

User Guide

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The Verba media player and viewer is a feature-rich multimedia tool that supports an easy in-depth analysis of media recordings.

- [Using the media player](#)
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[Verba Offline Player](#)

- [Installing a Windows Certificate for the Verba Offline Player](#)
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[Sharing and publishing conversations](#)

The recording system provides a secure and traceable way to share recordings among various members of your organization.

- [Sharing conversations](#)
- [Managing shared items](#)
- [Accessing shared conversations](#)
- [Verba Publishing Server](#)

[Using the Cisco IP phone service](#)

Many convenient features of the Verba System are available from Cisco IP phones.

- [Adding a tag to a conversation](#)
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- [Flagging a conversation as Important](#)
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- [Login to the Verba Phone service](#)
- [Recording an ongoing conversation or the most recent conversation](#)
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- [Silent monitoring and whisper coaching](#)

[Desktop recorder user interface](#)

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Accessing the web interface

Web access with login

The Verba System can be securely accessed through a standard web browser with a user identity.

The following HTTP address (URL) must be entered into the address field:

```
http://ServerNameorIPAddress/verba
```

ServerNameorIPAddress is the Verba Media Repository server name or IP address. Please contact the network administrator if the server name or IP address is not known.

HTTP IN 9.6 AND LATER

HTTP connection is by default not available, and automatically redirected to HTTPS. If HTTP connection is required, it can be re-enabled by editing the file at Program Files\Verba\tomcat\conf\context.xml and commenting out the following line

```
<Valve className="cat.inspiracio.catalina.HttpsValve" />
```

When Verba is configured to use the Secure Sockets Layer (SSL - HTTPS) protocol, the following address shall be entered into the address bar to access the web interface:

```
https://ServerNameorIPAddress/verba
```

❗ Verba web interface shall be run on the supported web browsers only! Using other web browsers may result in missing pages, missing parts of pages, and non-functional pages.

✅ The Verba user interface may be accessed quickly by adding the index page to the "Favorites" list of the browser after the first run. By doing so the server address will be populated automatically at every start.

Web access with Single sign-on (SSO) authentication

The Verba web application supports single sign-on authentication, that is a user has to provide login credentials only one time, from then on authentication is done in the background using Microsoft Windows Domain authentication information. Practically, when a user is logged into the Windows Domain on the PC, they can access the web application without authenticating again.

In order to access the web interface with SSO, use the following URL:

http://ServerNameorIPAddress/verba/sso

When Verba is configured to use the Secure Sockets Layer (SSL - HTTPS) protocol, the following address shall be entered into the address bar to access the web interface:

https://ServerNameorIPAddress/verba/sso

Access control

- [Login](#)
- [Four eyes login](#)
- [Sign out](#)
- [Locking users](#)

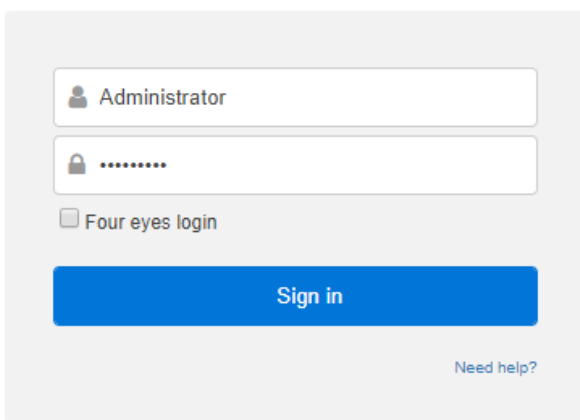
Login

Users can sign in to Verba in two different ways. They may either enter their Verba credentials, stored in the Verba database, or may enter their Active Directory domain credentials.

Using Verba credentials

The login screen appears after pointing the web browser to the Verba Web Application.

verba



Type the user account name into the **Login ID** field (not case sensitive) and enter the unique password in the **Password** (case sensitive) field, then press the **Sign In** button.

Contact the system administrator, if no login name and password was provided to you!

Should the user enter incorrect credentials, the login page displays the **Wrong login credentials!** error message.

Using Active Directory (Windows) domain credentials

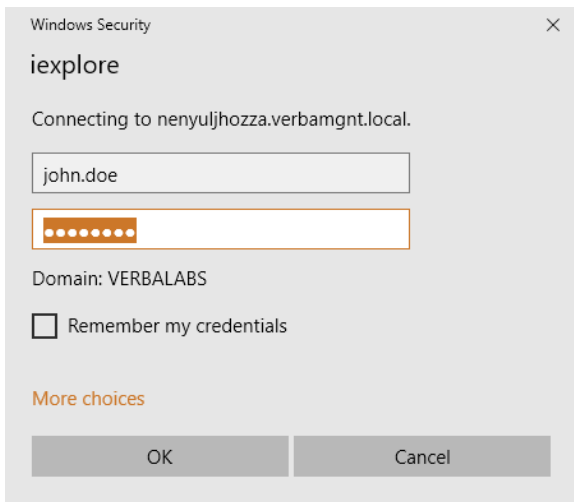
Users can use Single Sign On with Active Directory in two different ways. When SSO is enabled in the system, a different login page is displayed.

Automatic sign-in

When this option is enabled in the server configuration, then if the basic Web Application URL is used ("**hostname/verba**" or "**IP address/verba**"), Verba will automatically redirect the user to authenticate in the Active Directory.

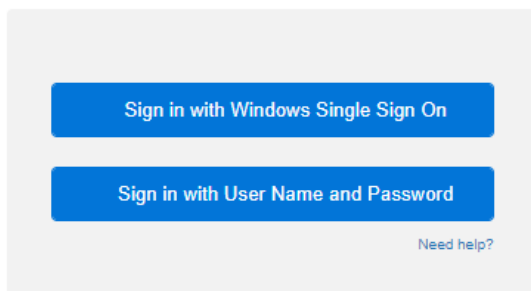
If the user is already logged in with his/her domain credentials, then they will automatically gain access to the Verba web interface and not additional interaction is required.

Otherwise, the system will prompt for a username/password combination.



Another URL can be used to avoid automatic redirection to AD ("**hostname/verba/login.do**" or "**IP address/verba/login.do**"). In this case, the following login screen is displayed.

verba



The software is licensed to: Stark Industries

Version: 9.0.0.5293

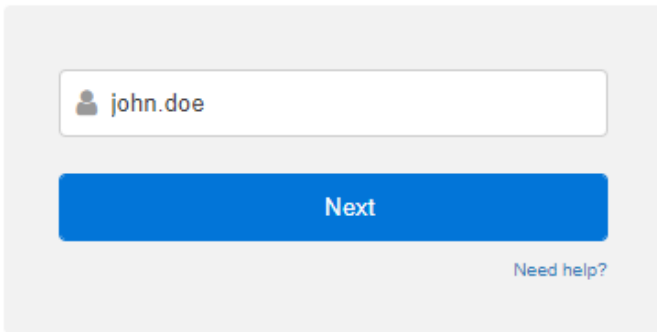
(c) Copyright Verba Technologies Ltd. 2000-2017. All rights reserved.

When the **Sign in with Windows Single Sign-On** option is selected, users will be redirected to AD and the procedure described above applies.

Manual sign-in

For manual sign-in the URL shown above ("**hostname/verba/login.do**" or "**IP address/verba/login.do**") should be used. Then upon selecting the **Sign in with User Name and Password** option, the user is taken to the following page.

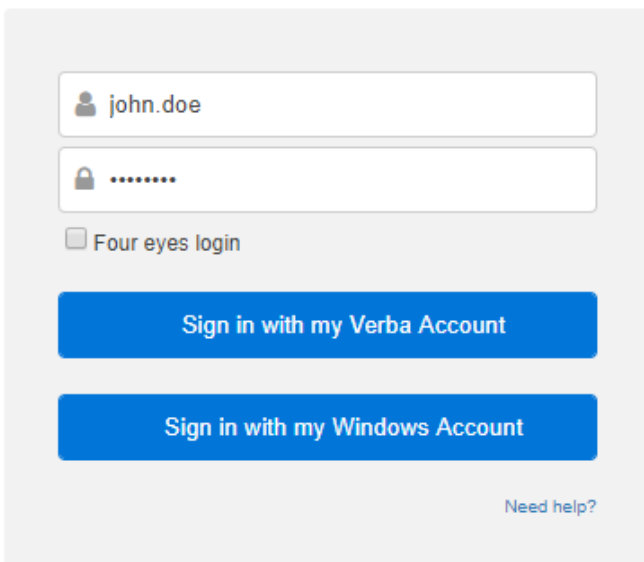
verba



A screenshot of the Verba login interface. At the top is the 'verba' logo in a dark red font. Below it is a light gray rounded rectangle containing a white input field with a user icon and the text 'john.doe'. Underneath the input field is a blue button with the text 'Next'. In the bottom right corner of the gray box, there is a small blue link that says 'Need help?'.

Enter the username to make the system enable the password field.

verba



A screenshot of the Verba login interface. At the top is the 'verba' logo in a dark red font. Below it is a light gray rounded rectangle containing two white input fields. The first field has a user icon and the text 'john.doe'. The second field has a lock icon and masked characters '.....'. Below the password field is a checkbox labeled 'Four eyes login'. Underneath these fields are two blue buttons: 'Sign in with my Verba Account' and 'Sign in with my Windows Account'. In the bottom right corner of the gray box, there is a small blue link that says 'Need help?'.

The **Sign in with my Verba Account** button will try to sign the user in based on the information available in the Verba database, as described in the **Login with Verba credentials** section at the top.

The **Sign in with my Windows Account** button will send the credentials to the Active Directory and will sign the user in if the AD returns a positive response.

✔ Four eyes login with domain credentials can be used on this page.

Four eyes login

Overview

The **four eyes principle** is an important security concept in certain industries for certain business processes that require approval from two persons before approval for a single business transaction, for example, log in. The transaction may be continued only on condition both approvers have signed off the process.

Although the effectiveness of this two-tier approval process relies upon the ability, integrity and, diligence of the individuals involved, the damages of a potential inadequate approval may be mitigated, because a second person is always involved in the final approval process.

With this in mind, it becomes evident that when a business process containing four-eyes principle constraints is automatized, the machine must guarantee that two independent users perform the approval steps. In other words, if User A approves one of the approval steps, the automation must make sure that user A is excluded from the subsequent approval step.

Configuring the Verba four eyes policy

With Verba, it is possible to define an **observer user** and/or an **observer group** for each user created in the recording system. If an observer user is defined for a user, the user can only log in with the observer user login information besides her/his original login information. In this way, these types of users can only access the Verba web application with the personal presence of the observer user. The same mechanism is applied when an observer group is defined (any member of the observer group can be an observer user). This is an optional security feature of the Verba system. For detailed information on user configuration, see [Find and List Users](#).

Login with four eyes policy

To add the login information of the observer user, just select the **checkbox next to the password input field**.



The screenshot shows the Verba login interface. At the top left is the 'verba' logo. Below it are two input fields: 'Login ID:' containing 'administrator' and 'Password:' containing a masked password. To the right of the password field is a small checkbox with an asterisk next to it. Below the password field is a 'Login' button. At the bottom of the form, there is a note: '* Click the check box to enable four eyes login!'. Below this note is the license information: 'The software is licensed to: Verba Technologies', 'Serial Number: MNRHQ4DK-005WDFLO-GE7QOX5K4I', and 'Version: 5.0.0281'. At the very bottom is the copyright notice: '(c) Copyright Verba Technologies, LLC. 2000-2010. All rights reserved.' and a paragraph of legal disclaimer text.

If the provided credentials are not valid, no error message is displayed; the login page is displayed again as part of the security design of the system.

Sign out

When work is completed in the Verba system, it is advisable to sign out before closing the web browser application, by selecting the **Account management / Sign ogout** menu item.

The login screen appears upon successful sign out, and the browser window can be safely closed.

Follow the instructions described in the previous section to log in again to Verba.

Locking users

The Verba System allows the system administrator to lock down user accounts as well as automatic lockout after a predefined number of invalid login attempts. By utilizing the following two parameters this function is fully configurable by the system administrator:

User Lockout Threshold: The user lockout threshold sets the number of invalid logon attempts that are allowed before a user is locked out. When lockout controls are used, they should be set to a value that balances the need to prevent user cracking and the needs of users having difficulty accessing their accounts.

The most common reason why users are not able to access their accounts is that they forget their passwords. If this is the case, several attempts may be needed to log in properly.

The lockout threshold can be set to any value between 0 and 999. When the lockout threshold is set to zero, users will not be locked out on invalid login attempts. Any other value sets a specific lockout threshold. Keep in mind that the higher the lockout value is, the higher the risk that a hacker may be able to break into a system.

Reset User Lockout Threshold After: Every time a logon attempt fails, the system raises the value of the threshold that tracks the number of unsuccessful logon attempts. The "reset user lockout threshold after" setting determines how long the lockout threshold is kept. This threshold may be reset upon a successful login or if the preset waiting time for "reset user lockout threshold after" has elapsed since the last unsuccessful logon attempt.

By default, the lockout threshold is maintained for one minute, but any value can be set between 1 and 99,999 minutes. Similar to the user lockout threshold, select a value that balances security needs against user access needs. A good value is between one and two hours. This waiting period should be long enough to force hackers to wait longer than they want to before trying to access the system again.

For more information on setting these parameters, see [Configuration settings for Verba Web Application](#).

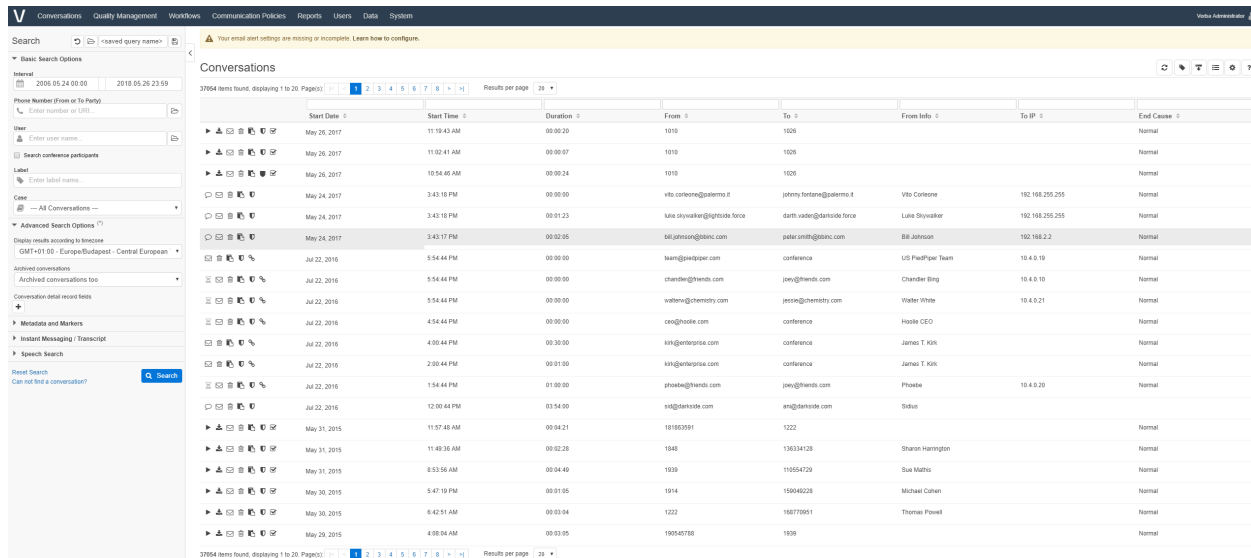
Locked users can be unlocked on the user configuration page. For more information see [User Administration](#).

Web interface layout

The Verba Web Application uses a common screen layout throughout the application. After logging into the system, the Verba web-based graphical user interface (GUI) will load.

The GUI consists of three key components:

- [Header and menu](#)
- [Body](#)
- [Web-based media player and viewer](#)



From top to the bottom the users see header with the menu, the main body of the page, and the embedded media player.

Although the web browser navigation features (*Back, Forward, Stop, Refresh, etc.*) may be used, **Verba does not recommend the use of these navigation buttons.** The browsers may misinterpret the Back and Forward buttons because of the active content of the pages.

The page is separated into two frames:

- Header and body (scrollable)
- Player (fixed at the bottom of the browser window)

✔ In order to maximize the visible useful area of your browser, you can toggle "full-screen mode" (e.g. by pressing the F11 key on your keyboard), and adjust zoom level if needed. You can also hide the Verba page header.

To configure the web access to the Verba user interface, put the index page into the "Favorites" list of the browser after the first run. This way you do not have to type the server address at every start.

Body

The body contains the main part of the user interface. Every event (e.g. selecting a menu item), generated by the user, takes effect in this interface area.

Pages, located in the body area, are described in the following sections.

Conversations 🔍 📄 🗨️ ⚙️ ?

43 items found, displaying 1 to 5. Page(3) | 1 2 3 4 5 6 7 8 > | Results per page 5

	Start Date	Start Time	Duration	From	From Info	To	To Info	Direction
▶ 📄 🗨️ 📧 📧 📧	Jul 22, 2016	5:54:44 PM	00:00:00	watanu@chemistry.com	Walter White	jessie@chemistry.com	Jessie	
▶ 📄 🗨️ 📧 📧 📧	Jul 22, 2016	5:54:44 PM	00:00:00	chandler@friends.com	Chandler Bing	joey@friends.com	Joey Tribbiani	
▶ 📄 🗨️ 📧 📧 📧	Jul 22, 2016	5:54:44 PM	00:00:00	team@piedpiper.com	US PiedPiper Team	conference	Conference (KSLNPTM1)	
▶ 📄 🗨️ 📧 📧 📧	Jul 22, 2016	4:54:44 PM	00:00:00	ceo@hoolie.com	Hoolie CEO	conference	Conference (KSLNPTM1)	
▶ 📄 🗨️ 📧 📧 📧	Jul 22, 2016	4:00:44 PM	00:30:00	kirk@enterprise.com	James T. Kirk	conference	Conference (KSLNPTM1)	

43 items found, displaying 1 to 5. Page(3) | 1 2 3 4 5 6 7 8 > | Results per page 5

Header and menu

The header section is on the top of the browser page. From left to right the Verba page header section contains the Verba logo, the Verba menu system and the Account Management menu.

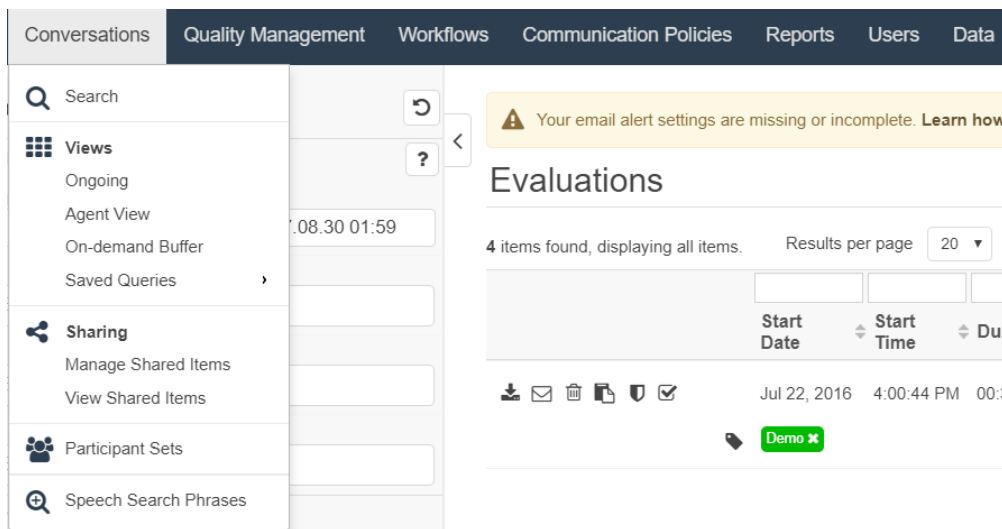
The Verba page header cannot be hidden.



The available menu items and functions depend on the authorization profile of the user.


The menu in the header makes navigation easier and quicker in the Verba Web Application.

The menu can be activated and navigated by using your mouse (pointing device) like in any other standard graphical user interface. If you move the pointer over a menu, the items belonging to that menu will appear. By clicking the left mouse button the page of the desired menu item opens.



Certain menu items are only accessible with higher authorization levels. Menu items not available on an authorization level are hidden in the list.

Menu structure

 Menu items and functions depend on the authorization profile of the user. Functions that are not available for the specific user are **hidden**.

Conversations

This part of the main menu lets users access call lists with predefined selection criteria and sorting based on various filters. Normally the search starts immediately after selecting a menu item. The resulting call lists appear in the Body area or in a pop-up window.

Group and system supervisors will have visibility to their respective authority circle of users when executing many of these queries.

- **Search** - This menu takes users to the search criteria definition page where they can define various flexible search criteria to find call recordings.
- **Ongoing** - This item displays the list of ongoing conversations that are being recorded.
- **Agent View** - Supervisors can monitor the work of agents by looking at their live desktop screen.
- **On-Demand Buffer** - This list menu item displays conversations that are not yet kept but are marked for recording.
- **Saved Queries** - This menu item contains the saved queries of the user that were previously defined in the search page.
- **Manage Shared Items** - Conversations can be shared among users. This page lets users change the parameters of their conversation shares. (i.e. extending/revoking access to a share).
- **View Shared Items** - Conversations can be shared among users. This page displays the conversations shared with the user.
- **Participant Sets** - Customised participant sets can be used to define a group of people within the system.
- **Speech Search Phrases** - Users can search and list speech phrases by using the appropriate filters in this item.
- **My Exports** - This item displays the export operations that the user created.

Quality Management

- **All Evaluations** - Supervisors can rate the agent conversations by using this interface.
- **My Evaluations** - Users can see their ratings using this page.
- **Projects** - By creating projects supervisors can assign calls of certain agents to certain supervisors for evaluation.
- **Forms** - By creating scorecards, the supervisors can rate the calls of their agents.
- **Skills** - Agent skills like empathy, communication, technical knowledge, etc.can be added here.

Workflows

- **Request Access** - This item offers users the option to select the requested data filtered to Users/Groups, Cases or Label in the drop-down menu.
- **Requests** - This item lists all the requests. Users can search for and list authorization requests.
- **Workflows** - Users can create custom workflows to gain access to the requested conversations.
- **Message Templates** - The email messages that are sent to requesters/approvers can be configured in the Message Templates item. Users can select these templates in a workflow.

Communication Policies

- **Communication Policies** - Communication Policies are the foundation of your Ethical wall, they define how and when Users and Groups can communicate with each other.
- **Content Policies** - Instant Messaging content can be filtered based on business requirements.

- **Notifications** - Users can define the messages to be sent to notifications, which then can be sent to selected parties when a given communication channel is opened.
- **Disclaimers** - Users can define the texts of the disclaimers, which then can be sent to selected parties when a given communication channel is opened.
- **Validator** - Using the Communication Policy Validator users can test Communication Policies.
- **Audit Log** - This item logs Ethical Wall events.

Reports

- **Dashboard** - This is a configurable tool providing a quick look at the most useful statistics for the user.
- **Create New Report** - By creating reports users can gain a summarized view of the data in the system.
- **Report Templates** - In this item users can create Report Templates and reuse them at a later time.
- **Reports** - This item displays an overview of previously created reports that can be downloaded from this page.

Users

- **Users** - Administrators can access the user administration page from this item.
- **Groups** - Administrators can access the group administration page from this item.
- **Extensions** - Administrators can use this page to configure extension (phone) numbers to be recorded and link users to specific phone numbers.
- **Roles** - This is the basis of the Role-based access control (RBAC) in the system. User rights can be defined in Roles and then the roles are assigned to users.
- **Active Directory Synchronization** - The Active Directory Connection parameters can be defined here so that the users and extensions in Verba are automatically synchronized from AD.
- **Bulk User and Extension Update** - In this field, the user and extension parameters can be bulk updated by defining the new values of the parameters.
- **Bulk User Import** - This submenu allows administrators to create Verba user accounts using a bulk import feature.

Data

- **Data Management Policies** - Administrators can set up different types of data retention rules to define storage policies for the recorded conversations.
- **Storage Targets** - Users can set up target folders for the data retention policies in this item.
- **Import sources** - Users can search and list the various import sources by using the appropriate filters in this item.
- **Data processors** - Users can search and list data processors by using the appropriate filters in this item.
- **Manage Labels** - This item lists the Cases that were placed on Legal Hold.
- **Labels in Legal Hold** - This item lists the Labels that were placed on Legal Hold.
- **Automatic Labeling** - Users can find and list Label Rules in this item based on the set filters.
- **Manage Cases** - This item lists the cases that were previously created in the system. Users can add new cases to this page. For more information refer to the [Cases](#) article.
- **Cases in Legal Hold** - This item lists cases placed on Legal Hold.
- **Export** - Users can export groups of conversations and create backups of conversations in this item.

System

- **Servers** - Administrators can register and administer all types of settings for the deployed Verba servers (e.g. local recorders).
- **Configuration Profiles** - These profiles can be applied to Verba servers, making the administration of the servers easy and convenient.
- **Metadata Templates** - Conversation records can be extended with Fields that contain additional information on that record can be added to conversation records.
- **Conversation List Layout** - Administrators can define the content of the default List Layout, which is automatically assigned to a new user.
- **Request Server Certificates** - Service connections are encrypted by using certificates. Administrators can request certificates to a new Verba server if it cannot access the web application during installation.

- **Encryption/Signing certificates** - Recordings are encrypted by using certificates. Administrators can add and access the certificates to be used.
- **API Keys - Software developers can create custom applications that access Verba through an API. The keys for the communication with the API can be managed here.**
- **Audit Log** - Administrators have access to the read-only event logs that provide an audit trail of certain user activities and system events.
- **Alert management** - Users can set up alerts in this item.
- **Background Tasks** - This page shows the background tasks that are scheduled in the system (i.e. Data Retention Policies)
- **Collect Configuration and Logs** - Users can collect and configuration setups and logs in this item.
- **Session Monitor** - Administrators can view real-time status of active user sessions in the Verba Web Application.
- **Database Summary** - Administrators can display summary information on Verba database including call information and configuration databases here.
- **Database Purging** - Administrators can remove erroneous call records from the database in this item.
- **License** - Administrators can view the details of the currently applied license for the system, including the expiration date and the number of licenses for each function.

Account information

- **My account** - This item displays an overview of the user information.
- **Change password** - Users can change their password at any time in this item.
- **Sign out** - Logged in users sign out from the user interface here.
- **Online Help** - This item opens a new tab in your browser, that points to <https://kb.verba.com/>
- **Online Support** - This item opens the online Verba support page. Normally system support and administrator personnel use this site (a user ID and a password are required).
- **Downloads** - Administrators have access to various Verba plug-ins in this item.
- **About** - This item displays the version and registration information along with the EULA (End-User License Agreement).

Updated menu structure in Verba 9

We have restructured the menu structure in Verba 9.

