CUSTOMEREXPERIENCEMANAGEMENT

SEARCH GUIDE

PURPOSE: This guide is intended to provide detailed instructions for Users of the CXM® call management system. This document will address logging into, searching, navigating and using call operations in the CXM® call management system.

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For more information about CXM®, see your CXM® representative or call 1-866-400-4296.

The purpose of this guide is to provide detailed instructions for the Users of the CXM® call recording system. This document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Co-nexus. Co-nexus assumes no responsibility or liability for any errors or inaccuracies that may appear in this book.

CUSTOMEREXPERIENCEMANAGEMENT

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GETTING STARTED

Welcome to CXM® - your digital, Web-based (intranet), call management software system. This manual introduces you to the basics of using the CXM® system. Access to the CXM® system is done with any Internet browser. However, to take advantage of all of the features Microsoft Internet Explorer 5.5 or higher is recommended. The use of any other browser will result in loss of application functionality. It is assumed that the Users know how to work in the Microsoft Windows environment. Please refer to Windows documentation if there are questions about how to use menu commands, dialog boxes, scroll bars, edit boxes and so on.

This manual covers logging on and off the system, searching for recorded calls, browsing call lists and using call operations in the CXM® call management system.

SYSTEM LOGIN

After launching the browser program, type in the URL for CXM®. All Users that access the CXM® system will use this same URL. For future reference please record your CXM® URL on the line below:

http://____

If there are any problems accessing the URL, please contact CXM® Support for further help.

A menu item in Favorites can be set in Internet Explorer for easier access to the URL. Also a desktop shortcut icon can be a placed on the desktop.

In the middle part of the screen is the system login area. The system requires a User name and password. The system Administrator will provide these, and they should be different from the User's network user name and password.

To Login to the CXM® System:

1. Enter User Name and Password into the appropriate *Login* fields.
2. Click *Login* or press *Enter*. All Users are taken to the *Quick Search* screen.

To Change Your Password:

1. To change your password, first select *My Login* and then *Change Password* from the options on the left side of the screen. You can also access the My Login → Change Password screen by clicking on *My Login* and *Change Password* from the CXM® menu.
2. Enter your new password into the *New Password* field.
3. Enter your new password one more time into the *Confirm Password* field.
4. Click the *OK* button to finalize your new password. A confirmation message will appear at the bottom of the screen.

To View Your Profile:

1. To view your profile, first select *My Login* and then *Profile* from the options on the left side of the screen. You can also access the My Login → Profile screen by clicking on *My Login* and *Profile* from the CXM® menu.
2. Your profile will appear on this screen, listing your user information and rights.

SEARCH

The purpose of the Search section is to enable the User to access calls and use call operations. To go to the Search section of CXM®, click on *Search* in the left column or in the CXM® menu located at the top of the window.

The Search section of CXM® allows the User to access the options under the following categories:

- Quick Search
- Recorded Call Operations
- Advanced Search
- Live Monitor
- Display Options

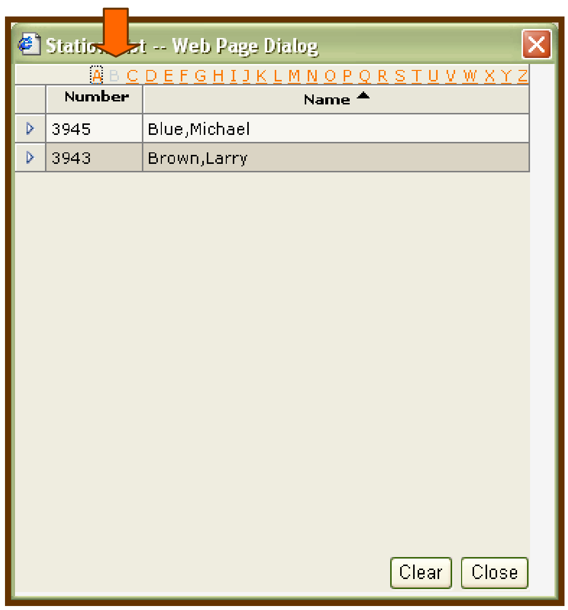
QUICK SEARCH

This section allows the User to perform a Quick Search for a recorded call using basic search criteria. To perform an Advanced Search, using a detailed list of search criteria, go to the Advanced Search section.

To Search for a Call (Quick Search):

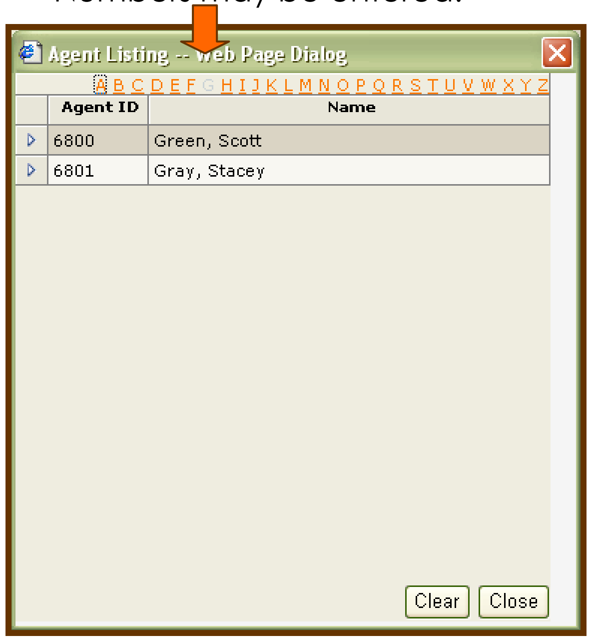
1. To perform a Quick Search for a recorded call in the CXM® system, first select *Search* and then *Quick* from the options on the left side of the screen. You can also access the Search → Quick screen by clicking on Search and *Quick* from the CXM® menu.
2. The CXM® system will search for and display a list of all calls recorded for a given date range. Enter the desired *From Date* and *To Date* into the corresponding fields. To activate the Quick Search based solely upon the specified date range, press Enter or click the *Search* button on the right side of the screen.
3. To narrow the Quick Search further, enter the appropriate information into one or more of the following fields:

- **Stations:** this option will search for and display a list of all calls made and received by the given Station. Enter the desired Station name(s) or number(s) into the *Stations* field. Multiple Station Names and Numbers may be entered.
    - To browse the list of available Stations, click the *Station List* icon on the right side of the *Stations* field. A Station List window will appear (below). Stations are categorized by name. To browse for a Station, click the corresponding letter at the top of the screen. All Stations beginning with that letter will appear. Click on the desired Station Number or Station Name to add it to the *Stations* field on the Quick Search screen. Multiple Station Names and Numbers may be entered.



- **Agents:** this option will search for and display a list of all calls made and received by the given Agent. Enter the desired Agent name(s) or number(s) into the *Agents* field. Multiple Agent Names and Numbers may be entered.
    - To browse the list of available Agents, click the *Agent List* icon on the right side of the *Agents* field. An Agent List window will appear (below). Agents are categorized by name. To browse for an Agent, click the corresponding letter at the top of the screen. All Agent names beginning with that letter will appear. Click on the desired Agent Name to add it to the *Agents* field on the Quick

Search screen. Multiple Agent Names and Numbers may be entered.

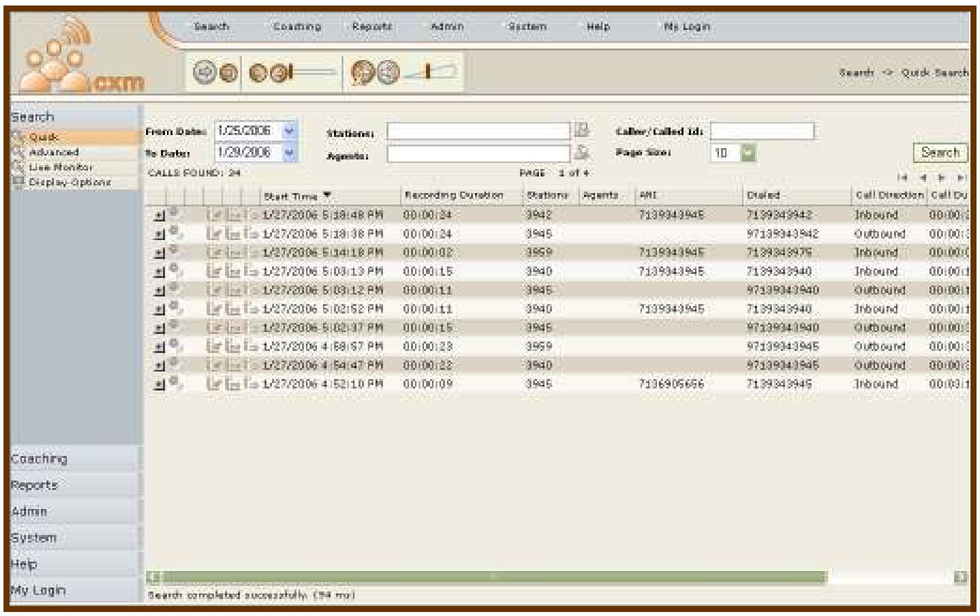


- **Caller/Called Id:** this option allows the User to search for and display a list of all calls with the given Caller/Called Id. Enter the desired Caller/Called Id number(s) into the *Caller/Called ID* field. Multiple numbers may be entered.
- **Page Size:** this field allows the User to set the maximum number of calls that appear on the page at one time. Select the desired number of calls to be displayed from the drop-down box.

4. When all desired Quick Search fields are completed, press Enter or click the *Search* button to activate the Quick Search.
5. A list of all calls found by the Quick Search will appear in the lower portion of the page. See Recorded Call Operations for instructions for browsing the call list and using the recorded call operations.

RECORDED CALL OPERATIONS

This section of the User Guide gives instructions for browsing call lists and using the available operations for recorded calls. From this screen, the User can access the following operations: View call details, Listen to a call, Grade a call, Email a call, Save a call, and Add Notes to a call.



To Browse a Call List:

After performing a Quick Search or Advanced Search, a list of recorded calls will appear in the lower portion of the page. The total number of *Calls Found* is indicated either above or below the call list. If the total number of calls exceeds the page size, use the page navigating arrows (located either above or below the call list on the right side of the page) to move through the pages of the call list.

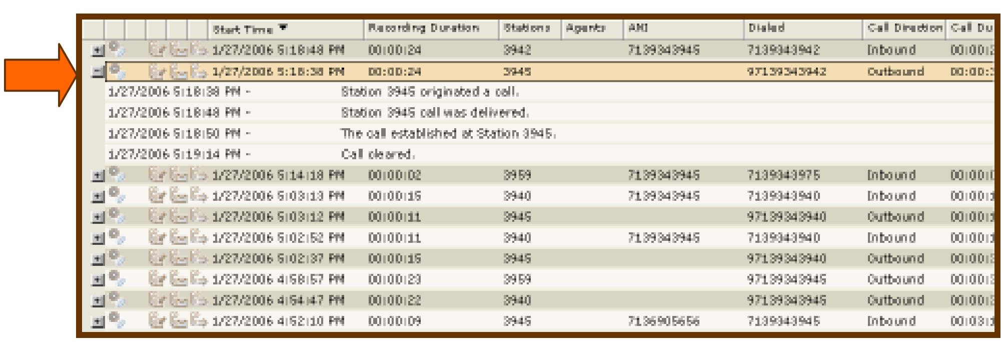
To Restore an Archived Call:

Users with the proper rights may restore a call that has been archived.

