Oracle CX Service

Using Live Experience

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons (?) to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

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2 The Live Experience Associate Desktop

Live Experience System Requirements

Live Experience is easy to use and requires technologies that are easy to obtain.

Oracle Live Experience Associates using the Associate Desktop need:

- Google Chrome, Mozilla Firefox, Microsoft Edge (version based on Chromium), or Safari on a laptop or desktop computer

- Microphone and speakers or a headset and a webcam, to take video calls

Associates who want to access the Associate Desktop on a mobile device need the Oracle Mobile Associate app on their Android device, Google Chrome on their Android device, or Safari on their iOS device.

To join a Live Experience meeting, customers need a microphone, speakers or a headset, and a webcam if video calls are used, and one of the following:

- An up-to-date version of the Live-Experience enabled iOS or Android mobile app to use the Live Experience widget, or

- Google Chrome on their Android device, or Safari on their iOS device, or

- Google Chrome, Mozilla Firefox, Microsoft Edge (version based on Chromium), or Safari on a laptop or desktop computer

Live Experience administrators using the Admin Console need Google Chrome, Mozilla Firefox, or Safari on a laptop or desktop computer.

System administrators might need to configure firewall settings on the network to allow outgoing connections to the Live Experience TURN servers. On the proxy or firewall used by your company, system administrators open an outgoing connection for "`*.live.oraclecloud.com`" or "`*.emea.live.oraclecloud.com`" on ports 443, 5349, and 3478.

Keep your browser, laptop or desktop, and mobile devices up to date to access the best Live Experience features.

The Live Experience Associate Desktop periodically checks your audio and video devices and settings to ensure that they are working properly.

Using the Live Experience Associate Desktop

The Oracle Live Experience Associate Desktop is a fully-functional interface for answering incoming Live Experience engagements from your customers and for making outgoing customer calls.

You open the Associate Desktop in a web browser. Go to one of the following URLs to get started: `https://live.oraclecloud.com/dae?tenant=your_tenant_name` or, for EMEA customers, `https://emea.live.oraclecloud.com/dae?tenant=your_tenant_name` .

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The Associate Desktop Welcome Screen

The Associate Desktop Welcome screen is the first screen you see when you sign in to the Associate Desktop.

It's the launching pad for all your tasks. From the Welcome screen, you answer incoming engagements initiated by your customers, and you can start meetings or make outgoing calls to your customers.

Associate Desktop Welcome Screen

Icon or Panel	Description
Name and Avatar	Click on your name to open a menu allowing you to change your password, change your avatar, run diagnostics, or sign out.
Status	Click on your status to change your current availability status.
Incoming Engagements Queue	You can view the list of all engagements in your queue by expanding the queue so that it appears as a panel.
Engagements in queue	You can view the total number of calls in a queue and determine how quickly you need to wrap up on the current call.
Caller Details Panel	The panel displays caller details for the incoming engagement. The details you see in the panel depend on the specific context attributes configured by your administrator and initialized by your developer. An icon displays to identify the kind of engagement you are answering, such as an audio call. Click **Answer** to connect with the engagement.
Meetings	Click **Meetings** to generate a meeting link or to join a Live Experience meeting. When Live Experience generates a meeting link, it provides you a unique meeting URL and code. You send the URL to participants by email or by SMS, and you use the code to join the meeting at the scheduled time.
Conversations	Click **Conversations** to start a new SMS conversation, or to reply to ongoing SMS conversations. A counter indicates the number of unread SMS messages for you. When you start an SMS conversation, or when you answer a new SMS conversation, that conversation is only available to you. Other associates can't read the conversation or respond to it. The Conversations panel only displays if Live Experience has been configured to send and receive SMS messages.
Place a Call	Click **Place a call** to call one of your customers. When you click this button, it opens a dialog where you can look up your customer by phone number. Depending on how Live Experience is configured, your outgoing call is either completed over the internet to your customer's Live Experience-enabled mobile app, or through a telephone line. If the outgoing call connects to your customer's Live Experience-enabled mobile app, then you and your customer are connected over Live Experience. If your outgoing call connects by telephone, then your customer answers the call like a regular phone call.

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The Associate Desktop Audio Interface

Use the Audio interface when you are on an audio call.