The reasons for this change were:

- **too many main items** - our menu structure grew a lot throughout the years, we had too many main menu items
- **new functionality** - new functionality in our pipeline did not properly fit into the existing structure
- **unclear logic** - the old structure included elements that did not properly fit in the menu where they were

The table below helps smooth navigation in the new structure:

Previous Menu Structure	Location in New Menu Structure in v9.0
System	
Logout	User Account -> Logout
Change Password	User Account -> Change Password
License	System -> License
Certificates	System -> [Security] / Encryption/Signing Certificates
Database Monitoring	
Database Summary	System -> [Monitoring] / Database Summary
Database Purging	System -> [Monitoring] / Database Purging
Server	
Session Monitor	System -> [Monitoring] / Session Monitor
Background Tasks	System -> [Monitoring] / Background Tasks
Media Troubleshooting	System -> [Monitoring] / Media Troubleshooting
Collect Configuration and Logs	System -> [Monitoring] / Collect Configuration and Logs
Request Server Certificate	System -> [Security] / Request Server Certificate
Alert Management	System -> [Monitoring] / Alert Management
Audit Log	System -> [Security] / Audit Log
Conversations	
Ongoing Conversations	Conversations -> [Views] / Ongoing
Cisco Phone Monitoring	Conversations -> [Views] Cisco Phone Monitoring
Agent View	Conversations -> [Views] / Agent View
My Conversations	Removed, go to search and filter for you user account or your assigned extensions/addresses
Important Conversations	Removed, go to search and filter for Important under Metadata and Markers

Private Conversations	Removed, go to search and filter for Private under Metadata and Markers
Conversation Buffer	Conversations -> [Views] / On-demand
Manage Shared Items	Conversations -> [Sharing] / Manage Shared Items
View Shared Items	Conversations -> [Sharing] / View Shared Items
Saved Queries	Conversations -> [Views] / Saved Queries
Saved query 1	Conversations -> [Views] / Saved Queries -> Saved query 1
Participant Sets	Conversations -> Participant Sets
My Exports	Data -> Export
Automatic Labeling	Data -> [Labels] / Automatic Labeling
Search	Conversations
Compliance	
Cases	Data -> [Cases] / Manage Cases
Cases in Legal Hold	Data -> [Cases] / Cases in Legal Hold
Cases Waiting for Approval	Data -> [Cases] / Manage Cases
Labels	Data -> [Labels] / Manage Labels
Labels in Legal Hold	Data -> [Labels] / Labels in Legal Hold
Labels Waitinf for Approval	Data -> [Labels] / Manage Labels
Request Access to Users/Groups	Workflows -> [Authorization Requests] / Request Access
Request Access to Case	Workflows -> [Authorization Requests] / Request Access
Request Access to Label	Workflows -> [Authorization Requests] / Request Access
My Requests	Workflows -> [Authorization Requests] / Requests
All Requests	Workflows -> [Authorization Requests] / Requests
Requests to Approve	Workflows -> [Authorization Requests] / Requests
Workflows	Workflows -> [Authorization Workflows] / Workflows
Workflow Message Templates	Workflows -> [Authorization Workflows] / Message Templates
Policies	
Communication Policies	Communication Policies -> [Policies] / Communication Policies
Content Policies	Communication Policies -> [Policies] / Content Policies
Notification Templates	Communication Policies -> [Tenplates] / Notifications
Disclaimer Templates	Communication Policies -> [Tenplates] / Disclaimers

Validator	Communication Policies -> Validator
Audit Log	Communication Policies -> Audit Log
Data Management Policies	Data -> [Data Management] / Data Management Policies
Storage Targets	Data -> [Data Management] / Storage Targets
Import Sources	Data -> [Data Management] / Import Sources
Data Processors	Data -> [Data Management] / Data Processors
Conversation Import	Data -> [Data Management] / Data Management Policies
Conversation Export	Data -> Export
List Phrases	Conversations -> Speech Search Phrases
Manage Phrases	Conversations -> Speech Search Phrases
Speech Indexing (Data Retention)	Data -> [Data Management] / Data Management Policies
Automatic Labeling	Data -> [Labels] / Automatic Labeling
Administration	
Users	Users -> [Administration] / Users
Groups	Users -> [Administration] / Groups
Extensions	Users -> [Administration] / Extensions
Roles	Users -> [Administration] / Roles
Active Directory Synchronization	Users -> [Management Tools] / Active Directory Synchronization
Bulk User and Extension Update	Users -> [Management Tools] / Bulk User and Extension Update
Bulk User Import	Users -> [Management Tools] / Bulk User Import
Metadata Templates	System -> [Configuration] / Metadata Templates
API Keys	System -> [Security] / API Keys
Default Conversation List Layout	System -> [Configuration] / Default Conversation List Layout
Verba Servers	System -> [Configuration] / Servers
Configuration Profiles	System -> [Configuration] / Configuration Profiles
Quality Management	
Show Evaluations	Quality Management -> [Evaluations] / All Evaluations
My Evaluations	Quality Management -> [Evaluations] / My Evaluations
Projects	Quality Management -> [Configuration] / Projects
Forms	Quality Management -> [Configuration] / Forms
Skills	Quality Management -> [Configuration] / Skills

Dashboard	Reports -> Dashboard
Reporting	
Create New Report	Reports -> [Reports] / Create New Report
Report Templates	Reports -> [Reports] / Report Templates
Reports	Reports -> [Reports] / Reports
Help	
Downloads	User Account -> Downloads
On-line Help	User Account -> On-line Help
On-line Support	User Account -> On-line Support
About	User Account -> About

Searching conversations

- [Resetting the search fields](#)
- [Saving and reusing search criteria](#)
- [Basic search options](#)
 - [Query interval](#)
 - [Phone number or address](#)
 - [User](#)
 - [Label](#)
 - [Case](#)
- [Advanced Search Options](#)
 - [Time zones in search results](#)
 - [Scope](#)
 - [Recording Audit](#)
 - [Conversation detail record fields](#)
- [Metadata and Markers](#)
- [Text Search](#)

The conversation search page can be accessed through the **Conversations \ Search** menu.

The screenshot displays a search interface with the following components:

- Search Header:** Includes a search icon, a refresh icon, a text input field for "Enter query name...", and a save icon.
- Basic Search Options:** A section with a dropdown arrow and a help icon (?).
 - Interval:** A dropdown menu set to "Fix Interval". Below it, a date range field shows "2020.09.01 00:00" to "2020.09.01 23:59".
 - Phone Number (From or To Party):** A text input field with a phone icon and a save icon.
 - User:** A text input field with a user icon and a save icon.
 - Search conference participants
 - Label:** A text input field with a tag icon.
- Advanced Search Options:** A section with a right-pointing arrow.
- Metadata and Markers:** A section with a right-pointing arrow.
- Text Search:** A section with a right-pointing arrow and a help icon (?).
- Speech Search:** A section with a right-pointing arrow.
- Footer:** Includes a "Reset Search" link, a "Cannot find a conversation?" link, and a blue "Search" button with a magnifying glass icon.

This page allows the user to enter the search criteria to find recorded conversations. The search criteria attributes are divided into groups, and placed on three separate vertical tabs to make search criteria definition easier:

- **Basic Search Options** tab includes the most commonly used search fields.
- **Advanced Search Options** tab includes the remaining technical attributes that allow more sophisticated search criteria to be defined and used.
- **Metadata and Markers** tab allows the user to narrow the search using the business data associated with the conversation records (stored in custom metadata fields and markers).
- **Text Search** allows the user to search in the text recorded from instant message conversations. Any combination of the following fields can be used:
 - All of the listed phrases
 - Any of the listed phrases
 - None of the listed phrases

The user can navigate between these tabs until all of the search criteria have been specified, and then initiate the search by pressing the **Search** button below the tabs. The search is executed based on the combined set of search field values on all tabs.

Resetting the search fields

After setting the search criteria, the system stores the field values, so whenever the user loads the search page the previous settings are restored and displayed. To reset the fields, click on the **Reset Search** link in the bottom right corner of the search panel, or click on the



button on the top.

Saving and reusing search criteria

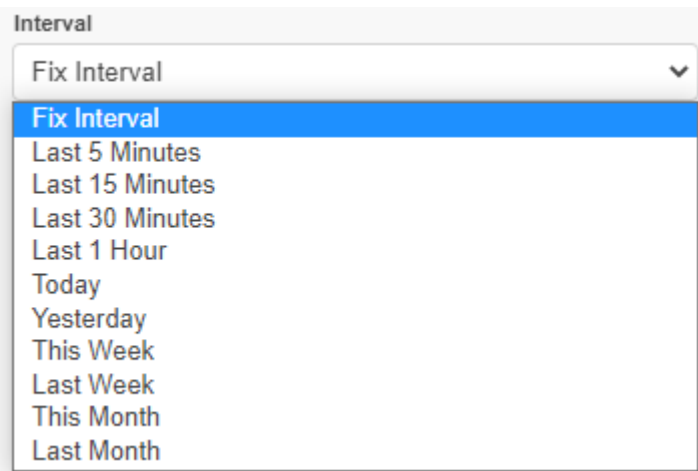
It is possible to save several different search criteria, then reuse them whenever it's required. For more information, see: [Reusing search criteria - saved queries](#)

Basic search options

Query interval

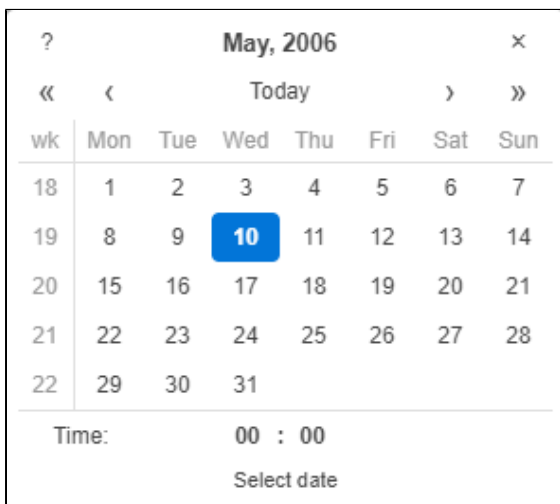
The time interval of the search results can be set under the Interval section. This criteria works based on the Start Time property of the recordings.

Using the dropdown, a predefined time interval can be used.



If the dropdown is set to Fix Interval, then the interval can be set manually. In this case, the left date represents the oldest time of the recordings and the right one is the oldest.

In order to modify the interval, click on any of the dates. The calendar pops up where the date and time can be set.



For changing the **month**, click on either the left (<) or right (>) arrows on the top. For changing the **year**, click on either the double left (<<) or double right (>>) arrows. The **day** can be selected by clicking on the date in the calendar.

The **time** can be set on the bottom. To increase the value of either the hour or the minute counter, left-click on the numbers. To decrease the values, use SHIFT + left click. The values can be set also by holding the left button of the mouse, then dragging to left or right.

Phone number or address

The Phone Number field can be used for searching based on the **From** or **To** fields of the recordings.



Multiple phone numbers or SIP addresses can be provided. In this case, there will be an OR logic between the provided values. While typing, the system also provides suggestions based on the configured extensions in the system. The '%' character can be used as wildcard.

A predefined list of numbers - or Participant Sets in other words - also can be provided by clicking on the



button. For more information about the Participant Sets, see: [Participant sets](#)

User

The User field can be used for searching based on the **From (Verba)** or **To (Verba)** fields of the recordings.



The image shows a user selection interface. At the top, the word "User" is displayed. Below it is a search input field containing "Sue Mathis (sue)". To the right of the input field is a folder icon. Below the input field, two user suggestions are listed: "Sue Mathis (sue)" and "Wesley Mack (wesley)". Each suggestion has a small 'x' icon to its right, indicating it can be removed from the selection.

Before using this field, the users have to be configured in Verba, and a proper user - extension assignment has to be present. Multiple Verba users can be provided. In this case, there will be an OR logic between the provided values. While typing, the system also provides suggestions based on the configured users in the system.

A predefined list of users - or Participant Sets in other words - also can be provided by clicking on the



button. For more information about the Participant Sets, see: [Participant sets](#)

i When using the **Search conference participants** checkbox, the values provided for the **Phone Number** and the **User** fields will be used for searching in the conference participants also.

Label

The Label field can be used for searching based on the labels attached to the recordings.



The image shows a label selection interface. At the top, the word "Label" is displayed. Below it is a search input field containing "HR issue". To the right of the input field is a folder icon. Below the input field, two label suggestions are listed: "HR issue" and "Reviewed". Each suggestion has a small 'x' icon to its right, indicating it can be removed from the selection.

Multiple labels can be provided. In this case, there will be an AND logic between the provided values, so the result will contain conversations that are labeled with all of the specified labels. While typing, the system also provides suggestions based on the configured labels in the system. For more information, see: [Labels](#)

Case

Instead of selecting the labels one by one, cases can be used for searching based on labels assigned to the same case. To use this search field, the cases have to be created and the labels have to be associated with the cases. For more information, see: [Cases](#)

Advanced Search Options

Time zones in search results

In Advanced Search Options, users can temporarily change the timezone of the current search. All time information will be presented in the selected time zone in the search results, when you Reset the Search fields.

Scope

By default, the system shows only the online conversations, so the searching will be fast also in case of a large number of old archived recordings. If this setting is set to **Archived Conversations too**, then the search will apply to the archived recording also.

Recording Audit

This section is visible only if the **Web Application \ Miscellaneous \ Hide not recorded conversations** setting is set to **No** in the configuration of the Verba server which hosts the web application.

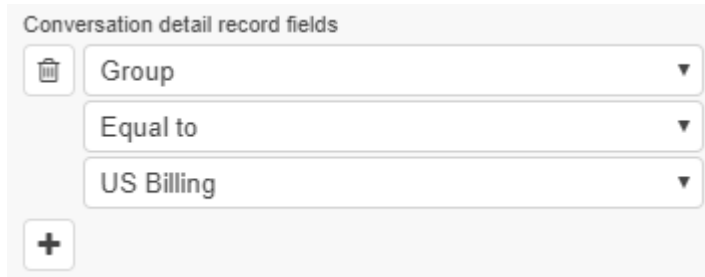
Recording audit

- Recorded conversations
- Recorded conversations with incorrect media
- Not recorded conversations due to error
- Not answered conversations

Filter	Description	Condition
Recorded conversations	Shows records without any error	Shows records where <ul style="list-style-type: none">media file exists (except instant messages and SMS records),recording failed flag is not set,end cause is not Caller Gave Up, Busy, Unobtainable, Error,and there is no media error
Recorded conversations with incorrect media	Shows records, which has an indication for a media error Note: these records are not available for all integrations	Shows records where <ul style="list-style-type: none">media file exists (except instant messages and SMS records),recording failed flag is not set,end cause is not Caller Gave Up, Busy, Unobtainable, Error,and there is a media error
Not recorded conversations due to error	Shows the not recorded conversations inserted by the recording services or imported by CDR reconciliation process. For information, see CDR reconciliation . Note: these records are not available for all integrations	Shows records where <ul style="list-style-type: none">media file does not exist and the end cause is not Caller Gave Up, Busy, Unobtainable,or recording failed flag is set,or end cause is Error
Not answered conversations	Shows the not answered conversations inserted by the recording services or imported by the CDR reconciliation process. For information, see CDR reconciliation . Note: these records are not available for all integrations	Shows records where <ul style="list-style-type: none">the end cause is Caller Gave Up, Busy, Unobtainable

Conversation detail record fields

All search fields support adding multiple query/filtering parameters.



Conversation detail record fields

- Group
- Equal to
- US Billing

+

Follow the steps below to add one or more filters to the desired search field:

Step 1 - Click on



the icon and select the desired field from the drop-down menu.

Step 2 - Choose the operation from the drop-down menu

Step 3 - Set the criteria in the last text box.

In case of multiple filters, there will be AND logic between the filters.

For more information about the available fields, see: [Search fields](#)

For more information about the available operators, see: [Search filter operators](#)

Users can remove previously added criteria by clicking on the



icon on the left side of the panel.

Metadata and Markers

This section provides the ability for searching in the metadata fields and in the markers. Under the Metadata fields setting, specific metadata criteria can be provided:

Step 1 - Click on



the icon and select the desired field from the drop-down menu.

Step 2 - Choose the operation from the drop-down menu

Step 3 - Set the criteria in the last text box.

In case of multiple filters, there will be AND logic between the filters.

Users can remove previously added criteria by clicking on the



icon on the left side of the panel.

Text Search

The Text Search section can be used for finding a recording based on its content. It can be used for:

- Instant Message recordings
- Voice recordings with transcript
- SMS recordings

When using the **All of these phrases** textbox, there will be AND logic between the provided phrases. If the **Any of these phrases** textbox is being used, then there will be OR logic. With the **None of these phrases** textbox, all recordings can be found which doesn't contain the provided phrases.

By clicking on the **Create labeling rule from these** link, a new automatic labeling rule can be created from the provided criteria. For more information, see: [Labels](#)

Reusing search criteria - saved queries

Every user can save a search query after it was executed, and rerun it at a later time. This feature is only available for conversation lists which were generated through the search page because saving of for example built-in conversation lists is fairly unnecessary.

Save a Query

To save a search query, follow these steps:

Step 1 Enter the search criteria on the search page and execute the search by pressing the **Search** button

Step 2 When the result is displayed, users can define a label for the query in the top-right corner of the Search panel. Specify the label and press the **Save** button. The name of the search query must be unique.

Step 3 Users will be notified of the success of the task and the query will be added under the **Conversations / Saved Queries** menu item.

Load a Query

A previously saved search query can be loaded by simply selecting it from the menu. The saved queries are located under the **Conversations / Saved Queries** menu item. Only those queries are listed that were saved by the user. The list of queries is generated when the user logs into the Web Application.

Delete a Query

Unnecessary queries can be deleted by following the steps below:

Step 1 Load the query to be deleted by clicking on the **Load query** button on the Search panel, and select it from the menu.

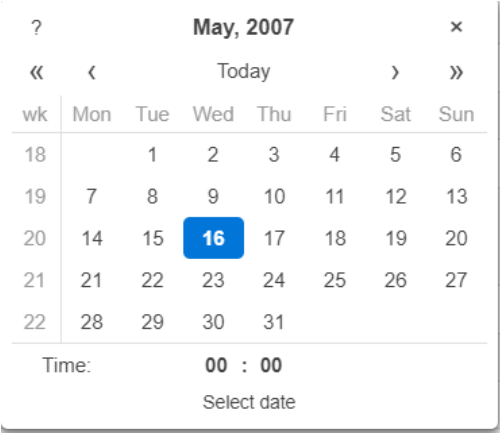
Step 2 In the top-right corner of the Search panel, press the **Delete** button to delete the query.

Make a query available to other users

Administrators can associate a saved query to a group through the **Group Queries Configuration** menu. For further information, see [GroupsGroup query configuration](#).

Search fields

Basic Search Options

Field Name	Description
Query Interval Start/End Time	<p>This tool is designed to define a date-time interval in a few easy steps. Once the start date-time of a conversation falls into the given interval, it will be displayed:</p>  <p>The selected date is displayed in red and can be adjusted using the following controls:</p> <p>Date selection:</p> <ul style="list-style-type: none">• Use the << and >> buttons to select the year• Use the < and > buttons to select the month <p>Hold the left mouse button on any of the buttons for faster selection</p> <p>Time selection:</p> <ul style="list-style-type: none">• Click on any of the time digits to increase the value• Shift-click to decrease the value• Click and drag for faster selection <p>Since all date and time values are stored in UTC/GMT (Universal Coordinated Time), the displayed date and time values depend on the time-zone setting of the user. You can override this setting by selecting another time-zone on the Advanced Search Options tab</p>
Phone Number (From or To Party)	<p>The phone number of the caller or the called party can be entered here.</p> <p>This field uses an auto-complete feature to list the matching registered numbers in a drop-down menu as you type. Any other number can be entered, however, the auto-completion only works for registered numbers.</p>
User	<p>This field also uses the auto-complete feature to list the matching registered Verba users in a drop-down menu as you type. Any other username can be entered here, however, the auto-completion only works for registered Verba users.</p>
Label	<p>Conversations can be marked by using labels. In this field, users can select from existing search labels in a drop-down menu.</p>


Advanced Search Options

Field Name	Description
Display results according to timezone	Search results will be displayed according to this time zone
Archived conversations	Determines whether the system will include archived conversation in the search or not
From	The initiating party's identifier (phone number, extension, SIP URI, etc.)
From Info	Searches in the From Info field of the records, that shows additional information on the conversation
From (digits)	Using this option, search results can be filtered based on how many digits the From extension contains
From Device ID	The initiating party's Device ID
From IP	The initiating party's IP address
From Proxy IP	The IP address of the media relay point from the initiating party's perspective. This can be the proxy server, edge server, or other relay points.
To	The receiving party's identifier (phone number, extension, SIP URI, etc.)
To Info	Searches in the To Info field of the records, that shows additional information on the conversation
To (digits)	Using this option, search results can be filtered based on how many digits the To extension contains
To Device ID	The receiving party's Device ID
To IP	The receiving party's IP address
To Proxy IP	The IP address of the media relay point from the receiving party's perspective. This can be the proxy server, edge server, or other relay points.
Both To or From	The initiating or the receiving party's identifier (phone number, extension, SIP URI, etc.)
Both To of From Info	Searches in the From and To Info fields of the records, that show additional information on the conversation
Dialed Number	If the dialed number differs from the person that answered the conversation, this field is populated
User	Users who are in the Verba database
Group	Users can select one or more Verba groups from the predefined list. Conversations linked to the users of the selected group(s) will appear in the search results.
User ID	The User/Agent/Trader ID obtained from the recorded platform
Direction	You can select one or more of the directions from the predefined list (internal, outgoing, and incoming).
Direction (User)	The direction of the conversation from the recorded user point of view (inbound, outbound)
End Cause	What was the reason behind the termination of the conversation. Caller hung up, timeout, etc.

Duration Interval	<p>Users can define an interval. Every conversation will be displayed in the search result for which the duration is inside the given interval. Specifying only the beginning or only the end of the interval results in conversations longer or shorter than the defined value.</p> <p>Seconds values greater than 59 are not accepted, however, minute values greater than 59 are accepted and converted to valid 'hours:minutes' values automatically.</p>
Conversation Type	<p>What conversation modalities should be displayed. Available options:</p> <ul style="list-style-type: none"> • Voice • Video • Instant Messaging • Desktop Screen • Screen & Application Share (Lync/SfB) • Whiteboard (Lync/SfB) • Poll / Q&A (Lync/SfB) • File Share (Lync/SfB) • SMS
Forward Reason	Conversation forwarding reason
On-demand	<p>Options are:</p> <ul style="list-style-type: none"> • Show only on-demand conversations • Show only always-on conversations
Marked for recording	Shows On-Demand conversations that have been marked to be kept
Protected	Conversation is Protected. If the system is set up to take this setting into account, then these conversations will not be deleted even after the retention time has passed
Related conversation exists	Only shows conversations where related conversations exist (the whole conversation is stored in more than one file)
Storage target	Which Storage target the conversation is stored on. This only has value if not the default storage location is being used
End of Retention	Shows when the retention time of a conversation ends
Delete after End of Retention	Available options are Yes/No, it can separate conversations that will be automatically deleted after the retention time is up
Encryption Certificate	Which certificate was used to encrypt conversations
Signature Certificate	Which certificate was used to sign conversations
Silence Ratio	Shows the ratio of silence in relation to the whole conversation
Talkover Ratio	Indicates the amount of time when multiple parties were talking at the same time in a conversation
Longest Silence	Longest time in a conversation when both parties were silent

Media Check	Shows what problems were discovered for each conversation. Available selection options: <ul style="list-style-type: none"> • No Media • Length Mismatch • RTP Loss • RTP Duplication • SRTP Decryption Error • Decoding Error • Media Mixing Error • One-way Media • Missing File • Corrupted File
Voice Quality	Makes it possible to search based on the rating of the conversation, done by the Voice Quality Check feature
Recording Server	Hostname of the Recording Server that recorded the conversation
Media File Name	Searches based on the name of the media file
Shared File Name	Works with Content Sharing can filter based on the name of the shared file
Shared File Extension	Works with Content Sharing can filter based on the file extension of the shared file
Conversation Identifier	Verba's unique, automatically generated conversation identifier. The search result will include only conversation(s) with the given identifier(s).
Platform Conversation ID	The ID of the conversation that the Telephony/UC platform assigns to the session
Source Platform	What Telephony/Unified Communications system was the conversation recorded in (Cisco, Sfb, Avaya, etc.)
Import Source	The import source which imported the conversation

To see what type of filtering criteria can be used with most of these options, refer to the [Search filter operators](#) article.

 You can define as many search criteria as you wish. The search field values are linked with a logical AND. Therefore only those conversations will be listed that meet all of the search criteria.

If all of the search fields are empty, every recorded conversation will be listed in the defined time range.

Metadata and Markers

As previously described, Verba allows the use of group-specific metadata templates. Depending on the user configuration, each user is a member of one or more groups. When a user is logged into the Verba Web Application, the user can use any of those comment templates for searching or adding new comments, which are defined for those groups the user belongs to.

Field Name	Description
Full-text search in markers	Searches in the text description of the conversation markers. Works with a portion of the phrase as well, it does not have to be an exact match

Metadata fields	Contents of specific metadata fields can be searched for here
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Text Search

This section makes it possible to search in text-based recordings, transcripts, and markers.

The search fields support '*' for a **starts-with or ends-with match**, or " " for an **exact match**.

Field Name	Description
Instant Messaging	Sets whether the Instant Messaging recordings will be in the scope of the searching or not.
Transcript	Sets whether the transcripts will be in the scope of the searching or not.
SMS	Sets whether the SMS recordings will be in the scope of the searching or not.
Markers	Sets whether the markers will be in the scope of the searching or not.
All of these phrases	Shows IM sessions that contain all of the listed phrases in one session
Any of these phrases	Shows IM sessions that contain any of the listed phrases
None of these phrases	Shows IM sessions that contain none of the listed phrases

Speech Search

For the Speech Search Filters refer to the [Speech Search Filters](#) article.

Search filter operators

When the user adds a **Conversation detail record field** to the search query under the **Advanced Search Options**, the system automatically displays the different operation types for the selected fields. Search filter operators include the following, however, the operator list differs by field:

Equal to	<p>The search query returns conversations where the selected field's value is equal to the specified criteria.</p> <p>Special search characters cannot be used here.</p>
Not equal to	<p>The search query returns conversations where the selected field's value is not equal to the specified criteria.</p> <p>Special search characters cannot be used here.</p>
Matches a value in the list	<p>The search query returns conversations where the selected field's value matches a value in the list.</p> <p>When the user selects this operator, a multi-select drop-down menu or a text input box is displayed, depending on the selected field.</p> <p>Multiple items in the drop-down can be picked by holding down CTRL while clicking on each item to be selected.</p> <p>When the text input is filled, the system automatically displays another field for the next value.</p> <p>Special search characters cannot be used here.</p>
Does not match a value in the list	<p>The search query returns conversations where the selected field's value does not match a value in the list.</p> <p>When the user selects this operator, a multi-select drop-down menu or a text input box is displayed, depending on the selected field.</p> <p>Multiple items in the drop-down can be picked by holding down CTRL while clicking on each item to be selected.</p> <p>When the text input is filled, the system automatically displays another field for the next value.</p> <p>Special search characters cannot be used here.</p>
Does not exist	<p>The search query returns conversations where the selected field's value is not defined.</p> <p>Special search characters cannot be used here.</p>
Exists	<p>The search query returns conversations where the selected field's value is defined.</p> <p>Special search characters cannot be used here.</p>
Starts with	<p>The search query returns conversations where the selected field's value starts with the specified criteria.</p> <p>Special search characters cannot be used here.</p>
Ends with	<p>The search query returns conversations where the selected field's value ends with the specified criteria.</p> <p>Special search characters cannot be used here.</p>
Includes	<p>The search query returns conversations where the selected field's value includes the specified criteria.</p> <p>Special search characters cannot be used here.</p>
Like	<p>The search query returns conversations where the selected field's value matches the specified criteria.</p> <p>Special search characters can be used here. These are described later in this topic.</p>

Not like	<p>The search query returns conversations where the selected field's value does not match the specified criteria.</p> <p>Special search characters can be used here. These are described later in this topic.</p>
Between	<p>This operator is only available for the Duration interval field. The search query returns conversations where the field's value is in the specified timeframe.</p> <p>Users can define custom timeframes, or use the drop-down menu for predefined settings.</p> <p>Special search characters cannot be used here.</p>

Special search characters

You can use certain special characters to perform "wildcard-search" using the following combinations:

The % character represents a string of characters at the position it is used. The system applies this character by default for phone number fields. Search pattern variations denoted by * can be resource intensive and can result in long search execution.

filtertext%	If only the beginning of a field value is known, the remaining unknown string can be replaced with the "%" character. For example specifying 414% in the extension search field will list all conversations where the extension number begins with 414.
%filtertext	* If only the ending of the value to be found is known, the remaining unknown string can be replaced with the "%" character. For example specifying %414 will list all conversations where the field value ends with 414.
% filtertext%	* If only the internal section of the field value is known, the preceding and trailing sections can be replaced with the "%" character. For example typing %414% will list all conversations where the field value contains 414 after the first digit and before the last digit.
_	If only the number of digits are known in the field, but one or more digits are uncertain, replace the unknown digit with "_" (underscore) character. E.g. typing 4143_69 will list all conversations containing this pattern (the "_" can be any character, excluding empty character).
[]	If the number of digits in the field are known, but one or more digits are uncertain and the possible values are known, the unknown digit(s) can be replaced with "[0123456789]" or "[0-9]" character(s). E.g. typing 4143[4-8]69 or 4143[45678]69 will list all conversations containing this number (the "[4-8]" or "[45678]" can be any number between 4 and 8).

