



**Voice Documentation and  
Contact Center Management Solutions**

# Unlock the Full Potential of Your Business Communications

Call recording technology can play a vital role for businesses across a wide range of industries. For example, healthcare providers, financial institutions, automotive dealerships and debt collection agencies all benefit from the ability to monitor, playback, evaluate and archive their telephone-based interactions. This also holds especially true for transportation, energy and government agencies. Organizations within this sector deal with extensive regulatory, safety, company and industry-specific requirements, and ensuring communications excellence is of critical importance.

In fact, virtually any organization that regularly engages by phone with customers, clients, colleagues or suppliers stands to gain from having greater insight and understanding into the interactions that shape their everyday operations. The ability to quickly retrieve important information contained within phone-based exchanges can help resolve disputes, minimize liability risk, improve customer service and safeguard company revenues. Some businesses may not have fully considered the true value of such benefits, or have avoided implementation due to apprehension regarding capability, complexity and cost. OASYS dispels these concerns, providing solutions that make it easy for any company to fully leverage the power of their internal and external communications.



## What Makes OASYS the Right Choice for Your Business? *The answer is simple.*

OASYS delivers voice documentation and contact center management solutions that are technologically innovative, but that alone does not create value for our customers. Without a true understanding of customer needs, even the most advanced technology solution will fail to effectively improve business operations. We recognize just how important this consideration is, and it drives our company-wide focus on delivering feature-rich, affordable and reliable products. Our approach is really quite simple—we listen to our customers.

Listening to the shared voice of our customers helps us decide how best to develop technology that makes their lives easier. Examining a problem closely, asking the right questions and, above all else, actually listening to the answers has allowed OASYS to continuously evolve our solutions in the ways that prove most beneficial to customers. We create award-winning products that solve common business problems in the most simple and direct fashion for our end-users, versus other solution providers that leverage technology only for technology's sake. It's a simple philosophy that yields impressive results.

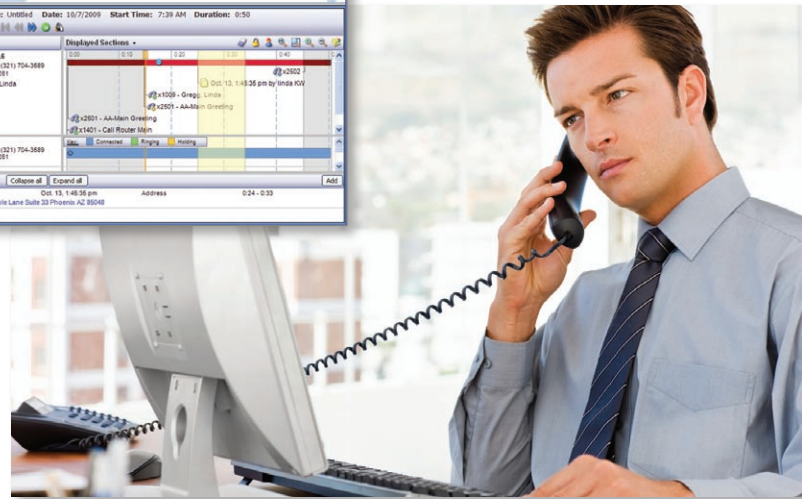
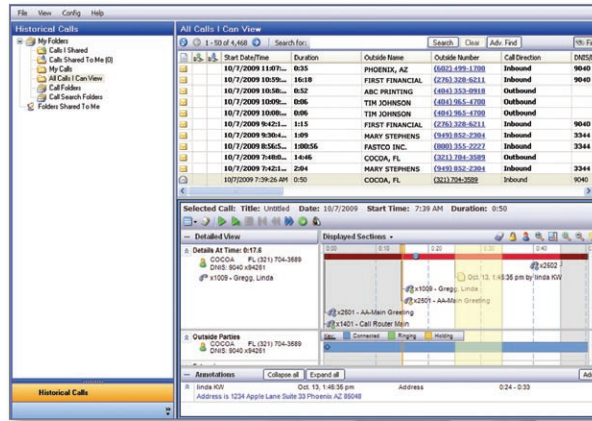
## Talkument: The Leader in Voice Documentation