1. After performing a Quick or Advanced Search, locate the call to be opened in the list of search results. If the call has been archived, it will be indicated by the *Restore Archived Call* icon:

2. Click to highlight the row containing the archived call.
3. Click the *Restore Archived Call* icon to restore the archived call.
4. A message box will appear stating that a request has been sent to restore the archived call. Click OK.
5. Wait approximately 3 minutes for the call to be retrieved and restored.
6. Refresh the query by clicking the *Search* button again.
7. Relocate the call in the Search list. The *Restore Archived Call* icon will have changed to the *Listen to Call* icon and is now available to be accessed:

To View Call Details:



1. To View a text description of the events of a call, click the "+" button located on the left end of the row that corresponds to

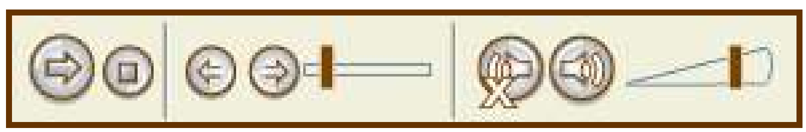
the desired call. The call record will expand to show the event details.

2. To return to the normal view of the call list, click the "-" button. The rows of event details will be hidden.

To Listen to a Call:

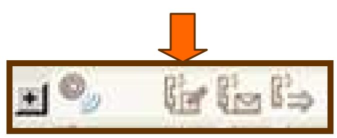
1. To Listen to a recorded call, click the *Listen to Call* button (see above). The call will automatically play on either the embedded player (located below the CXM menu bar) or Windows Media Player.

CXM Embedded Media Player



2. To use the CXM® Embedded Media player, click desired button(s). The buttons are "Play/Pause," "Stop," "Rewind," "Fast Forward," "Mute," and "Volume Slider," respectively.

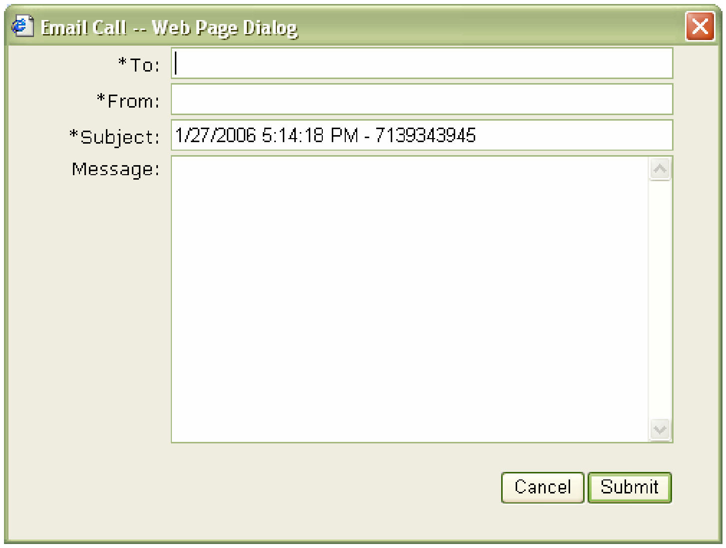
To Grade a Call:



1. To Grade a call, click the *Grade Call* button (above). A Grading Form window will appear with a list of all Grading Forms to which the User has access.
2. Select the appropriate Grading Form from the list.
3. For Grading instructions, refer to the Coaching section.

To Email a Call:

1. To Email a call to a desired email address, click the *Email Call* button (above). An *Email Call* window will appear.



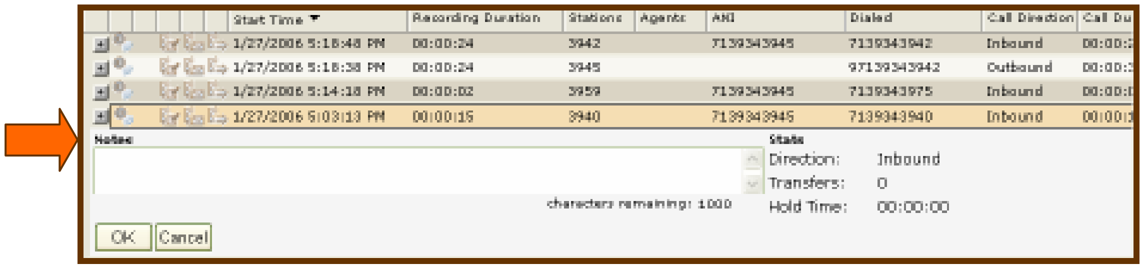
2. Enter the email address(es) to which the call is to be sent in the *To* field. (This information is required.)
3. Enter the email address from which the User is sending the call in the *From* field. (This information is required.)
4. The call profile will automatically appear in the *Subject* field, or the User may change it. (This information is required.)
5. Type a message to the recipient(s) of the email in the *Message* field, if desired.
6. Click the *Submit* button to send the email, or click the *Cancel* button to cancel the email.

To Save a Call:

1. To Save a call to a desired location, click the *Save Call* button (above).
2. Depending upon your Microsoft Internet Explorer options settings, a *File Download* dialogue box may or may not appear. If it does appear, click the *Save* button. A *Save As* window will appear.
3. If the *File Download* dialogue box does not appear, the *Save As* window will appear.
4. Select the location to which the call is to be saved and click the *Save* button to save the call.