None of the fields are case sensitive, so you can use either uppercase or lowercase letters. You can also combine the above mentioned special search patterns.

Example search pattern

414[3-7]_6%	This will list all conversations that start with 414, the fourth number is one of 3, 4, 5, 6 or 7, the fifth number can be any character (excluding nothing or an empty character), the sixth number is 6, and after character 6 the number can contain anything (including nothing).
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Special search modifier characters

You can use certain special characters to perform "wildcard-search" using the following combinations:

The % character represents a string of characters at the position it is used. The system applies this character by default for phone number fields. Search pattern variations denoted by * can be resource intensive and can result in long search execution.

filtertext%	If only the beginning of a field value is known, the remaining unknown string can be replaced with the "%" character. For example specifying 414% in the extension search field will list all conversations where the extension number begins with 414.
%filtertext	* If only the ending of the value to be found is known, the remaining unknown string can be replaced with the "%" character. For example specifying %414 will list all conversations where the field value ends with 414.
% filtertext%	* If only the internal section of the field value is known, the preceding and trailing sections can be replaced with the "%" character. For example typing %414% will list all conversations where the field value contains 414 after the first digit and before the last digit.
_	If only the number of digits are known in the field, but one or more digits are uncertain, replace the unknown digit with "_" (underscore) character. E.g. typing 4143_69 will list all conversations containing this pattern (the "_" can be any character, excluding empty character).
[]	If the number of digits in the field are known, but one or more digits are uncertain and the possible values are known, the unknown digit(s) can be replaced with "[0123456789]" or "[0-9]" character(s). E.g. typing 4143[4-8]69 or 4143[45678]69 will list all conversations containing this number (the "[4-8]" or "[45678]" can be any number between 4 and 8).

None of the fields are case sensitive, so you can use either uppercase or lowercase letters. You can also combine the above mentioned special search patterns.

Example search pattern

414[3-7]_6%	This will list all conversations that start with 414, the fourth number is one of 3, 4, 5, 6 or 7, the fifth number can be any character (excluding nothing or an empty character), the sixth number is 6, and after character 6 the number can contain anything (including nothing).
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Searching in IM conversations and voice transcripts

	Field Name	Description
<div style="border: 1px solid #ccc; padding: 5px;"> <p>▼ Text Search ^(*) ?</p> <p>Search in</p> <p><input checked="" type="checkbox"/> Instant Messaging</p> <p><input checked="" type="checkbox"/> Transcript</p> <p><input checked="" type="checkbox"/> SMS</p> <p>All of these phrases</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">weekly report ×</div> <p>Any of these phrases</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">meeting ×</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">monday ×</div> <p>None of these phrases</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">e-mail ×</div> <p>Create labeling rule from these</p> </div>	Search in	What conversation modalities should be included in the search. Available options: <ul style="list-style-type: none"> • Instant Messaging • Transcript • SMS
	All of these phrases	The search will return conversations where all phrases are matched
	Any of these phrases	The search will return conversations where at least one phrase is matched
	None of these phrases	The search will return conversations where none of the phrases are matched
	Create labeling rule from these	Create an Automatic labeling rule based on current search criteria

Conversation lists and actions

Users can search for recorded conversations, and the search results can be displayed through conversation lists. Conversations lists can be accessed from various parts of the user interface including the following:

- Clicking on the **Conversation** menu item
- Selecting **Conversations / Search** submenu and filling in the criteria
- Selecting **Conversations / Ongoing Conversations** submenu
- Loading a previously saved query from **Conversations / Saved Queries**


The conversation list is displayed in a tabular format where the columns can be configured by the administrator or the user can personalize it using the **System / Conversation List Layout** menu.

Start Date	Start Time	Duration	From	To	From Info	To IP	End Cause
May 26, 2017	11:19:43 AM	00:00:20	1010	1026			Normal
May 26, 2017	11:02:41 AM	00:00:07	1010	1026			Normal
May 26, 2017	10:54:46 AM	00:00:24	1010	1026			Normal
May 24, 2017	3:43:18 PM	00:00:00	vito.cortese@paterno.it	johnny.fortana@paterno.it	Vito Cortese	192.168.255.255	Normal
May 24, 2017	3:43:18 PM	00:01:23	luke.skywalker@lightside.force	darth.vader@darkside.force	Luke Skywalker	192.168.255.255	Normal
May 24, 2017	3:43:17 PM	00:02:05	bill.johnson@ibmc.com	peter.smith@ibmc.com	Bill Johnson	192.168.2.2	Normal
Jul 22, 2016	5:54:44 PM	00:00:00	team@pipediper.com	conference	US Pipediper Team	10.4.0.19	Normal
Jul 22, 2016	5:54:44 PM	00:00:00	chandler@trends.com	jay@trends.com	Chandler Bing	10.4.0.10	Normal
Jul 22, 2016	5:54:44 PM	00:00:00	walter@chemistry.com	jessie@chemistry.com	Walter White	10.4.0.21	Normal
Jul 22, 2016	4:54:44 PM	00:00:00	ceo@hoolie.com	conference	Hoolie CEO		Normal
Jul 22, 2016	4:00:44 PM	00:30:00	kirk@enterprise.com	conference	James T. Kirk		Normal
Jul 22, 2016	2:00:44 PM	00:01:00	kirk@enterprise.com	conference	James T. Kirk		Normal
Jul 22, 2016	1:54:44 PM	01:00:00	phoebe@trends.com	jay@trends.com	Phoebe	10.4.0.20	Normal
Jul 22, 2016	12:00:44 PM	03:54:00	sid@darkside.com	sid@darkside.com	Sidux		Normal
May 31, 2015	11:57:48 AM	00:04:21	181863591	1222			Normal
May 31, 2015	11:49:36 AM	00:02:28	1848	136334128	Sharon Harrington		Normal
May 31, 2015	8:53:56 AM	00:04:49	1939	110554729	Sue Mathis		Normal
May 30, 2015	5:47:19 PM	00:01:05	1914	159849228	Michael Cohen		Normal
May 30, 2015	6:42:51 AM	00:03:04	1222	188770951	Thomas Powell		Normal
May 29, 2015	4:08:04 AM	00:03:05	1905452788	1939			Normal

Every conversation list displays the calls ordered by date and time (in descending order). This means that the most recently recorded conversation is the first, while the oldest conversation is the last one in the list.

Predefined queries (not initiated from the **Search** menu) cannot be filtered further. The result list will contain every recorded conversation that meets the predefined criteria. E.g. selecting **Conversations / Ongoing Conversations** submenu will show every ongoing call of the logged in user.

Use the **Search** page to narrow down the call list.

 If a security profile has a "search window" limit set, then only conversations recorded in the last x hours can be listed. A message informs the user about this at the top of every conversation list.

Small Letter Icon

When the conversation includes a [desktop screen recording](#), then an S icon is shown in the call list.

Using the Conversation List

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Conversation fields

A conversation list consists of a list header and one line for each record found matching the search criteria. The system administrator can configure the default layout, and every user can personalize the list layout further: configure the fields (columns) to be displayed and their order (see the next section for more information).

The following table shows the available fields. Not all fields are filled in for all integrations. Check the description of the integration to see which fields are available.

Category	Field	Description
Participants	From	The number of the caller party in the conversation
	To	The number of the called party in the conversation
	From (Verba)	The name of the Verba user associated with the calling party
	To (Verba)	The name of the Verba user associated with the called party
	From Info	The name of the caller party in the conversation
	To Info	The name of the called party in the conversation
	User	The recorded user associated with the conversation
	User ID	The User/Agent/Trader ID obtained from the recorded platform
	From Device	The Device ID of the calling party
	To Device ID	The Device ID of the called party
	Dialed Number	The original dialed number
	Recorded Extension	The recorded extension number associated with the conversation
Details	End Cause	The end cause of the conversation (e.g. normal, hold, transfer, etc.)
	Direction	The direction of the conversation from the communication system point of view (e.g. internal, inbound, outbound, etc.)
	Direction (User)	The direction of the conversation from the recorded user point of view (inbound, outbound)
	Start Date Time	Start date and time of the conversation
	Start Date Time (GMT)	Start date and time of the conversation in GMT/UTC timezone
	End Date Time	End date and time of the conversation
	End Date Time (GMT)	End date and time of the conversation in GMT/UTC timezone
	Duration	The length of the call in hhh:mm:ss format
	Start Time	Start time of the conversation
	End Time	End time of the conversation
Video Thumbnail	Thumbnail image from the beginning of the video recording	

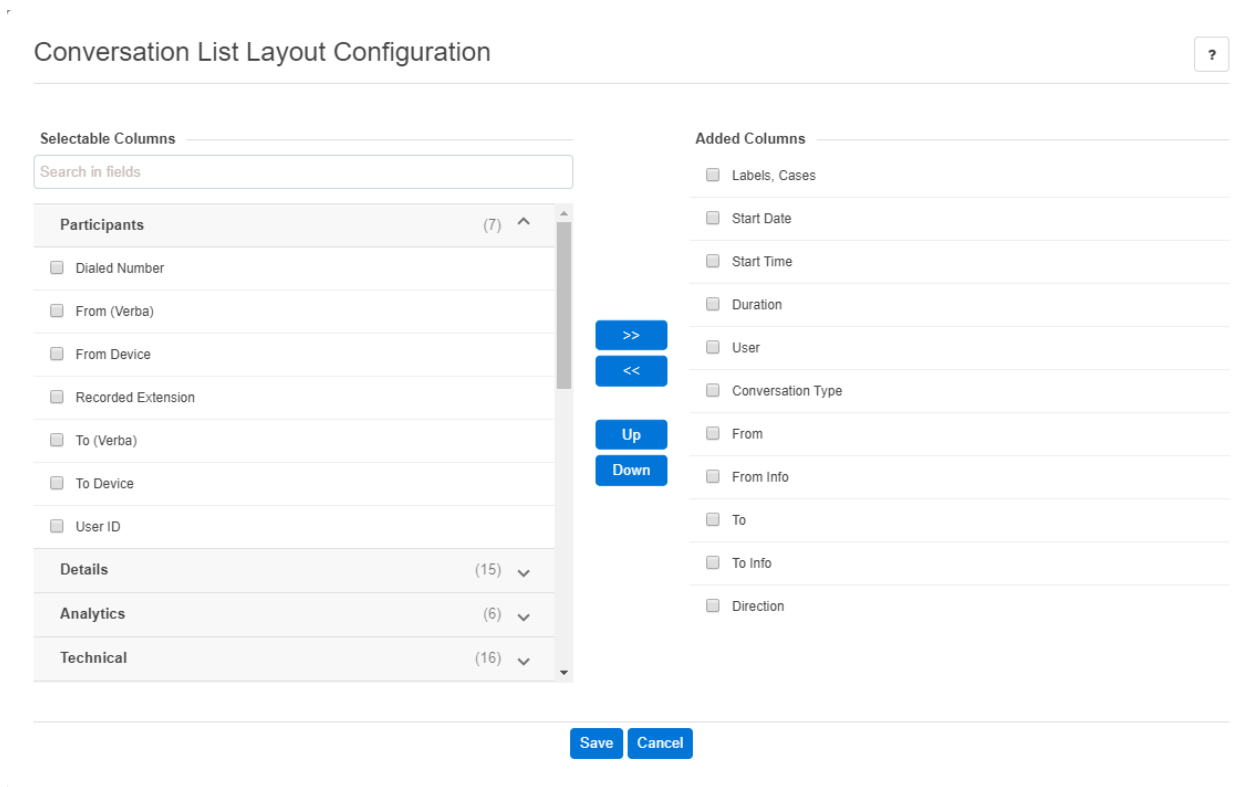
	Conversation Type	The type of conversation. Available options: <ul style="list-style-type: none"> • Voice • Video • Instant Messaging • SMS • Desktop Screen • Screen & Application Share (Lync/SfB) • Whiteboard (Lync/SfB) • Poll / Q&A (Lync/SfB) • File Share (Lync/SfB)
	Forward Reason	The forward reason for the conversation (e.g. forwarded, transferred, team call, delegated, etc.)
	End of Retention	End date and time of the retention period based on the retention setting applied to the conversation
	Delete after End of Retention	It shows if the conversation will be automatically deleted after the retention period expires
	Storage target	The current storage location of the media file(s) associated with the conversation
	Encryption Certificate	The certificate which was used to encrypt the conversation
	Signature Certificate	The certificate which was used to sign the conversation
	Labels, Cases	The labels and cases associated with the conversation
Analytics	Silence ratio	The ratio of silence in the conversation
	Talkover ratio	The talkover ratio of the conversation
	Longest Silence	The length of the longest silence present in the conversation
	Media Check	It shows the media processing errors during recording. The system can identify the following media errors: <ul style="list-style-type: none"> • No media • Length mismatch • RTP loss • RTP duplication • SRTP decryption error • Decoding error • Media mixing error
	Voice Quality	The overall voice quality check score for the conversation
Technical	Recording Server	The hostname of the Recording Server which recorder the conversation
	Audio Codec	The audio codec of the recorded stream
	Archive Status	It shows if the conversation record is archived in the database or not
	File Format	The file format of the media file
	Video Codec	The video codec of the recorded stream
	Platform Call ID	The unique identifier of the conversation received through the integration
	From IP	The IP address associated with the calling party

	To IP	The IP address associated with the called party
	From Proxy IP	The IP address of the proxy server associated with the caller party
	To Proxy IP	The IP address of the proxy server associated with the called party
	Source Platform	It shows which telephony / unified communications system the conversation was recorded on (Cisco,Sfb, Avaya, etc.)
	Import Source	The import source which imported the conversation
	Conversation ID	The unique identifier of the conversation which was generated during recording/capture/import
	Recording Failed	It indicates if the recording has failed and the metadata was imported during CDR reconciliation
	Record Type	It indicates the type of the database record: <ul style="list-style-type: none"> • Standard • CDR-Only • Media-Only
	2N Source	In case of duplicate (2N) recording, records are marked as primary or secondary
Metadata Fields	Custom Metadata Fields	Custom metadata fields configured in the system, the list of available fields might vary depending on the integration configured and the metadata templates added

Conversation list layout

The default conversation list layout is configured by the system administrator. When a new user is created, the default conversation list layout is automatically assigned to the user. Users can customize this (select the fields/columns to be included and their order) if the system administrator provided the necessary rights (Conversation List Layout) to the user, from the System menu.

The right panel contains the configured/selected fields and their column position and order. The left panel contains the remaining fields available for selection.



Adding a field to the Conversation List Layout

To add a field to the conversation list layout, first select the desired field in the left pane (where the available, not selected fields are listed) by checking the checkbox to the left of the field name. Then press the >> button, which will move the field over to the right to the end of the **Added Columns** list where you can move it to its desired position (see the **Changing field order** section below).

Removing a field from the Conversation List Layout

In order to remove a field, select the desired field on the right pane (where the selected fields are listed) by checking the corresponding checkbox, then press the << button.


Changing field order

In order to change the order of the selected fields, select the desired field by selecting the checkbox in the right pane (where the selected fields are listed), then press the **Up** button to move a field up in the order or press the **Down** button to move a field down in the order.

Conversation list navigation bar


The navigation bar is displayed at the top and the bottom of the conversation list. This indicates the number of total records selected, and the navigation position within the list if the list is longer than a page (usually 20 items fit one page).

For multi-page lists, the navigation bar indicates the range of records displayed, lists the page numbers with the current one highlighted, and contains the navigation controls.

44 items found, displaying 1 to 20. Page(s): 

The following navigation options are supported (wherever applicable) for multi-page lists:

- To display and navigate to a given page just click on the page number.
- Click the "|<" icon to go to the **First** page of the list.
- Click the ">|" icon to go to the **Last** page of the list.
- Click the "<" icon to go to the **Previous** page of the list.
- Click the ">" icon to go to the **Next** page of the list.

 The system automatically navigates to the first page when the list is resorted by the user.

Delete conversations

Recorded conversations can be deleted directly from any conversation list.



The trash icon indicates that the conversation can be deleted. If the user's permission does not include the right to delete conversations, **no icon** is displayed for the delete icon.

After pressing the delete icon, the system deletes the CDR information from the database and all corresponding files including the media file. As an alternative to this function, administrators can set up a data retention policies, which can automatically delete conversations based on various filtering options.



This action CANNOT be undone!

Downloading a single media file

If a user is granted the download right (given by an administrator), they are able to download the recorded media file to their local PCs. For setting a download right see **Verba Administration Guide**, [User Administration](#).



Click the download icon next to the media file you need to download. The download operation starts automatically.

Downloading time depends on the file size and the connection speed.

The filename of the media file is generated automatically in the following format:

```
Calling_party_number--Called_party_number_Start_date_and_start_time.ext
```

where **.ext** is the extension of the media file, depending on the file format.

Providing download reason

Users can be prompted for providing Playback Reason when clicking on the Play icon. In this case, the web-based media player will pop up only when the reason is provided.

For this feature, the "Require Access (Playback/View/Download) Reason" setting has to be turned on at the user's role. For more information, see [User roles](#) and [User permissions](#).

Download Reason

Get direct link

A valid HTTP/HTTPS URL pointing directly to a given conversation recorder from any conversation list may be sent to the users. The same URL is generated, when the send email function is invoked on the conversation.



The pin icon indicates that the URL pointing to the given conversation can be accessed. Simply press the pin icon to copy the desired URL to the clipboard.

Mark conversations as Protected

Conversations intended to be kept in the system can be marked as Protected.











After pressing the **Protect** button, the system marks the conversation as Protected. By pressing the button one more time, the marking is removed.

The administrators can configure the system in a way that all conversations marked as Protected are not deleted even if all other conversations are automatically deleted (e.g. after 30 days).

Metadata columns on conversation lists

The columns shown on the [conversation lists](#) can be customized. By using this feature, metadata columns defined by administrators in the [Metadata designer](#) can be added to the data. These extra columns can store **business information** like Customer or Transaction IDs, or SSource Platforms and much more. Different business fields can be added for different groups of an organization.

      	Jul 22, 2016	4:54:44 PM	00:00:00	ceo@hoolie.com	Hoolie CEO	conference	Conference (K6LNPTM1)	Generic SIP
 Demo ✖								

 In the example above the **Source Platform** field is added so that platform information can be stored for each conversation.

The information in these fields can be added in the following ways:

- manually through the [ongoing conversations](#) or regular [search conversation lists](#)
- using integrated Verba desktop phone applications (currently in the [Cisco environment](#))
- automatically using the [HTTP Business API](#)

Ongoing conversations

In the system, **ongoing conversation recordings** can be listed by selecting the **Conversations / Ongoing** submenu. The group level and administrator privileges decide whether or not this function can be accessed and which ongoing recordings are displayed.

The followings apply to ongoing conversations:

- The page displays conversations that have no end date set (yet).
- Information obtained or calculated at the end of the conversation is not available: e.g. **Duration, End Date, End Time, End Date-Time**.
- The conversation cannot be played back unless it is trader voice recording where call splitting is active.
- The conversation cannot be downloaded (nor individually or using the multi-record download).
- Silent monitoring can be invoked on ongoing voice conversations.
- Recording can be started or stopped for voice recording if controlled recording is configured, see [Using the start/stop controls](#).
- Recording can be paused or resumed, see [Using the pause/resume controls](#).
- Ongoing chat conversations are displayed for integrations using the standard data model, but integrations using the advanced chat data model are not (e.g. Microsoft Teams). For more information, see [Data models](#).
- Labels and legal holds can be added to conversations.
- Conversations can be added to cases.
- Custom metadata can be entered and attached to ongoing conversations.
- E-mails can be sent with a URL link pointing to an ongoing conversation.

The screenshot shows the 'Ongoing Conversations' page. On the left is a search sidebar with sections for 'Basic Search Options', 'User', 'Label', and 'Case'. The main area displays a table of 3 items. The table has columns for Start Date, Start Time, Duration, User, From, From Info, To, To Info, Direction, Recording Server, and Storage Target. The first row shows a conversation from Dec 10, 2017, at 4:38:06 PM, with a duration of 4:38:06 PM, involving Kenneth Franklin, Sue Mathis (1096) and Tom Johnson (1079), recorded on QM-SERVER. The second row shows a conversation from Jul 22, 2016, at 2:54:44 PM, involving sid@darkside.com (Sidius) and ani@darkside.com (Anakin), recorded on QM-SERVER. The third row shows a conversation from Jul 22, 2016, at 2:54:44 PM, involving scott.thomas@industry.com (Scott Thomas) and thomas.jeffreys3@buyer.com (Thomas Jeffreys), recorded on QM-SERVER. There are also icons for 'HR Issue' and 'Training' next to the first two rows.

✔ In certain error situations, conversations might remain on the ongoing list even after they are over. This behavior is always a fault that the support team should investigate. The ongoing conversations started more than two days ago can be forcibly removed by using the **System / Database / Database Purging** menu.

Refreshing the page

To **refresh the ongoing conversation page only once**, press the



icon.

To **refresh the ongoing conversation page periodically** first, check the **Auto refresh** checkbox and select the appropriate timer interval from the drop down menu in seconds. To turn off the automatic refresh, uncheck the **Auto refresh** checkbox.

Using the start/stop controls

The start and stop controls allow users to control the recording. In order to use these controls, the controlled recording mode must be configured for the recorded extension associated with the user (not all integrations support controlled recording).

When controlled recording is enabled for the extension, the system will automatically create a "control or placeholder" record in the database which will be visible on the ongoing conversation page.

Every time the recording is started, a new record is created in the system. Subsequent start/stop controls will create multiple records in the system, which will not be stitched together.

To **start the recording**, press the



button. The system immediately creates a new record in the database for the ongoing recording. The page will keep displaying the original "control" record too (there will be 2 records, the original control record, and the new recorded call record).

To **stop the recording**, press the



button on the control record. You will notice that the recorded call entry will disappear since the recording has stopped for the call.

Using the pause/resume controls

The pause and resume controls allow temporarily stopping and restarting the recording, essentially muting and unmuting the recording during a live call. Users must have **Mute Recording** permission, and the feature is only available for voice recordings. The pause action will not stop recording entirely, and there will be no new record created when the resume action is triggered. The system still creates a single recording where one or more segments are muted and substituted with silence.

To **pause the recording**, press the



button.

To **resume the recording**, press the







button.

Playback and download multiple records simultaneously

Users have the option to play back or download selected audio-only records simultaneously. The server will mix these records together based on the StartTime timestamp.


For this option, the users need to do the following:

- Click on the **Select Multiple Conversations** button () at the top right corner of the page
- Checkboxes appear in front of every record. Users can **select which conversations** they would like to mix together.
- Once the required conversations are selected, the **Play** and **Download** buttons can be used just above the list of conversations.

	Jul 22, 2016	12:00:44 PM	03:54:00	sid@darkside.com	Sidius	ani@darkside.com	Anakin
	Case External conversations						
<input type="checkbox"/>		May 31, 2015	11:57:48 AM	00:04:21	181863591		Thomas Powell
<input checked="" type="checkbox"/>		May 31, 2015	11:49:36 AM	00:02:28	1848	Sharon Harrington	136334128
<input checked="" type="checkbox"/>		May 31, 2015	8:53:56 AM	00:04:49	1939	Sue Mathis	110554729
<input type="checkbox"/>		May 30, 2015	5:47:19 PM	00:01:05	1914	Michael Cohen	159049228
<input type="checkbox"/>		May 30, 2015	6:42:51 AM	00:03:04	1222	Thomas Powell	168770951






Upon selecting the playback option, the Verba player opens.



 In this view, only the basic player controls can be used, markers and other features are disabled, as all of those are used for specific records.


Playing back recorded conversations

A recorded conversation can be directly played back from the conversation list by clicking on the left most (play) icon in the conversation list table. The icon has a different display depending on the following conditions:

	Play - By pressing the play icon left to the conversation list record, the selected conversation is loaded into the player and playback starts immediately.
	Locked - This icon indicates that one of the parties flagged the conversation as private. If the current user did not participate in the conversation, they cannot play this conversation back.
	No media file - If there is no media file for the selected conversation, the no media file icon appears.
	Not uploaded - If the media file has not been uploaded yet to the Media Repository, the not uploaded icon is displayed. This icon is only applicable for distributed, multi-site Verba deployment.
	Archived - If the media file has been archived for the selected conversation, the archived icon appears. If the media file is in the archive folder, it can be played back by pressing this icon.

If the user's permission does not include the right to play back recorded conversations, **no icon** is displayed in the place of the play icon.

After pressing the play icon, the selected media file loads into the media player located at the bottom of the page. The media player starts playing the loaded conversation automatically.

 Do not press the play button on the media player on workstations without a sound card! The computer may freeze and reboot will be necessary. This is a Windows Media Player issue.

For more information on using the Verba player see the [Verba Player](#) section.

Providing playback reason

Users can be prompted for providing Playback Reason when clicking on the Play icon. In this case, the web-based media player will pop up only when the reason is provided.

For this feature, the "Require Access (Playback/View/Download) Reason" setting has to be turned on at the user's role. For more information, see [User roles](#) and [User permissions](#).

Playback Reason

Cancel

Continue

Presentation of complex conversation scenarios


Complex conversation scenarios (like hunt groups, transfers, forwards and more) can be tracked using the additional information presented in the **Caller info** and **Called info** fields of the [Conversation List](#).

The screenshot below illustrates a conversation transfer:

1. **william.lawrence@verba.com** is calling **info@verba.com** (an example for an internal information line)
2. The conversation gets transferred to **peter.harrison@verba.com** (it takes 13 seconds in this case to discuss the transfer)
3. **peter.harrison@verba.com** answers the conversation (33-second long discussion)

Conversations in the screen below are presented in reverse order with the latest conversation on the top (this order can be changed by clicking the column name on the top).

