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Recording, Quality Management and Speech Analytics User Manual

Using Text Mode

Using Text Mode

Search criteria can be specified in the Filter Panel in one of two modes:

- **Standard mode**—The user selects options from lists in each filter category.
- **Text mode**—The user types the search criteria in a text box using a specified syntax.

In general, Standard mode is easier to use. In addition, it includes the full range of search options available, while Text mode only includes the more basic options. However, in some cases, Super Users who know exactly what they want to include in their search criteria may find it faster to type the criteria in Text mode.

You can switch back and forth between the two modes while you are in the process of defining search criteria. The display in each mode is automatically updated to include the changes that were made in the other mode.

This section explains how to use Text mode. For information about using Standard mode, see [Defining Search Criteria](#).

Switching to Text Mode

Switching to and from Text Mode

You can open Text mode at any time while you are defining search criteria. The criteria that are currently selected are displayed in both modes.

To switch into Text mode:

- At the upper-right corner of the Filter Panel, click [file:Sm_textmodebutton.png](#).

To switch into Standard mode:

- At the upper-right corner of the Filter Panel, click [file:Sm_standardmodebutton.png](#).

Defining Filters

Defining a Filter Condition in Text Mode

You define filter conditions by typing the code for the type of filter and selecting the condition from a dropdown menu.

Filter Codes

You can use the following codes in Text mode:

Code	Description
T	Topic
C	Category
D	Date
CD	Custom Date
L	Language

Inserting Filter Conditions

You can insert one language and one date condition, and multiple Category and Topic conditions. Each Category and Topic condition can also include multiple items. The logical relationship between items within a single condition is OR - if any of the items are in the interaction, the interaction will be included in the search results. The logical relationship between separate conditions is AND - only interactions that meet both conditions are included in the search results.

1. In the text field, type the code of the type of filter you want to use, followed by a colon (:). A dropdown menu (or date and time selectors, if you type the CD code) opens and displays a list of the available options for the filter.
2. Select the required option from the list. The dropdown menu closes and the option appears in the text field.

Important

To filter the list, begin typing a sequence of characters that appear in the name of the option. Only those options that contain the specified sequence of characters are displayed.

3. For the Categories and Topics filters, if you want to add an additional selection to the filter, type a comma (,). The relevant dropdown menu opens again. Select the additional option as explained above.
4. To add another filter condition, press **Enter** and then repeat the steps above.

Important

You can insert multiple Category and Topic filter conditions. The search results will only include interactions or Events that match all of the filter conditions. For example, if you insert two Category conditions, C:Accounting and C:Short Interactions, only interactions that are in both Categories are included in the search results. Note, however, that within a single filter condition, if you select multiple items, the logical relationship between the items is OR. That is, if any of the items is found in a interaction, the interaction is included in the search results. For example, if you insert one condition, C:Accounting, Short Interactions, interactions that are in either Category are included in the search results.

Deleting Filters

Deleting Filter Conditions

You can delete filter conditions as necessary by editing the text field. In addition, you can clear all of the filter conditions. Note that if you clear all filter conditions, even conditions that are only visible in Standard mode, and cannot be seen in Text mode, are deleted.

To delete a filter condition:

- Select the condition and press **Delete**.

To clear all the filter conditions:

1. At the top of the Filter Panel, click **Clear Filters**. You are prompted to confirm that you want to delete all of the currently defined filters (including those that are not currently visible).
2. Click **Yes**. The filters are cleared.