

## Active Insights Configuration Recommendations

All rights reserved © December 2025

### System Configuration

#### Voice/Screen Recording

- Voice Recording is a system level configuration setting that toggles Active Insights ability to utilize IS Voice Recordings
- Screen Recording is a system level configuration setting that toggles Active Insights ability to utilize IS Voice Recordings
- They determine whether the Active Insights Call Log should include voice and screen recordings if they are being captured through IS.
- Voice is **REQUIRED** unless the only goal of Active Insights is for dashboard or messages purposes.
- Deleting a recording in IS will not delete it out of Active Insights.
  - o Note: IS and Active Insights are two separate databases!

#### Transcription Limit

Rather than a one-to-one comparison with Intelligent Series (IS) hierarchical structure where typically you can expect Agent settings to take precedence over Client settings, which take precedence over System settings, Active Insights Configurations (System/Client/Agent) should be thought of as profiles into which we can assign records from each respective level of the hierarchy.

The System Configuration will apply to the whole system but can be overridden by a Client or Agent Configuration.

#### Percentage of calls to transcribe

20

The actual percentage of calls to transcribe will be determined by the larger of the three settings: System, Client and Agent. To give any level the highest precedence, simply set it to the highest value.

⚠ Setting the value at this level to a larger value than agent or client will effectively override any agent or client settings. It is recommended to set this to a low value, perhaps zero so the control rests on the client and agent settings.

- Note: The Default Call Condition (Secretarial) should be configured before moving on to Client Groups and Client Configuration. See Call Conditions (Page 3).

## Clients Configuration

Client Groups are created in Active Insights to group Intelligent Series Clients for the purpose of transcription and scoring.

Client Configurations are created and reference Active Insights Client Groups (Associated Intelligent Series Clients). If an IS Client is not assigned to a Client Group, they will fall into the settings in the default Client Configuration.

## Agents Configuration

Agent Groups are created in Active insights to group Intelligent Series Agents for the purpose of transcription and scoring.

Agent Configurations are created, and reference Active Insights Agent Group (Associated Intelligent Series Agents). If an Agent is not assigned to an Agent Group, they will fall into the settings in the default Agent Configuration.

- Default Configuration values such as the Transcription and Token limits should be set to 0 (zero) or “disabled” at first. When you are ready to start using the Active Insights scoring feature, create non-default configurations for the purpose of scoring.

### Token Limit

The Token Limit should be set to “Unlimited” with resource limitations coming from Transcription Limits. This should be consistent at **all three levels** (System, Client, and Agent).

### Percentage of Calls to Transcribe

This setting will determine approximately the percent chance a call will have of being transcribed.

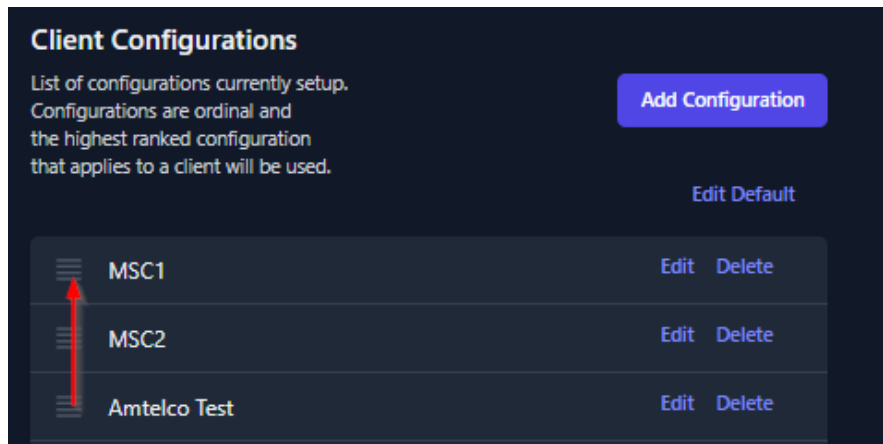
- Example: If the percentage is set to 20%, approximately 20 out of 100 calls will be transcribed.

This setting will always take the highest value applicable to the call.

- Example: If the System is set 0%, the Client is set to 15%, and the assigned agent's configuration is set to 30%, the percentage of calls to transcribe would be 30%.

## Configuration List Order

Configurations are ordinal, and the highest ranked configuration that applies will be used.



- Example: If the client group, Internal, is referenced in Active Insights configurations MSC1 and Amtelco Test, you may drag Amtelco Test above MSC1. This will ensure that the client group, Internal, will utilize the Amtelco Test configuration instead of MSC1.

## Calls Configuration

### Call Conditions

- Client Configurations are dependent on having a Call Condition – most commonly secretarial calls.
- Call Conditions are used to set up the types of calls being scored for that Client Configuration.
- Includes the ability to filter on Automatic Call Distribution (ACD) Skills as well as types of call distribution.
- Typically, this should include every type of call distribution you want to score on, and differences between call conditions should be based on ACD Skill.
- Amtelco recommends that a minimum call duration be set to help exclude outliers (i.e basic information calls, fax calls, wrong number calls or other fringe cases, etc.)

## Post Call Configuration

- Active Insights Scripting follows logic-based statements. ChatGPT interprets these qualitative prompts and actions after the call completes and scores the script.
  - o Note: ChatGPT and associated scripts can only reference call transcriptions. Vocal indicators such as speed or tone cannot be scored.

## Example 1 – General Setup (Recommended for most cases)

The following example is recommended for those who are new to Active Insights and want a basic configuration. In this example, the System and Agent values are disabled; Client configurations will determine the percentage of calls to be transcribed for scoring.

