column headers here to group by additional fields.







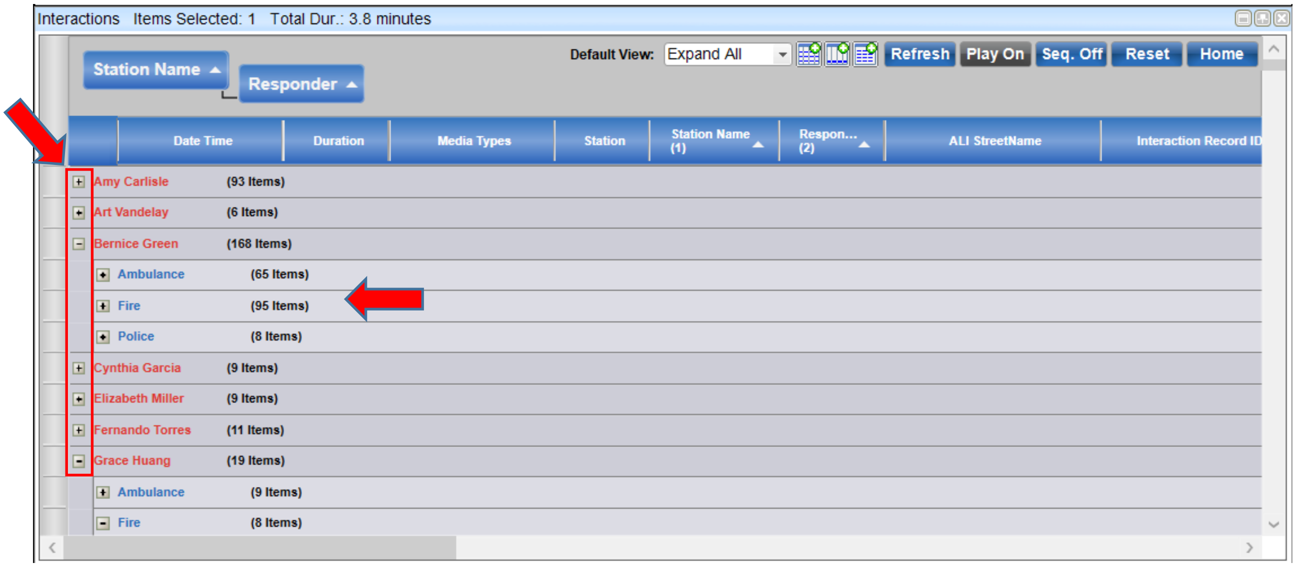
Grouping View

Columns that have been dragged to the grouping bar automatically have their interaction's field types combined into summary rows for easy identification.

After columns have been grouped together, each summary row can be expanded to view all the interactions that fall within that category or collapsed to hide the interactions. Individual rows can be expanded or collapsed by clicking on the plus (+) or minus (-) sign button at the left side of the group header row. To expand or collapse all the rows in a given grouping level, right-click on the column header button in the grouping bar and select either Collapse This

Level or Expand This Level. This will collapse or expand all the rows for whichever grouped field has been selected. Grouped fields can be sorted in any order the user prefers. The first column header moved to the grouping bar becomes the primary sort, the next column header moved becomes the secondary sort, and so on. The summary rows in the grid display the field type description and interaction information based on this sort order.

The sort order of grouped fields can be easily rearranged by dragging the column headers to a new position within the grouping bar. The field types sort order displayed will change depending on which column headers have been repositioned.



Default Grid View (continued)

Grid Subtotals On/Off This setting displays all subtotals at the bottom of each grouped section in the Interactions grid when columns have been grouped together.

Grid Grand Total On/Off This setting displays a Grand Total line beneath the Interactions grid. Grouping is not necessary to see the Grand Total row.

Turn KPI Display On/Off This setting determines whether the grid displays the grouping information with the KPI columns that are selected in the Settings > Report Settings > View/KPIs tab. When KPI Display is off, each grouping row displays the Items Count only.

Grid View Options

Refresh Clicking this button refreshes the grid to retrieve the latest data from the database.

Play Mode On/Off Places the Interactions grid in a non-playing mode allowing the user the ability to select multiple interactions without the player opening for each one. This is useful for manipulating data rows where it is not necessary to have the media play. Simply click the Play On or Play Off button to use this feature.

Seq. Play On/Off Sequential Play Mode instructs the program to play the interactions in the grid one at a time, sequentially. When the selected interaction is finished playing, the program automatically selects the next interaction in the grid and beings playing that. When in Sequential Play mode, only one interaction can be selected. Selecting more than one interaction turns off Sequential Play.

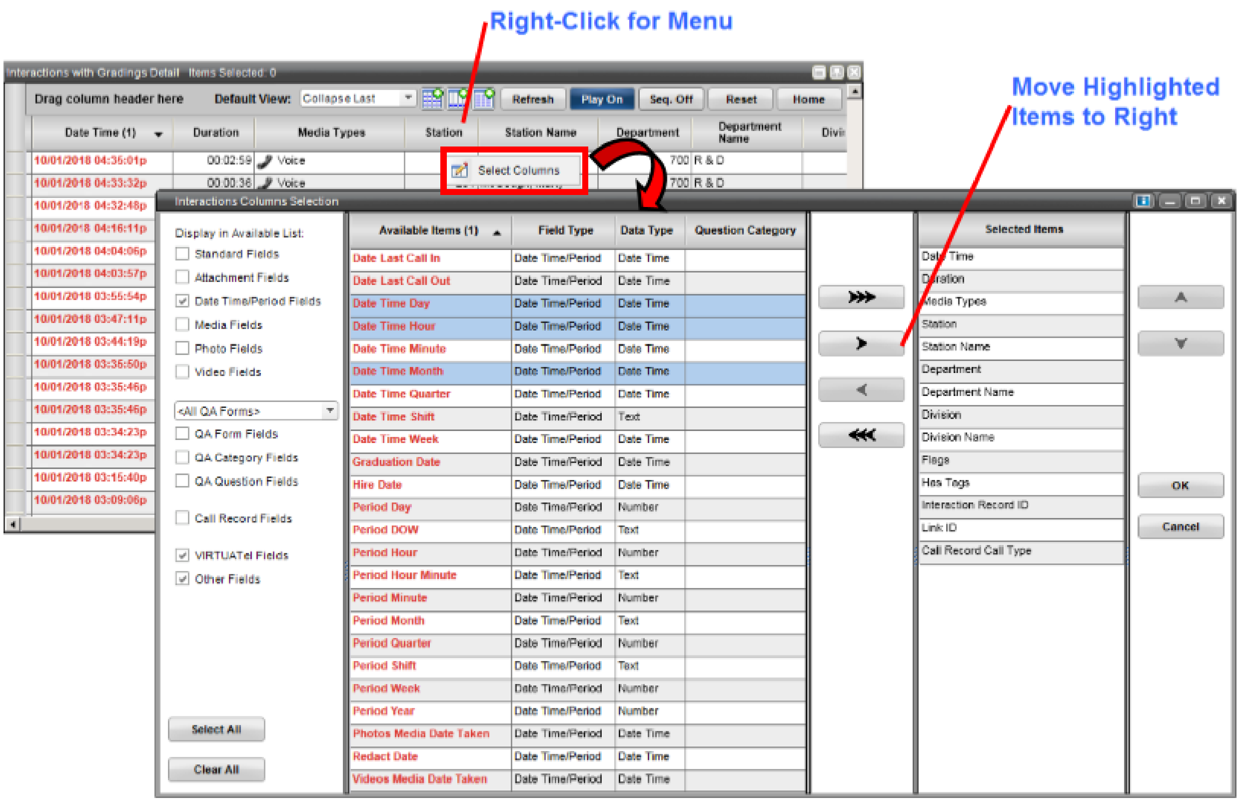
Reset After making changes to the Interactions Grid, settings can be reset to their original default configurations from the last report by clicking on the Reset button. Users are now able to load Retrieval and make any number of changes to the filters, columns, or sorts, while having the ability to easily revert the settings back to the way they were when the report was loaded. This feature is particularly useful when the user loads a report and wants to modify the report slightly to look at something in particular. Instead of having to reload the report or remember how the filters were set before the changes were made, the user can just simply click on the Reset button.

Home Clicking on the Home button loads your default report, which is always the first report you see when you start Retrieval. This is the report you saved the last time you closed Retrieval and selected to save your changes. The Reset button, in contrast, loads the last report you opened. If you start Retrieval and make changes to the report settings, but do not load another report, the Reset button does the same thing as the Home button, loading your default report.

Date Time Period Fields Grouping/Reporting

Using **Date Time Period** fields, you can group together and display summary information based on the date and time of each interaction. Date Time Period fields can group interactions by Minute, Hour, Day, Week, Month, Quarter, or Year.

Date Time Period field ranges can be displayed in the Interactions grid by right-clicking on any column header and selecting **Select Columns**. The **Interactions Columns Selection** window will appear and here you can add the Date Time Period fields you would like displayed in the Retrieval window.