Having the different conversation legs in different conversation records provides **security benefits**. The supervisor of the **info@verba.com** address will see the transfer discussion, but if the person has no access to **peter.harrison@verba.com**'s conversations, then those will be not visible for that account.

 This example is based on SIP addresses (e.g. on a Microsoft Lync platform), but **regular phone numbers are also presented the same way**. If the display name is available in the phone system, the caller/called info field also displays that name.

Calls							
Start Date	Start Time	Duration	Caller Phone Number	Caller Info	Called Phone Number	Called Info	End Cause
Jul 30, 2012	4:19:13 PM	00:00:13	william.lawrence@verba.com	(william.lawrence@verba.lab) -> (info@verba.lab)	peter.harrison@verba.com	Peter Harrison	Caller Terminated
Jul 30, 2012	4:18:43 PM	00:00:33	william.lawrence@verba.com	William Lawrence	info@verba.com	Verba Technologies (info@verba.com) -> Peter Harrison (peter.harrison@verba.com)	Transfer

2 items found, displaying all items. Page(s): 1 Results per page 20

Export options: [Excel](#) | [CSV](#) | [PDF](#) | [Download all](#)


Private conversations

In the Verba System, users can flag a conversation as "private". After a conversation was flagged as private, other users (including supervisors and administrators) are not allowed to play back the conversations (only users having participated in the conversation).

This feature is only available for users who participated in the conversation, whose user profile includes the right to flag a conversation private.

Private conversations can be easily listed using the **Conversations / Private conversations** submenu. The private conversation list is maintained separately for each user (every user has different private conversation list).

Private conversation flagging is built into the commenting feature. The "Private" flag is an embedded dcomment field of the default comment template.

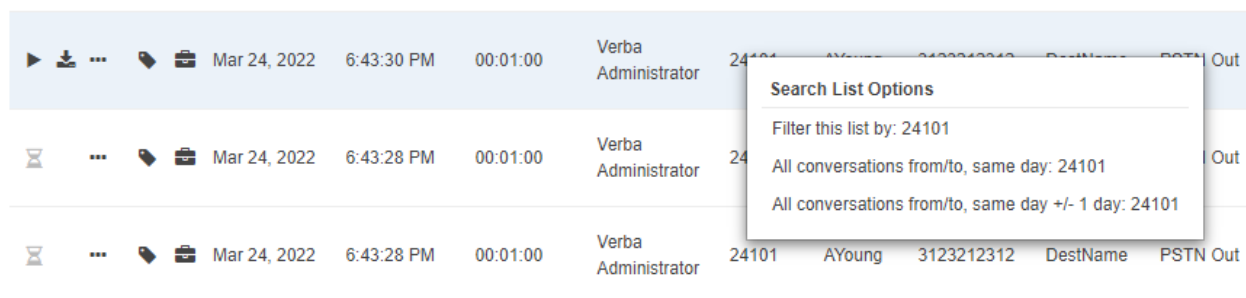
 The only way to play back a private conversation is by logging into the system with a username and password belonging to one of the conversation participants. If the parties deny providing their password, system administrators can change the passwords.

To remove the "private" flag, just uncheck the corresponding checkbox on the conversation detail page and save the changes.

Conversations can be flagged as "private" from the telephone by using the Verba XML service. For further information see [Flagging a conversation as private](#).

Right click options on conversation lists

Every conversation list enables one to apply certain filtering options by right-clicking on a phone number.



These filtering options are useful when the user would like to find corresponding conversations to a given phone number. The following table describes the available options:

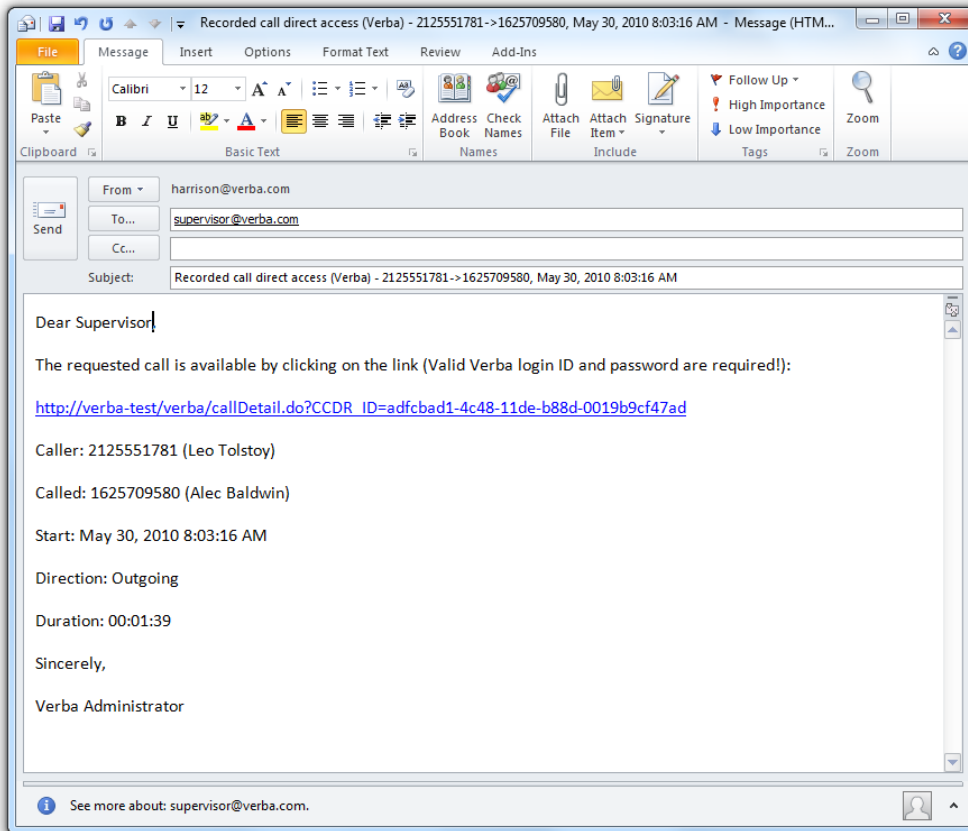
Option	Description
Filter this list by	By applying this option, the current list will be filtered by the number, over which the right-click was initiated. The new results will be deployed in the same window.
All conversations from/to, same day	By applying this option, the current list will be filtered by the number, over which the right-click was initiated, and that date will be used, which was selected by the right-click. The new results will be deployed in the same window.
All conversations from/to, same day +/- 1 day	By applying this option, the current list will be filtered by the number, over which the right-click was initiated, and that date +/- 1 day will be used, which was selected by the right-click. The new results will be deployed in the same window.

After applying any of these options, on the top of the new list, the filter setting can be canceled.

Sending an email

If a user has the right to send e-mails, a URL pointing to the selected conversation will be sent via e-mail to them or to the Administrator of their (primary) group. For setting the e-mail sending right, see the [User Administration](#) topic in [Verba Administration Guide](#).

- ✉ To start sending an e-mail, press the envelope icon in the conversation list. After pressing the icon, the default email client is opened with pre-populated data.



Silent monitoring ongoing conversations

Ongoing conversations can be silently monitored from the **Conversations / Ongoing Conversations** menu item.

The play and the bubble icons indicate that the conversation can be silent monitored. If the [user's right](#) does not include the right to silent monitor conversations, **no icon** is displayed for the silent monitor icon.

Search

Basic Search Options

Phone Number (From or To Party)
Enter number or URL...

User
Enter user name...

Search conference participants

Label
Enter label name...





Advanced Search Options

Metadata and Markers

Reset Search
Can not find a conversation?




Ongoing Conversations

2 items found, displaying all items. Results per page 20

	Start Date	Start Time	Duration	From	From Info	To	To Info	Direction
 	Jan 19, 2018	1:16:10 PM		kirk@verbatest.local		skywalker@verbatest.local		Internal
 	Jan 19, 2018	1:15:39 PM		kirk@verbatest.local	James T. Kirk	skywalker@verbatest.local		Internal

2 items found, displaying all items. Results per page 20


Conversation View ?


 00:00:49  


Monitoring...

Conversation Details

Jan 19, 2018 1:16:10 PM



 kirk@verbatest.local

 skywalker@verbatest.local

Search

Basic Search Options

Phone Number (From or To Party)

User

Search conference participants

Label

Advanced Search Options

Metadata and Markers

Reset Search

Can not find a conversation?

Search

Ongoing Conversations

2 items found, displaying all items. Results per page 20

Start Date	Start Time	Duration	From	From Info	To	To Info	Direction
Jan 19, 2018	1:16:10 PM		kirk@verbatest.local		skywalker@verbatest.local		Internal
Jan 19, 2018	1:15:39 PM		kirk@verbatest.local	James T. Kirk	skywalker@verbatest.local		Internal

2 items found, displaying all items. Results per page 20

Instant Messaging

Export options: Excel | RTF | PDF

From	Message	To	Timestamp
	hi		1:15:39 PM
	hello		1:15:46 PM
	how are you?		1:15:51 PM
	doing well, and you?		1:16:01 PM

Conversation Details

Jan 19, 2018 1:15:39 PM -

kirk@verbatest.local (James T. Kirk)

skywalker@verbatest.local

Protected

Private

Important

Three types of silent monitoring features are available:

- **Online (works with all our recorders)** - use the built-in web-based media player located at the bottom of the page (see the codec requirement below) - **works with Cisco, Lync, Avaya and more**
- **Phone-based (Cisco)** - use Cisco silent monitoring, where the silent monitoring session is sent to the Cisco phone - **only on Cisco UCM platforms**
- **Whisper Coaching (Cisco)** - use Cisco whisper coaching - **only on Cisco UCM platforms above version 8.5**
- **Dial-in (works with all our recorders)** - a dedicated [silent monitoring line](#) can be called that streams ongoing conversations after authentication

Conversation View

The selected conversation can only be silently monitored using a Cisco IP phone. Please provide a directory number, which will be used by the system to silently monitor the conversation, then press the Start button.

1020

Silent monitor

Whisper coaching

Start

Conversation Details

Jan 19, 2018 3:19:38 PM -

12106 (Luke Skywalker)

2026

The silent monitoring feature requires the Verba Unified Media Codec to be installed on the client computer. The codec can be downloaded from the download page at support.verba.com (requires login). During the silent monitoring session, the Windows Media Player is instructed to connect to the recording server directly on a configured port. **The UDP port range 16384-16500 must be open on the firewall of the client PC, where the codec is installed (not on the server). Ports need to be opened on the Recording Servers, based on the platform being used (Please refer to Firewall configuration).**

Do not press the play button on the media player on workstations without a sound card! The computer may freeze and rebooting might be necessary. This is caused by a Windows Media Player bug, we have little control over this.

The Chrome browser does not support the Media Player plugin so it cannot be used for Silent Monitoring.

For more information on using the Verba player see the [Verba Player](#) section.

Timeline View

The Timeline View shows the recorded conversations listed in the conversation list on a diagram, so it provides a visual representation of the recordings in time. It provides a more informative view of when the conversations actually happened, and how long they were compared to each other.

The Timeline View can be turned on by clicking on the



icon in the upper right corner of the conversation list layout. Once it's turned on, it can be turned off with the



icon.

Start Date	Start Time	Duration	End Time	From	To	Conversation Type
Jul 4, 2018	6:29:33 PM	00:05:00	6:34:33 PM	frank.lucas@harlem.com	ritchie.roberts@nypd.gov	File Share
Jul 4, 2018	6:16:33 PM	00:13:00	6:29:33 PM	frank.lucas@harlem.com	ritchie.roberts@nypd.gov	Whiteboard
Jul 4, 2018	6:05:33 PM	00:10:00	6:15:33 PM	ritchie.roberts@nypd.gov	frank.lucas@harlem.com	Screen & Application Share
Jul 4, 2018	5:51:33 PM	00:13:00	6:04:33 PM	frank.lucas@harlem.com	ritchie.roberts@nypd.gov	Screen & Application Share
Jul 4, 2018	5:47:33 PM	00:45:00	6:32:33 PM	frank.lucas@harlem.com	ritchie.roberts@nypd.gov	Voice
Jul 4, 2018	5:44:33 PM	00:50:00	6:34:33 PM	frank.lucas@harlem.com	ritchie.roberts@nypd.gov	Instant Messaging


When a conversation is selected on the Timeline View, the corresponding recording will be highlighted in the conversation list.

It's possible to scroll horizontally in the Timeline View by clicking and holding the left mouse button and dragging to left or right. If there are more than four conversations in the same time period, then the scrolling vertically may be required using the same method in order to show them. Zooming is also available by using the mouse wheel.


Conversation details

Detailed information is shown for each recorded conversation on the call details screen.

To access detailed conversation information data, select the conversation record by clicking on the appropriate row with the left mouse button (the background color of the row changes when the cursor is moved over the record).

 To display detailed conversation data, click on one of the columns/fields of the desired row. Do not click on the icons on the left, because that will start the corresponding function without displaying the conversation detail page.

After selecting a conversation record, the **Conversation Details** page appears, containing all available information about the recorded conversation.









[View Call Events History](#)
[Share/Publish the call](#)
[Back to Previous Call List](#)
Call Details

Call Details Data	
Call Start	May 30, 2010 12:47:30 PM
Duration	00:00:07
Call Direction	Outgoing
Caller Party Phone Number	2125551780
Called Party Phone Number	8486157450
System Caller Party Name	Ian Flemming
System Called Party Name	Alan Alda
Verba Caller Party Name	Ian Flemming
Verba Called Party Name	
Call Identifier	cd0df4e3-9a0f-11dd-8a4a-0019b9cf47ad
Recording Server	NEWYORK-RECORDER
Caller Party IP Address	10.0.13.84
Called Party IP Address	69.28.111.6
Audio codec	G.711 u-law 64k
Video Codec	
Archived	false
End	Normal
File format	WAVE
Technical Call Identifier	69.28.111.6-0-1302411486-0-1262839281
Data Retention Events	Calculate

Add new comments based on the selected Template

Default Select a comment template first and then push the 'Show' button.

The following functions are available on the conversation detail page:

	Plays back the conversation. The status of the play icon varies depending on the status of the conversation, or it can be completely missing if the user has no playback right. For further information, see the Playing back recorded conversations section.
	Downloads the media file. This icon is only displayed if the user has the download right and playback is enabled.
	Sends an e-mail containing a URL, which points directly to the conversation detail page of the selected conversation. This icon is only displayed if the user has the e-mail right and the conversation has a media file.
	Silent monitors the call. The full user right has to be set to access this functionality.
	Deletes the conversation. The full user right has to be set to access this functionality.
	Gets the URL pointing to this conversation. The URL is automatically copied to the clipboard of the client.

Adding metadata

This powerful function of the Verba System provides great benefits for enterprises by allowing the enrichment of technical information with related business information and conversation content-related data.

This makes searching far easier and enriches reporting, thereby can support complex and sophisticated business processes and workflows as well as improving process and service quality of the organization.

A few attributes attached to a conversation can help a lot with finding the conversation later, identifying and managing exceptions, etc. Of course, in conjunction with these the conventional technical attributes/fields like conversation time, duration, and phone numbers can still be used to find a conversation in the database.

Several comment templates can be defined, which are fully customizable in line with the needs of the organization as set up by the administrator.

The **Metadata Template Configuration** item can be accessed from the **System** menu. To add new metadata template fields or create entirely new templates, use the options in the top right corner.

When comments are added for the first time to a given conversation, a comment template has to be selected first. The list of available comment templates is collected from the group settings. If a user is part of a group, all comment templates associated with the given group are available for commenting.

Once all the comments have been added, press the **Save** button to store the comments in the database.

If the user is associated with more than one group, they will be able to add comments using any of the available comment fields for those groups.

Every user who is authorized to view a given conversation will be able to add comments to a conversation. Comments added by a specific user cannot be modified by another user.

On the conversation list, the mark (blue square) indicates that the comments have been entered to the conversation.

For further information on comment administration, see [Comment Template Administration](#).

Conversation participant list

The system keeps track of conference participants.

In the top of the [Conversation details](#) window **Conversation participants** are shown with:

- name
- role
- start of participation
- end of participation
- duration
- end cause

Conversation Details

[View Conversation Audit Log](#)
[Share/Publish the conversation](#)
[Close](#)

Demo X

▼ Conversation Participants

Phone Number	Name	User	Role	Start Time	End Time	Duration	End Cause
kirk@enterprise.com			host	2016 Jul 22 12:54:44	2016 Jul 22 18:30:44	05:36:00	Normal
ceo@hoolie.com			conferee	2016 Jul 22 12:59:44	2016 Jul 22 18:25:44	05:26:00	Normal
skywalker@darkside.com			conferee	2016 Jul 22 13:00:44	2016 Jul 22 18:24:44	05:24:00	Normal

▼ Conversation Details Data

Start Time	End Time
Jul 22, 2016 5:54:44 PM	Jul 22, 2016 5:54:44 PM
Duration 00:00:00	Direction
From team@piedpiper.com	To conference
From Info US PiedPiper Team	To Info Conference (K6LNPTM1)
Verba From Party Name	Verba To Party Name
Conversation Identifier 38041662-501d-11e6-80c5-00155d001c32	Recording Server TESTMR4
From IP 10.4.0.74	To IP 10.4.0.19
From Proxy IP	To Proxy IP
Audio codec	Video Codec
Archived No	Import Source
Source Platform	Forward Reason
Conversation Type File Share	File format
End Cause Normal	Data Management Events Calculate
Storage Target	Delete after End of Retention No
End of Retention	Technical Identifier 48ee8f9964654db5ae26d1f4ae3af7311j-1
Platform Conversation ID kirk@verbatest.local	Talkover Ratio
Silence Ratio	Media Length
Longest Silence	To Device ID
Recording failed No	
Media Error	
Agent ID	
From Device ID	

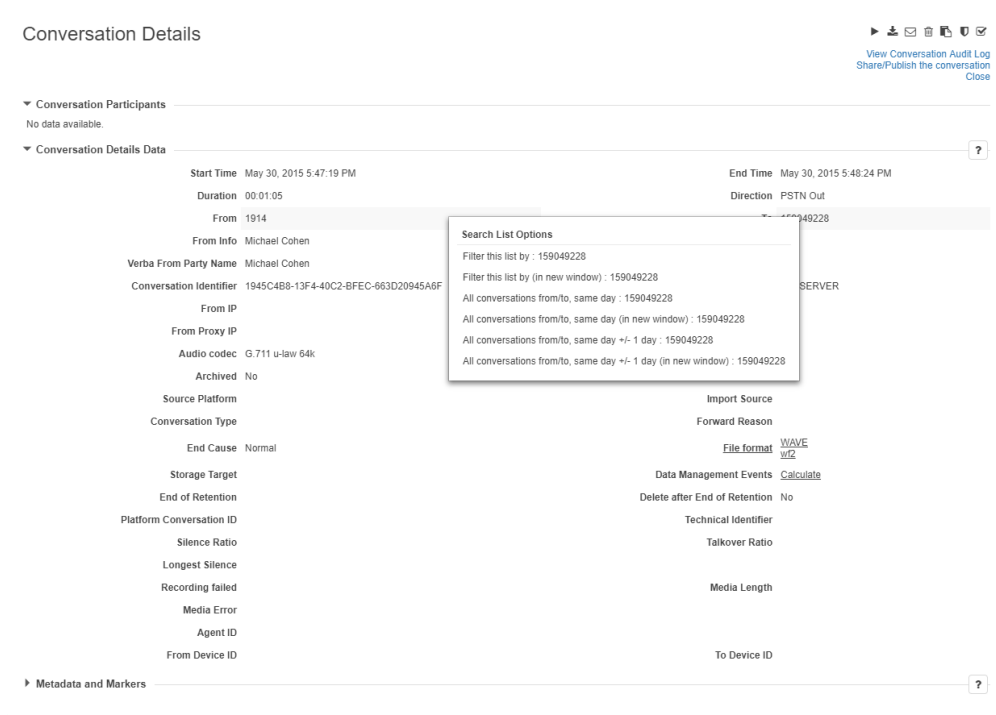
► Shared Files

► Metadata and Markers

i In certain cases, a conference conversation is not stored in the system as a single conversation. For example, if the host is not a recorded user, only certain participants, then only those parts of the conference will be recorded, when that participant is part of the conversation. This way each participant can have a record of the part when they were in the conversation. This is sometimes necessary for security reasons.

Right click options

Every conversation detail page allows for the application of certain filtering options by right clicking on a phone number.



These filtering options are useful when the user would like to find corresponding conversations to a given phone number. The following table describes the available options:

Option	Description
Filter this list by	By applying this option, the current list will be filtered by the number, which was selected by the right click. The new results will be displayed in the same window.
Filter this list by (in new window)	By applying this option, the current list will be filtered by the number, which was selected by the right click. The new results will be displayed in a new window.
All conversations from/to, same day	By applying this option, the current list will be filtered by the number, over which the right click was initiated, and that date will be used, which was selected by the right click. The new results will be displayed in the same window.
All conversations from/to, same day (in new window)	By applying this option, the current list will be filtered by the number, over which the right click was initiated, and that date will be used, which was selected by the right click. The new results will be displayed in a new window.
All conversations from/to, same day +/- 1 day	By applying this option, the current list will be filtered by the number, over which the right click was initiated, and that date +/- 1 day will be used, which was selected by the right click. The new results will be displayed in the same window.
All conversations from/to, same day +/- 1 day (in new window)	By applying this option, the current list will be filtered by the number, over which the right click was initiated, and that date +/- 1 day will be used, which was selected by the right click. The new results will be displayed in a new window.

After applying any of these options, the filter settings can be canceled on the top of the new list.

Participant sets

Participant Sets allow users to search for recorded conversations by a predefined list of users or extensions. [Overview](#)

Participant sets can be shared with other users via user groups.

User permissions for participant sets

The table below summarizes user level permissions controlling access to participant sets.

Permission	Description
Use Participant Set	Allows using participant sets.
Participant Set	Grants access to creating or sharing participant sets: <ul style="list-style-type: none">no access: The user is not allowed to create or share participant sets.Define Users: With this permission, the user can create Participant Sets, but can't share them with other users.Define & Share: Users with this permission can create and share Participant Sets.

Creating a Participant Set

In order to create a new Participant Set follow these steps:

Step 1 - Login to the web interface with the user who has Participant Set access control and the Define or Define&Share is enabled.

Step 2 - Navigate to the **Conversations / Participant Sets** menu item and select **Add New Participant Set** on the top-right corner of the page.

Step 3 - Name the new Participant Set.

Step 4 - Select one from the available types:

Type	Description
User	Select from the following ' <i>User Lookup Fields</i> ': <ul style="list-style-type: none">Display NameLoginE-mailCustom User Field 1Custom User Field 2Custom User Field 3Custom User Field 4Custom User Field 5
Extension	Verba will only match users with extensions.

Step 5 - Provide a brief description to the Participant Set.

Step 6 - With Define access control only continue with step 8. (The access control will be Private)

Step 7 - Select an Access Control. The following Access Controls are available:

Name	Description
------	-------------

Private	Not shared with anyone. Only the user can see and use this Participant Set.
Selected Users	Shared with given users and groups.
Everyone	Every user can see and use this Participant Set.

Step 8 - Enter the Participant Set Items. (search criteria, custom field values, extension numbers, etc.)

Step 9 - Hit the save button to see which users/extensions (depending on the type) are included in this new Participant Set.

Sample view of the Participant Set Configuration page:

Participant Set Data

Name*

Type*

User Lookup Fields* Display Name Login E-mail Custom User Field 1 Custom User Field 2 Custom User Field 3 Custom User Field 4 Custom User Field 5

Description*

Access Control

Private Selected Users Everyone

Users

Groups

Participant Set Items

Items*

You can enter user names, login IDs or email addresses. Enter each item in a new line.

* Indicates required item.

Using a Participant Set

Step 1 - Navigate to the Conversations page.

Step 2 - The Load Participant Set icon



is next to **Phone Number (From or To Party)** (extension type Participant Set) and **User** (user type Participant Set) input boxes.

Step 3 - Click on the icon and select the Participant Set to be used.

Step 4 - Hit the **Search...** button.

Desktop Screen Capture	Transcoded video in MP4	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Native video in VF	Yes with Verba Codec installed	-	-	-	-	-	-	-	-
Instant Message	Standard format	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
	Advanced format	-	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
SMS		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Voice Transcript		Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
File / Attachment***	Any format	-	-	-	-	-	-	-	-	-

Notes:

* For **Internet Explorer**, the **audio** and **video** playback works with **Windows Media Player ActiveX** component which allows using the Verba Media Codec to playback non-standard formats as well. For other browsers, the **audio** and **video** playback works with **HTML5** audio and video capabilities.

** Audio is automatically transcoded to **PCM Wave** or **MP3** on the server-side for playback. For silent monitoring, a network connection is required with the Recording Server to receive the audio streams in real time.

*** Files are not displayed in the player/viewer, they are automatically downloaded and can be opened on the desktop computer with corresponding applications

Test whether the required components are properly installed or not, by clicking on the waveform icon left to the Verba Player title in the top-left corner of the player frame. This test feature is only available when a recorded media file is selected to play from a conversation list. If one of the required components are not properly installed the test will fail.

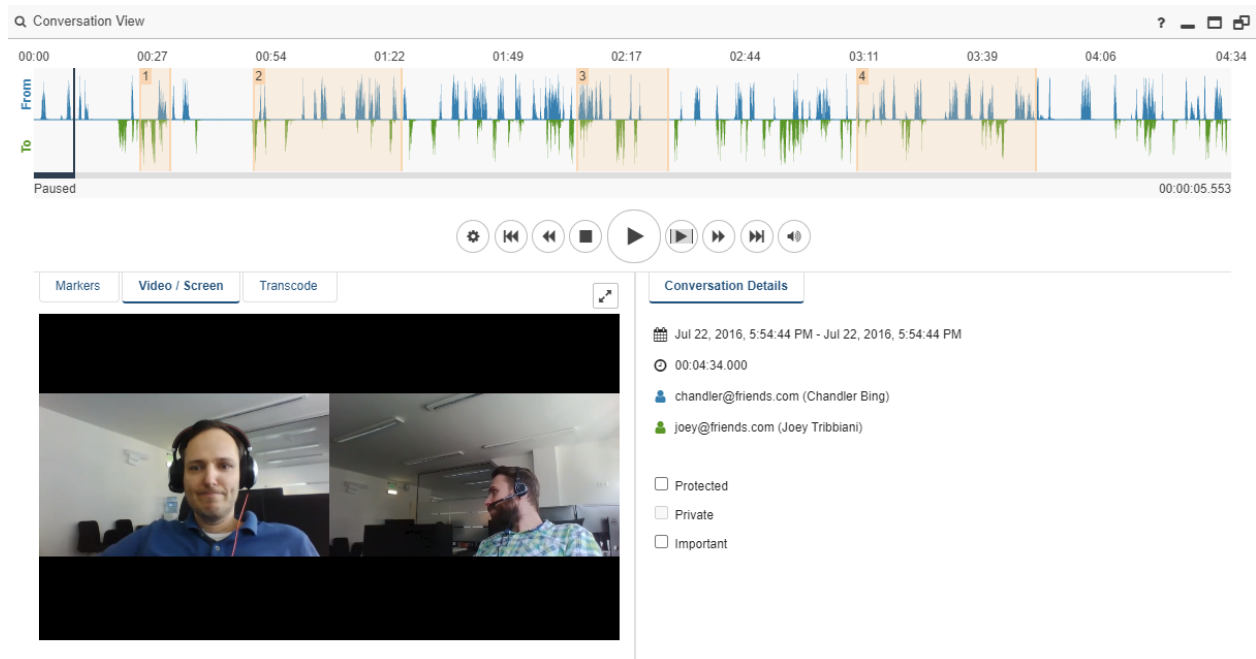
Using the player

- [Using the media player](#)
- [Using conversation markers](#)

Using the media player

After clicking on the play icon of a conversation in the conversation list, the Verba player automatically appears (from the bottom), loads the media file, and starts playing back the recorded conversation.