Talkument®, the voice documentation solution from OAISYS, does for phone calls what the advent of e-mail did for letters and memos, providing similar benefits to collaboration, productivity and accuracy. Talkument captures digital recordings, or voice documents, of authorized users' phone-based conversations using patent-pending OAISYS Portable Voice Document (PVD™) technology. Conversations are captured in their entirety and can be easily and securely shared with other authorized users to facilitate improved collaboration.

In the past, the practice of recording calls was predominantly reserved for the contact center. In today's world, every phone-based interaction across the enterprise has the potential to exert a positive or harmful effect on overall business success. Customer retention has become more important than ever, and the demand for business transparency and accountability has also increased. Recording a call is simply part of the equation; an effective means of reviewing, analyzing and disseminating the information contained within that call is the other component. Talkument is the solution.

With Talkument, an individual's voice conversations are centrally documented through call recording and made available to store, organize, playback, annotate and share with others. Now, phone calls and the information they contain become searchable, sharable content, similar to e-mail. When a user shares a voice document, the recipient is notified and provided a link to the document, rather than a copy of the file itself (although users do have the option to convert PVD files to .WAV or other formats should they desire). Users can insert text annotations to further explain and clarify verbal content, or to respond to a specific question within the voice document. Promoting privacy and security, shared content can be set to expire and sharing restrictions can also be included.

Voice document management and accessibility is simple and efficient, owing to the instinctively familiar Microsoft Outlook®-style organizational folder structure. Static folders enable users to manually organize call recordings as needed, while dynamic folders make it possible to automatically organize recordings based on pre-defined criteria or conditions set for that folder. Additionally, the Talkument user interface is intuitively designed to help users quickly locate recordings by conducting a search on a wide variety of specific file attributes or by simply locating within a dynamic search folder.



As a personal voice documentation and collaboration solution, Talkument addresses the gap between real-time communications and knowledge sharing—an invaluable ability in a new business world where the act of efficiently communicating knowledge has become equally important to the process of creating it.

**Can't remember if your customer needed that order to arrive on the 30th or the 31st?** Simply review the voice document. Once verified, highlight the portion of the conversation where the customer conveyed the address and billing information and share the document directly with your shipping manager to eliminate the risk of miscommunication and customer dissatisfaction.

**Need your manager's guidance after a difficult conversation with an upset customer?** Rather than recreating the discussion from memory, which can result in a potentially troublesome "he said/she said" dispute situation, simply retrieve the voice document, highlight the related section, add your comments and send directly to your manager for review.

**Require the support and expertise of your entire sales and fulfillment team to help resolve a customer service issue?** Highlight the relevant portion of the voice document with Talkument, comment on the specific actions that need to be taken, share the call with the group and successfully work out a solution.

Now, telephone conversations no longer disappear as they occur, leaving just a few lines of ink on a notepad to retain the important details at completion. With Talkument, a voice document and the wealth of additional information it contains are readily available for future reference.

## Tracer: Professional Interaction Management

Tracer, the contact center management solution from OAISYS, adds advanced quality assurance, personnel development and reporting tools to our core PVD technology, all tightly bundled into one comprehensive system. Every Tracer solution deployment also includes an unlimited user license for Talkument. While other products attempt to address the needs of only the contact center, businesses deploying Tracer can dramatically improve operations across all facets of their enterprise.



# T R A C E R



Tracer automatically records, stores and organizes telephone conversations and, optionally, associated screen activity on a central, secure network repository. Using a variety of audio connections, communications system integrations and recording triggers, Tracer can target those conversations that have a lasting impact on your business.