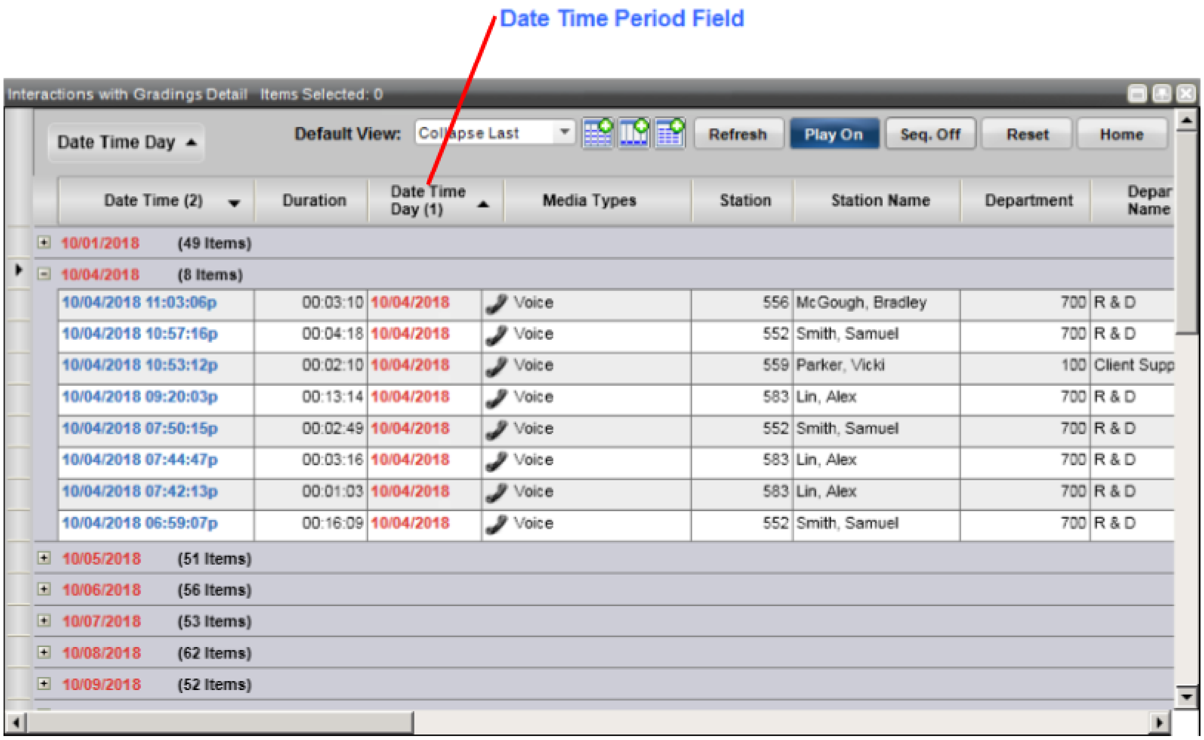


Selecting Date Time Period Field Columns

Date Period Continued

The Date Time Period field for each interaction displays the Date Time for the interaction as it pertains to the period of that field. For example, all the interactions that happened in May, 2014 display the same value in the Date Time Month field. Grouping on the Date Time Month Period field puts all the calls into summary rows by month.

Similarly, all the interactions for a particular date will display the same value in the Date Time Day field, regardless of the time of the interaction. This enables you to group all the calls on the same Date into one summary row. You can view the individual interaction records that fall within the grouped period by expanding the summary line.



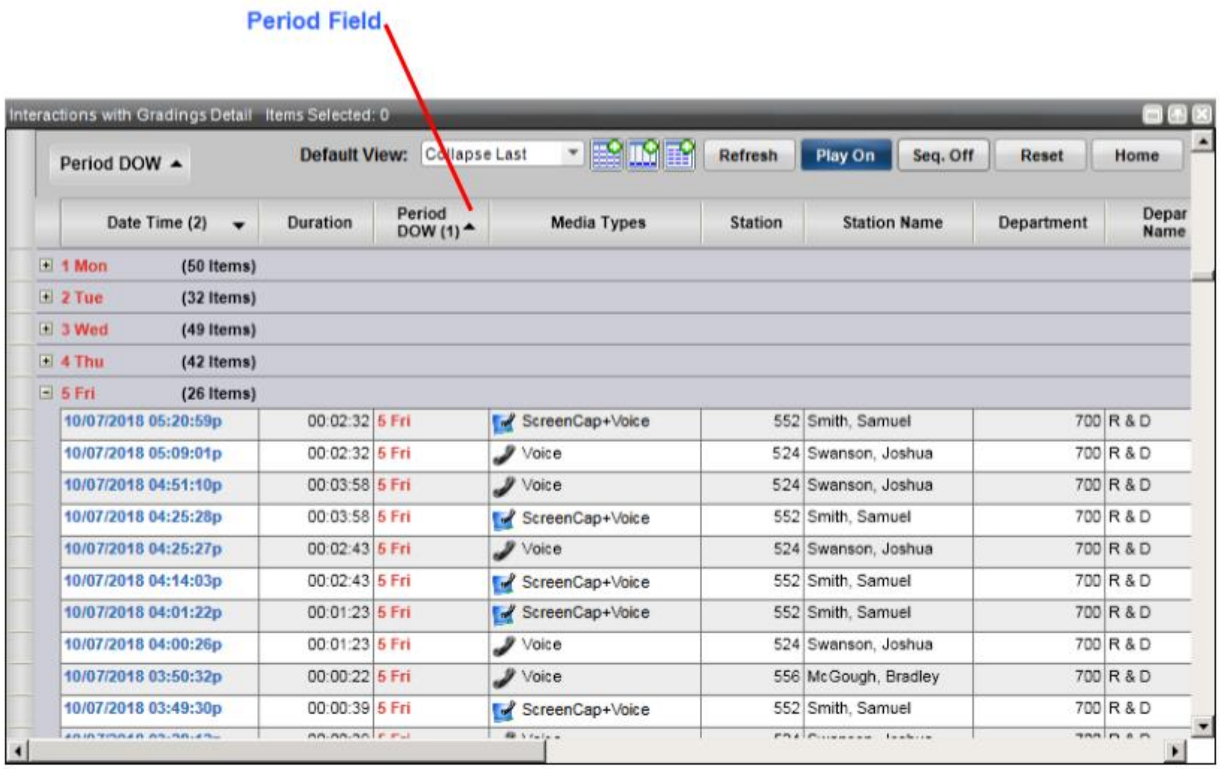
Grouping Interactions by Date Time Day Fields

Period Fields

The Period field for each interaction displays the Date Time for the interaction as it pertains to the period of that field. Period fields can be grouped by Minute, Hour, Day, DOW (Day Of Week), Week, Month, Quarter, and Year.

Period fields columns can be displayed in the Interactions window by right-clicking on any column header and selecting Select Columns. The Columns Selection window will appear and here you can add the Period fields you would like displayed in the Retrieval window.

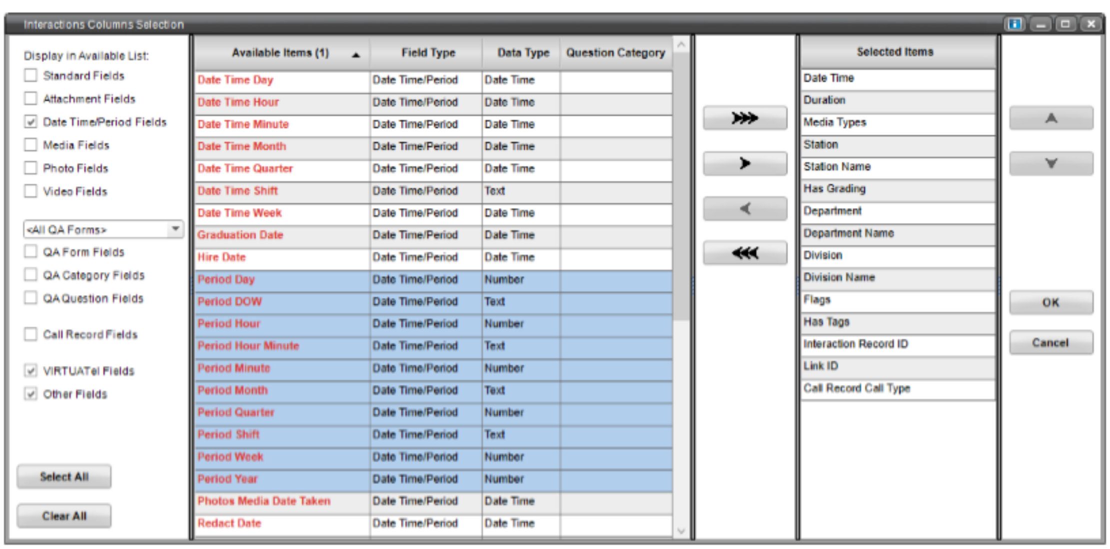
When you are grouped on a Period field, you can view the individual interaction records that fall within the grouped period by expanding the summary line.