Audio Interface

Icon	Description
Status	When you are in a call, your status automatically changes to **On a call**.
Call Duration	The duration of the engagement displays. A red circle indicates that the engagement is being recorded.
Caller Information Panel	The caller information panel displays all the information automatically collected by Live Experience. Click the icon next to the panel to expand and collapse the panel.
Caller Name and Avatar	The caller's name and avatar displays during the call.
Microphone	The large microphone icon in the center of the interface identifies this engagement as an audio engagement.
Options	Click **Options** (a six dot grid on the lower toolbar) to see a list of all the possible features and options available in an audio engagement. Your available features and options depend on how your Live Experience is configured and which features are enabled in the engagement scenario you're using. Possible options include asking the customer to share their camera, their screen, or to start a Co-browse session; sharing your own camera or screen; sending the customer an SMS message or an in-channel message; creating a meeting; adding another associate to the call; or transferring the call to another associate. **Note:** When you start a Co-browse with a customer, a new browser window appears for the Co-browse session. The Co-browse window can't be recorded.
Pause	Click **Pause** to pause the audio engagement. When paused, you can't hear the customer, and the customer can't hear you.
Exit	Click **Exit** to end the engagement for you and your customer.
Mute	Click **Mute** to mute your microphone so that your customer can't hear you. You are still able to hear the customer.

The Associate Desktop Video Interface

Use the Video interface when you are on a video call.

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The customer's video feed, which is their camera or their screen depending on what's being shared, occupies most of the video interface. The following icons and panels display over the video engagement.

Video Interface

Icon or Panel	Description
Status	When you are in a call, your status automatically changes to **On a call**.
Video	Click the video icon to stop sharing your camera with your customer.
Pencil	Click the pencil icon to use the annotation feature.
Camera	Click the camera icon to freeze the video so you can annotate on a still image.
Call Duration	The duration of the engagement displays. A red circle indicates that the engagement is being recorded.
Caller Information Panel	The caller information panel displays all the information automatically collected by Live Experience. Click the icon next to the panel to expand and collapse the panel.
Options	Click **Options** (a six dot grid on the right of the lower toolbar) to see a list of all the possible features and options available in an audio engagement. Your available features and options depend on how your Live Experience is configured and which features are enabled in the engagement scenario you're using. Possible options include asking the customer to share their camera, their screen, or to start a Co-browse session; sharing your own camera or screen; sending the customer an SMS message or an in-channel message; creating a meeting; adding another associate to the call; or transferring the call to another associate. **Note:** When you start a Co-browse with a customer, a new browser window appears for the Co-browse session. The Co-browse window can't be recorded.
Your video feed	Your camera feed, if you are sharing your camera, is inlaid in the video interface so that you can also see yourself as the customer sees you.
Pause	Click **Pause** to pause the video engagement. When paused, the video stream is interrupted, you can't hear the customer, and the customer can't hear you.
Exit	Click **Exit** to end the engagement for you and for your customer.
Mute	Click **Mute** to mute your microphone so that your customer can't hear you. You are still able to hear the customer.

The Associate Desktop Annotation Interface

Improve the effectiveness of your customer support with the real-time annotation capabilities of Oracle Live Experience.

The annotation tool is automatically enabled and available to you and your customers whenever you are on a video call together or are sharing a screen. The Live Experience annotation feature is not available when Co-browsing with a customer. When screen sharing, both you and the customer can use the annotation tool. When on a video call, only the associate can use the annotation tool. On mobile devices, use your finger to make annotations. On a computer, use your cursor.

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Customers see annotations on their screen as you guide them through the engagement. When the call is ended, the annotations disappear from your customer's screen. Annotations are saved as part of recorded engagements.

> **Note:** When a customer's call originates from a website, annotations can appear only on the browser page containing the Live Experience widget. If the customer navigates to another browser tab and either party attempts to annotate, the annotations won't appear.

Annotations Interface

Icon	Description
Pencil	The pencil icon is blue, indicating that you've selected it and enabled the annotation feature.
Camera	To annotate when on a video call, you can click the camera icon to freeze the video to annotate on a still image. When you freeze the video, both you and the customer see the still image until you select to resume the video feed.
Annotation toolbar	Click the color to open a color picker to choose a different color. Click the pen to choose a different tool, like a highlighter. Select the eraser icon and then click on an annotation to delete it.

The Associate Desktop Conversations (SMS) Interface

The Conversations interface is available only if your administrator configured the SMS service.