### System Configuration

- o Voice – Required for transcription and scoring
- o Screen – Optional (If enabled, screen captures will exist in IS and Active Insights)

### Transcription Limit

- o Set to “Disabled.”

### Token Limit

- o Set to “Disabled.”

### Percentage of Calls to Transcribe

- o Set to 0% - Active Insights Client Configurations will determine a call’s percentage of Calls to Transcribe value.

### Call Conditions

- Validate the configuration of the Secretarial Call Condition – ensure that Secretarial is set as the default call condition.
  - o Enable Call Abandoned, select the box for Not Abandoned
  - o Include all ACD Skills
  - o Limit Call Type to Secretarial (live-answered calls)
  - o Set Minimum Recording Duration to 10-15 seconds

### Client Configuration

- Client Groups
  - o The goal is to group your IS clients for the purpose of desired transcription limits and scoring.

- Edit Default Client Configuration
  - o Add the Secretarial Call Condition.
  - o Leave the Script selection at “(None).”
  - o Set Transcription Limit and AI Token Limit to “Disabled.”
  - o Set Percentage of Calls to Transcribe to 0 (zero).
  - o Add data purge settings if needed.
- Additional Configurations (Non-Default)
- Transcription Limit
  - o Unlimited
- Token Limit
  - o Unlimited
- Percentage of Calls to Transcribe
  - o Set a percent value
    - $(\text{Transcription Limit}) / (\text{Total call volume in hours per month})$
    - Ex. If there are 1,000 hours of traffic, and you want to transcribe about 100 calls,  $100/1000 = 10\%$  percentage of calls to transcribe.

### Agent Configuration

- Agent Groups: Do not create agent groups – edit the Default Agent Configuration
- Default Agent Configuration
  - o Set Transcription Limit to “Disabled.”
  - o Set Token limit to “Disabled.”
  - o Set Percentage of calls to transcribe to 0% (Client configurations will give the value for percentage of calls to transcribe.)

## **Example 2 – Limits for High Volume Clients (Additional Setup, more granular)**

The following example is recommended for those who have complete Active Insights training and would like further Client and Agent configurations. In this example, the System values are disabled; Client **and** Agent configurations will determine the percentage of calls to be transcribed for scoring.

### **System Configuration**

- Voice Recording/Screen Recording
  - o Voice – required for transcription and scoring
  - o Screen – Optional (If enabled, screen captures will exist in IS and Active Insights.)
- Transcription Limit
  - o Set to “Disabled.”
- Token Limit
  - o Set to “Disabled.”

- Percentage of Calls to Transcribe
  - o Set to 0% - Client and Agent Configuration will drive the transcription.

## Call Conditions

- o Validate the configuration of the Secretarial Call Condition – ensure that Secretarial is set as the default call condition.
  - Enable Call Abandoned; select the box for Not Abandoned.
  - Enable Skills; select all desired ACD Skills.
  - Limit Call Type to Secretarial (live-answered calls.)
  - Set Minimum Recording Duration to 10-15 seconds

## Client Configuration

### Client Groups

- The goal is to group your IS Clients for the purpose of desired transcription limits and scoring.
  - o You may want to set High call volume clients to a lower percent of calls to transcribe.
  - o All Clients outside of Client Groups will utilize the Default Client Configuration.
  - o Create an Active Insights Client Group for IS Clients that have the “Record Patch Calls” Client Setting enabled. It is recommended to set a lower value for percentage of calls to be transcribed. (0% may be best.)

### Edit Default Client Configuration

- o Add the call condition “Secretarial.”
- o Leave the Script selection at “(None).”
- o Set Transcription Limit and AI Token Limit to “Disabled.”
- o Set percentage of calls to transcribe to 0%.
- o Add data purge settings if needed.

### Additional Client Configurations (Non-Default)

- Transcription Limit
  - o Unlimited
- Token Limit
  - o Unlimited
- Percentage of Calls to Transcribe
  - o Set a percentage value
    - $(\text{Transcription Limit}) / (\text{Total call volume in hours per month})$
    - Ex. If there are 1,000 hours of traffic, and you want to transcribe about 100 calls,  $100/1000 = 10\%$  percentage of calls to transcribe.

## Agent Configuration

The goal is to group your IS Agents for the purpose of desired transcription limits and scoring.

### Agent Groups

- Agent Groups are used to group IS Agents for the purpose of transcription limit outside of Client Configuration.
- Create an Active Insights Agent Group for **Trainees** – The corresponding Agent Configuration should be set to 40% for call transcription.
- Create an Active Insights Agent group for **Remote Agents** – The corresponding Agent Configuration should be set to 30% for call transcription.
- Create an Active Insights Agent Group for **Super Users** – The corresponding Agent Configuration would be set to 20% for call transcription.

### Default Agent Configuration

- Set Transcription Limit to “Disabled.”
- Set Token Limit to “Disabled.”
- Set percentage of calls to transcribe to 0% (Client configurations will give the value for percentage of calls to transcribe.)

### Additional Agent Configurations (Non-Default)

#### Transcription Limit

- Unlimited

#### Token Limit

- Unlimited

#### Percentage of Calls to Transcribe

- Set a percentage value
  - $(\text{Transcription Limit}) / (\text{Total call volume in hours per month})$
  - Ex. If there are 1,000 hours of traffic, and you want to transcribe about 100 calls,  $100/1000 = 10\%$  percentage of calls to transcribe.