Period Field Grouping

Date Time Period vs. Period Fields

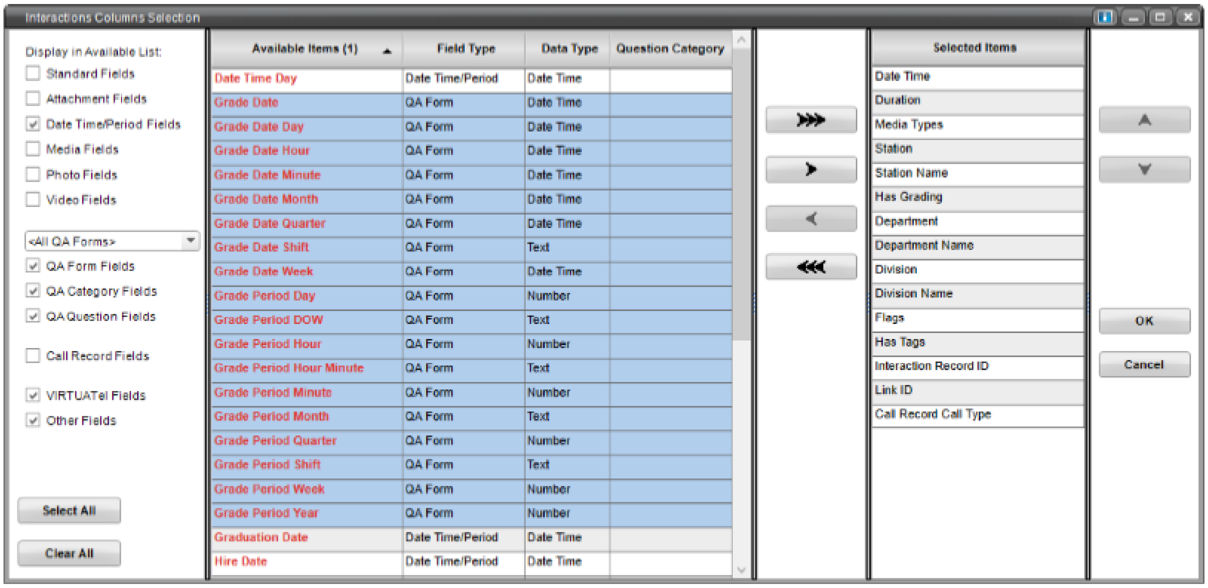
The Date Time Period fields include the full date in the period, while the Period fields do not. For example, the Period Day field puts Jan. 1, Feb. 1, and Mar. 1 all in the same grouping, because the Period Day value for each of those dates is just 1. The Date Time Day period field would make three separate groupings for those values. The Date Time Day period field would also make Jan. 1, 2015 and Jan. 1, 2016 two separate groups.



Selecting Period Field Columns

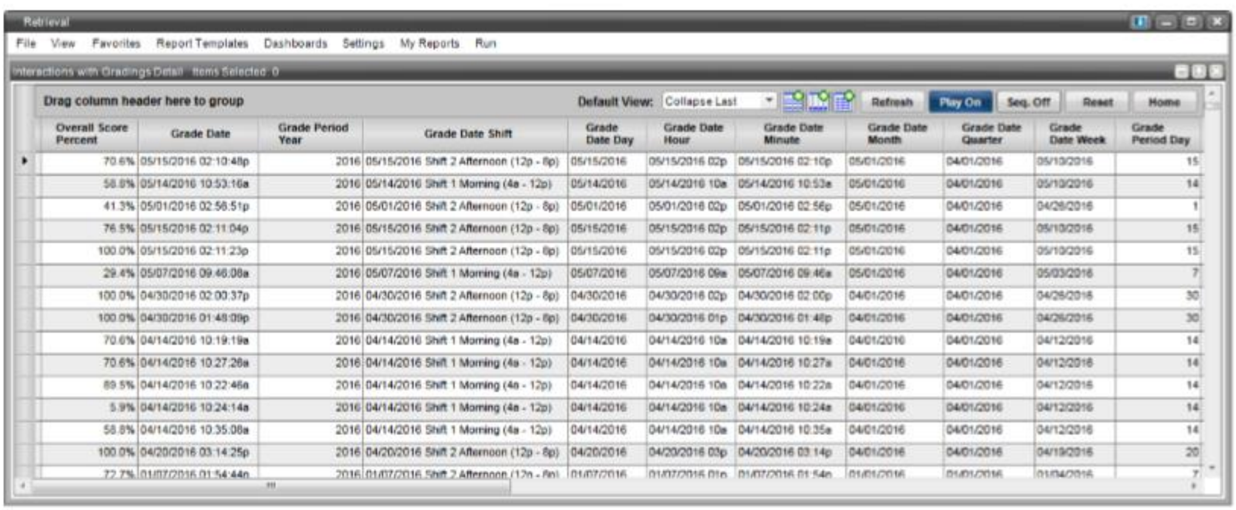
QA GradeDate Date & Period Fields

Gradings can also be grouped together using **Grade Date Time Period** fields as well as **Grade Period** fields in order to display grading counts of selected grouped fields.



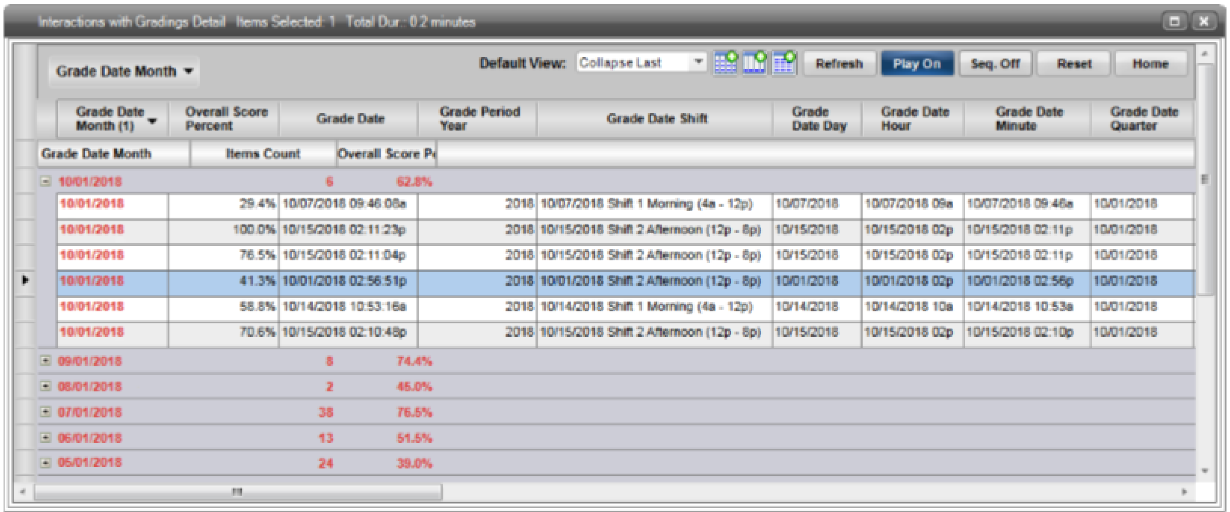
Grade Date Time Period & Grade Period Fields

Here is an example report showing the format of the various Grade Date Period columns. This can be also converted into a graphical report as all other interaction groupings.



Grade Date Period Report

In the following example, the report is grouped by **Grade Date Month**, reporting **Grading Count** and **Overall Score Percent** by month

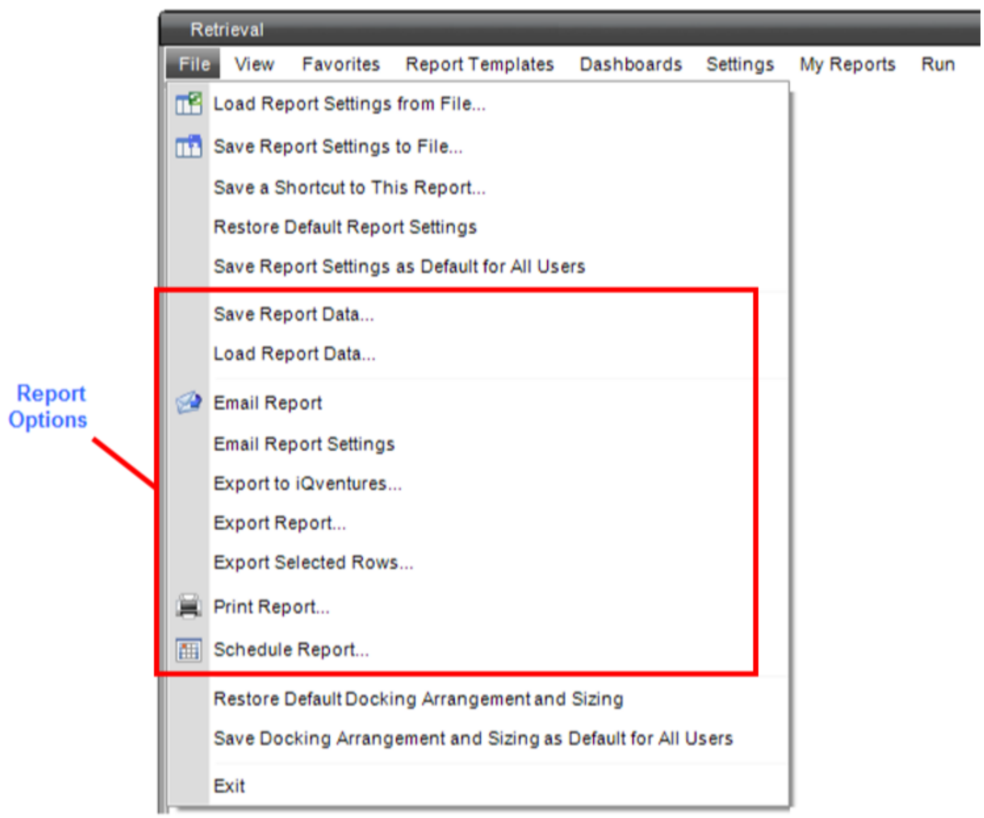


Grade Date Month Report

Reports

Report Data

Generated report data can be easily saved, retrieved, printed, and distributed through the **File** menu located in the **Application Menu** bar.