The key components of the Verba player are shown here:








The playback controls are displayed below the waveform display. Use these controls to adjust the volume level and perform basic playback tasks such as play, pause, stop, rewind, and fast-forward the audio and video files.

The following table explains the function of each control.

Player Control Icon	Feature	Description
---------------------	---------	-------------

	Player Settings	<p>Provides additional settings for the playback, including:</p> <ul style="list-style-type: none"> • Hiding the markers on the waveform • Showing absolute time instead of relative time on the waveform • Playback speed control • Skipping silence <div data-bbox="671 412 1235 1061" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Hide Markers</p> <p>Show Absolute Time</p> <p>Playback Speed ▾</p> <p>0.25x</p> <p>0.5x</p> <p>0.75x</p> <p>Normal (1x)</p> <p>1.25x</p> <p>1.5x</p> <p>2x</p> <p><input type="checkbox"/> Skip silence longer than <input type="text" value="10"/> seconds.</p> </div> <p>The settings set here will be saved, and applied for every subsequent playback action.</p>
	Begin	Jumps to the beginning of the media.
	Fast reverse	Fast reverses, if applicable.
	Stop	Stops the media playback (and repositions to the beginning).
	Play	Starts playing the stopped or paused media.
	Pause	Pauses the media playback.
	Play selected	Starts playing the selected timeframe. Select a timeframe by following these steps: <ul style="list-style-type: none"> • Move the mouse over the timeline area. • Press the left mouse button and drag it to left/right to select a timeframe. • Release the mouse button and the area will be highlighted.

	Fast forward	Fast forwards, if applicable.
	End	Jumps to the end of the media.
	Volume control	Drag the volume bar and move the mouse to the left to decrease or to the right to increase the volume. The setting set here will be saved, and applied for every subsequent playback action.
	Balance control	Drag the balance bar and move the mouse to the left to mute the right speaker or to the right to mute the left speaker(Available using Internet Explorer). *
	Fullscreen	Resizes to full screen. This button is only available when the media type is video.

* Media files recorded in stereo format can be played back from the view of only one of the participants using the Verba special balance control. The stereo recording has to be enabled in the Verba configuration. For more information, see **Verba Deployment Guide**.

The playback position can also be changed using the mouse by clicking on the position bar (when the cursor changes to shape) and dragging it left or right. When the mouse button is released, playback starts automatically.

Controlling the player by keyboard

A subset of the above control features is available as keyboard shortcuts:

Keyboard shortcut	Description
CTRL+Left	Move the position bar/playback 1 second back.
CTRL+Right	Move the position bar/playback 1 second forward.
CTRL+Space	Strop/Pause the playback.
CTRL+Up	Increase the playback speed.
CTRL+Down	Decrease the playback speed.
CTRL+Page Up	Increase volume by 5%.
CTRL+Page Down	Decrease volume by 5%.

Waveform display

The waveform display provides a visual representation of the audio volume waveform when playback is initiated from the call list. The waveform generator supports all kinds of media types which are supported by the Verba system. If stereo media is played back, Verba generates one waveform for each channel.

Transcoding video files

Video conversation and desktop screen recordings are written into the highly efficient Verba Media Format by default.

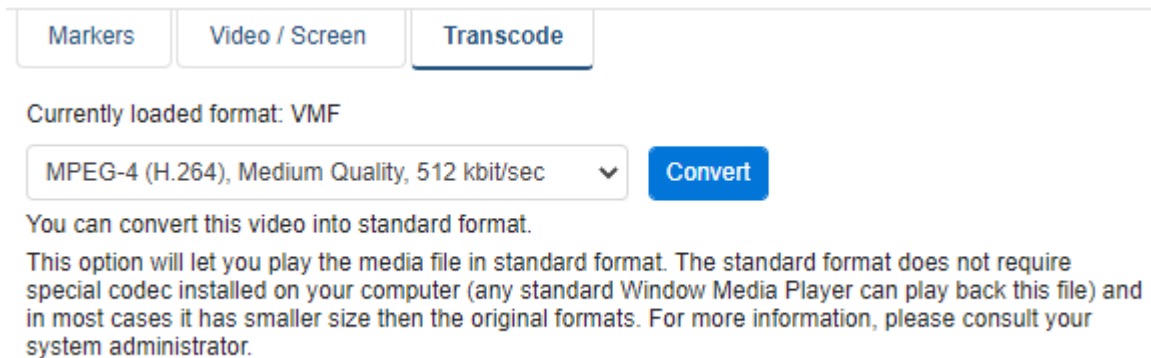
Playback of those files requires the [Verba Unified Media Codec](#) on the client PC where the user plays back the conversations and using Internet Explorer.

Follow these steps to transcode and play a conversation from the Verba web interface:

Step 1 - Search for the conversation (Search menu on the top)

Step 2 - Click the Play button on the desired conversation

Step 3 - When the Verba player appears, click on the **Transcode** tab on the left side of the player



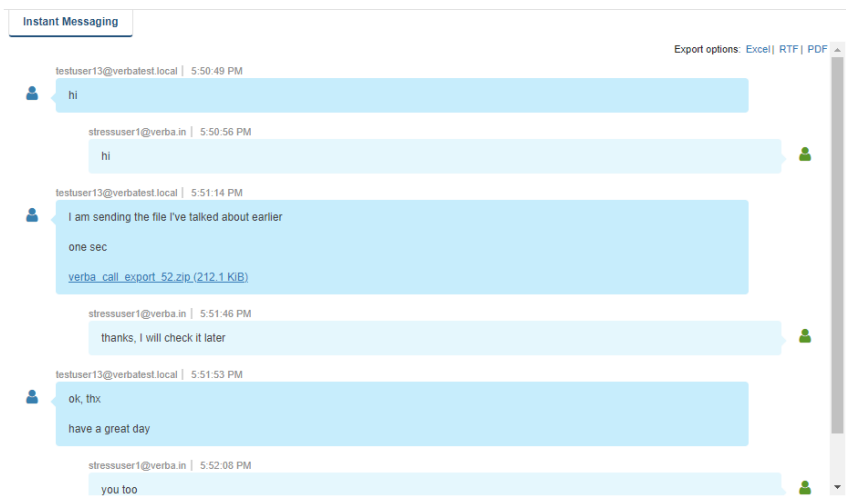
The screenshot shows the 'Transcode' tab selected in a player interface. Below the tabs, it says 'Currently loaded format: VMF'. There is a dropdown menu showing 'MPEG-4 (H.264), Medium Quality, 512 kbit/sec' and a blue 'Convert' button. Below this, there is explanatory text: 'You can convert this video into standard format. This option will let you play the media file in standard format. The standard format does not require special codec installed on your computer (any standard Window Media Player can play back this file) and in most cases it has smaller size then the original formats. For more information, please consult your system administrator.'

Step 4 - Select the video format, then click "**Convert**" and wait until the transcoding finishes (it will show the progress)

Step 5 - Click the "**Play media file in standard format**" link that appears (after this the next searches will play the new format automatically)

Text-based conversation view

When a text-based recording (Instant Message, SMS) is opened, the layout of the web-based media player is different. There are no playback controls, and on the left side, the IM conversation can be viewed.



The screenshot shows an 'Instant Messaging' window. At the top right, there are 'Export options: Excel | RTF | PDF'. The conversation consists of several messages: 'hi' (sent by testuser13@verbalest.local at 5:50:49 PM), 'hi' (received by stressuser1@verba.in at 5:50:56 PM), 'I am sending the file I've talked about earlier one sec' (sent by testuser13@verbalest.local at 5:51:14 PM) with a link to 'verba_call_export_52.zip (212.1 KIB)', 'thanks, I will check it later' (received by stressuser1@verba.in at 5:51:46 PM), 'ok, thx have a great day' (sent by testuser13@verbalest.local at 5:51:53 PM), and 'you too' (received by stressuser1@verba.in at 5:52:08 PM).

Export options

The conversation can be exported in XLS, RTF, or PDF format by clicking on the links in the upper right corner of the conversation view.

Attachments

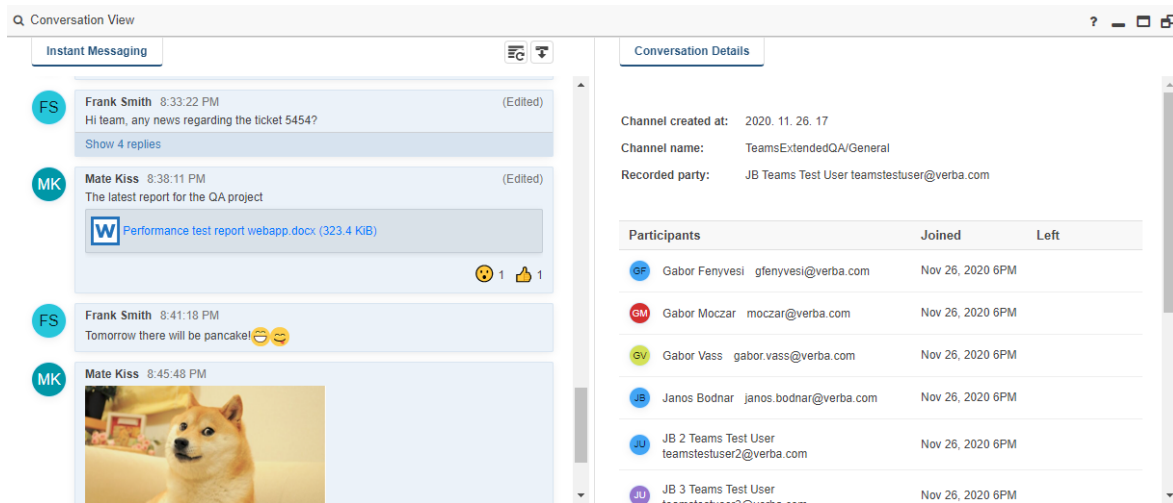
The files sent during the IM conversation can be seen inline with the text messages. These files can be downloaded by clicking on the links in the conversation view.

Advanced text-based conversation view for Microsoft Teams

When a Microsoft Teams IM recording is opened, a more advanced text-based player opens up that supports the rich media content of the Teams conversations, like:

- Text formatting
- Attachments
- Emojis
- Giphys
- Stickers
- Other apps

The left side of the player contains the conversation, and the right side of the player contains the channel and participant information. The player supports **infinite scrolling**.

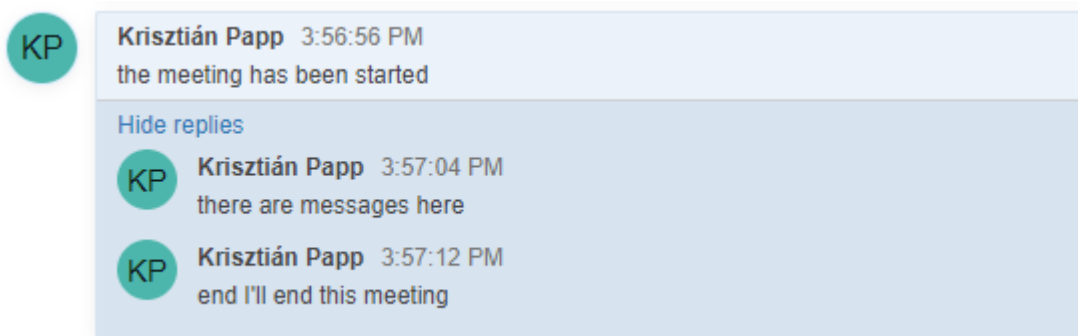


The following table explains the buttons on the top of the player:

Button	Feature	Description
	Load every messages	Loads every message for the conversation
	Export PDF	Exports the entire conversation in PDF format

Showing message replies

If there are replies to a message, the reply thread can be opened by clicking on the **Show replies** link. With the **Hide replies** link, the reply thread can be closed.




Showing message edit history

The edit history of a message can be opened or closed by clicking on the **(Edited)** link on the right side of the message box.

GV **Gabor Vass** 11:26:23 AM (Edited)
> Simple text containing 😊 emoticon. 11:26:23 AM
Simple text containing 😊 emoticon. 11:27:37 AM
👎 1

Attachments

The files sent during the IM conversation can be seen inline with the text messages. These files can be downloaded by clicking on the links in the conversation view.

JB **Janos Bodnar** 1:31:05 PM
bunnydoc
 bunny.docx (13.3 KiB)

Emoticon replies

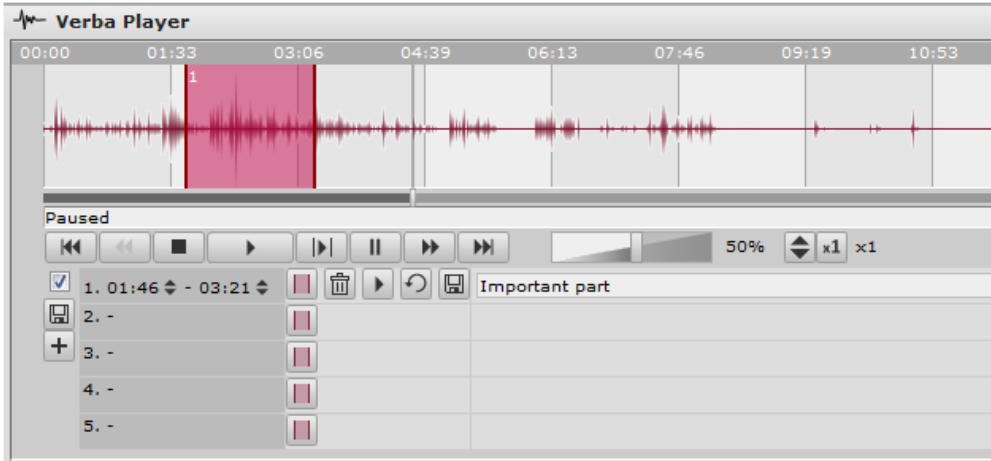
Emoticon replies are shown on the right side of the message box.

AI **Attila Ihasz** 12:17:12 PM (Edited)
Message reacted to by multiple users
😊 1 👍 1







Using conversation markers

Markers are powerful tools to support conversation analysis and information sharing. Users can bookmark the recording by adding markers. A marker is a specific section of a conversation (highlighted in the waveform pane) with related notes. This facilitates conversation reviews and helps information sharing and collaboration with other users e.g. supervisors or managers.




The following figure illustrates the key elements of the marker information pane:



Available marker controls:

Marker Control Icon	Feature	Description
	Mark selected timeframe	Creates a marker for the timeframe selected in the waveform window. To select a timeframe, follow these steps: <ul style="list-style-type: none"> • Move the mouse over the timeline area. • Press the left mouse button and drag to the left/right to select a timeframe. • Release the mouse button.
	Delete marker	Deletes the marker.
	Play marked timeframe	Starts playing the corresponding marked timeframe.
	Play marked timeframe continuously	Plays the corresponding marked timeframe repeatedly.
	Export marked audio segment	Exports the marked audio segment.
	Modify marker	After marking a certain timeframe, the user can modify the starting and ending position of the marker by clicking on the up/down arrows next to the timeframe starting and ending time values. The values are incremented or decreased by one second for each click. The markers can also be repositioned by dragging and moving the left or right border of the markers in the waveform pane (the mouse cursor changes when the feature is available on the borders).

The following table summarizes the available controls for saving or adding new markers:

Control Icon	Feature	Description
	Show/Hide markers	Shows or hides the markers on the waveform pane.
	Add new marker	Add new marker element row. By default, only five positions are displayed.
	Save markers	Apply all changes for all markers. Saves, modifies or deletes the markers in the database.

After successfully marking a timeframe, other users, who are authorized to play back the given conversation (e.g. group or system supervisors), can easily review and play back the marked section of the conversation. Markers that were placed by a given user cannot be modified or deleted by other users. The name of the user that placed the marker is displayed in the marker information tab.

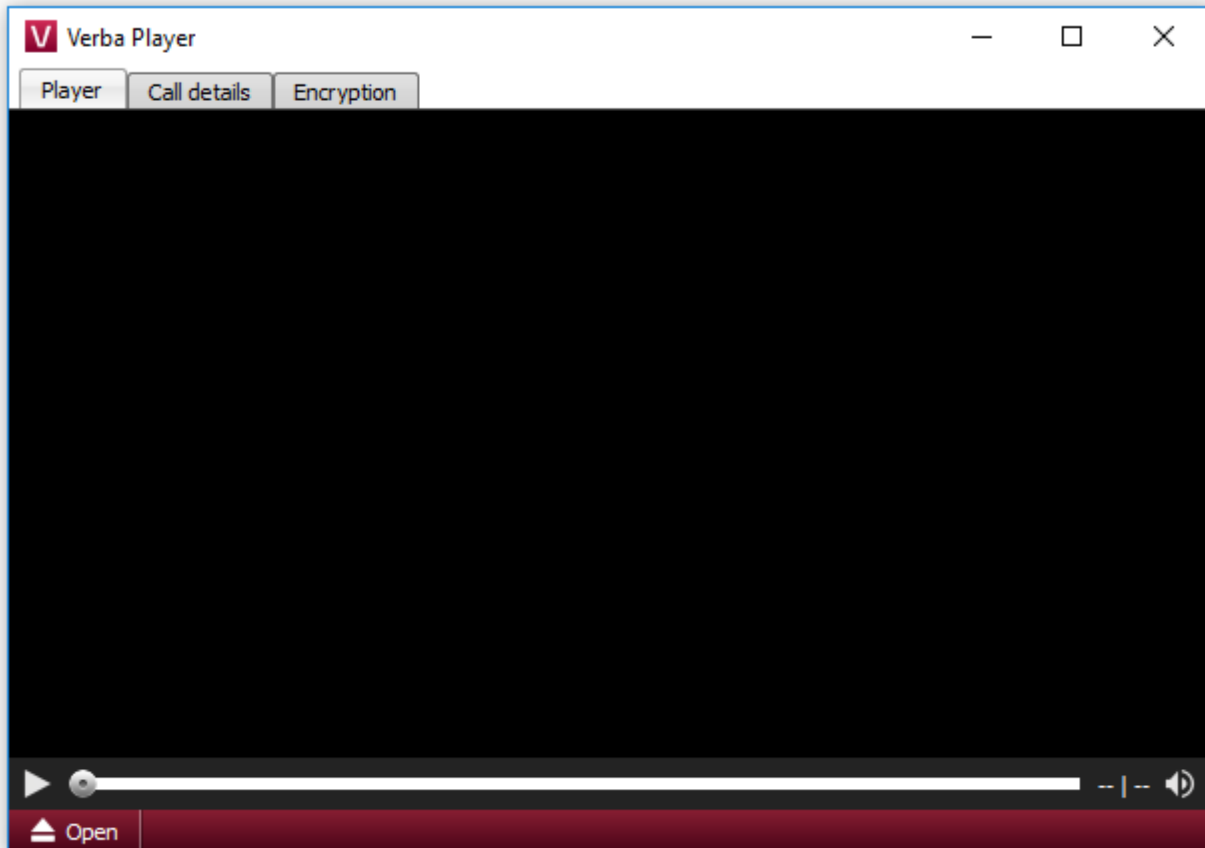
On conversation lists, an **M** mark indicates that one or more markers have been assigned to the conversation.

Markers can be added with the Verba XML Service too. For more information refer to [Adding markers to an ongoing conversation](#).

Verba Offline Player

Overview

The Verba Player is designed to offer playback of encrypted media files on client computers.



The supported file formats are:

- .vplb (Verba encrypted files)
- .wav, .spx, .vox, .vmf, .au, .vf, .wmv, .vma, .asf, .pcma, .pcmu, .g722, .g729 (Media files)

Configuring a client PC for encrypted playback

In order to open encrypted media files the certificate with which it was encrypted is required to be installed on the client PC. The certificate must contain the private key.

- [Installing a Windows Certificate for the Verba Offline Player](#)

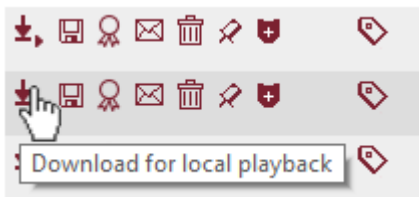
How to open and play an encrypted file

To play an encrypted media:

- Step 1** - Login to the Verba Web Interface and find your record using the **Search** menu

Step 2 - Download the file for local playback by clicking on the **Download**

↓,
icon



Step 3 - Start the Verba Player and click on the **Open**

▲
button on the bottom left corner

Step 4 - Find and **select** your downloaded media file for playback

Troubleshooting Playback Issues

In case of problems with the Verba Player verify the following:

- [Troubleshooting the Verba Offline Player](#)

Installing a Windows Certificate for the Verba Offline Player

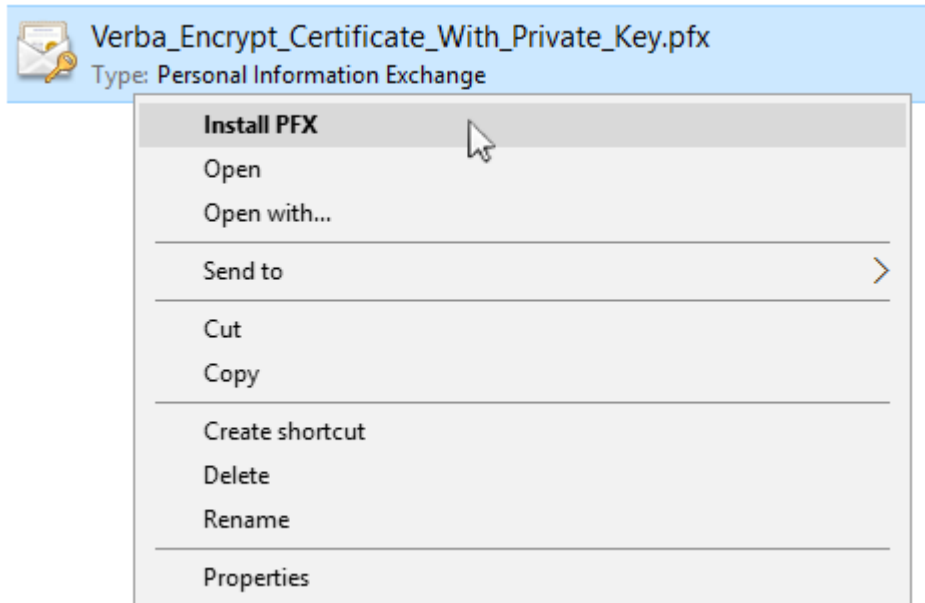
Overview

To open encrypted media files, the certificate with which it was previously encrypted needs to be installed on the client PC.

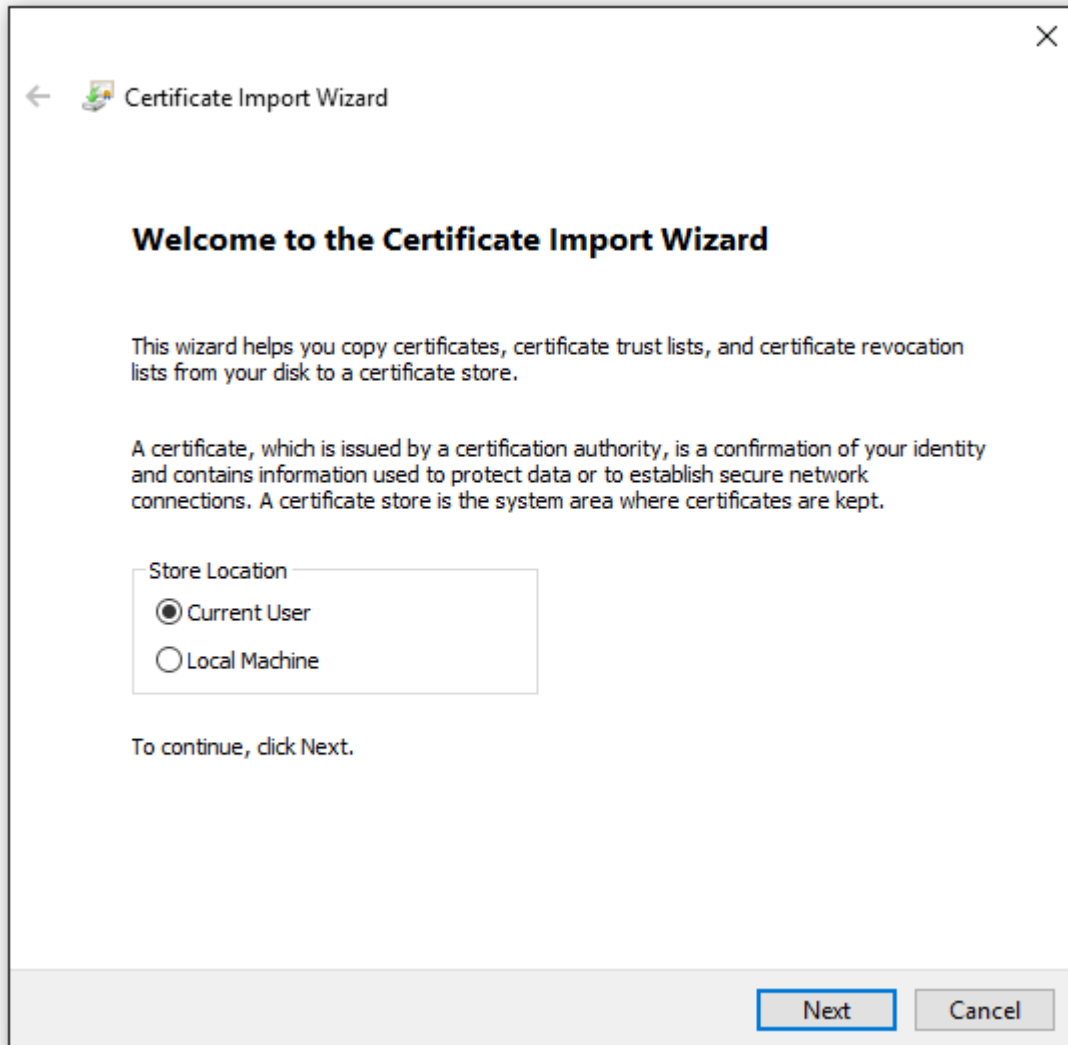
 The certificate must contain the private key.