An incoming SMS engagement is routed to you or your team similarly to other types of engagements. New SMS engagements are included in the Incoming Engagements queue and are distinguished from other engagement types by a small text bubble icon. After the SMS engagement is answered by one associate, the engagement leaves the queue and belongs to that associate.

Each tab of the Conversations interface is an open SMS conversation between you and a customer. The tab labels are the customer's SMS phone number. The active tab is identified with bold text on the tab label, underlined in dark blue.

Conversations Interface

Icon	Description
Status	Participating in an SMS conversation does not count as being on a call, so your status remains **Available**. Video or audio calls will still be routed to your queue.
Home	Click **Home** to return to the Welcome Screen.
New unread message	A blue dot next to the customer's SMS number indicates there is a new unread message in the conversation.

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Icon	Description
X	Click **X** to end the SMS conversation and close the tab. If the customer writes back, a new conversation starts.
Pencil	Click the pencil icon to start a new conversation. This opens a dialog where you specify a phone number and compose a first message. When you send this new SMS message, a new tab appears in the Conversations interface.
Type a message	Compose a message to add to the conversation on the active tab.
Send	Click **Send** to send the composed message to the customer and add the message to the conversation on the active tab.

The Associate Desktop FAQ

Refer to this list of answers to common tasks and questions.

How do I change my password?

Click on your avatar and select **Change Password**. Then follow the directions on screen to complete the process.

I've forgotten my password. How do I reset it?

Using a web browser, enter your Associate Desktop URL. On the login screen, click on **Forgot your password?** to receive a password reset email. Follow the instructions in the email to complete the process.

How do I change my status?

Your status is displayed beside your avatar, just under your user name in the top-right corner of the Associate Desktop interface. Click on your current status to change it.

How do I change my avatar?

To change, delete, or set your avatar, click on your user name in the top-right corner of the Associate Desktop interface and select **Set Avatar**. Follow the directions on screen to complete the process. Your avatar is an image you selected to represent yourself to customers on their devices whenever they connect with you. Often, your avatar is a photograph of you, but it could also be another image.

How do I answer an incoming engagement?

When you receive a new incoming engagement, the Associate Desktop notifies you. The notification window shows you the caller details and includes the Answer icon. Click **Answer** to answer the engagement.

What's a meeting? And how do I start a meeting?

A meeting is an engagement that you initiate and to which you invite participants. Using the Associate Desktop, you can start a meeting immediately or you can schedule a meeting for some time in the future. From the Associate Desktop Welcome screen, click **Meetings** to get started.

How do I transfer an outside engagement with a customer to a Live Experience engagement?

Use a Live Experience meeting. From the Associate Desktop Welcome Screen, click **Meetings** to get started. If you are already exchanging emails or SMS messages with the customer, then send the meeting URL to the customer by email or SMS and wait for them to join.

If you are talking with the customer by telephone, you can get them into your meeting using a short code. Direct them to your Live Experience-enabled website or mobile app. You need to tell them how to get to the page that has the short-code scenario. When the customer gets to this page, tell them to select the widget. The widget generates a six-character short code, which they tell you over the phone, and which you enter into your meeting.

See *How to Use Short Codes in Your Engagement Scenarios*.

How do I use screen sharing?

Screen sharing is an optional feature. For you to share your screen, or for your customer to share their screen, the screen sharing feature needs to be enabled on the engagement scenario being used. For example, if your customer begins a call with you from a specific page on your website where screen sharing is enabled, then you'll be able to use the screen sharing feature. If the screen sharing button is grayed-out, it means that the feature is disabled.

If the screen sharing feature is enabled, click the Options icon in the Associate Desktop audio or video interface and then select **Ask End User to Share Screen**.

What's the difference between screen sharing and Co-browse?

Co-browse and screen sharing are similar. Both allow associates to see the customer's screen. Co-browse is a more advanced tool for screen sharing, allowing the associate to take control of the customer's pointer and keyboard. There are some limitations to using Co-browse. Live Experience can't record the screen being shared with Co-browse, and Co-browse doesn't work if the customer is using an Android or iOS device. Your administrator must configure a Co-browse account before you can enable it in your engagement scenarios.

How do I use the annotation feature?