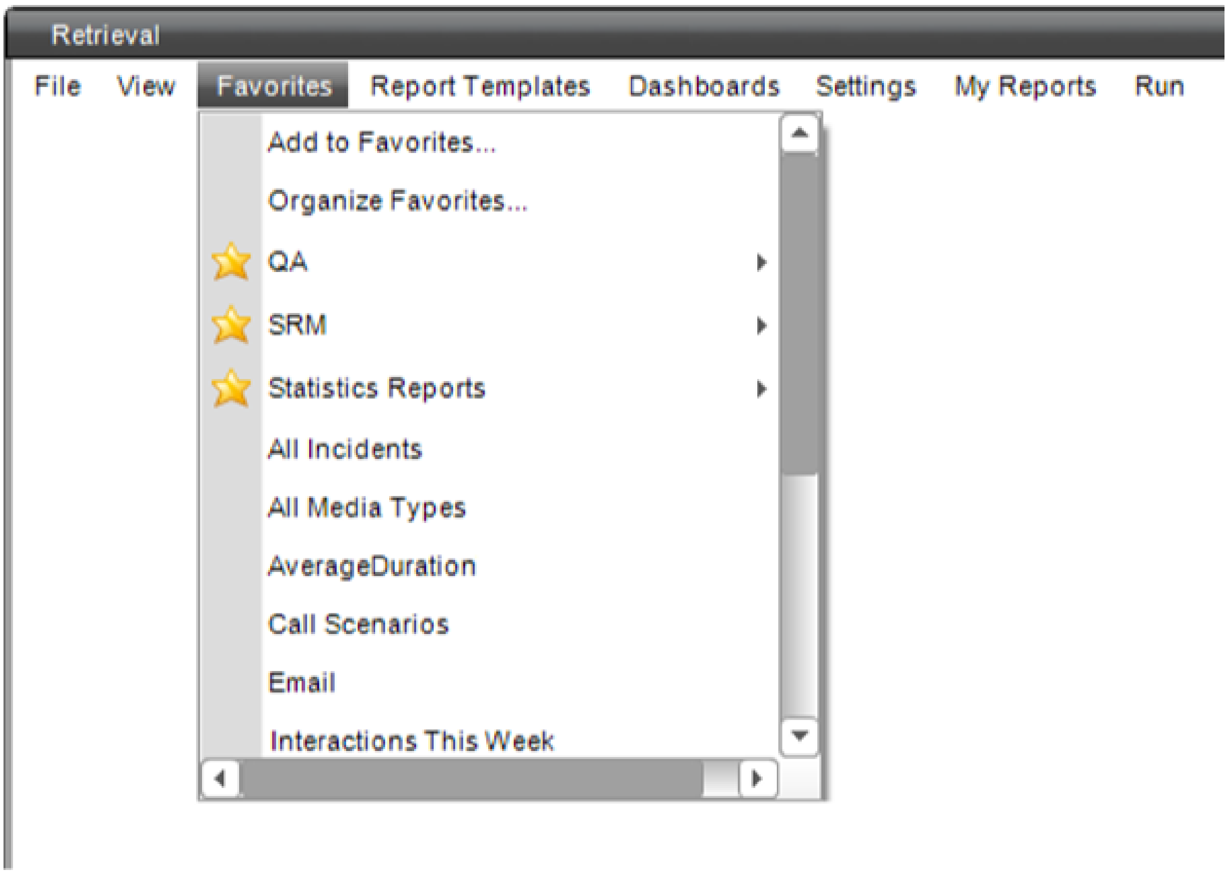


File Menu

Favorites Reports

Favorites reports are frequently used reports that can be created with the client Retrieval and saved in the **Favorites** menu. **Favorites** reports may be accessed from both the client and **Browser Interface**. To save a report to the Favorites menu, click on the **Favorites** menu and select **Add to Favorites**.

The **Favorites** menu also offers the choice **Organize Favorites**. This can be used to delete or rename Favorites reports, create sub-folders, and move saved reports between folders.

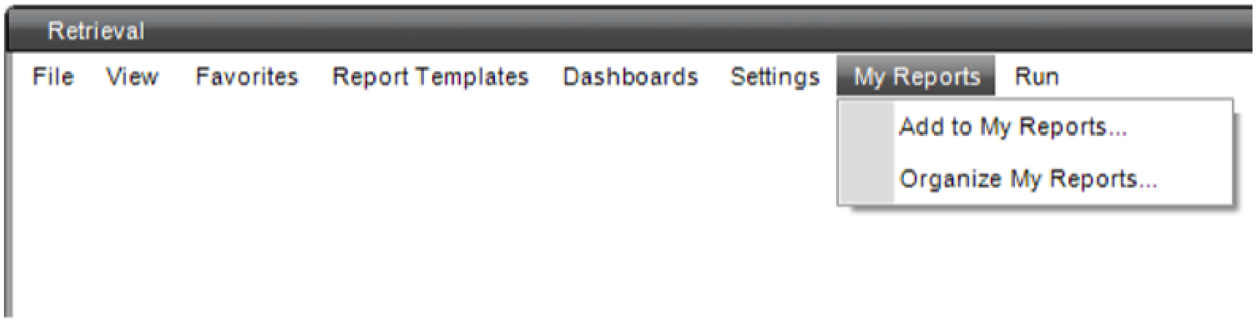


Favorites Reports

My Reports

The My Reports menu contains your own personal reports that you have saved. These reports are saved on the server, but cannot be accessed by other users. You can also access these reports from the Browser Interface Retrieval. To save a report, click the My Reports menu and select Add to My Reports.

The My Reports menu also offers the choice Organize My Reports. This can be used to delete or rename My Reports reports, create sub-folders, and move saved reports between folders.



My Reports

View Chart

Accessing View Chart

The application allows the user to view the interaction data of a single or group of columns together within a chart format. The Interactions grid has to be grouped by one or two fields in order to chart the data. Grouping on two fields results in a 3-Axis chart. The user has the same options to customize the chart as in the Dashboard application.

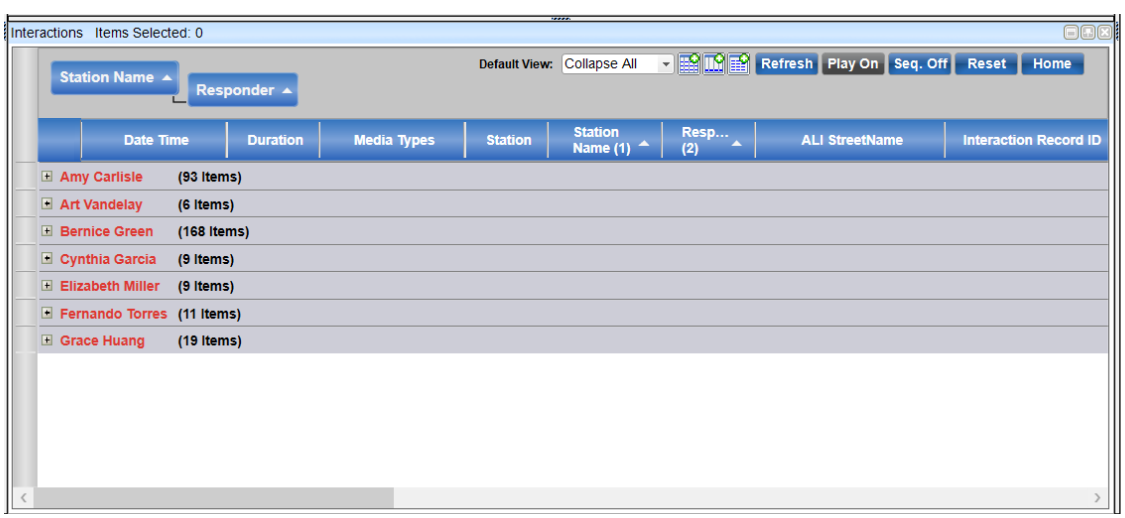
Note that any customized View Chart settings are included in the current Report Settings. To save a specific View Chart setting for a report, use any of the following commands to save the report definition after customizing the chart:

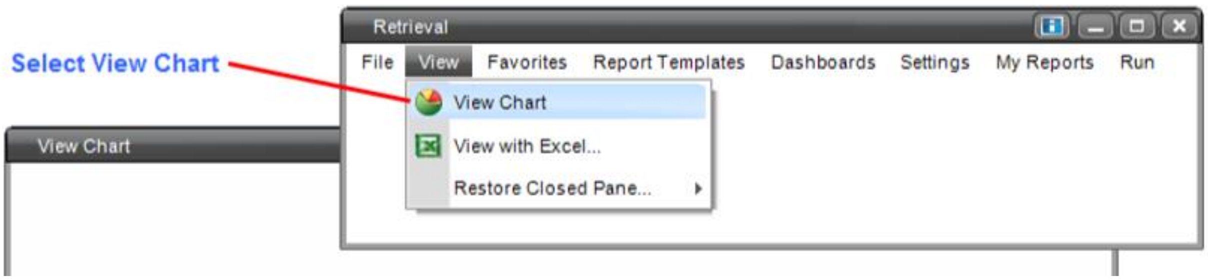
File > Save Report Settings to File

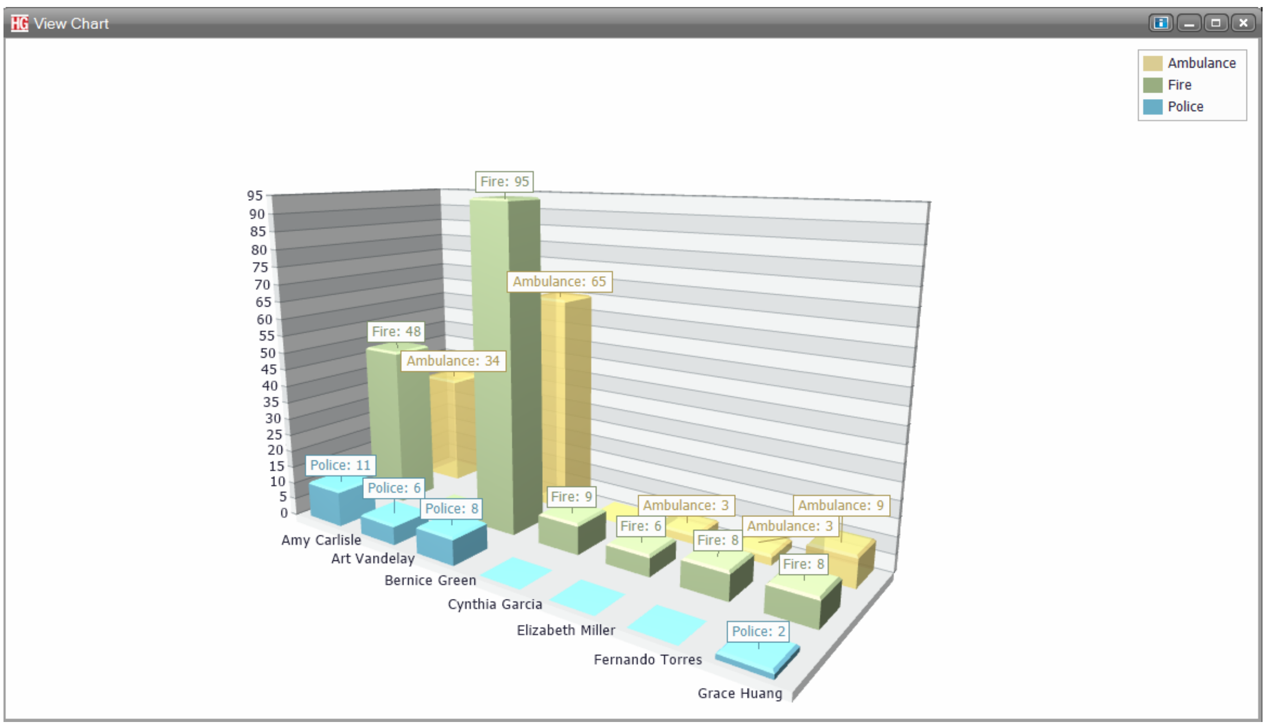
Favorites > Add to Favorites

My Reports > Add to My Reports

In the Interactions grid, group one or a more columns together by moving the column headers to the grey area just below the Interactions title bar. A new window will appear with the data set sorted for those grouped columns.

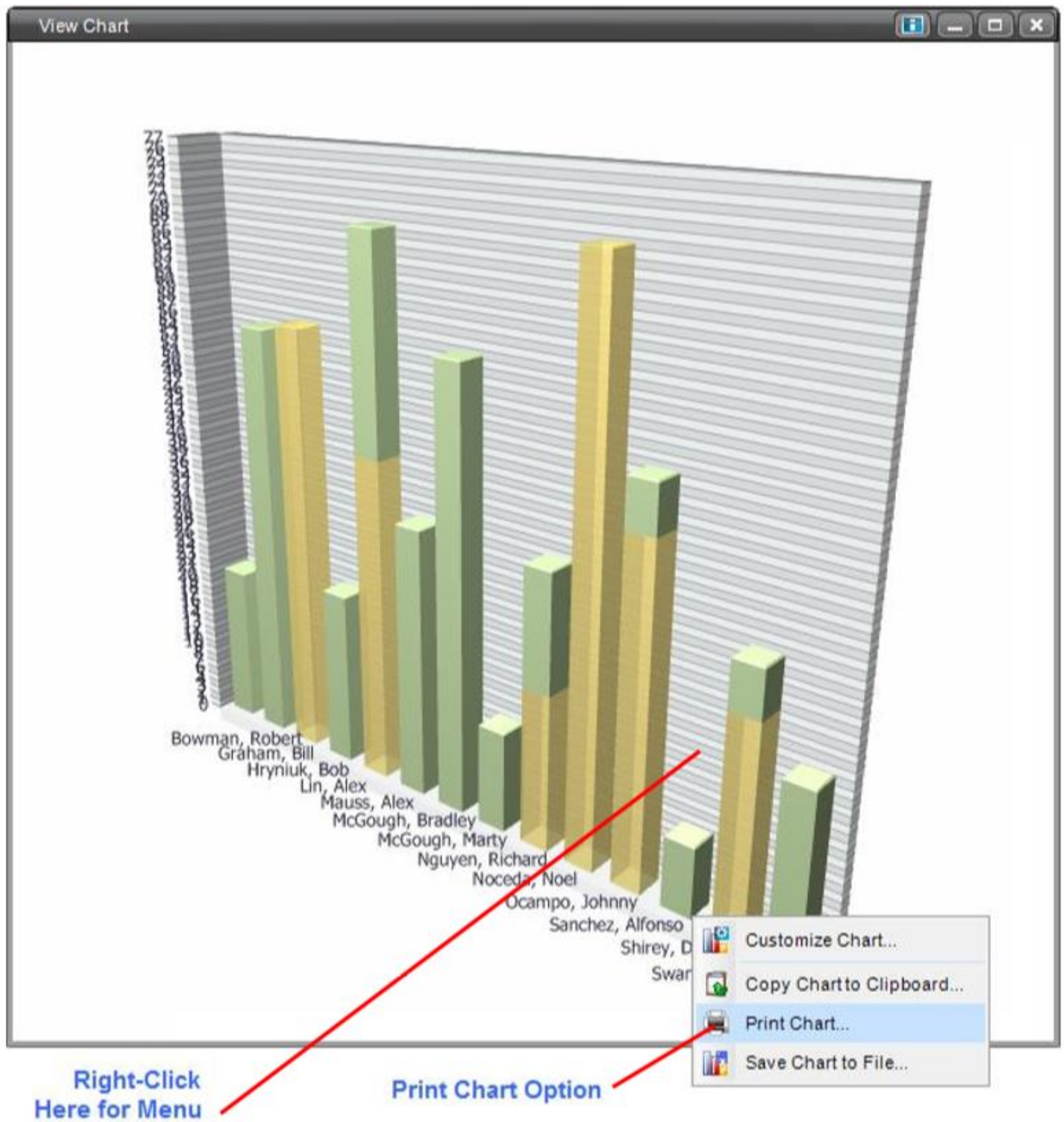






Print Charts from View Chart

Charts can be printed directly from the View Chart option in Retrieval. From within the chart, right-click and select the **Print Chart** option from the menu. It is no longer necessary to export files or use third-party software in order to print charts. Users can now print directly from within Retrieval



Print Chart from View Chart

Save Selected Recordings

Saving Media Files

The window enables you to save recordings to your desktop, a local hard drive, or other locations on the computer network. The software is not required on the receiving end to play back audio recordings. However, playing back screen captures outside the system requires installation of the video Codec. This can be accomplished by sending the recipient the file