Installing the certificate

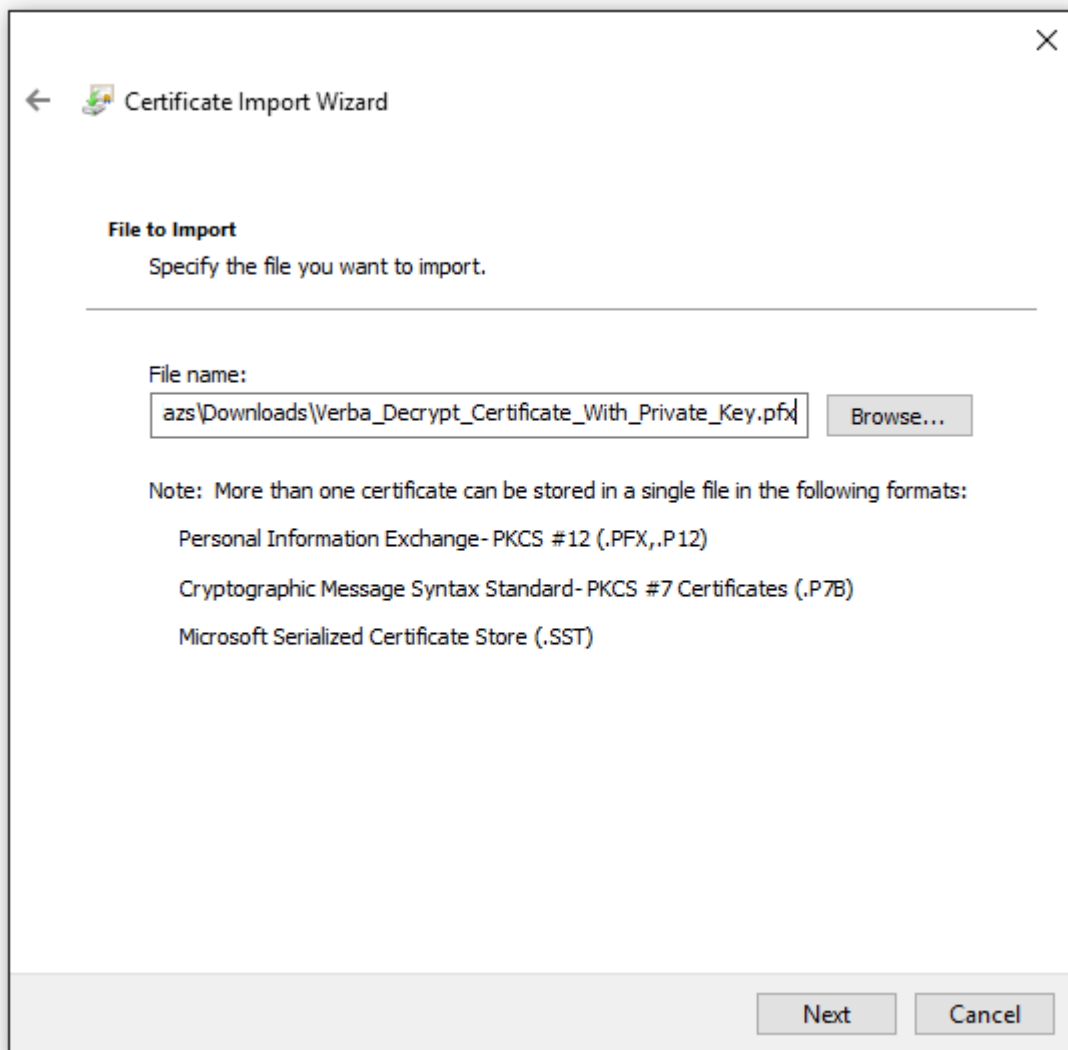
Step 1 - **Right-click** on the certificate which contains the private key and was used to encrypt the media files and select **Install PFX**.



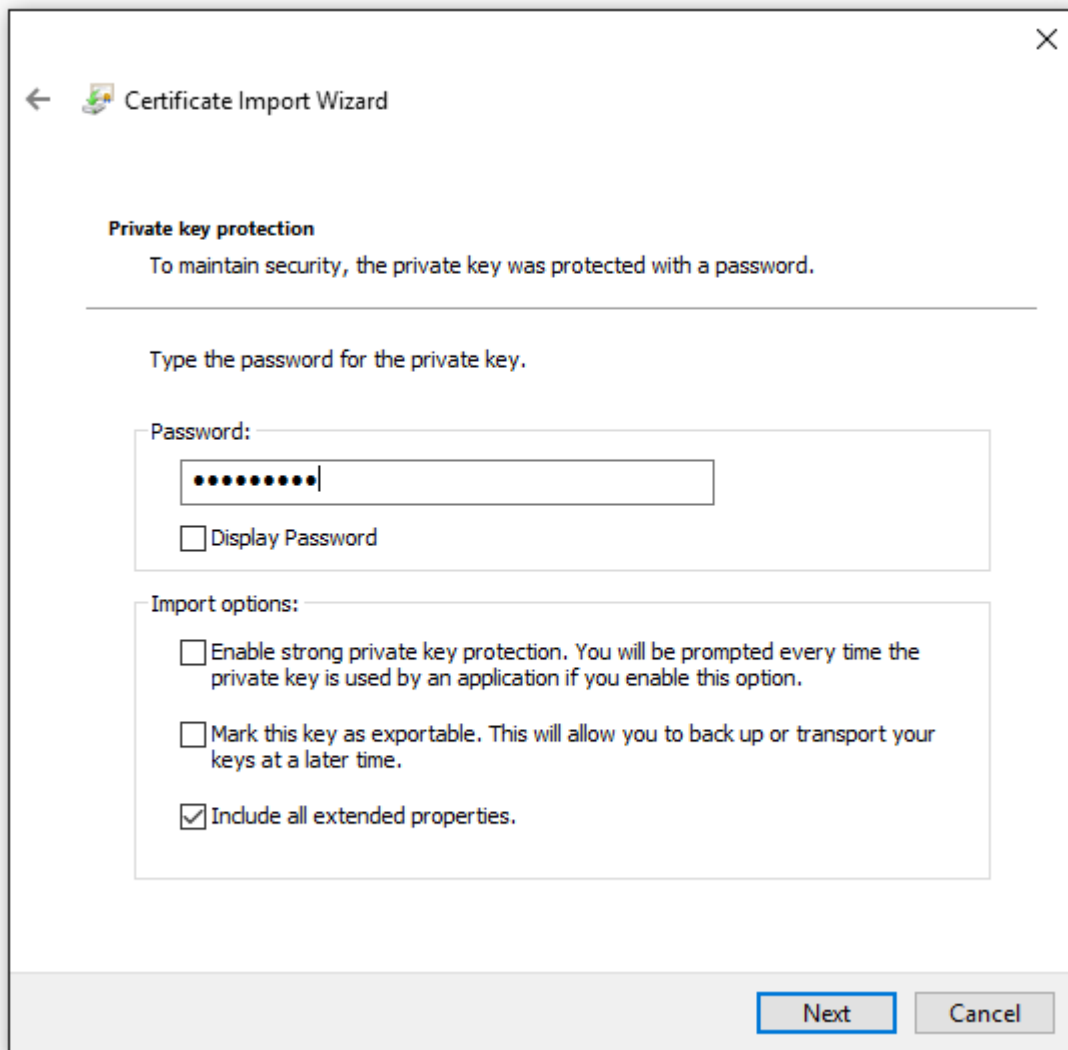
Step 2 - Select **Current User** to install the Certificate for only the current user or **Local Machine** to install the Certificate globally for every user on the computer.



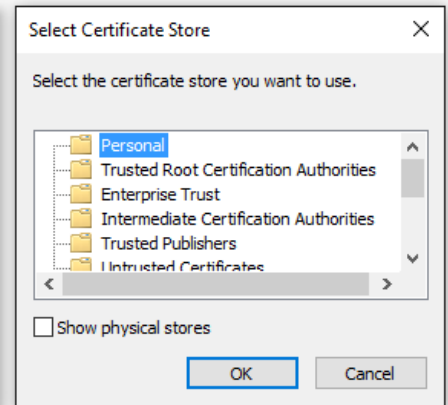
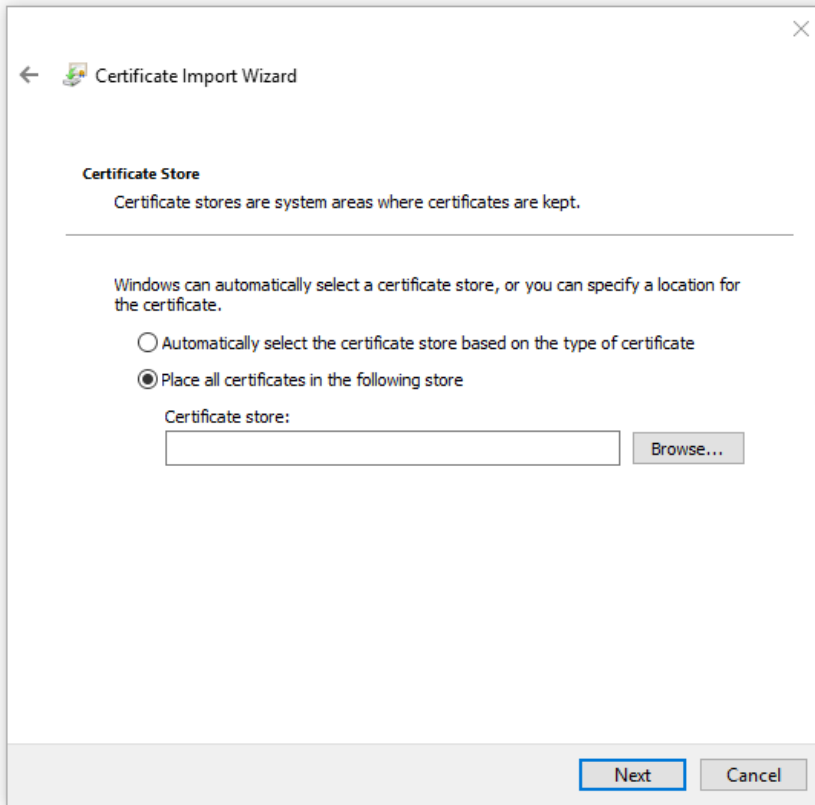
Step 3 - By default, the location is filled in for the current file. A different file can be selected by clicking on the **Browse...** button.



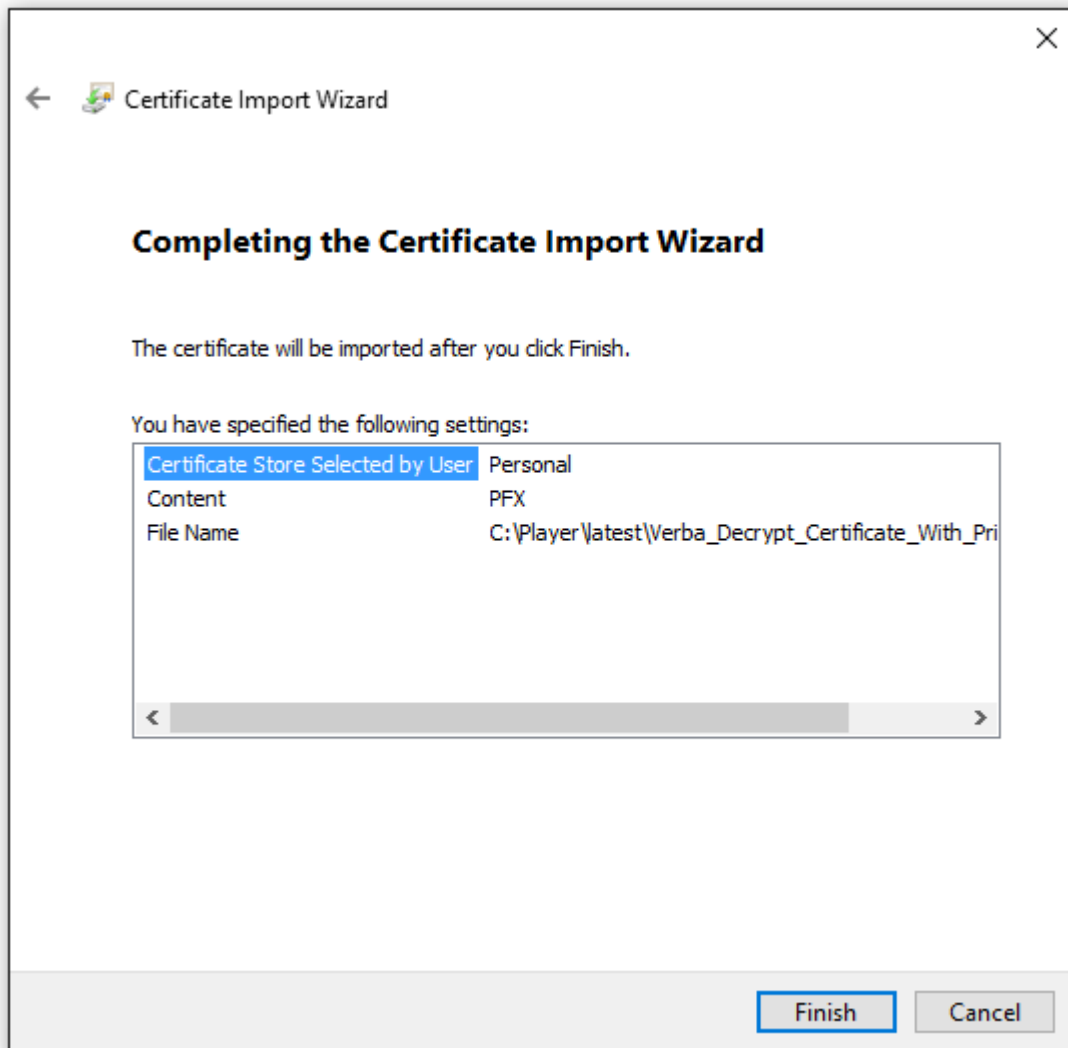
Step 4 - Type in the password for the private key. When the certificate is exported with the private key the wizard asks for a password to protect the Certificate. Enter that password here.



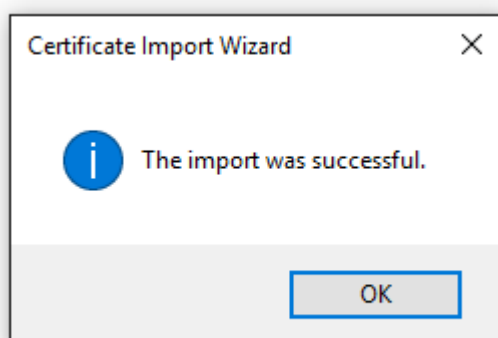
Step 5 - Select the **Place all certificates in the following store** option, then select **Personal**.



Step 6 - The summary page should look similar to this:



Step 7 - After clicking on the **Finish** button, a popup informs the user that **the import was successful**.



Troubleshooting the Verba Offline Player

Possible error reasons and solution:

- **Could not open encrypted file: decryption certificate is not available: <certificate footprint>:**

This error means that the required certificate is not installed on the client computer. The certificate's unique footprint is printed out to help identify which certificate is missing.

- **The program can't start because libsiren.dll is missing from your computer:**

When this error message appears, verify that the libsiren.dll is placed next to the verbaplayer.exe. The default installation path is: "C:\Program Files\Verba Player".

Log files and increasing the log level:

The Verba Offline Player writes its log to the following file:

C:\Users\<Username>\AppData\Local\Verba\log\player.log

It supports command line parameters such as:

Command Line Parameters:

USAGE:

```
verbaplayer.exe [-c] [-d[=k]] [-n[=k]] [-s[=k]] [-h] [-i]
```

Where:

- -c, --config
Displays Offline Player configuration
- -d[=k], --debug[=k]
Debug mode, sets the log level to k; k=0..7, default is 4

Level	Name
1	fatal
2	error
3	warning
4	info
5	debug
6	trace
7	insight

- -n[=k], --numberlogfile[=k]
Sets the number of log files, k>0, default is 5
- -s[=k], --sizelogfile[=k]

Sets the size of log files in bytes, k>1000000, default is 5000000

- -i, --ignore

The command line window will not show up

- -h, --help

Displays usage information and exits

 **Example:**

Users can create a shortcut for the executable file and for the shortcut path type: "VerbaPlayer.exe -d=7 -i", the log level will be the highest without any console popup window.

Sharing and publishing conversations

The recording system provides a secure and traceable way to share recordings among various members of your organization. Recordings with some important elements can be easily shared with other users or published to all colleagues in the company. The system differentiates two types of audiences:

- **Standard Verba users** - conversations shared for standard users, who can access the shared recordings via the standard web application.
- **Publishing server users** - these users do not have access to standard Verba Web application, they can use a simplified interface called the Verba Publishing Server. Through this easy-to-use and simple web interface, these users can easily search and play published records back without the need to login to the Verba Web application. The Verba Publishing Server can also provide authentication when certain records have to be published with access control. The Verba Publishing Server users can be created and maintained in the standard Verba system.

The following articles explain how to use the system:

- [Sharing conversations](#)
- [Managing shared items](#)
- [Accessing shared conversations](#)
- [Verba Publishing Server](#)

Sharing conversations

Sharing a conversation

To share a conversation recording, the users have to find the related conversation and navigate to the conversation detail page or double click the conversation, then select the **Share/Publish the conversation** link on the top right corner of the page. The option is only available for users with Share Conversations rights.

Share Conversation

Sharing Data

Title

Description

Expires On Never expires

Audience* Selected Users/Groups

Users

Groups Administration Group All Regulated Users Customer Services Group Default Global Compliance Office Global Dynamics

Allow Download

Allow Linking and Embedding

Save

* Indicates required item.

The following table describes each of the available fields:

Field Name	Description	Requirements
Title	Title for the shared recording.	Maximum length: 64
Description	Description of the shared recording.	Maximum length: 512

Audience	<p>The type of the audience can be selected here. The following valid values apply:</p> <ul style="list-style-type: none"> • Selected Users/Groups - this option will provide access to the shared record for selected users or group of users defined in the Verba System. These users can be standard or publishing server users as well. After selecting this option, users can define the desired users and/or groups in the multi-select boxes below. Only those selected standard users can access the shared recording, who have Access to Shared Calls right. This restriction does not apply to publishing server users. Publishing server users can access the shared recordings via the Verba Publishing Server interface only after authentication. • All standard users - this option provides access to the shared recording for all existing and all future users of the standard Verba system. Only those users can access the shared recording, who have Access to Shared Calls right. • All Publishing Server users - this option provides access to the shared recording for all existing and future publishing server users. Publishing server users can access the shared recordings via the Verba Publishing Server interface only after authentication. • All standard and Publishing Server users - this option provides access to the shared recording for both of the above-mentioned user types. • Public - this option provides access to the shared recording for anyone through the Verba Publishing Server without authentication. 	Required field.
Users	<p>If the audience is Selected Users/Groups, this option enables to select the desired users. Click on the desired user(s) in the left box and click on the >> button to select the users. Remove the user(s) by the clicking on them in the right box and pressing the << button.</p>	-
Groups	<p>If the audience is Selected Users/Groups, this option enables to select the desired groups. Click on the desired group(s) in the left box and click on the >> button to select the groups. Remove the group(s) by the clicking on them in the right box and pressing the << button.</p>	-
Allow direct linking of the item to the Publishing Server	<p>If this option is enabled, the recording can be shared from the Verba Publishing Server user interface. It allows to link directly to the published recording from a 3rd party application or embed a Windows Media Player object to any HTML page pointing to the shared record. Published recordings shared in this way do not provide any access control.</p>	-

Fill in the form and press the **Save** button to store the sharing information to the database.

Managing shared items

Modifying, deleting and deactivating shared conversations

Already shared conversations can be modified, deleted or deactivated through the **Sharing / Manage Shared Items** menu item.

Manage Shared Items

Title begins with [Find](#) ?

Active	Title	Description	Duration	Sharing Date	Audience	Views	Downloads
Yes	Dealing with a typical customer complaint	This audio recording was made when a customer complained about a service outage and how professionally the service agent handled the issue.	00:01:37	May 5, 2017 10:42:11 AM	All standard users	0	0
Yes	Bank of In-Surance Best Practice sales	This conversation demonstrates how an insurance is sold to a new customer (In-Surance). It can be used as a template for new sales personnel.	00:02:13	May 5, 2017 10:36:28 AM	All standard users	0	0
Yes	Public Video v3.wmv	This public video demonstrates the meaning of life.	00:03:37	May 10, 2016 1:25:40 AM	Public	0	0
Yes	Public Video v1.wmv	This public video demonstrates why 42 is the answer.	00:03:36	May 10, 2016 1:25:40 AM	Public	0	0
Yes	Public Video v2.wmv	This public video demonstrates the weak points of the Death Star.	00:02:33	May 10, 2016 1:25:40 AM	Public	0	0
Yes	Public Video v4.wmv	This public video demonstrates that you can publish videos recorded by Verba.	00:02:52	May 10, 2016 1:25:40 AM	Public	0	0

6 items found, displaying all items.

Export options: [Excel](#) | [RTF](#) | [PDF](#)

After selecting the menu item, click on the desired row and the system navigates to the Share conversations page, where the existing sharing information can be modified. Simply press the **Save** button after finishing the modifications.

The shared item can be also deactivated on this page by pressing the **Deactivate** button. Once a shared item is deactivated, it will no longer be available for the target audience. A deactivated item can be reactivated anytime later.

The shared item can be deleted by pressing the **Delete** button. After deleting the shared item, the target audience will no longer be able to access the sharing. The original conversation recording will NOT be deleted by this action, this operation only removes the sharing attributes from the original conversation record.

Accessing shared conversations

Users with **Access to Shared Conversations** right can list and view shared recordings under the **Sharing / View Shared Items** menu item.

Shared Items

Title	Description	Duration	Sharing Date	Publisher
Dealing with a typical customer complaint	This audio recording was made when a customer complained about a service outage and how professionally the service agent handled the issue.	00:01:37	May 5, 2017 10:42:11 AM	Administrator
Bank of In-Surance Best Practice sales	This conversation demonstrates how an insurance is sold to a new customer (In-Surance). It can be used as a template for new sales personnel.	00:02:13	May 5, 2017 10:36:28 AM	Administrator
Public Video v3.wmv	This public video demonstrates the meaning of life.	00:03:37	May 10, 2016 1:25:40 AM	Verba Technologies, LLC.
Public Video v1.wmv	This public video demonstrates why 42 is the answer.	00:03:36	May 10, 2016 1:25:40 AM	Verba Technologies, LLC.
Public Video v2.wmv	This public video demonstrates the weak points of the Death Star.	00:02:33	May 10, 2016 1:25:40 AM	Verba Technologies, LLC.
Public Video v4.wmv	This public video demonstrates that you can publish videos recorded by Verba.	00:02:52	May 10, 2016 1:25:40 AM	Verba Technologies, LLC.

6 items found, displaying all items.
Export options: Excel | RTF | PDF

All control buttons like play, download, etc. are available based on the user rights for the shared conversations, just like for normal recordings.

The following table describes each of the available columns in the list:

Field	Description
Title	Title of the shared recording.
Description	Description of the shared recording.
Duration	Length of the shared recording.
File Size	File size of the shared recording.
Publisher	Name of the user shared the recording.
Sharing Date	Date and time of the sharing.
Views	Overall number of attempts to view the shared recording.
Downloads	Overall number of attempts to download the shared recording.
Audience	Defined target audience.

Verba Publishing Server

The Verba Publishing Server provides a convenient, easy-to-use simple interface to access published recordings. The Verba Publishing Server can be accessed through a web browser. The following HTTP address must be typed in the **address** field:

http://ServerNameorIPAddress/verba/pub

After entering the URL, all the recordings made available to the public are displayed automatically. To access published calls for a certain publishing server users only, log in to the Verba Publishing Server first. For more information, please read the topics below.

Verba Publishing Server

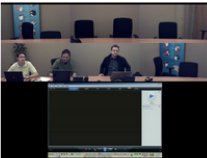

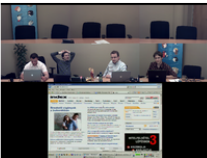
Tuesday, June 22, 2010 | [Login](#) | [Live Streams](#) | [Tiles View](#) | [About](#) |

Recorded Media

Title begins with

No active query. Please enter your search criteria using the options above.

3 items found, displaying all items. Page(s): **1**

	Title and Description	Media	Publisher	Creation Date	Views	Downloads
	<p>Publishing and Sharing</p> <p>Organizations can leverage the valuable assets stored in their call recording system using Verba publishing and sharing functionalities. The sharing function allows users to easily share important and useful recordings among other users for best practice training, information handover, etc. The flexible options allow to share the recordings to certain individual users or event to entire groups.</p>	<p>Duration: 00:34:13 File Size: 14,246,078 Bytes</p> <p><input type="button" value="Play"/> <input type="button" value="Download"/> <input type="button" value="Share"/></p>	Administrator	Jun 2, 2010 3:04:05 PM	2	0
	<p>Video and Telepresence Recording</p> <p>In todays unified communications world, video based interactions are getting more and more widespread. In order to provide call recording capability to these system, Verba Technologies introduced its outstanding video and telepresence recording system. Built on the top of the very successful traditional voice recording solution, organizations introducing video or telepresence based communication channels can leverage the same benefits with video calls and conferences.</p>	<p>Duration: 00:00:04 File Size: 16,606,264 Bytes</p> <p><input type="button" value="Play"/> <input type="button" value="Download"/> <input type="button" value="Share"/></p>	Administrator	Jun 2, 2010 3:03:10 PM	1	1
	<p>Strategic Partners</p> <p>Technology leadership is about vision, innovation, and a commitment to research and development. It's also about recognizing that in this complex unified communications environment, it is impossible to innovate alone.</p>	<p>Duration: 00:24:07 File Size: 4,701,592 Bytes</p> <p><input type="button" value="Play"/> <input type="button" value="Download"/> <input type="button" value="Share"/></p>	Administrator	Jun 2, 2010 3:02:18 PM	1	0

3 items found, displaying all items. Page(s): **1**

Export options: [Excel](#) | [PDF](#) | [RTF](#)

(c) Copyright Verba Technologies, LLC. 2000-2010. All rights reserved.

The following table describes the available columns in the list:

Field	Description
Title and Description	Title and description of the shared recording.
Media	Duration and the file size of the shared recording. Access the Play , Download and Share functions as well.
Publisher	Name of the user who shared the recording.
Creation Date	Date and time of the sharing.
Views	Total number of attempts to view the shared recording.

Downloads

Total number of attempts to download the shared recording.

Login to the Verba Publishing Server

To access published conversations for a certain publishing server users only, log in to the Verba Publishing Server first. After accessing the interface, click on the **Login** link on the top right corner of the page.



The screenshot shows the login page for the Verba Publishing Server. At the top left, the logo "verba" is displayed in a large, lowercase, sans-serif font, with "Publishing Server" written below it in a smaller, uppercase, sans-serif font. To the right of the logo, there are two input fields: "Login ID:" followed by a white rectangular box with a thin orange border, and "Password:" followed by a white rectangular box with a thin grey border. Below these fields is a grey button with the word "Login" in white text. At the bottom of the page, there is a block of text containing license information: "The software is licensed to: Verba Technologies", "Serial Number: MNRHQ4DK-005WDFLO-GE7QOX5K4I", and "Version: 5.0.0281". Below this is a copyright notice: "(c) Copyright Verba Technologies, LLC. 2000-2010. All rights reserved." and a paragraph of legal disclaimer text.

In the **Login ID** field type the user account name (not case sensitive) and enter the corresponding password in the **Password** (case sensitive) field, then press the **Login** button.

Users without a login name and password must contact their system administrator.

If the credentials entered are not valid, the login page is displayed again with the **Wrong login credentials!** error message.

After a successful login attempt, all shared/published recordings will be displayed, which are made available for the given user.

Users can log out anytime by clicking on the **Logout** link in the top-right corner of the page.

The system also allows users modify their password. Simply click on the **Change Password** link in the top right corner and fill in the form.

Using the Cisco IP phone service

Many convenient features of the Verba System are available from Cisco IP phones.