To Add Notes to a Call:

1. To Add Notes to a call, double click anywhere in the text portion of the row containing the desired call profile. A *Notes* box will appear below the call profile.



2. Type the desired notes (up to 1,000 characters) to be applied to this call in the *Notes* box.

3. Click the *OK* button to apply the notes to the call, or click the *Cancel* button to cancel the notes.

To Add a Call to a Call Bucket:

1. To add a call from the call list to a Call Bucket, Highlight by clicking the row containing the call to be added to the Call Bucket.

2. **Right click** anywhere on the highlighted row. Select *Add To Bucket* from the menu that appears.

3. In the window that appears, select the Call Bucket to which the call is to be added.

4. Click the *Add* button to add the call to the bucket. A confirmation message will appear at the bottom of the window.

5. Click the *Close* button to exit the call list. The call will now appear in the designated Call Bucket.

To Delete a Recorded Call:

1. To delete a recorded call, first locate the call by performing a Quick or Advanced Search in the CXM® user interface.

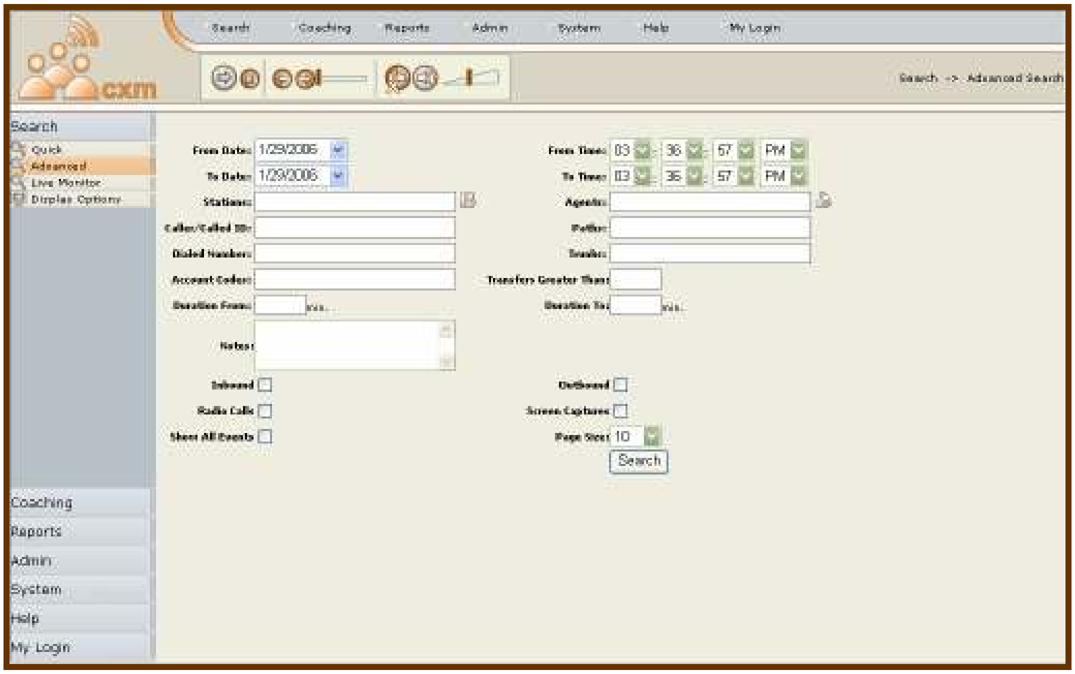
2. Click to highlight the row containing the call to be deleted.

3. Right click on the highlighted row.

4. Select “Delete Call” from the menu that appears.
5. A confirmation box will appear. Click “OK” to delete the call.

ADVANCED SEARCH

This section allows the User to perform an Advanced Search for a recorded call using detailed search criteria. To perform a Quick Search, using a basic list of search criteria, go to the [Quick Search](#) section.



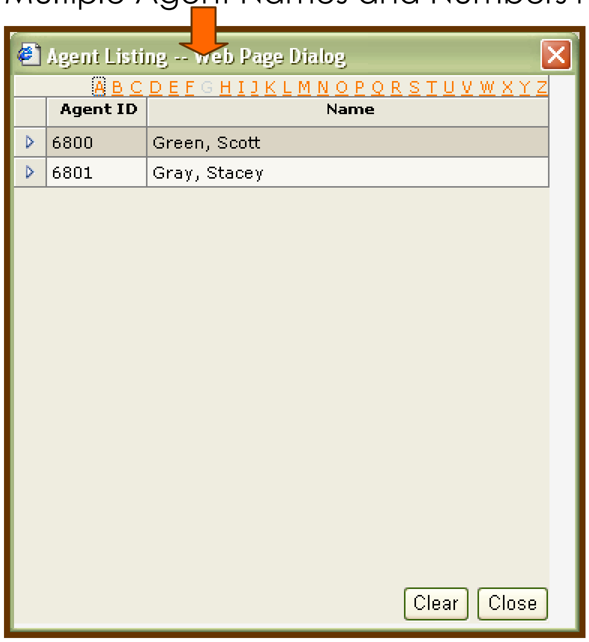
To Search for a Call (Advanced Search):

1. To perform an Advanced Search for a recorded call in the CXM® system, first select *Search* and then *Advanced* from the options on the left side of the screen. You can also access the Search → Advanced screen by clicking on Search and *Advanced* from the CXM® menu.
2. The CXM® system will search for and display a list of all calls recorded for a given date and time range. To enter the desired *From Date*/*From Time* and *To Date*/*To Time* into the corresponding fields, either type the desired dates/times or select them from the drop-down boxes.
3. To narrow the Advanced Search further, enter the appropriate information into one or more of the following fields:

- **Stations:** This option will search for and display a list of all calls made and received by the given Station. Enter the desired Station name(s) or number(s) into the *Stations* field. Multiple Station Names and Numbers may be entered.
    - To browse the list of available Stations, click the *Station List* icon on the right side of the *Stations* field. A Station List window will appear (below). Stations are categorized by name. To browse for a Station, click the corresponding letter at the top of the screen. All Stations beginning with that letter will appear. Click on the desired Station Number or Station Name to add it to the *Stations* field on the Advanced Search screen. Multiple Station Names and Numbers may be entered.