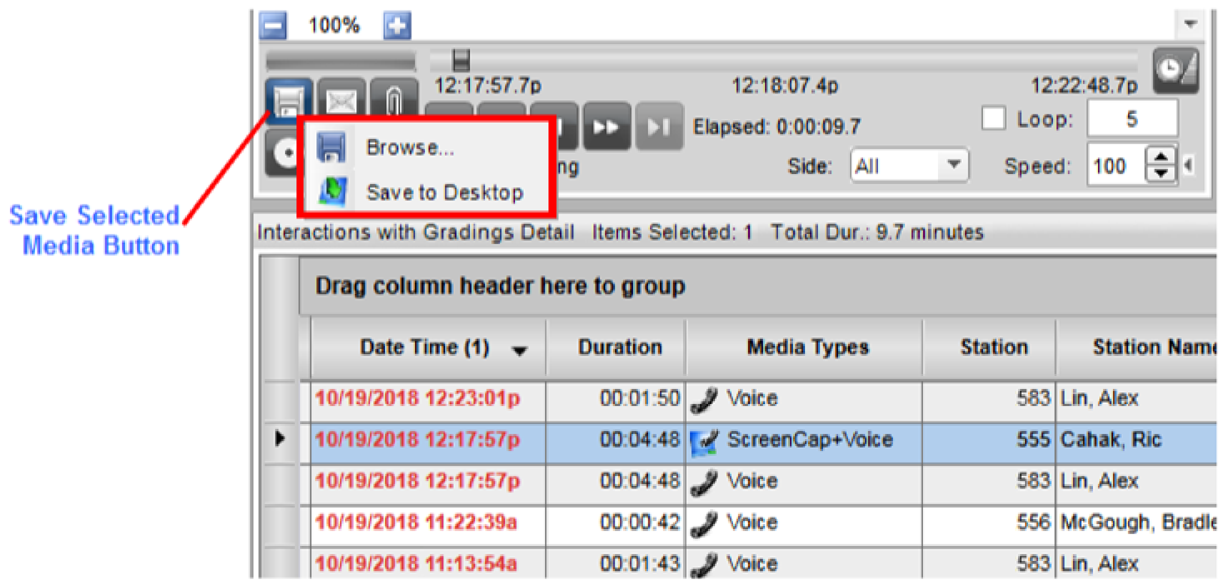
HgCodec32SfxUser.exe. That file needs to be run on the computer that is going to play back the screen capture.

While reviewing a recording, you might decide to keep a copy of that recording off-line for easy access. The **Save Selected Media** button enables this functionality.

Important: Playback Mode must be turned **On** in order to save any kind of media.

When you click the **Save Selected Media** button, a menu appears that gives two options for saving a media file. From the menu, you can select **Browse** or **Save to Desktop**. When you click the **Browse** option, the **Browse for Folder** window appears enabling you to browse and select the desired folder in which you wish to save the recording. It can be anywhere on your local drive, removable media, or on the network.

When saving ScreenCap+Voice recordings, users can choose to save just the screen capture, just the audio, or both. Users no longer have to save both the screen capture and the audio when they only need one of the recordings saved. (This applies only when the User Preference **Save ScreenCap+Voice as One File When Saving/Emailing** is not checked.)



Saving an Item

Saving Multiple Recordings

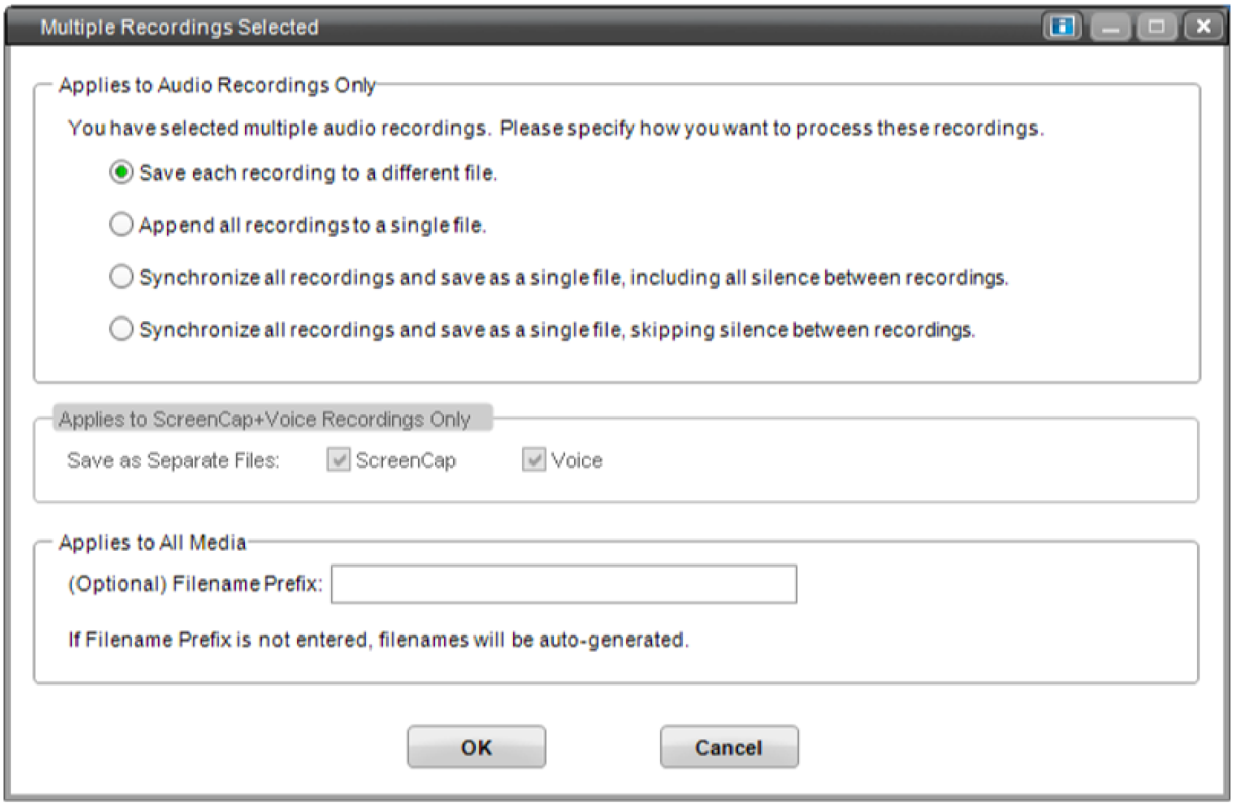
When multiple recordings are selected, the user can specify how the output will be saved. These options apply only to audio recordings that are selected. Screen capture and video files are never combined.

The radio button options are:

- **Save each recording to a different file.**

- **Append all recordings to a single file.**
- **Synchronize all recordings and save as a single file, including all silence between**
- **recordings.**
- **Synchronize all recordings and save as a single file, skipping silence between**
- **recordings.**

When the option has been chosen, click the **OK** button to process the recordings. The output destination can then be selected using the **Browse** option or the **Save to Desktop** location.



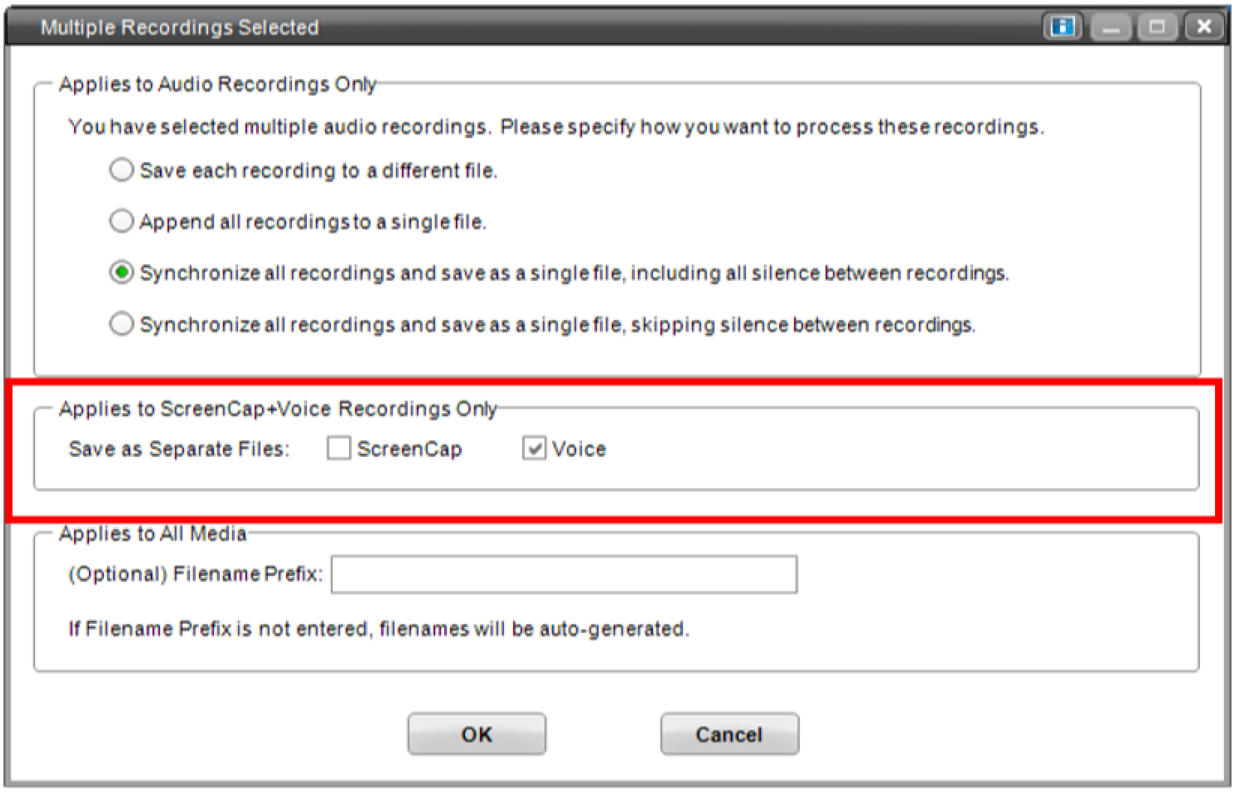
Multiple Recordings Selected To Be Saved

The ability to save multiple recordings is no longer restricted to just audio recordings. Users can select any combination of Voice, ScreenCap, or ScreenCap+Voice recordings and save them all at once.