The annotation feature is automatically available and enabled if you are in a video call or screen sharing call. Customers can also use the annotation feature. Your customers activate annotation by clicking or tapping the pencil icon on the widget. You activate annotation by clicking the pencil icon in the top-left corner of the video interface.

To make annotating video calls easier, you can temporarily freeze the video stream so that you can annotate on a still image. Freeze the video stream by clicking the camera icon to the right of the pencil icon.

How do I transfer an engagement to another associate?

There are two ways to transfer an engagement to another associate. The call transfer feature is an optional feature that allows you to transfer an audio engagement to another associate. For you to be able to transfer a call, the call transfer feature needs to be enabled by an administrator on the engagement scenario being used. For example, if your customer

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begins a call with you from a specific page on your website where call transfer is enabled, then you have the ability to transfer the call.

> **Note:** The Live Experience call transfer feature doesn't give you a tool to notify the other associate beforehand that you are transferring a call to them.

If the call transfer feature is enabled, click the **Options** icon, and then select **Transfer call**. Search for an available associate and transfer the call.

The Add Associate feature is an optional feature that allows you to join another associate to your engagement, and then you can leave that engagement. When you leave an engagement to which you've added another associate, you effectively transfer the engagement to the remaining associate. For you to be able to add another associate to an ongoing engagement, the add associate feature needs to be enabled by an administrator on the engagement scenario being used. For example, if your customer begins a call with you from a specific page on your website where add participant is enabled, then you have the ability to add an associate.

> **Note:** You can also use the add participant feature to transfer a call. When you transfer a call this way, you have an opportunity to talk to the new associate before you leave the engagement. You can even pause the customer so that you and the other associate can talk in private.

If the add associate feature is enabled, click the Options icon on the video or audio interface, and then select **Add Associate**. Search for an available associate and invite them to join your engagement.

How do I enable the recording feature for an engagement I'm on?

Your administrator configures engagement recording settings. You aren't able to turn the recording on or off. You know whether the engagement you are in is being recorded by the red recording icon at the top of the video or audio interface.

How do I look up an engagement I had? How do I play back a recorded engagement?

If your Live Experience account has the supervisor or administrator role, then you can use the Admin Console to search for past engagements. You can review details about the engagement, and if the engagement was recorded, you can play it back. See *Search for Engagement Details and Recordings*.

What do I need to use the Associate Desktop

See *Live Experience System Requirements*.

How is using the Associate Desktop on a mobile browser different?

The Associate Desktop is available on iOS and Android tablets and smart phones, using the Safari (on iOS or Android) or Google Chrome (on Android) web browsers.

When in a mobile browser, the Associate Desktop behaves a little differently than on a computer. When you are logged into the Associate Desktop and a call gets routed to you, you don't receive a push notification. You do hear a ringing sound if your device isn't silenced. This means that you don't see a visual indication of an incoming call. To answer an incoming call, you need to open your browser where you are logged into the Associate Desktop and tap the Answer icon.

If you are on a Live Experience call and you move the browser to the background or lock your device, the audio will continue to work for about five minutes. However, after five minutes of being in the background, the Associate Desktop becomes unresponsive, ending your call. You need to keep the browser in the foreground when you are on a Live Experience call.

The Associate Desktop becomes unresponsive after about five minutes in the background or when you lock your mobile device. To fix this issue, refresh the browser and log in again. To avoid this issue, do one of the following:

- For Android, use the Oracle Mobile Associate app instead of a browser. See *The Oracle Live Experience Mobile Associate*.

- Keep the browser in the foreground and do not lock your device for longer than five minutes when you are logged into the Associate Desktop.

How do I join a meeting that I scheduled for a future date?

You join a meeting from the Associate Desktop Welcome Screen. Start by clicking Meetings, then click **Join**. In the Join a Meeting window, enter the meeting code for your meeting. The meeting code is part of the meeting link you send to your customer by email or SMS. For example, if the meeting link you send your customer is `https://live.oraclecloud.com/meetings/ABC123`, then the meeting code is `ABC123`.

3 Using the Mobile Associate App

The Oracle Live Experience Mobile Associate

With the Oracle Mobile Associate app for your Android device, you can answer Oracle Live Experience calls with your mobile device.

Download and install the Oracle Mobile Associate app for your Android mobile device from the Google Play store.

The Oracle Mobile Associate works just like the Associate Desktop, with the following important differences.