- **Agents:** This option will search for and display a list of all calls made and received by the given Agent. Enter the desired Agent name(s) or number(s) into the *Agents* field. Multiple Agent Names and Numbers may be entered.
    - To browse the list of available Agents, click the *Agent List* icon on the right side of the *Agents* field. An Agent List window will appear (below). Agents are categorized by name. To browse for an Agent, click the corresponding letter at the top of the screen. All Agent names beginning with that letter will appear. Click on the desired Agent Name to add it to the

Agents field on the Advanced Search screen. Multiple Agent Names and Numbers may be entered.



- **Caller/Called Id:** This option allows the User to search for and display a list of all calls with the given Caller/Called Id. Enter the desired Caller/Called Id number(s) into the *Caller/Called ID* field. Multiple numbers may be entered.
- **Paths:** This option allows the User to search for calls based upon the VDN/SPLIT name(s) or number(s). Enter the desired Path name(s) or number(s) into this field.
- **Dialed Number:** This option allows the User to search for calls based upon the Dialed number(s). Enter the desired Dialed Number(s) into this field.
- **Trunks:** This option allows the User to search for calls based upon the Trunk number(s). Enter the desired Trunk Number(s) into this field.
- **Account Codes:** This option allows the User to search for calls based upon the Account Code(s). Enter the desired Account Code(s) into this field.
- **Transfers Greater Than:** This option allows the User to search for calls based upon the number of times the calls had been transferred. Enter the desired minimum number of transfers into this field. The Advanced Search will list all calls that had been transferred the minimum number of times or more.

- **Duration From/Duration To:** This option allows the User to search for calls based upon the length (in minutes) of the calls. To indicate a call duration range, enter the minimum and maximum number of minutes for which to search in the *Duration From* and *Duration To* fields, respectively. For example, to search for all calls between 3 and 5 minutes long, enter 3 in the *Duration From* field and enter 5 in the *Duration To* field.
- **Notes:** This option allows the User to search for calls based upon the notes applied to the calls. Enter in the *Notes* field any desired key word or phrase by which to search. The Advanced Search will display all calls that have notes containing an exact match to the key word or phrase in the *Notes* field.
- **Inbound:** Selecting this option allows the User to search for calls among Inbound calls only.
- **Outbound:** Selecting this option allows the User to search for calls among Outbound calls only.
- **Radio Calls:** Selecting this option allows the User to search for calls among Radio calls only.
- **Screen Captures:** Selecting this option allows the User to search only for calls with Screen Captures.
- **Show All Events:** Selecting this option allows the User to search for calls among all recorded events.
- **Page Size:** This field allows the User to set the maximum number of calls that appear on the page at one time. Select the desired number of calls to be displayed from the drop-down box.

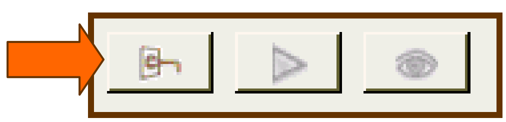
4. When all desired Advanced Search fields are completed, press Enter or click the *Search* button to activate the Advanced Search.
5. A list of all calls found by the Advanced Search will appear in the lower portion of the page. See Recorded Call Operations for instructions for browsing the call list and using the recorded call operations.
6. To perform a new Advanced Search from the Advanced Search Calls Found screen, click the *New Search* button located in the bottom right corner.

LIVE MONITOR

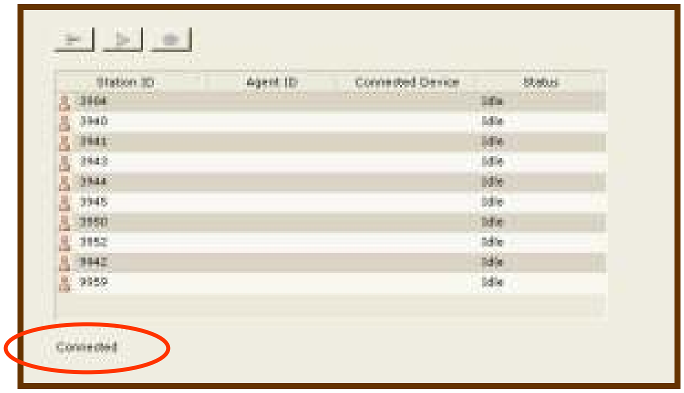
This section of the CXM® System allows any User with Live Monitor rights to listen to active calls at a given station.

To Connect to Live Monitor:

1. To utilize the Live Monitor option in the CXM® system, first select *Search* and then *Live Monitor* from the options on the left side of the screen. You can also access the Search → Live Monitor screen by clicking on Search and *Live Monitor* from the CXM® menu. A *disconnected* screen will appear (above). If the Live Monitor Control does not appear, the Security Settings may need to be adjusted (See the section called *To Adjust Security Settings for Live Monitor*).
2. To connect to Live Monitor, click the *Connect* button located in the top left corner.