The following functions are available for XML-capable Cisco IP phone users:

- **On-Demand recording** capability for those extensions where this recording mode is configured in the Verba system. Users can select the current conversation to be recorded through an XML-capable Cisco IP phone. For users with extensions constantly monitored and recorded the on-demand conversation recording function is not applicable. Regardless, when the user marks the conversation for recording during the conversation, the entire conversation will be recorded (not only from the point of recording request).
- **Silent monitoring and whisper coaching** features allow supervisors to silent monitor and/or whisper coach agents using their Cisco IP phones. The same feature is available on the web interface, see [Silent monitoring ongoing conversations](#).
- **Conversation tagging** allows the user to assign a tag to an ongoing conversation or to an already recorded one. Users can assign (add) a tag to a conversation by selecting it from a predefined list of values (configurable) using the screen of the IP phone. Only those users are able to tag their conversations who have the commenting right. For more information about rights visit [User rights](#).
- **Adding markers to an ongoing conversation** (Bookmark). These markers are displayed in the Verba Player during playback to support call analysis and information sharing. For more information see [Markers on page](#).
- **Flagging a conversation as Private**. Users can flag both ongoing and already completed recorded conversations as private from their phone in addition to doing it through the web-based interface. Private conversations can be played back only by the participants of the conversation. For detailed information see [Private conversations](#) and [User rights](#).
- **Flagging a conversation as Important**. Conversations flagged as important can be listed directly through the Conversations / Important conversations menu item on the web interface. More information is available in the [Important conversations](#) section.
- **Sending an email** with a link pointing to a URL. This provides direct access to the conversation (conversation detail page) for the recipient the conversation is "one click away". Authentication is performed before allowing access to the conversation.

In order to provide access to the Verba Phone service for the user, the system administrator needs to configure the Verba Phone Service for the user's Cisco IP phone device (for details check [Configuring the Cisco IP Phone service](#)).

Supported Cisco IP phone models: every XML capable phone.

The Verba Phone Service provides access to certain functions of the XML service by a single button click (only available if Verba is used without authentication). This access method provides features for ongoing conversations only.

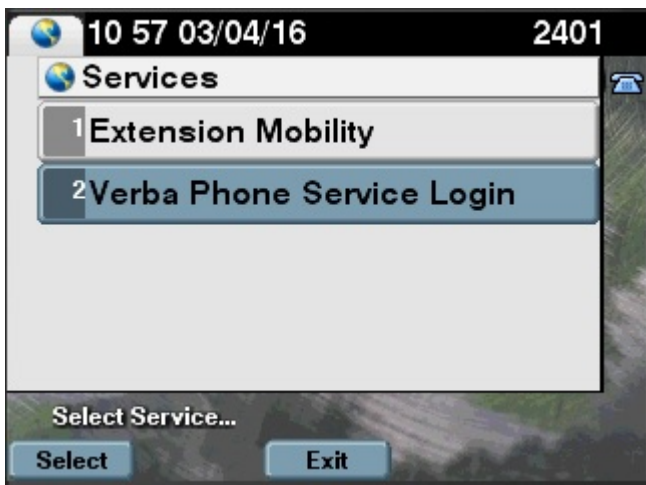
- [Adding a tag to a conversation](#)
- [Adding markers to an ongoing conversation](#)
- [Flagging a conversation as Important](#)
- [Flagging a conversation as private](#)
- [Login to the Verba Phone service](#)
- [Recording an ongoing conversation or the most recent conversation](#)
- [Sending emails](#)
- [Silent monitoring and whisper coaching](#)

Adding a tag to a conversation

This function allows the user to assign a tag to an ongoing conversation or to an already recorded one. Users can assign (add/change/delete) a tag to a conversation by selecting it from a predefined list of values (configurable) using the screen of the IP phone. To add a comment tag to a conversation (tagging) through the Verba Phone Service, follow these steps:

Step 1 Press the Services button on the phone or select the proper menu item.

Step 2 Select the **Verba Phone Service**.



Step 3 If the service is only accessible through authentication, follow the steps described in [Login to the Verba service](#).

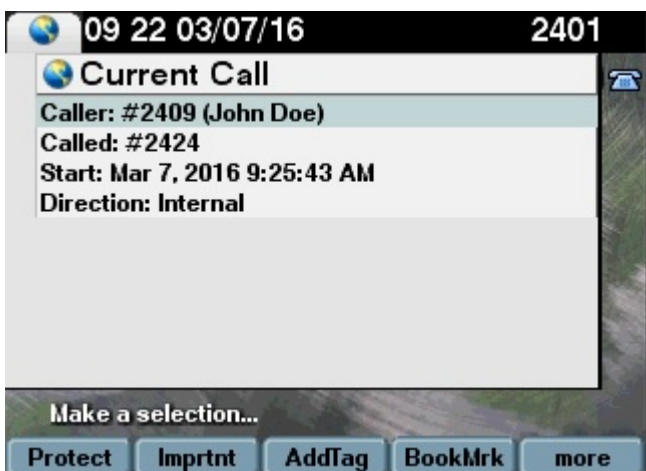
Step 4 Details about the ongoing conversation (associated with the user) are displayed.

To add a tag to the **ongoing conversation** press the **AddTag** button

To add a tag to the **most recently completed conversation** press the **Other** button then the Last button, and finally the **AddTag** button.

To add a tag to **any previously recorded conversation**, press Other followed by the **Calls** button, then select the desired item by pressing the Select button and finally press the **AddTag** button.

The **AddTag** button is only displayed if the user has the right to add a comment. The service checks the user's right. If the given username is valid and the user is granted the commenting right, then the button is displayed.



If there is no conversation in progress then the following screen is displayed:



Step 5 After pressing the **AddTag** button a predefined list of tags (labels) are displayed. Choose the desired comment label by pressing the appropriate number on the touch pad of the IP phone or the **Select** soft-key. If more than five labels are available, scroll the list by using the navigation button on the phone.



Step 6 After selecting the appropriate tag, the user is informed that the comment has been saved.



Step 7 To remove the assigned tag from the given conversation, navigate to the detailed conversation page of the given conversation then press the **AddTag** button. On the list of displayed items an asterisk (*) marks the currently assigned item. Just press the **Delete** button to remove the tag from the conversation.



After attaching a flag, tag or comment to a conversation, users can search for this conversation by using the proper fields and text in the search criteria. The addition of comments through the service can only be done when the conversation is active. Comments may be added or removed after finishing the conversation from the web-based user interface or select the last twenty conversations from the service on the phone. For further information, see [Adding a tag to a conversation](#).

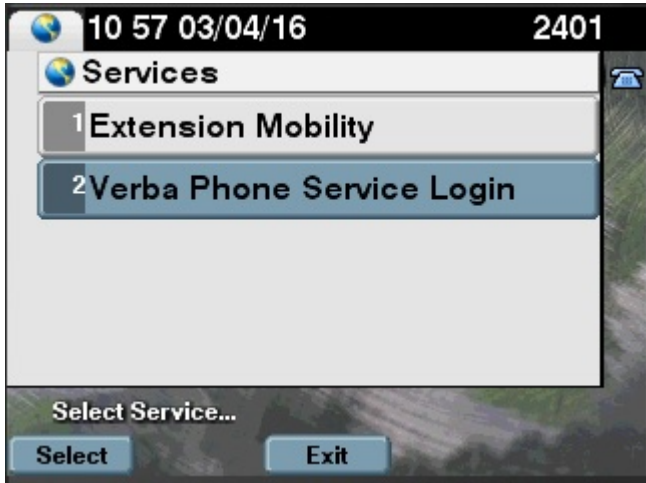
The comment texts are added to the comment field (named **IP Phone Service XML List**) of the comment template in the default group of the given user. This is a built-in comment field, which is unique in every comment template.

Adding markers to an ongoing conversation

In order to add a marker to an ongoing conversation through Verba Phone Service, follow the steps below:

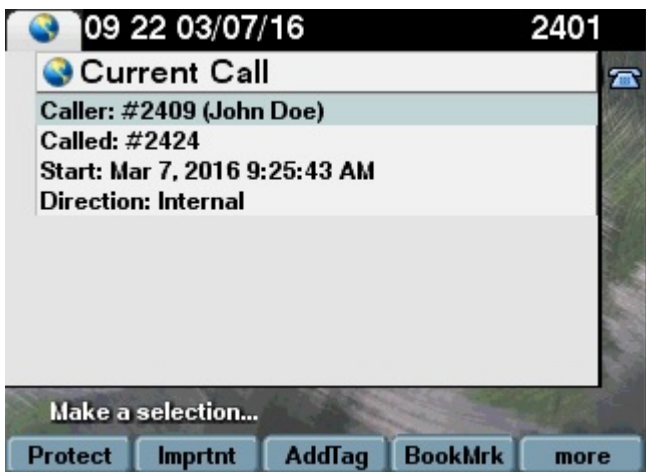
Step 1 Click on the **Services** button on the phone or select the full menu item during the conversation.

Step 2 Select the **Verba Phone Service**.



Step 3 If the service is only accessible through authentication, follow the steps described in [Login to the Verba service](#).

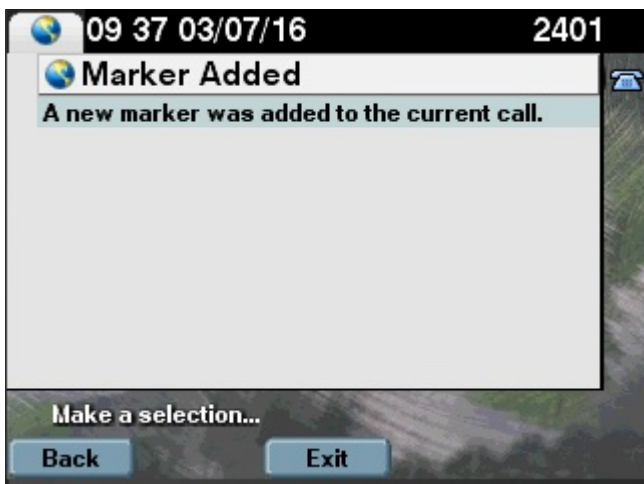
Step 4 Details about the ongoing conversation (linked to the user) are displayed. Press the **BookMrk** button. A maximum five markers can be added to a single conversation. Each marker will cover a timeframe starting from (pressing the time " " for 4 seconds) to (pressing the time "+" for 4 seconds).



If there is no conversation in progress then the following screen is displayed:



Step 5 After adding a marker to the ongoing conversation, the user is informed about the success of the operation.



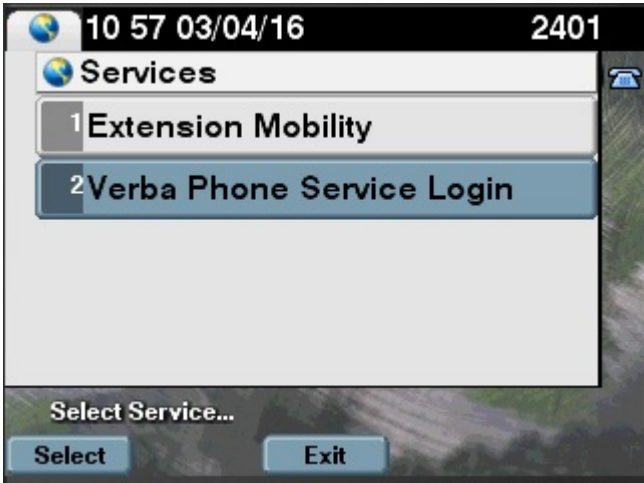
After adding one or more marker(s) to the conversation, users are able to display the marked timeframe in Verba player. For more information, see [Markers](#).

Flagging a conversation as Important

To flag a conversation as important through the Verba Phone Service, follow these steps:

Step 1 Click on the **Services** button on the phone or select the proper menu item.

Step 2 Select the **Verba Phone Service**.



Step 3 If the service is only accessible through authentication, follow the steps described in [Login to the Verba service](#).

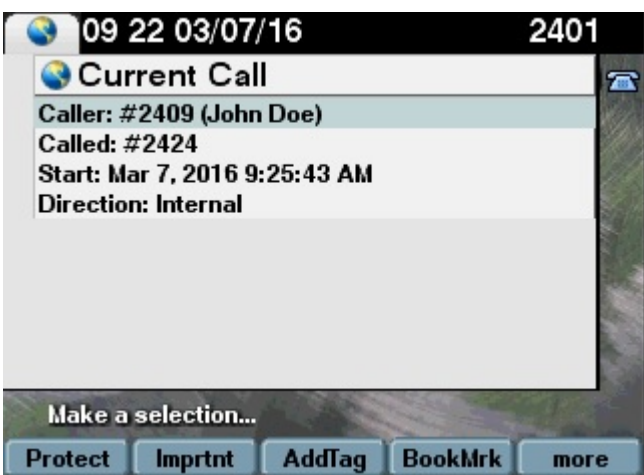
Step 4 Details about the ongoing conversation (linked to the user) are displayed.

To flag the **ongoing conversation** as Important press the **Important** button.

To flag the **most recently completed** conversation as important press the **Other > Last**, and then the **Important** button.

To flag **any previously recorded conversation** as important, press the **Other > Conversations** buttons, then select the desired item by pressing the **Select** button and then press the **Important** button.

The **Important** button is only displayed if the user has the right to flag a call as important and to add a comment.



If there is no call in progress, the following screen is displayed:

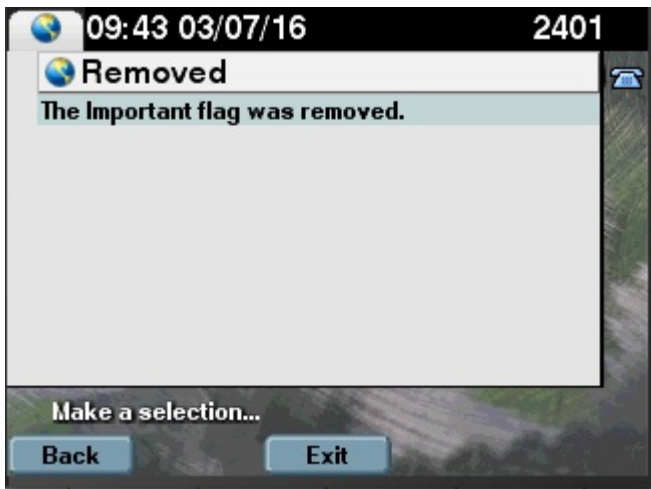


Step 5 After successfully flagging a conversation, the user is informed that the conversation has been flagged as important.



Step 6 To remove the important flag from the conversation, navigate to the detailed conversation page of the given conversation. A new status line shows that the given conversation has already been flagged as important. To remove the "Important" flag, press the **Dellmpt** button.





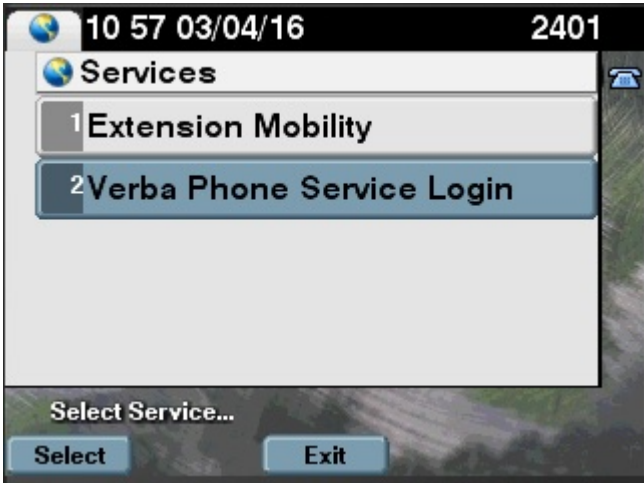
After flagging a conversation as important, the conversation can be listed through the **Conversations / Important conversations** menu item on the web interface. The Verba Web Application also has the important conversation flagging function, see [Important conversations](#).

Flagging a conversation as private

To flag a conversation as "Private" using the Verba Phone Service, follow these steps:

Step 1 Press the **Services** button on the phone or select the proper menu item.

Step 2 Select the **Verba Phone Service**.



Step 3 If the service is only accessible through authentication, follow the steps described in [Login to the Verba service](#).

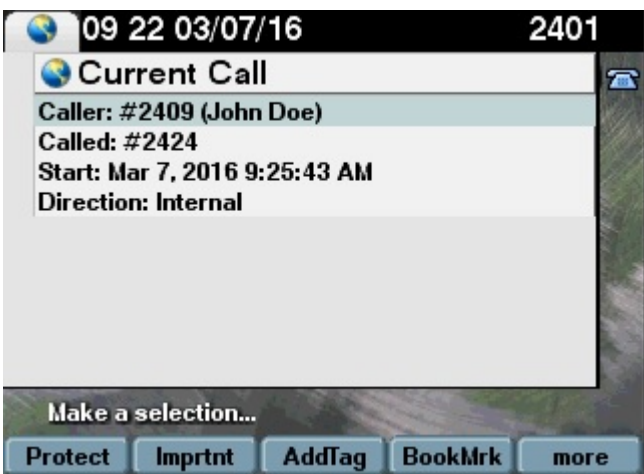
Step 4 Details about the ongoing conversation (linked to the user) are displayed.

To flag the **ongoing conversation** as private press the **Private** button.

To flag the **most recently completed conversation** as private press the **Other > Last**, and then the **Private** button.

To flag **any previously recorded conversation** as private, press the **Other > Calls** buttons, then select the desired item by pressing the **Select** button and finally press the **Private** button.

The **Private** button is only displayed if the user has the right to flag conversation as private. The service checks the user right through the username that was configured for the service (or added through the login process). If the given username is valid, the button is displayed for users having the private right.



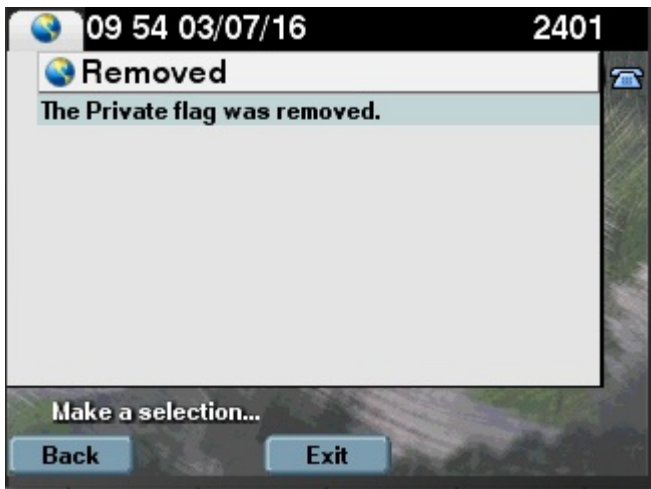


Step 5 After successfully flagging a conversation, the user is informed that the conversation has been flagged as private.



Step 6 To remove the private flag from the conversation, navigate to the detailed conversation page of the given conversation. A new status line shows that the given conversation has been already flagged as private. To remove the private flag, press the **DelPriv** button.





After flagging a conversation as private, the conversation can be listed through the **Conversations / Private conversations** menu item on the web interface. Private conversations can only be played back by the participants of the conversation. Conversations can be flagged as Private using the Verba Web Application, see [Private conversations](#).

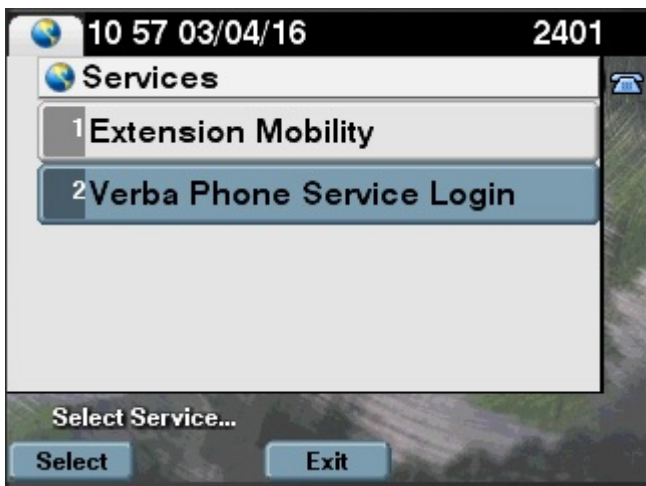
Login to the Verba Phone service

The Verba Phone Service is available in two variations: with authentication and without authentication. When authentication is used, users have to login to the service using their credentials in order to access its functions.

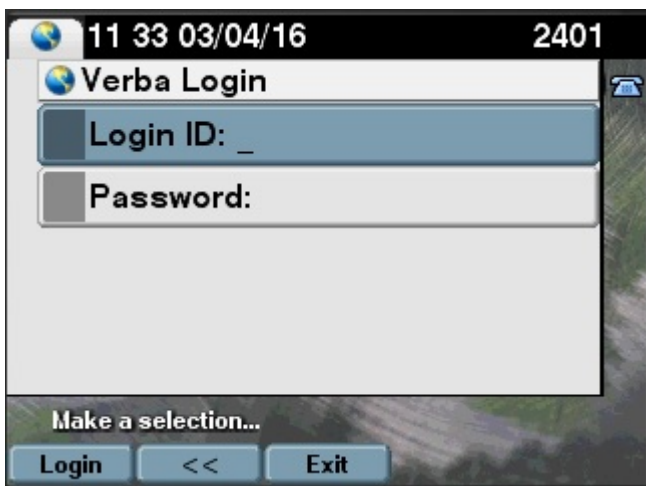
To login to the service, follow these steps:

Step 1 Press the **Services** button on the phone or select the proper menu item.

Step 2 Select the **Verba Phone Service**.

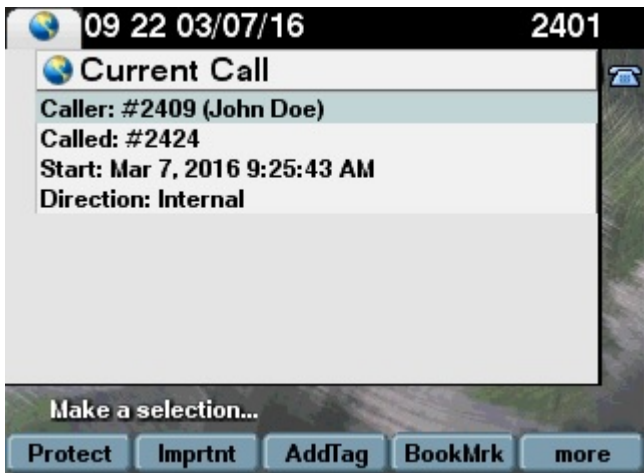


Step 3 The login screen is displayed, where you have to enter the Verba login name and password.



Step 4 Use the phone keypad to input the Verba username and password, then press the **Login** button.

Step 5 After successful login the current conversation page is displayed. If incorrect login information is provided, the login page is displayed again.



Step 6 If there is no conversation in progress, the following screen is displayed:

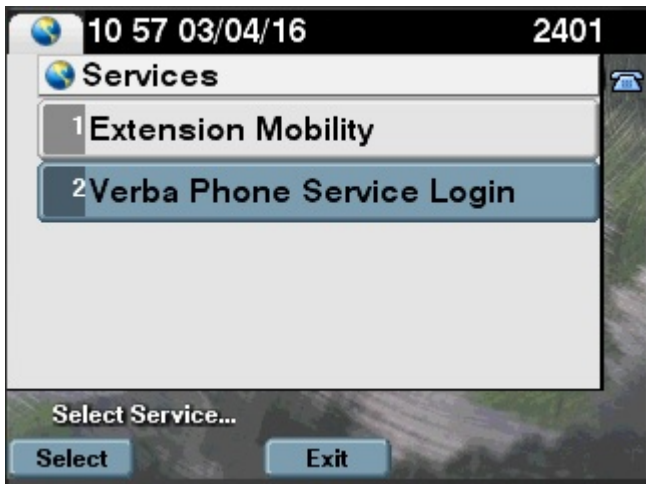


Recording an ongoing conversation or the most recent conversation

To record an ongoing conversation (or recover and store the most recently completed conversation) through the Verba Phone Service, follow these steps:

Step 1 Press the **Services** button on the phone or select the proper menu item.

Step 2 Select the **Verba Phone Service**.



Step 3 If the service is only accessible through authentication, follow the steps described in [Login to the Verba service](#).

Step 4 Details about the ongoing conversation (associated with the user) are displayed. Press the **Record** button to record the ongoing conversation for recording. To record the most recently completed conversations, press the **Other** button and the **Last** button, then press the **Record** button.



If there is no conversation in progress the following screen appears:



Step 5 After successfully denoting a conversation for recording, the user is informed about that the conversation is being recorded.



When the **Back** button is pressed, the conversation detail page is displayed again, and a new status line appears showing the conversation status as "being recorded".



When a user initiates conversation recording in the middle of a conversation, the whole length of the conversation is recorded. It is achieved by recording all conversations for extensions, where on-demand recording mode is set, and deleting those which were not denoted by the user to be recorded (kept).

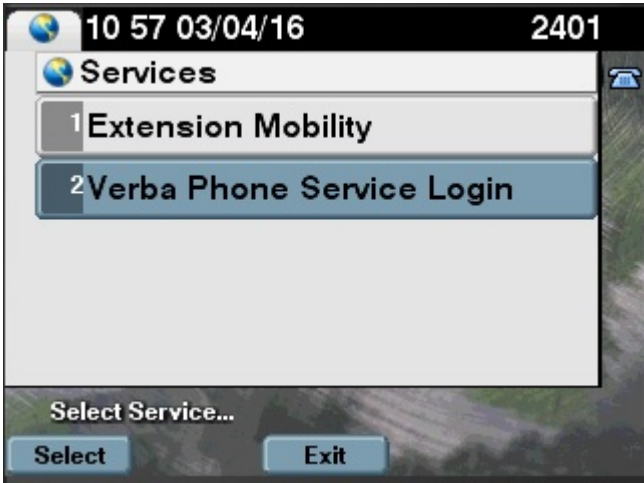
For further information, see [Verba Storage Management Service](#) in **Verba Deployment Guide, On-demand Recording Settings** topic.

Sending emails

In order to send an email containing a URL that points to the conversation, follow these steps:

Step 1 Press the **Services** button on the phone or select the proper menu item.

Step 2 Select the **Verba Phone Service**.



Step 3 If the service is only accessible through authentication, follow the steps described in [Login to the Verba service](#).

Step 4 Details about the ongoing conversation (linked to the user) are displayed.

To send an e-mail about the ongoing conversation, press the **Email** button and then the **To Me** button (to send in e-mail to yourself) or the **To Suprv** button (to send an e-mail to the default group supervisor(s)).

To send an e-mail about the most recently completed conversation, press the **Other > Last >** and the **Email** and then the **To Me** button (to send an e-mail to yourself) or the **To Suprv** button (to send an e-mail to the default group supervisor(s)).

To send an e-mail about a previously recorded conversation, press the **Other** then the **Calls** button. Select the desired item by pressing the **Select** button then the **Email** button and then the **To Me** button (to send an e-mail to yourself) or the **To Suprv** button (to send an e-mail to the default group supervisor(s)).

The button is only displayed if the user has the right to send e-mails. The Verba e-mail sending function is interpreted by users. The service checks the user through the username that was configured for the service (or added through the login process).



If there is no conversation in progress, the following screen is displayed:



Step 5 Press the **To Me** or **the To Suprv** button to send the email to yourself or to your group supervisor(s) for the given conversation. The user is informed that the email has been sent. The email address is always collected from the Verba users database (please, refer to [User Administration](#)).

After sending an email, the user receives an email containing an URL pointing to the selected call. By clicking on the URL, the Verba direct access page is loaded. The user has to login in order to access the call.

Step 6 Open your email application (e.g. Microsoft Outlook).

Step 7 Click on the URL in the email.

Step 8 Login into Verba system with a proper username and password.