- The Oracle Mobile Associate app notifies you of incoming calls even when the app is in the background or your device is locked.
- During video calls, you can share either your front or back camera and switch between the two.
- You can minimize the Oracle Mobile Associate app while you are in a call to open another app such as email or maps, and the call remains connected.
- You can't share your mobile device's screen with your customer, though your customers can share their screen with you.
- If you choose to answer another call while you are already in a Live Experience call, or if you open another app that uses your camera and audio, your Live Experience call is paused.

Set Up the Oracle Mobile Associate App

Follow this procedure to set up the Oracle Mobile Associate app.

1. Search the Google Play store for Oracle Live Experience Mobile Associate, or go to the following URL: *https:// play.google.com/store/apps/details?id=com.oracle.live.oma*.
2. Download and install the app.
3. Set options in your device settings.
   a. Add the Oracle Mobile Associate to your auto-run apps to keep the app from disconnecting when it's in the background or when your device is locked.
   b. Set your permissions for the Oracle Mobile Associate to show on the lock screen so you are notified of incoming Live Experience engagements when your device is locked.
4. Open the app.
5. Read and agree to the end-user license agreement (EULA) terms to proceed and use the Oracle Mobile Associate app.
   You can also read the *Oracle Live Experience Demo App End-User License Agreement for Android*.
6. Choose your region, either US for North-America, EMEA for Europe, or Custom if you have been instructed to use a different region.
7. Enter your user name (your email address) and password.

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8. Click **Log In**.

If your user name is associated with multiple tenants, you need to select the tenant on which you want to log in. You can change your tenant setting by logging out and logging back in.

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4 Engaging Your Customers

Engage Your Customers by Calling Them Directly

Learn about making outgoing calls directly to your customers.

Your administrator can set up outbound calling to enable calls through the Live Experience-enabled app, over the phone, or both.

Your customers need to have the mobile app installed on their device and properly configured to receive in-app Live Experience calls. Live Experience uses the mobile phone number as entered by the customer in the app's settings. The customer needs to set up the app to allow notifications. If they don't allow notifications, the app won't notify them of incoming calls.

Phone calls are delivered to the customer over their mobile network and behave just like any telephone call. No special apps or configurations are required.

1. On the Associate Desktop, click **Place a call**.
2. Enter the customer's phone number in the dialog window and click **Call**.

    Depending on how your administrator configures outbound calling, Live Experience first attempts to contact your customers through the Live Experience-enabled app. If the call fails or can't be completed, you may be presented with an option to call the customer with a telephone call.

Engage Your Customers Visually with Annotations

Improve the effectiveness of your customer support with the real-time annotation capabilities of Oracle Live Experience.

When your customers share their screen or camera, you can annotate exactly where they need to tap or precisely where to plug in their internet cable.

The annotation tool is automatically enabled for video calls and screen sharing. When screen sharing, both the customer and the associate can use the annotation tool. On a video call, only the associate can use the annotation tool. Customers see annotations on their screen as you guide them through the engagement. When the call is ended, the annotations disappear from your customer's screen. Annotations are saved as part of recorded engagements.

> **Note:** When a customer's call originates from a website, annotations can appear only on the browser page containing the Live Experience widget. If the customer navigates to another browser tab and either party attempts to annotate, the annotations won't appear.

See *The Associate Desktop Annotation Interface* for more information.

1. Click the pencil icon in the call window to activate annotations.

    Your customers activate annotation by clicking or tapping the pencil icon on the widget.
2. To make annotating on a video easier, click the camera icon next to the pencil icon to temporarily freeze the video stream so you can annotate a still image.
3. Choose a color for your annotations.

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4. Use the eraser tool to erase any annotations you made.

Using Meetings to Upgrade to Live Experience Engagements

Use meetings to upgrade from non-Live Experience channels (like telephone, email, or SMS) into a Live Experience engagement so that you can have two-way audio, two-way video, or screen sharing features.

If your company has a number that customers call to get product support, for example, it sometimes makes sense to switch to a video call so that you can see the product that the customer needs support with. You can direct the customer to a specific page on your website or mobile app that starts a Live Experience meeting. Your customer can tap on the Live Experience widget to start the meeting.

Or, for example, your company has a support form on your website or mobile app where your customers can create a support request. You might begin by exchanging email messages, but you may want to have a voice or video call with the customer to give them the best support experience possible. You can set up a scheduled Live Experience meeting and email the customer the meeting URL.