Tracer is engineered to support sophisticated, enterprise-class recording needs, operating either trunk-side or station-side and delivering data link integration with a wide range of business communications systems. Tracer provides unlimited user access to search and playback call recordings based on extensive permissions criteria, including DNIS, agent ID, ANI, call duration, call direction and much more. Tracer VOX recording integration addresses the needs of businesses engaged in radio communications, including dispatch facilities, transportation networks, 9-1-1 centers and other public safety organizations.

OAISYS PVD technology enables access to recordings via encrypted media file streaming. Recordings never leave the server, allowing you to retain full control of important call data. Tracer's advanced administrative application allows for easy assignment of individual and group permissions, ensuring call recordings are accessed only by those with proper authority and in accordance with established company policies. The administrative interface also provides visibility to log files showing the date, time and user name associated with the playback of all recordings, creating an audit trail that helps support legal and regulatory compliance requirements.

## Quality Assurance and Workforce Optimization

Tracer empowers managers, supervisors and agents with a variety of contact center workforce management tools to help monitor, analyze and enhance individual and group performance. With Tracer, the entire organization can benefit from powerful real-time and historical perspective on the interactions occurring within their business. This translates to enhanced employee performance, a better understanding of customer service issues and improved business processes. The advanced feature functionality Tracer delivers includes:



### Tracer Agent Desktop Client

The Tracer Agent Desktop Client is provided free of charge and includes unlimited user access. Using the Desktop Client, agents can view relevant information about a call in progress, start and stop call recording (provided they have the appropriately assigned permissions to do so) and request coaching assistance if needed.

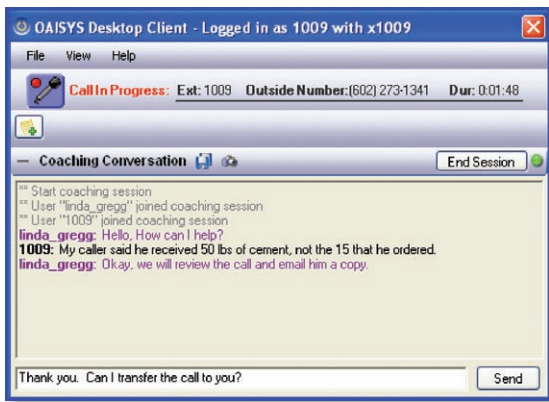
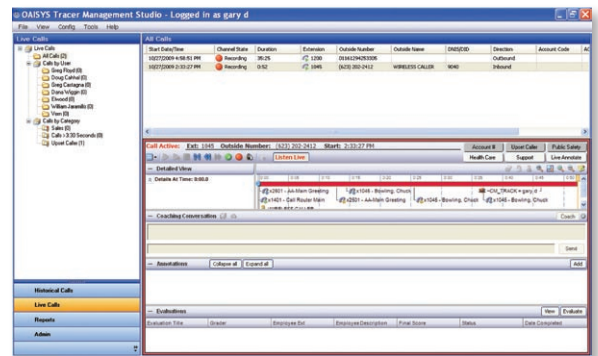
The Agent Desktop Client also includes an integrated Call Tagging interface for adding text notes or category assignments to voice documents in real-time. Tags added by agents can be viewed within the voice document and used as search criteria for easy retrieval. Up to six programmable buttons and drop-down menus configured by the administrator can be created for this purpose. For example, in a 9-1-1 contact center environment, the buttons could be used to tag calls with the nature of the incident being reported, such as "high speed pursuit" or "civil disturbance."

## Tracer Live Call and Auto Call Monitor

Tracer's incredibly powerful Live Call Monitor feature allows calls to be monitored while in progress, enabling contact center management to easily and efficiently monitor agent interactions with customers in real-time. Management can seamlessly access calls occurring across all nodes of the enterprise voice network, such as those handled in a remote or branch office.

Users can connect to one or more Tracer systems, each with up to 192 channels. These channels can be associated with live calls used to provide audio streams to the Live Call Monitor, and calls to be monitored are regulated by permissions lists. Supervisors with appropriate permissions can easily hear what is transpiring on a call in real-time, making it easy to conduct spontaneous reviews as desired.