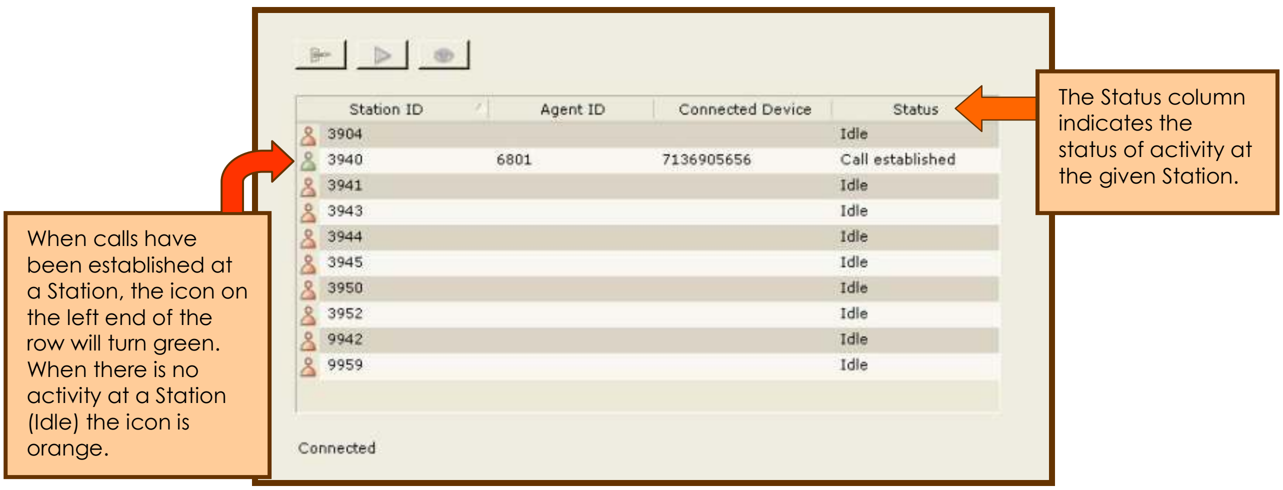


3. Once connected to Live Monitor, a list of Stations/Agents to which the User has rights will appear in the window (below).

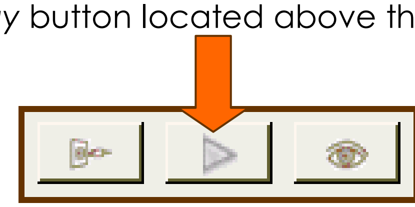


To Listen to Active Calls:

Once connected to Live Monitor, all active (currently established) calls made or received by a given Station/Agent can be heard by the User through the User's computer speakers. *Calls will be heard with a two-second delay.*



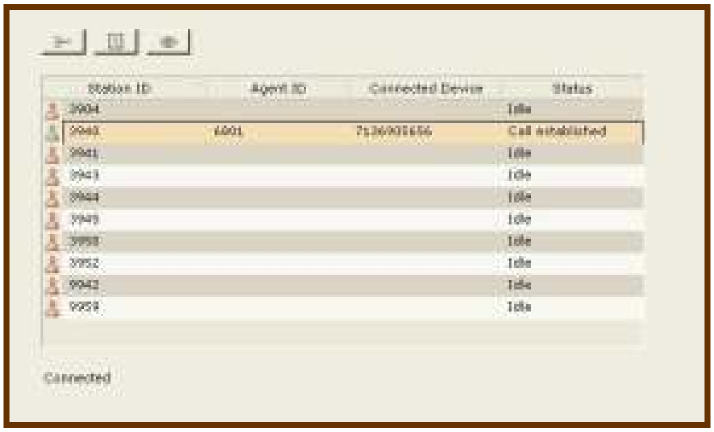
1. To listen to an active call, first highlight (by clicking) the row containing the Station to be heard.
2. Click the *Play* button located above the Station list.



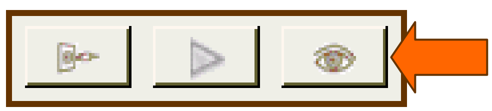
3. The established call will begin playing on the User's computer speakers in two seconds.
4. To stop an active Live Monitor stream, click the *Stop* button (previously the *Play* button).

To Watch a Station/Agent:

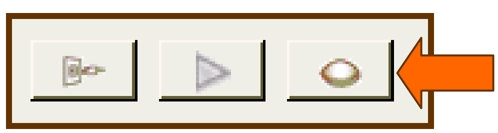
The purpose of the Watch feature of the CXM® system is to allow the User to monitor the incoming and outgoing calls for a given Station/Agent. Any time a call is active at the Station being "watched", the audio will automatically begin streaming over the User's computer speakers.



1. To Watch a Station/Agent (as described above), highlight by clicking the Station/Agent to be "watched".
2. Click the *Watch* button located above the Station list.

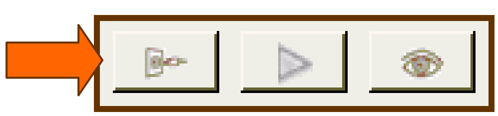


3. The selected Station/Agent is now being Watched. Note that the *Watch* button has changed to a closed eye. Clicking this button will discontinue the *Watch* function. Highlighting other Stations in the list will not discontinue the current *Watch*. However, clicking the *Watch* button for a new Station will end the current *Watch* and start a *Watch* on the new station.



To Disconnect from Live Monitor:

To disconnect from Live Monitor, click the *Disconnect* button located above the Station list.



