

Searching conversations

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

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

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


- **Basic Search Options** tab includes the most commonly used search fields.

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

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

Resetting the search fields

After setting the search criteria, the system stores the field values, so whenever the user loads the search page the previous settings are

restored and displayed. To reset the fields, click on the **Reset Search** link in the bottom right corner of the search panel, or click on the  button on the top.

Saving and reusing search criteria

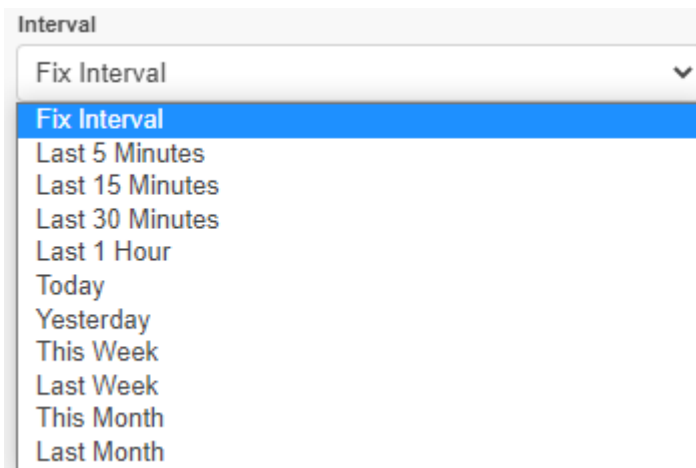
It is possible to save several different search criteria, then reuse them whenever it's required. For more information, see: [Reusing search criteria - saved queries](#)

Basic search options

Query interval

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

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



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

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

? May, 2006 ×							
« < Today > »							
wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
18	1	2	3	4	5	6	7
19	8	9	10	11	12	13	14
20	15	16	17	18	19	20	21
21	22	23	24	25	26	27	28
22	29	30	31				

Time: 00 : 00
Select date

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

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

Phone number or address

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

Phone Number (From or To Party)

☎ walterw@chemistry.com × 📁

12778 ×

12882 ×

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

A predefined list of numbers - or Participant Sets in other words - also can be provided by clicking on the 📁 button. For more information about the Participant Sets, see: [Participant sets](#)

User


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

User

👤 Sue Mathis (sue) × 📁

Wesley Mack (wesley) ×

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

A predefined list of users - or Participant Sets in other words - also can be provided by clicking on the  button. For more information about the Participant Sets, see: [Participant sets](#)

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

Label

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



The screenshot shows a 'Label' field with two tags: 'HR issue' and 'Reviewed'. Each tag has a small 'x' icon to its right, indicating it can be removed. The field is titled 'Label' in the top left corner.

Multiple labels can be provided. In this case, there will be an OR logic between the provided values. While typing, the system also provides suggestions based on the configured labels in the system. For more information, see: [Labels](#)

Case

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

Advanced Search Options

Time zones in search results

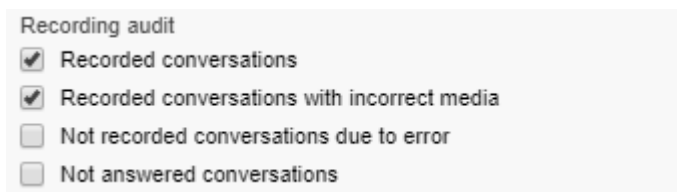
In Advanced Search Options, users can temporarily change the timezone of the current search. All time information will be presented in the selected time zone in the search results, when you Reset the Search fields.

Scope

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

Recording Audit

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



The screenshot shows the 'Recording audit' section with four checkboxes:

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

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

Conversation detail record fields

All search fields support adding multiple query/filtering parameters.

Conversation detail record fields

✖


Group ▼

Equal to ▼

US Billing ▼

+

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

Step 1 - Click on  the icon and select the desired field from the drop-down menu.

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

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

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


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

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

Users can remove previously added criteria by clicking on the  icon on the left side of the panel.

Metadata and Markers

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

Step 1 - Click on  the icon and select the desired field from the drop-down menu.

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

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

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

Users can remove previously added criteria by clicking on the  icon on the left side of the panel.

Text Search

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

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

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

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