Tracer's Live Auto Call Monitor feature enables automatic live monitoring of calls by agent or by dynamic search folders. This delivers an incredibly robust tool to streamline supervisor access for monitoring a range of important calls as they occur. For example, if a new sales agent experiences difficulty with a customer and tags the call using a custom "Irate Caller" button, the contact center supervisor with the appropriate auto monitor configuration may begin hearing the call instantly, or can receive an instant visual and/or audible notification of the situation requiring their attention.



Additionally, Tracer's versatile live monitoring functionality is further bolstered by the ability to add text comments directly to calls while they are in progress, which then become a permanent part of the voice document along with the audio recording. Management will benefit from capturing their observations in real-time and providing immediate feedback to their staff.

Tracer also delivers supervisor and agent chat capabilities, making it easier to oversee agent teams and support contact center management objectives. Agents can conveniently request coaching assistance and supervisors can in turn respond via integrated instant messaging, enabling unobtrusive coaching sessions that help agents achieve targeted goals, such as cross-sell and up-sell opportunities, as well as resolve difficult customer situations.

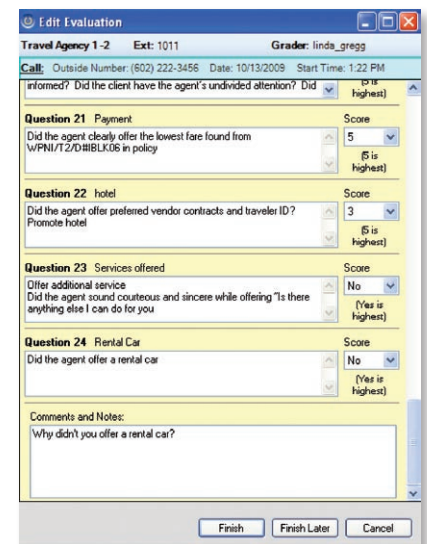
## Tracer Quality Control Module

The Tracer Quality Control Module allows an evaluator to review a recording and rate the call by grading a series of pre-selected questions/criteria. QA personnel can evaluate calls live while they are in progress, and evaluations can contain an unlimited number of questions. Employees can listen to and evaluate their own performance; managers and supervisors can more effectively and consistently gauge agent performance; and training and process changes can be implemented to help improve overall service levels.

Tracer's quality control work queues allow users to create rules for the count and types of calls that call center supervisors must evaluate, making it effortless to automatically collect calls that meet established evaluation requirements. Custom evaluations can be created based on types of calls, agents, ACD groups and other criteria. Work queues can then be based on either the number of calls or a percentage of calls (a maximum of 100 calls in either scenario), and can be set to occur either on a daily or weekly basis.

For example, rules can be created to automatically select 10 random calls per agent, per week for a supervisor to evaluate using a custom evaluation. Users benefit from easy to administer, statistically relevant quality control that provides a meaningful sample of agent capabilities while also ensuring evaluation objectivity.

Evaluation of agent performance is further streamlined by Tracer's ability to automatically categorize calls that meet set criteria, such as agent ID or extension lists, within a specific search folder. For example, a contact center supervisor can easily review a folder comprised of only her sales agent calls. Management is empowered to maximize the efficiency of their quality assurance processes with immediate access to the information they care about most.



## Tracer Screen Recording

Organizations seeking even greater insight into agent performance can choose to deploy optional Tracer Screen Recording capabilities. Tracking agent screen activity can help further improve contact center management and quality assurance initiatives.

Tracer Screen Recording works in synchronization with voice recording, capturing the entire scope of the agent interaction, helping to promote high quality customer service delivery for customers, improved employee productivity and overall efficiency of processes within the contact center.