Step 9 The system automatically forwards users to the detailed conversation information page of the given conversation record.

Silent monitoring and whisper coaching

To silently monitor or whisper coach during an ongoing conversation through the Verba Silent Monitoring Phone Service, follow the steps below:

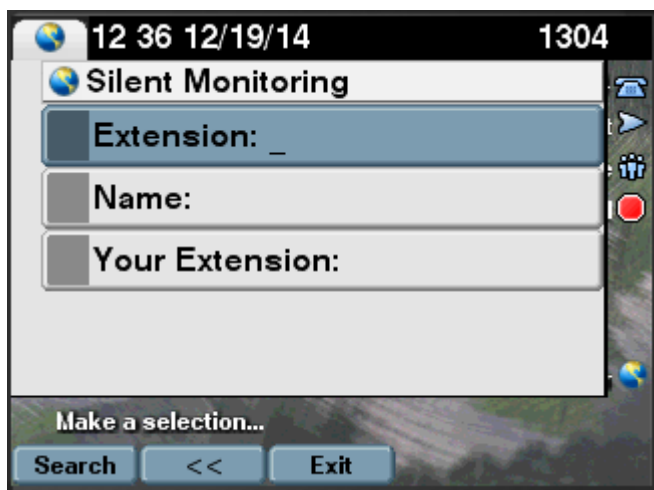
Step 1 - Click on the **Services** button on the phone or select the proper menu item during the conversation.

Step 2 - Select the **Verba Silent Monitor Phone Service**.



Step 3 - If the service is only accessible through authentication, follow the steps described in topic [Login to the Verba service](#).

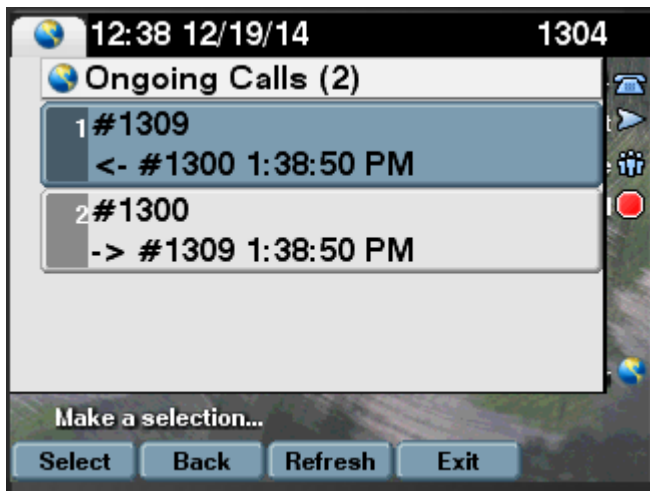
Step 4 - On the first screen, enter the extension number and/or the name of the user to be monitored. The system searches for any occurrences of the provided query strings, so there is no need to enter the full number or name. If these fields are left empty, the system will display all ongoing conversations based on the access control settings.



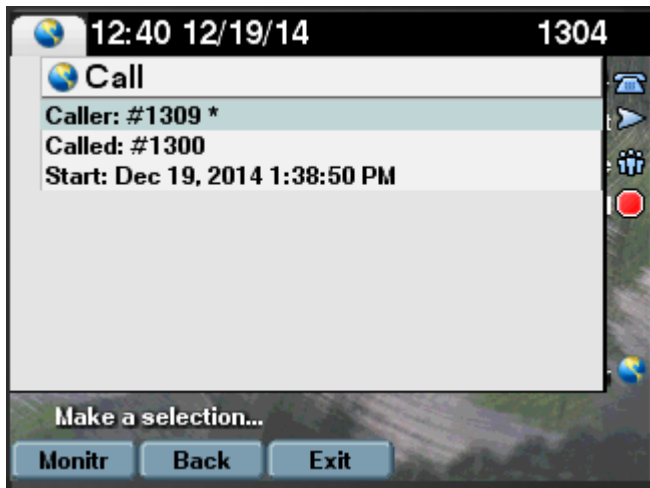
Step 5 - Enter the extension number, where the service will deliver the silent monitoring/whisper coaching call.

Step 6 - Press the **Search** button.

Step 7 - In the ongoing conversation list, select the relevant one. Conversations, where both parties can be monitored, are listed twice. The number and name in the first row identifies the monitored party in the list.



Step 8 - Once an ongoing conversation is selected, press **Monitr** to start silent monitoring the conversation or **Whispr** to whisper coach the user.



Step 9 - The silent monitoring/whisper coaching session is presented as a conversation on the supervisor phone. The conversation is automatically answered. Users can end the conversation anytime like in the case of normal calls.

Desktop recorder user interface

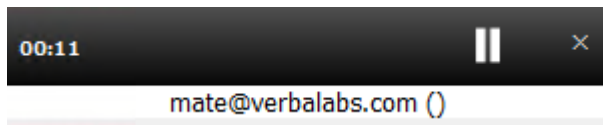
Overview

The Verba Desktop Recorder is responsible for recording screen capture videos on the desktop PCs of contact center agents.

Screen recording starts when a conversation is started on the numbers associated with the agent and recording stops when the conversation is terminated. The recorded video is automatically uploaded to the Verba Media Repository where it is precisely combined with the corresponding conversation audio.

The recorder has a minimal user interface on the agent's desktop, designed to ensure the agent is not disturbed during work, but status assessment and troubleshooting are very easy for the IT team.

Conversation popup panel









The conversation popup appears at the beginning of the conversation, and the recording can be paused with the pause button. It also places pause/resume markers at the waveform in the web player.

Taskbar notification icon

The Verba Desktop Recorder presents its current status on the Windows taskbar notification area in the form of an icon.

The following table describes the different icon recorder states:

Icon	Description
	Idle No ongoing screen/audio recording. System is working properly.
	Recording Screen/Audio recording in progress. System is working properly.
	Paused Screen/Audio recording is paused. System is working properly.
	Inactive/Disabled Screen recording is disabled or inactive. Network or configuration problem.
	Error Critical error occurred. Desktop recorder is not operational.

 It is possible to disable this icon and make the desktop recorder completely invisible/silent by changing the SilentMode variable through the Verba administration web interface.

Status messages

Users can get detailed status messages by moving the mouse over the Verba icon in the taskbar notification area.

In the tables below <user> means user names, <extX> means phone extensions.

Normal operational states

Icon status message	Explanation
Configuring...	The desktop recorder is being reconfigured by the Verba node manager.
Initializing...	The desktop recorder is starting up.
Idle username - <ext0>, <ext1>	Everything works properly, the screen recorder is ready for the next conversation.
Inactive - Recording is disabled	Everything works properly, but screen recording is administratively disabled (though e.g. API calls).
Recording <user> - <ext0>, <ext1>	Screen recording in progress.
Paused <user> - <ext0>, <ext1>	Ongoing screen recording is paused (e.g. for PCI DSS compliance reasons).

Error states

Icon status message	Explanation	Possible resolution steps
Inactive - Not connected to database	SQL Server database connection cannot be established.	<ol style="list-style-type: none"> 1. Verify that the SQL Server is available from the desktop PC 2. Verify the database login credentials configured in the Verba Media Repository
Inactive no user - no extensions	User and phone extension are not configured for this desktop recorder.	<ol style="list-style-type: none"> 1. Verify that the user logged into the desktop PC with a name that is configured for recording in the Verba Media Repository. 2. Register the user name for recording in the Verba Media Repository.
Inactive <user> - no extensions	User is configured, but no phone extension is associated.	<ol style="list-style-type: none"> 1. Verify that the user has an extension associated with it in the Verba Media Repository.
Inactive - No recorders configured	No recorder servers are configured. Messages about conversation start and termination will not be received.	<ol style="list-style-type: none"> 1. Verify that the recorder servers are properly configured
Inactive - Not connected to any recorder	No recorder servers are available. Messages about conversation start and termination will not be received.	<ol style="list-style-type: none"> 1. Verify that the recorder servers are properly configured 2. Verify that the recorder serves are accessible from the desktop PC (firewall issues)
Configuring...	The desktop recorder is being reconfigured by the Verba node manager.	-
Initializing...	The desktop recorder is starting up.	-
Idle username - <ext0>, <ext1>	Everything works properly, the screen recorder is ready for the next conversation.	-


Inactive - Recording is disabled	Everything works properly, but screen recording is administratively disabled (though e.g. API calls).	-
Recording <user> - <ext0>, <ext1>	Screen recording in progress.	-
Paused <user> - <ext0>, <ext1>	Ongoing screen recording is paused (e.g. for PCI DSS compliance reasons).	-
Critical Error	System is in critical error state from which it can not go back to normal operation.	<ol style="list-style-type: none"> 1. Try restarting the desktop recorder service 2. Try restarting your PC 3. Try reinstalling your desktop recorder 4. If all these fail, please collect logs and contact support.

Dial-in user interface

Overview

The Verba Recording System provides dial-in services to end-users for the following:

Use case	Description	Audio conversations	Video conversation
Dictation	Users can record a dictation with a simple conversation.	SUPPORTED	SUPPORTED
Ad-hoc conference	Users can add the recorder to any conference call to record it.	SUPPORTED	SUPPORTED
Playback	Recorded conversations can be played back over the phone.	SUPPORTED	SUPPORTED
Silent monitoring	Ongoing conversations can be listened to over the phone.	SUPPORTED	NOT SUPPORTED

 Verba Dial-in Services provide **audio functions for all PBXs with SIP support**, however, **video services are limited to certain vendors**. Please contact Verba regarding the latest video recording compatibility.

Dial-in lines

The solution provides different dial-in lines with different capabilities:

- **recording line without prompt** - recording starts immediately when the recorder answers (but asks for Recorder PIN if required)
- **recording line with prompt** - recording starts after a prompt when the recorder answers (but asks for Recorder PIN if required)
- **playback line** - provides playback capabilities for conversation recordings stored in the solution
- **advanced dial-in line** - provides more advanced playback and recording capabilities

Recorder line numbers are configurable. Different customer deployments will have different recorder line numbers.


Authentication

The dial-in services lines are **authenticated**, functions and content are restricted based on the detected identity. Authentication uses the following procedure:

1. Detect the caller's phone extension
2. If the extension is configured in Verba and configuration allows PIN-less operation, the service progresses directly
3. If the extension is configured in Verba, but configuration requires PIN, the service progresses after successful PIN authentication

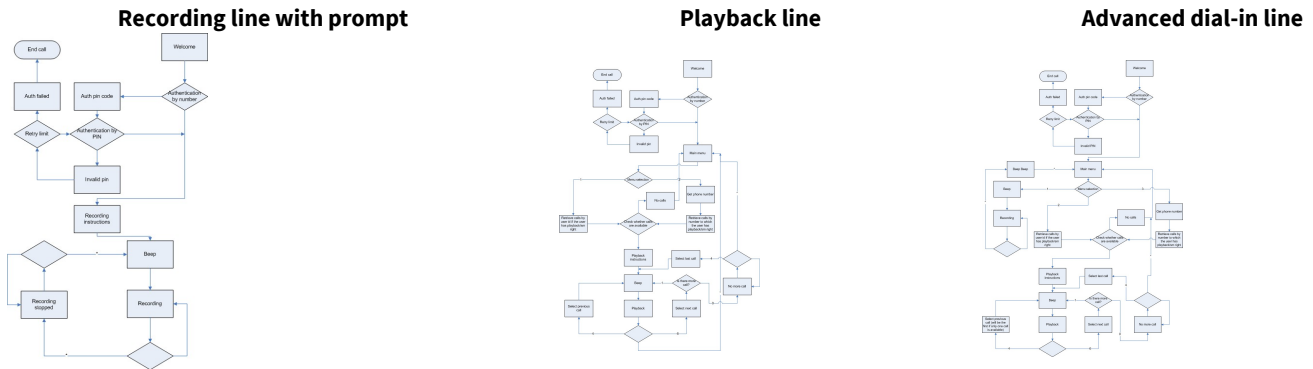
The recorder line **does not answer** if:

- the caller uses a hidden number
- the extension is not configured in the Verba system,
- dial-in recording is not allowed for that extension

 PIN-less, extension based authentication is prone to caller ID spoofing. Use that functionality with care (e.g. for internally accessible dial-in services only).

Dial-in service flows

Click on the diagrams below to see the service flows of the various dial-in lines. Flow and prompt audio customizations can be configured.



Dial-in interface customization

Audio prompts

Prompts are stored in <PromptPath>\<Language>\ subdirectories.

Language is determined based on authenticated user's language property if available, otherwise based on a configured language default.

File	Default Prompt	Comment
authfailed.wav	Authentication failed!	
beep.wav		Beep before recording and playback of next conversation
beepbeep.wav		Double beep after the recording ended
enterpin.wav	Please enter your PIN code terminated by the # key!	
fullmenu.wav	To record this conversation press 1, to play back conversations, press 2, to play back conversations by phone number press 3!	
getplaybacknumber.wav	Please enter the phone number terminated by the # key!	
invalidpin.wav	Invalid PIN code!	
nocalls.wav	There are no conversations available to play back for you	"for you" because there is no distinction between no access for playback and no conversations found according to searching criteria
nomorecall.wav	No more conversations to play back. To play back the previous conversation press 4, to enter menu press the * key.	
playbackinstructions.wav	To play back an earlier conversation press 4, to play back a consecutive conversation press 6, to enter menu press the * key.	

playbackmenu.wav	To play back conversations press 1, to play back conversations by phone number press 2.	
recinstructions0.wav	Recording will be started after the beep. To stop recording press the * key, after two beeps recording will be stopped. You can restart it by pressing the * key again.	Recording instructions for recorder line. It's too long, a shorter prompt is needed is here.
recinstructions1.wav	Recording will be started after the beep. To stop recording and enter menu press the * key.	Recording instructions for voice portal
resptimeout.wav	Response timeout.	
sqlerror.wav	SQL error.	
welcome.wav	Welcome to the Verba Recording System.	

Video prompts

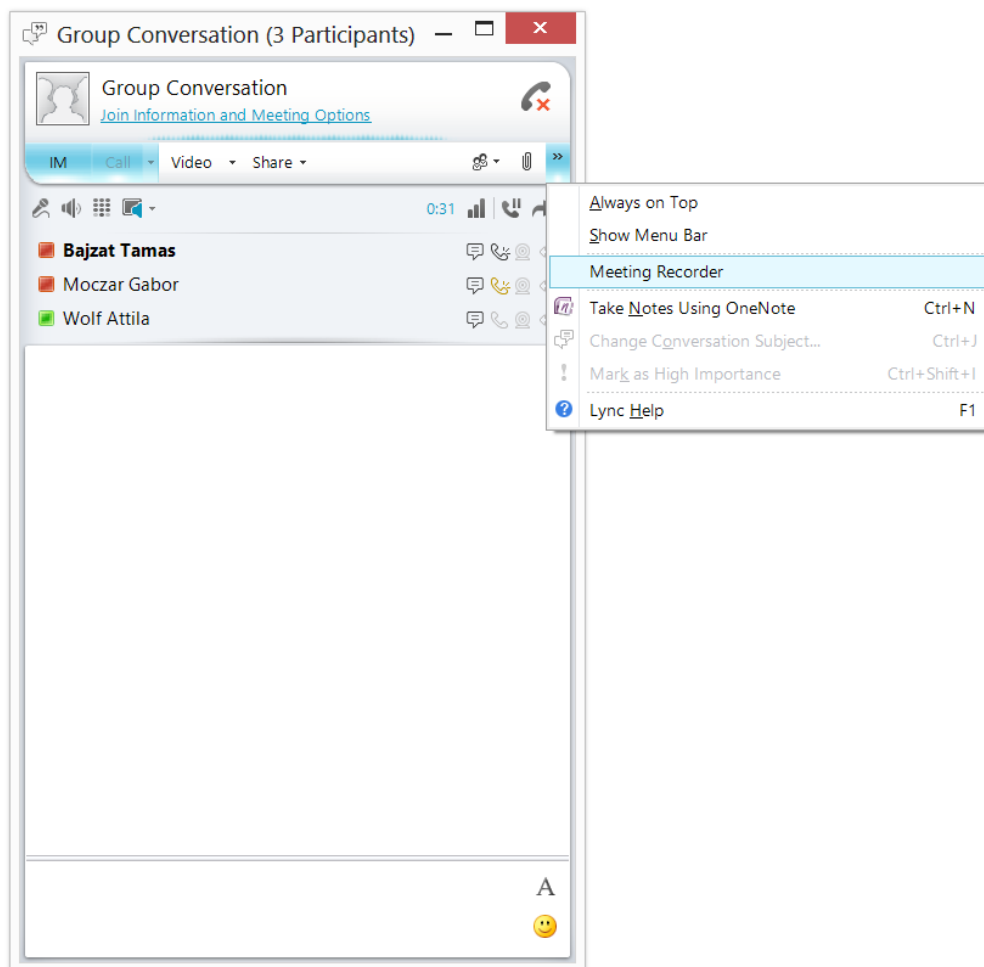
Prompts are stored in <PromptPath> subdirectories. Currently there is no multi-language capability for video prompts.

File	Prompt
audioicon.png	Thumbnail for audio conversations, used if waveform service, cannot generate waveform
erroricon.png	Thumbnail for conversations, that couldn't be opened
verbatech.png	Verba logo showed in bottom right corner of the menus, and full screen for recording with forced duplex streams (recorder should send audio and video stream, not just receive)
recscreen.png	Image for recording screen in 4:3 ratio
recscreen_wide.png	Image for recording screen in 16:9 ratio

Using the Lync 2010, 2013 and Skype for Business extension for conference call recording

Opening the extension

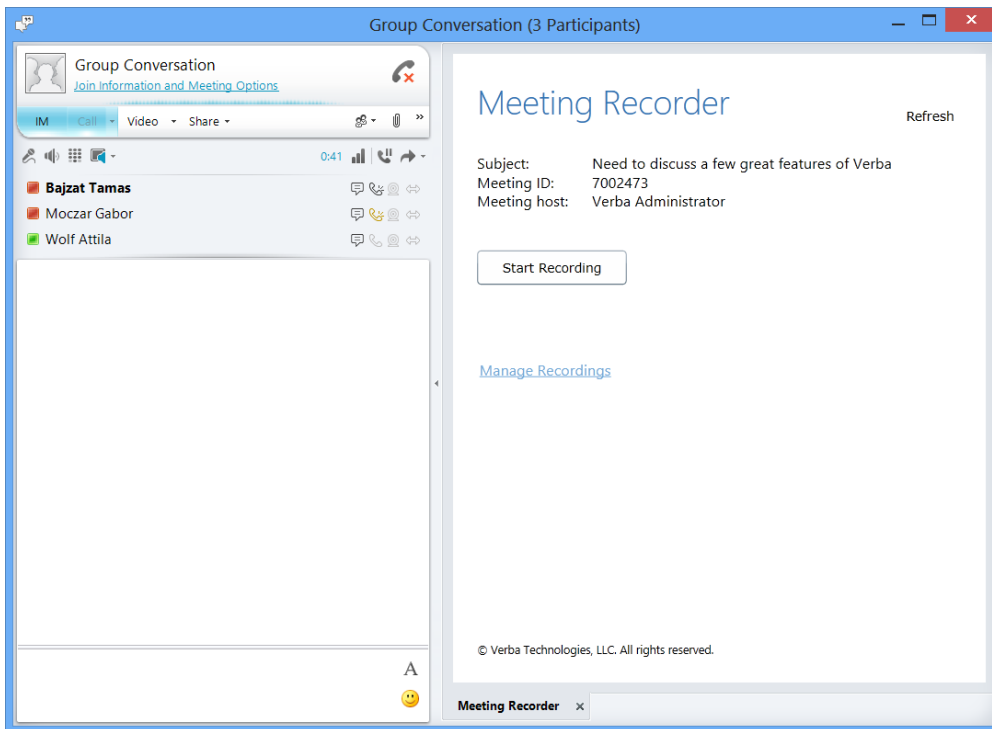
The extension can be opened from the Lync toolbar. The name of the extension might be different depending on the installation. By default, it is called **Meeting Recorder**.



Start recording

Once users start the extension, a new panel appears on the right side of the Lync window. It shows the information about the current conference call. Meeting related metadata is only available if a meeting invite was sent earlier to the recorder. Please contact your system administrator to get more information about the email address of the recorder service.

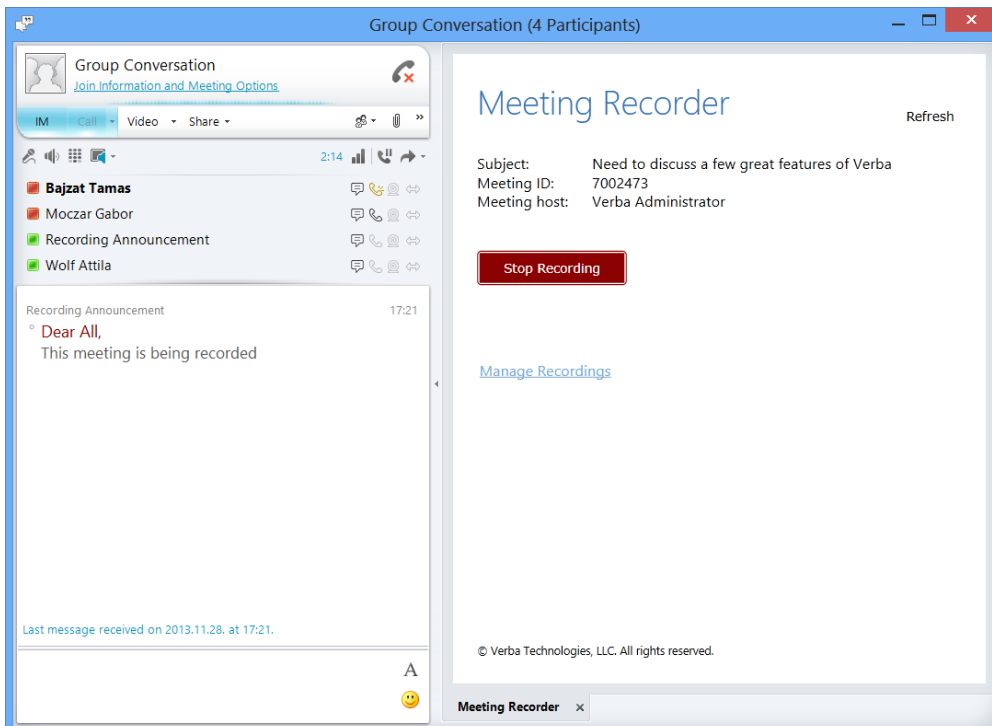
Users can start conference call recording by pressing the **Start Recording** button.



Once users start recording, the system automatically joins the conference call and plays in an audio prompt and sends out a text message notifying conference participants about the recording. If the announcement service is disabled, no notification will be heard and seen.

Recording can be restarted any time by pressing the **Start Recording** button again. The system creates separate recordings for each recording section and assigns the same metadata to each record, so users can easily search for related legs using the subject or meeting ID during search.

Stop recording



Users can simply stop recording by pressing the **Stop Recording** button.

Error messages

The following table describes error messages:

Message	Description
Extension/address is not enabled for recording	The recording system is not configured properly, because the extension/address is not configured for controlled recording.
No ongoing conference call is found	The system cannot find any ongoing call for the extension/address. If you do have an ongoing call, please check the recorder configuration. Click on the Refresh link on the top right corner to retry.
Authentication error, token expired. Requesting new token...	Authentication error occurred when contacting the recording server. The extension automatically tries to reconnect.
Recording already started	Recording has already been started.
Recording already stopped	Recording has already been stopped.
Connection error	Connection error occurred between the extension and the recording server. Click on the Refresh link at the top right corner to retry.

Agent View

Summary

The Agent View provides contact center supervisors (users with system supervisors and group supervisor rights) that ability, to







- see conversation status of all agents on a single screen
- see agent desktop screens and start monitor sessions.

For the desktop screen functionality, users need to [install the Verba Desktop Agent](#) on the PCs of the contact center agents.

Agent View settings



On the top of the Agent View, the settings change how the agent information is presented:

Icon	Name	Function
 Group: Sales	Group selector	Show only the supervised group if the logged in user is System supervisor the drop down contains every group
 Grid size: 5 X 5	Grid size selector	This drop down set the size of the current grid. (3x3, 4x4 (default), 5x5)
	Enable agent screens	Turns on the agent screen monitoring and shows the screen thumbnails at every agent (Default: OFF)
	Disable agent screens	Turns off the agent screen monitoring and hides the thumbnails
	Save settings	Stores the previously set options into the database. Next time the user goes to the Agent View the saved settings will be loaded
	Refresh	Refreshes the Agent View grid. Refreshes every thumbnail.
<input checked="" type="checkbox"/> Show Idle Screens	Show Idle Screens	All extensions with enabled Desktop Screen recording is listed (checkbox is only available if the user has the Agent View Scope permission set to 'On the phone' & Idle Screens - for more information check User Roles page.
<input type="checkbox"/> Show Available Screens Only	Show Available Screens	Show extensions with connected/available desktop only

The grid view provides the followings:

- **grid of agents** - where each agent is always in the same place for easy follow-up
- **conversation status and remote party number** - Every 5 seconds the grid view updates and shows the conversation status of the agents. Agents with an ongoing conversation are marked with a red border and shows the number/address of the other party
- **thumbnail video** - by moving the cursor over an agent's thumbnail, it will continuously refresh until the mouse cursor stays over it
- initiate monitoring - click on the thumbnail to monitor the agent screen in large resolution

Monitoring the desktop of an agent

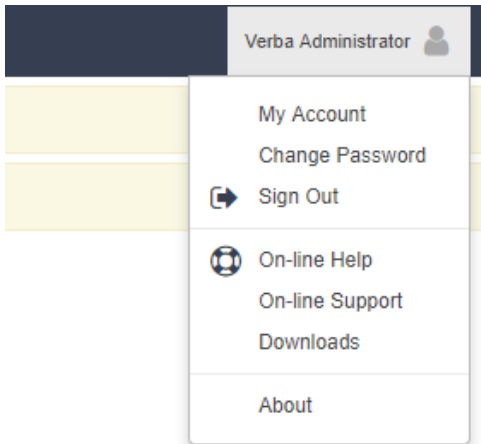
By clicking on any of the displayed agents in the Agent View, you can open a monitoring session, which shows a fullscreen view of the agent's desktop.

The current desktop screen of the agent is streamed into this window in high resolution and keeps refreshing until the view is closed by clicking on the shaded territory around the stream.

The two arrows on the left and right of the screen let you navigate between the agent's screens real-time.

User Information

The user information page can be reached by clicking on the logged in user in the upper right corner of the Verba web interface, then selecting the **My User** menu.



This page provides detailed information about the currently logged in user. It also provides the capability for setting the **Language** and the **Timezone** easily. The **Home Page** setting provides the ability for defining the default landing page when the user logs in.

User Name	Verba Administrator
Login	Administrator
Valid From	Jul 23, 2017 6:47:12 PM
Email	
Assigned Roles	Standard User Supervisor
Extensions	
Groups	Default
Observer User	-
Observer Group	-
Login Time	Jul 26, 2018 3:55:57 PM
Logged in since	28:59 min(s)
Previous Login Time	Jul 26, 2018 2:30:26 PM
Verba Server	10.4.0.46 (TESTMR4.VERBATEST.LOCAL)
User Agent	Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/67.0.3396.99 Safari/537.36

⚠ The changes will be effective only after you log off and log in again.

Language	English (en)
Timezone	CMT+01:00 - Europe/Budapest Central European Time 16:17:41
Home Page	