Besides the convenience of being able to select these different kinds of recordings and save them all at once, this new feature also allows for the combining of the audio portions of ScreenCap+Voice recordings into a single file with other audio recordings that are saved at the same time. The user can select to combine the audio files sequentially, synchronized with the real-time silence between recordings, or synchronized without the silence between recordings.

Saving Screen Capture or Associated Audio Without Saving Both

When the User Preference option **Save ScreenCap+Voice as One File When Saving/Emailing** is not checked, you have the option of saving either the ScreenCap portion or the Voice portion without saving both, or saving both as separate files. The default setting for these checkboxes is also set on the User Preferences screen.



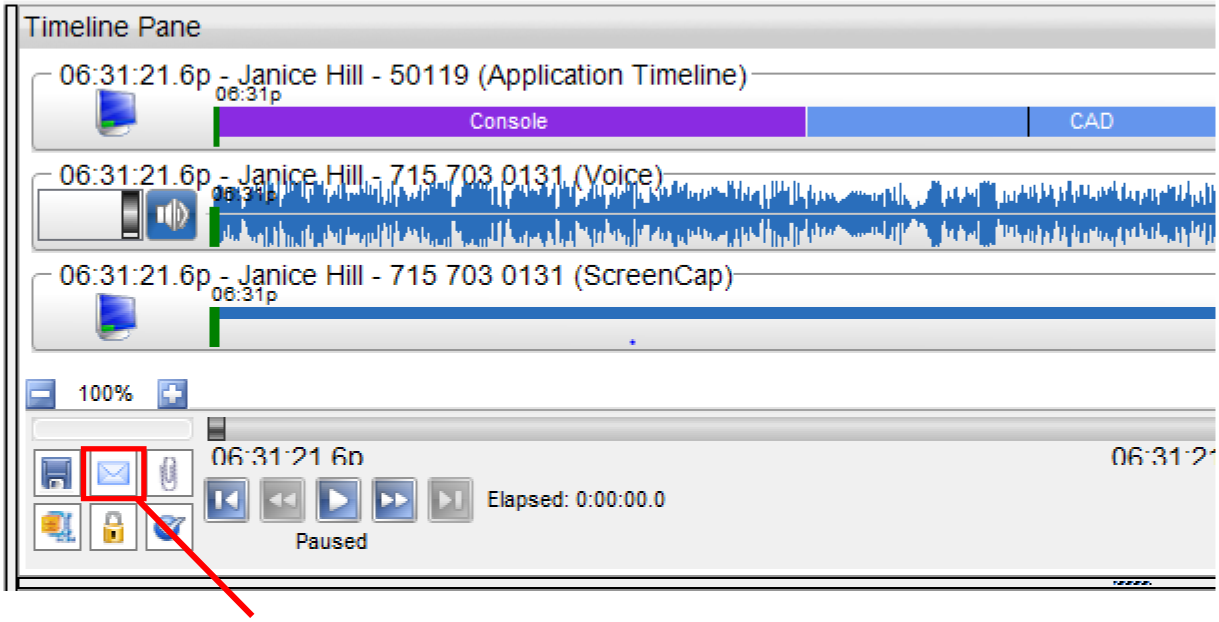
Saving Screen Capture or Associated Audio Without Saving Both

Emailing Interactions

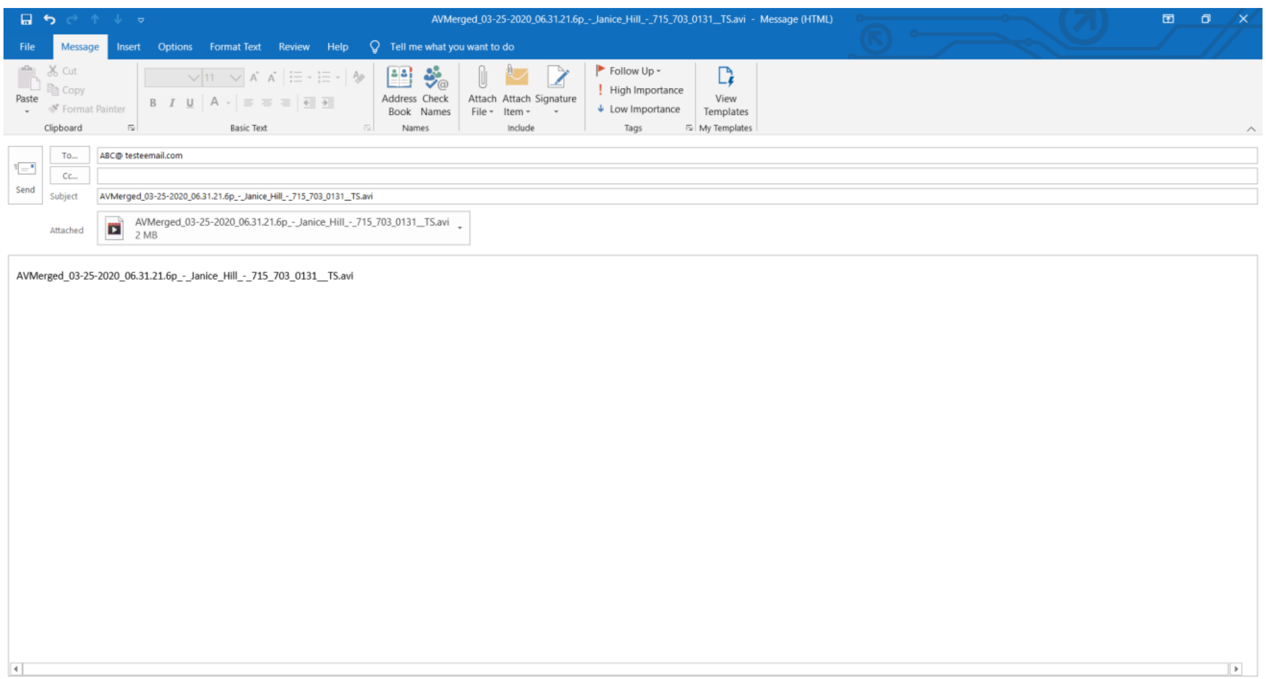
Send Selected Media

Interactions can also be emailed to other users internally or external to the organization as attachments to messages that can be played back on any Windows computer. Emailing works much like saving, although, once the desired recordings are selected, the user clicks the **Send Selected Media button**, which brings up an email window. The user can add text to the body of the email prior to sending it to a user, or multiple users. You can erase the file name in the message body if you desire.

To mail to more than one email address, separate the addresses with a semicolon (;).