In the event of an inquiry, customer dispute or allegation of regulatory non-compliance, management can easily reconstruct the interaction by listening to the call and viewing the associated on-screen activity. This enhanced level of insight can help management by:

- Explaining errors in data capture, voice recordings alone may not explain how mistakes in data entry occurred
- Divulging if mistakes were the result of application issues, process problems or agent error
- Exposing previously overlooked areas for improvement and providing additional opportunities to train using real-world examples
- Generating supplementary evidentiary record of agent actions to help resolve disputes

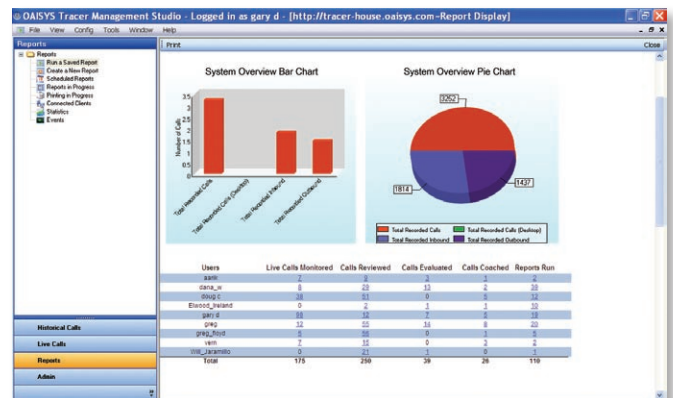
## Tracer Reporter

Tracer Reporter is the powerful reporting package included with the Tracer contact center management software. Businesses can generate comprehensive, accurate and timely reports, including graphs for easy analysis, on contact center activity. Managers can make well-informed decisions regarding staffing levels, contact handling procedures, marketing and advertising efforts and much more.

Tracer's reporting capabilities make it easy to evaluate and compare performance of individual agents or agent teams, make staffing or training decisions and develop incentive programs to help agents meet overall contact center objectives. Used in combination with Live Call Monitor and Auto Call Monitor as well as the Quality Control Module, Tracer Reporter provides a comprehensive personnel development platform.

## Tracer Owner's Report

Tracer delivers the features organizations need to improve employee performance and maximize the bottom line, but only if the solution is being used consistently and effectively. Customers making the investment in contact center management technology want to know these tools are actually being utilized.



The Tracer Owner's Report feature clearly discloses this data and can help hold management accountable to their oversight and QA responsibilities. The Owner's Report, which can be automatically generated and delivered via e-mail, lists all user activity for a specified period (daily, weekly, monthly) for the following functions:

- Live Calls Monitored (*who listened live to what calls?*)
- Calls Reviewed (*are managers reviewing calls?*)
- Calls Evaluated (*is your QA team evaluating the number of calls required?*)
- Calls Coached (*which managers are responding to your agent needs?*)
- Reports Run (*are the reports being utilized by all managers?*)



## OAISYS API Integrations

Customers choosing Tracer receive a free, system-level Application Programming Interface (API), designed to leverage open technology and provide an easy development and deployment environment. While many other vendors charge a premium for API integration, OAISYS provides this free of charge, further enhancing the overall value and utility of the Tracer recording system. The Tracer API is an open architecture developer's kit that is designed to allow communication with third-party software and devices, such as various predictive dialers, ACD and other contact center applications.

The OAISYS Web Services API allows key components of OAISYS voice documentation solutions to be accessed via other commonly used business applications, such as Microsoft Outlook®, Microsoft Dynamics® CRM and Microsoft SharePoint®. Additionally, the free OAISYS Web Services API creates the foundation for OAISYS Mobile Recall, an innovative feature allowing web access to recorded calls anytime, anywhere via a smartphone, PDA or other mobile device.

## Flexible, Scalable and Reliable Deployment

OAISYS delivers unsurpassed flexibility and value by providing an unlimited user license for the Talkument personal voice documentation and collaboration solution with every OAISYS Recording System deployment. Tracer, working jointly with Talkument software, offers an enterprise-wide interaction management system that optimizes information exchange and revolutionizes the customer experience. Now, everyone can take advantage of the benefits that call recording can provide—whether in the contact center or another department within the company—to facilitate the seamless, immediate transfer of information.