To Adjust Security Settings for Live Monitor:

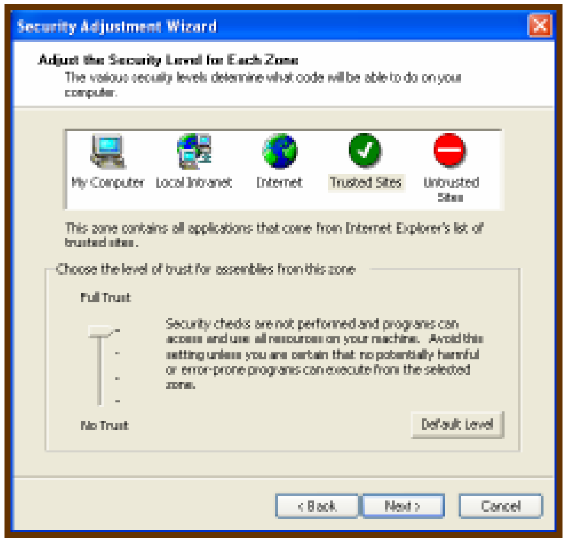
In order to adjust Security Settings, you must first be logged into Windows as a user with Administrator rights on the local machine.

Prerequisites:

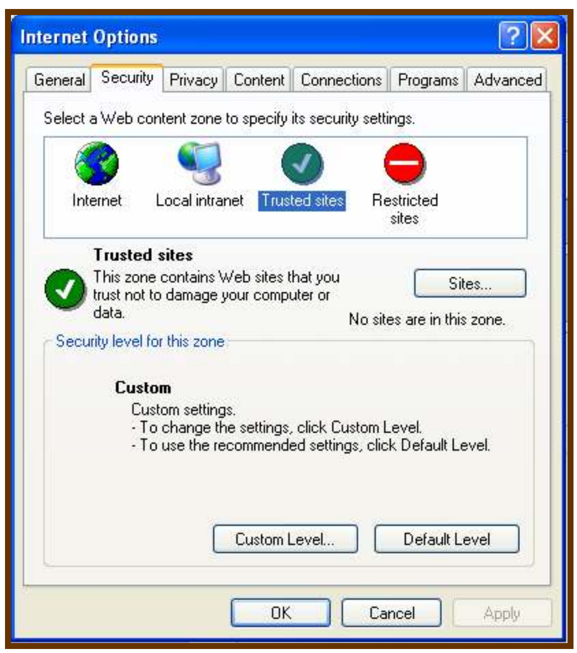
- Microsoft .Net 1.1 Framework (Redistributable)
- Microsoft .Net 1.1 Service Pack 1

- Configure security settings for Trusted Zones to *Full Trust*.
  1. Under Administrative Tools, select *Microsoft .Net Framework 1.1 Configuration*.
  2. On the left side of the screen, right click on *Runtime Security Policy* and select *Adjust Security*.

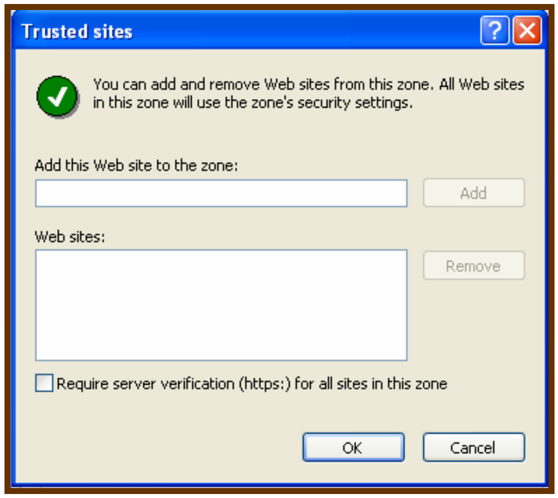
  3. Verify that "Make Changes to this Computer" is selected and click *Next*.
  4. At the top of the screen, select the Trusted Sties icon, and move the slider (below) to the Full Trust level. Click *Next* and *Finish*, respectively.



- Add the Web Application Address as a Trusted Site.
    1. Open Internet Explorer
    2. Select Internet Options from the Tools menu.
    3. Under the Security tab, select Trusted Sites at the top of the screen.



