

How Do I CONFIGURE ANNOTATION

Annotations can be used to add customised metadata to recorded communications. These fields are added to the database and are fully searchable in Search & Replay and other Quantify applications.

Add Fields

Annotation fields are created in the local Callstore configuration page. This is normally performed at install, but you can add annotation fields at any time – it will require a recorder restart in order to perform a database rebuild.

To add annotation fields:



1. Login to Quantify with an administrator account and go to **Configuration > Setup > Callstore**.
2. In the **Annotation Database Fields** panel, enter the details for the annotation field:
 - **Field Name:** A “useful” name for the field. This field name will appear in Search & Replay and other applications, i.e. it’s not hidden.
 - **Field Size:** Maximum number of characters (2 to 260). Annotation fields support the full range of ASCII characters.
 - **Allow Manual Annotation:** If selected, the field can be edited either before call storage (Agent Call Annotation – WorkStation Client) or after storage (Search & Replay – Call Annotation). If this field is being used by an automated process, such as a telephony integration to add extra details, then leave this option unticked.

As you add a fields in the panel, the **Remove** option is available for each field you add. Once you click **Update**, annotation fields can no longer be removed.

3. Once you’ve added all the fields you need, click **Update**. You’ll then need to restart the recorder to perform a database rebuild – go to **Configuration > Maintenance > Recorder > Restart > Stop Recorder**.



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Annotation Database Fields

Reference Field:

Field Name: (Max 80)

Field Size: (2-260)

Allow Manual Annotation:

Reference	Name	Size	Manual	Edit	Remove
Yes	Screen Event ID	20	<input type="checkbox"/>	Edit	
	Extra Recording	100	<input type="checkbox"/>	Edit	
	extra 3	50	<input type="checkbox"/>	Edit	
	extra 4	50	<input type="checkbox"/>	Edit	
	Notes	50	<input checked="" type="checkbox"/>	Edit	
	Call Wrapup	100	<input checked="" type="checkbox"/>	Edit	
	RBR Test	75	<input checked="" type="checkbox"/>	Edit	Remove

Your Red Box system may look different to the one used in this document.
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Additional Options & Considerations

- For Quantify 5A and above you can add up to eighty nine annotation fields to your system. For Quantify 4C and below you can add up to thirty annotation fields to your system.
- The **Reference Field** option is only available for one annotation field. Once “used”, the option is greyed out. The annotation reference field is indexed in the database to help provide faster search results – it’s your choice of what field is likely to be best for this, probably a field that will be searched often in your organisation.
- Once an annotation field has been added, although you can’t remove it, you can edit the field (change the size). Just click **Edit** for a field in the **Annotation Database Fields** panel and enter the new size – you can increase the number of characters, but you can’t decrease the number.
- Although a recorder restart is needed in order to perform a database rebuild (after adding/editing annotation fields), Quantify 4B and above has enhanced database rebuild times. See the Database Rebuild Quick Question topic for details.
- If you have WorkStation Client installed on your system, manually editable annotation fields can be edited using the Agent Call Annotation feature – either using a pre-configured button, or free text. For details on WorkStation Client and Agent Call Annotation, see the WorkStation Client Quick Question topic:
- Manually editable annotation fields can be edited using the Call Annotation tab in the Media Player in Search & Replay. You can enable/disable this feature for each user account – go to **Configuration > Management > Users > Create/Edit > Permissions > Annotation**
- If you re-introduce a NAS previously removed from the system (before new annotation fields were added to the recorder), those fields will simply show as “blank” for the recorded communications stored on that NAS.

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