Send Selected Media Button

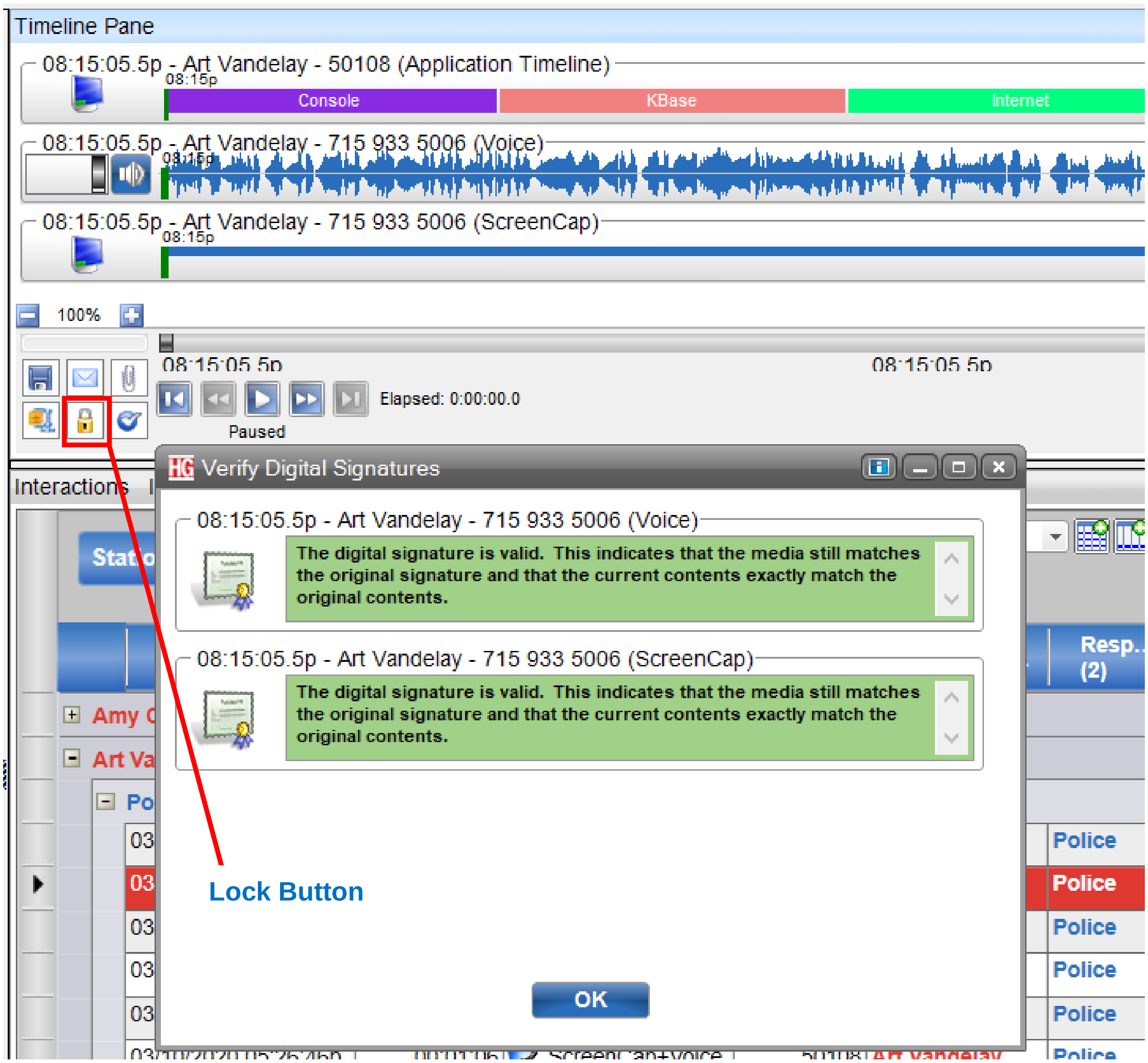


Validate Signature

Verify Digital Signatures

The authenticity of a recording can be checked by clicking the Verify Digital Signatures button, depicted as the familiar **Lock** icon near the **Save** and **Send** buttons. A recording with a valid digital signature is guaranteed to not have been tampered with in any way. If a recording is edited or otherwise altered, the digital signature will become invalid. This feature is currently implemented only on audio recordings, including those associated with screen captures.

Click on the **Lock** button and the **Verify Digital Signature** window will appear and confirm that the recording's signature is valid. Click **OK** to close the window. If multiple Interactions are selected, each will be listed in the Digital Signatures form with its own confirmation.



Save to Stand-Alone CD or ZIP File

Saving Interactions to CD/ZIP File

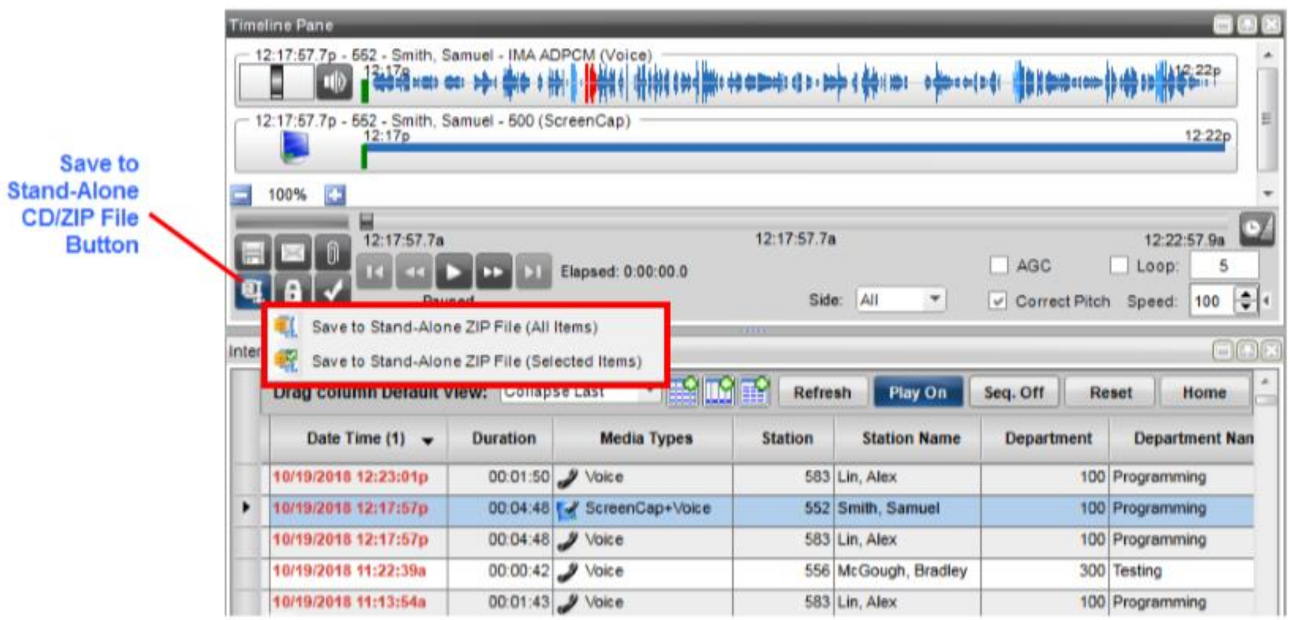
The **Save to Stand-Alone CD/ZIP** File option enables users to save selected interactions to a CD or ZIP file along with a version of the software that can run on a computer outside the network. The software does not include mapping or a filter pane, but includes enough of the features of the system to locate interactions in the Interactions Grid and view or play them back in the Interaction Details pane.

This option is configured in Retrieval under the **Settings > User Preferences > Application** tab.

Clicking on the **Save to Stand-Alone CD/ZIP** File button brings up a menu where you can choose to save **Selected Interactions** or **All Interactions** currently displayed in the Interactions Grid. When saving to a CD, be sure to have a blank CD in your drive before with this action.

Once the CD or ZIP file is created, it can be transferred to any other computer and used to play back the selected interactions. To use software on the CD or ZIP file, you must have a user name and password that is in Manage. When the Stand-Alone software is started, you will need to log in with this user name. In order to see all the interactions, you need to use a user name that is set up with the same permissions of the user who created the CD or ZIP file.

Note that the Save to Stand-Alone CD/ZIP File option is only available to customers who have purchased that specific option.

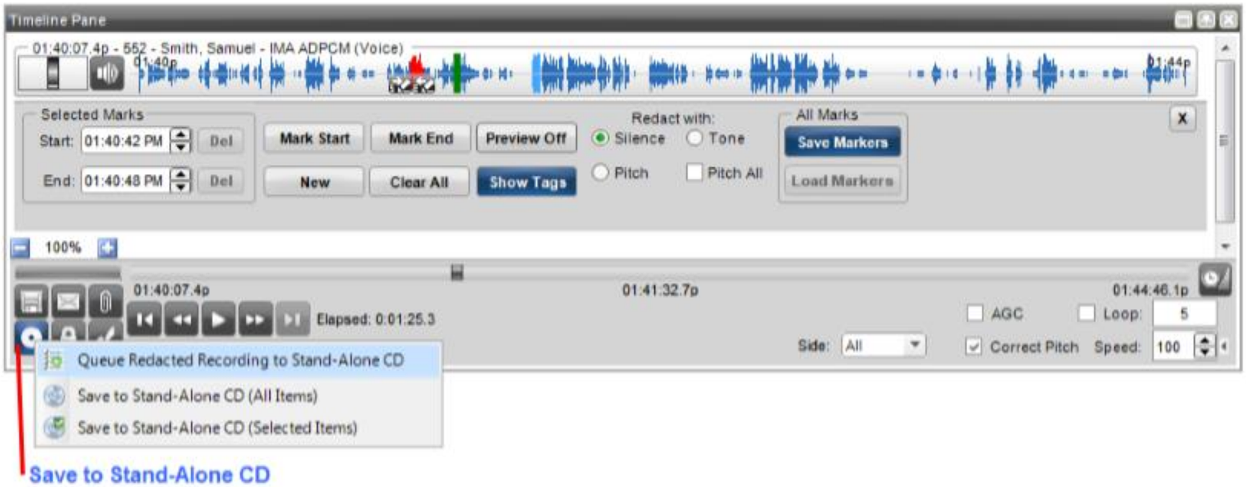


Saving to a Stand-Alone CD/ZIP File

Burn Redacted Files to Stand-Alone CD

Redacted recordings can also be queued and then burned to a CD using the Save to Stand Alone CD feature in Retrieval. After a recording has been redacted, click on the **Save to Stand Alone CD** button in the Timeline Pane and select the file destination. This functionality also allows users to take multiple redacted recordings and burn them all at one time to a CD along with the Stand-Alone CD playback application.

Users are able to distribute redacted recordings via CD. This allows sensitive information to be eliminated from the recordings before the CDs are distributed. Also, by burning the CD from within Retrieval, the CD is bundled with the easy to use, yet secure, Stand-Alone CD player for listening to the recordings.



Burn Redacted Files to Stand-Alone CD