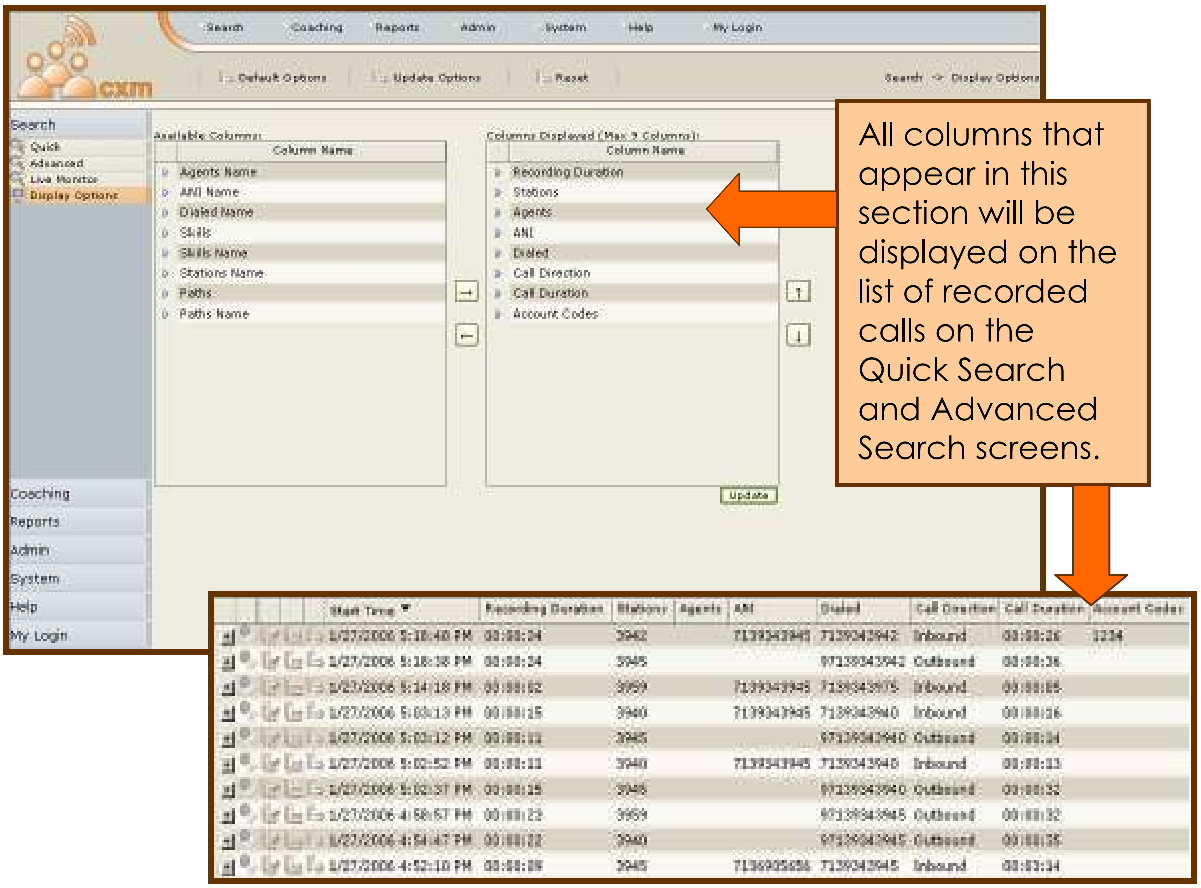
4. Click the Sites button.
5. Enter the IP address for the Web Application in the top field.



6. Deselect the check box next to "Require server verification (https:) for all sites in this zone".
7. Click the Add button to add it to the Web Sites list, then click OK. The "Trusted Sites" icon will now appear in the lower right corner of Internet Explorer.

DISPLAY OPTIONS

This section allows the User to select and order columns to be displayed on the list of recorded calls.



List of Recorded Calls

To Add a Column:

1. To add a column to the list of recorded calls, first select *Search* and then *Display Options* from the options on the left side of the screen. You can also access the Search → Display Options screen by clicking on *Search* and *Display Options* from the CXM® menu.
2. The list of recorded calls that appears on the Quick Search and Advanced Search screens displays the items indicated by the *Columns Displayed* box (right). The items located in the *Available Columns* box (left) are not displayed on the list of

recorded calls. To add a column from the *Available Columns* box to the *Columns Displayed* box, highlight the desired column name by clicking on it. Then click the → button. The column name will move from the *Available Columns* box to the *Columns Displayed box.* There may be up to nine columns displayed at one time.

3. After all additions have been made to the Displayed Columns, click the *Update* button located in the bottom right corner of the screen, or click the *Update Options* button in the CXM® tool bar. A confirmation message will appear at the bottom of the screen. **Any update must be finalized by clicking the *Update* button.**
4. To reset the Displayed Columns **if they have not been finalized by clicking the *Update* button**, click the *Reset* button located in the CXM® tool bar.
5. To reset the Displayed Columns to the Default Options, click the *Default Options* button located in the CXM® tool bar.

To Delete a Column:

1. To delete a column from the list of recorded calls, first select *Search* and then *Display Options* from the options on the left side of the screen. You can also access the Search → Display Options screen by clicking on *Search* and *Display Options* from the CXM® menu.
2. The list of recorded calls that appears on the Quick Search and Advanced Search screens displays the items indicated by the *Columns Displayed* box (right). The items located in the *Available Columns* box (left) are not displayed on the list of recorded calls. To delete a column from the *Available Columns* box, highlight the desired column name by clicking on it. Then click the ← button. The column name will move from the *Columns Displayed* box to the *Available Columns box.* This column will no longer be displayed on the list of recorded calls.
3. After all changes have been made to the Displayed Columns, click the *Update* button located in the bottom right corner of the screen, or click the *Update Options* button in the CXM® tool bar. A confirmation message will appear at the bottom of

the screen. **Any update must be finalized by clicking the *Update* button.**

To Arrange Column Order:

1. To arrange the column order in the list of recorded calls, first select *Search* and then *Display Options* from the options on the left side of the screen. You can also access the Search → Display Options screen by clicking on *Search* and *Display Options* from the CXM® menu.
2. The list of recorded calls that appears on the Quick Search and Advanced Search screens displays the items indicated by the *Columns Displayed* box (right). The items located in the *Available Columns* box (left) are not displayed on the list of recorded calls. To change the order of the displayed columns, highlight a column name by clicking on it. Then click the ↑ or ↓ button to move the column to the desired location. The columns will appear in this order in the list of recorded calls.
3. After all changes have been made to the Displayed Columns, click the *Update* button located in the bottom right corner of the screen, or click the *Update Options* button in the CXM® tool bar. A confirmation message will appear at the bottom of the screen. **Any update must be finalized by clicking the *Update* button.**

SYSTEM LOGOUT

1. To log out of the CXM® System, click *My Login* in the bottom left corner, or from the CXM® menu. The *Logout* page will appear.
2. Click *Logout* to end your CXM® session. This will take you to the CXM® *Login* screen.