See *The Associate Desktop Welcome Screen* for details.

How to Use Short Codes in Your Engagement Scenarios

It might not be immediately obvious how to use the Short Code feature when planning and determining your needs with respect to engagement scenarios.

Imagine that your company uses other traditional communication tools external to Live Experience for engaging with customers, such as a support telephone number. You may want to escalate an external engagement into a Live Experience engagement to solve your customer's issue best with a video or screen sharing engagement. With the short code feature, the Live Experience widget generates a six-character code when the customer taps on it. The customer can then read the code to the associate, who enters the code into the Associate Desktopto continue the engagement in Live Experience.

Configure your short code engagement scenario with a specific and narrow rule so that it doesn't get triggered by accident. For example, you could configure a condition that looks for an Application Location value of **short code**, and then you could add a "short code" page to your website or app and add the Live Experience widget to that page. Then, when your associates want to escalate a phone call to a Live Experience engagement, they could tell the customer to go to the "short code" page and tap on the widget.

The Short Code Workflow in Practice

With a short code engagement scenario in place, here's an example of how to use the short code functionality.

1. A customer calls your support number and connects with an associate.
2. The associate determines that a screen sharing session would help solve the customer's issue.
3. The associate directs the customer to the location in your mobile app or website that triggers the short code engagement scenario.
4. When the customer gets to the page, they see the widget. The widget shows a screen sharing icon.
5. The customer taps the widget, which then displays a six-character short code.

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6.   The customer provides that code to the associate over the phone.

7.   In the Associate Desktop, the associate starts a meeting using the **Ask them for a short code** option and enters the short code the customer provided them.

8.   The associate and your customer are now connected in a Live Experience engagement.

Search for Engagement Details and Recordings

Every Oracle Live Experience engagement is logged and stored in Live Experience.

If you have the supervisor or administrator role, you can use the Live Experience Admin Console to search for engagements. Use the search parameters on the Engagement History screen to filter the list of engagements to help you find the one you're looking for.

After you find a specific engagement record, you can review the engagement details. If the engagement was recorded, you can also play back the recording.

1.   From the Admin Console navigation menu, click **Engagements**.

   The Engagement History page opens.

2.   Use the **Search for Engagements** area to search for engagements.

   a.   In the search bar, search by participants or keyword.

      For the keyword search, you need to enable the Transcription feature and set up keywords in your application. See *Creating Text Records of Your Engagements*.

      The Engagements list updates automatically to match the search values and filters you set. If no search criteria are used, it lists all engagements.

   b.   Use the drop-down list in the search bar to match on **ANY** search terms, or **ALL** search terms.

   c.   Click **Clear Search** to clear the search values and filters and see all engagements.

   d.   Click **Save Query As** to save and name the current set of search values and filters so you can easily perform the same search again.

   e.   Click **Saved Queries** to view and select from your saved queries.

3.   Use the **Channels** field to filter your search results by one or more channels.

   Possible channel types are Chat, Video, Audio, Screen Share, Message (SMS), and ID Verification. A single engagement can include multiple types of channels. For example, if an engagement starts as an audio call and is upgraded to a video call, it is both an audio and a video engagement. The Channels filter works as an AND filter, meaning that it filters the Engagements list to match all the selected channels in the field. So, if you select Video and Audio, the search results will include engagements that are either video and audio engagements, or both.

4.   Use the **From** and **To** fields to filter the search results by date and time.

   You can set the From date, or you can set both the From and To dates.

5.   Use the **Duration** slider to filter the search results by duration of the engagement.

6.   Use the **Application** field to filter the search results by the application that handled the engagement.

7.   Use the **Quality** field to filter the search results by the quality of the engagement, as specified by your customer.

   To use this filter, you need to enable Engagement Quality Tracking. See *Enable Engagement Quality Metrics*.

8.   Click the pencil icon to specify your display preferences for the Engagements list.

   For example, you can specify how many results to display at a time.

9. Click an engagement title to open its engagement details.

   From the engagement details, you can get more information about the engagement and play it back. See *Engagement Details*.

10. If the transcription feature is configured and enabled, select the engagements for which you want transcripts.

    The transcription feature is enabled per application, so not all engagements are available for transcription. When you select an engagement, the Request Transcript button becomes available if enabled.