OAISYS recognizes that many smaller companies strive to become larger companies, and require solutions that can scale up as they grow. Choosing the system deployment that presents the best fit for your business is straightforward with OAISYS software delivery models, designed to support both ease of deployment and ease of operation. OAISYS offers a full range of scalable, networkable and reliable hardware platforms, all using the Microsoft Windows operating system and Microsoft SQL database, to meet the demands of small-to medium-sized businesses and multi-site large enterprises. OAISYS delivers enterprise-class call recording solutions that can easily grow and evolve with your business.

**OAISYS Recording Appliances:** A single, rack-mountable 1U appliance unit, capable of interfacing with up to two digital trunk circuits or up to 48 PBX endpoints using some form of IP recording. OAISYS Recording Appliances can support call recording storage up to approximately 56,000 hours.

**OAISYS Recording Servers:** A built-to-order server base system, which is scalable up to 192 ports per stackable unit, suitable for installations requiring advanced fault tolerance and data protection capabilities. OAISYS Recording Servers can accommodate call recording storage from approximately 56,000 up to 200,000 hours, dependent upon the server model selected. Additionally, recordings can be archived using the included DVD burner or across your Local Area Network to an alternate storage device.

## Addressing Critical Business Needs

- **Regulatory Compliance:** Various regulatory bodies require recorded documentation of transactions occurring via telephone such as with telesales and the Telemarketing Sales Rule (TSR); financial transactions including account transfers, loan origination, securities/commodities trading; utilities account management; local government requirements for public safety organizations and several others.
- **Risk Management:** Recordings of telephone conversations can be used to effectively reduce the risks and ramifications of miscommunication. Examples include improperly filed insurance claims, business to business purchasing, perishable goods orders, personnel recruiting, billing verification, handling or outcome of an emergency services call and other critical telephone transactions.
- **Personnel Development:** Staff development and training programs are supported through systematic review and evaluation of vital business communications functions in sales, customer service, product support, collections, personnel applications, scheduling, emergency dispatch facilities and other public safety organizations. Tracer provides functionality for live monitoring, recording, coaching, evaluating and

reporting, delivering a complete personnel communications development platform.

- **Business Documentation:** Businesses regularly document every form of electronic and paper communications, investing significant time and money in storage, document management and digital imaging technologies. Yet verbal communications still include some of the most sensitive, urgent and precise information shared. OAISYS solutions document phone-based verbal communications and enable simple retrieval, playback and sharing of those recorded conversations, helping to prevent miscommunication.
- **Collaboration:** Teams of specialists regularly collaborate on various business projects, and group progress can be adversely affected by the communications that occur between team members. Voice documentation facilitates seamless, immediate transfer of critical data between associates, ensuring all involved parties are working from the most accurate and current information. Organizations benefit from shortened project cycles, improved operational efficiencies and decreased miscommunication errors.

## It's Your Call, We'll Back it Up.

*OAISYS is a leading provider of call recording and contact center management solutions for small- to medium-sized businesses and multi-site large enterprises. Our Tracer and Talkument solutions affordably and reliably deliver the tools these businesses need to improve customer interactions, enhance knowledge sharing and achieve operational effectiveness. Our willingness to listen, understand and react to the voice of our customers is tied directly to the level of satisfaction they experience with our solutions. We are focused on providing additional value to our existing customers and demonstrating to new customers the many exciting ways in which our products can improve their business operations. Accomplishing this requires a relentless commitment to proactively seeking out and responding to customer feedback. We believe there is no better, or more important, source of inspiration for fueling our product innovation.*



To learn more about OAISYS, Tracer and Talkument, please visit our website at [www.oaisys.com](http://www.oaisys.com) or call 888.496.9040 today.

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