# **Verint Searches**

[Searching in Verint](#_Toc205387827)

[Related Documents](#_Toc205387828)

**Description:** Guidance on the various ways to search for Voice Interactions and Evaluations in Verint.

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| Searching in Verint |

**Notes:**

* Verint retains recorded calls for a maximum of twelve calendar months from the date of the recording. If in need of a call older than twelve calendar months, leaders can request a call pull in Verint. **LDRs:** Refer to [LDR: Five9 Support Process Guide (066074)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d87e003a-beb4-4370-b6fe-74ae4d62bfe0).
* When searching, use last names to start since first names widen the search.
* For instructions on how to locate chat and secure message interactions, refer to [Using Verint (056210)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=d9eec58d-f754-497f-b253-ced75bac8770).

Use the following:

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| **Type of Search** | **Steps** |
| **Quick Search** | Path – Verint > Interactions > Search > Search   1. Select Search type – **Interactions** or **Evaluations**. 2. Set the range to search.   **LDRs:** Click the Employees Tab (Employees or Org/Group to search for) following Step 2.   1. Click the magnifying glass icon to search. |
| **Advanced Search Menu & Pre-Search Tips** | 1. When searching, always account for: Name/group being searched, date range and the targeted forms in scope. 2. At the bottom of the Advanced Search menu is a recap of all your selections made. 3. Always reconfirm the parameters being used before searching to ensure the desired outcome is produced.   **Note:** Results shown in maroon indicate an entry error needs to be corrected (**Screenshot Example:** Interaction Total Hold Time). |
| **Phone Number** | Path – Verint > Interactions > Search > Search > Advanced Search   1. Access **Advanced Search**. 2. Select Search type – **Interactions** or **Evaluations**.   **LDRs:** Click the Employees Tab (Employees or Org/Group to search for) following Step 2.   1. Click **Date Range** tab. 2. Click the **Interactions tab**. 3. Locate the **Participant** field. This will search both inbound and outbound interactions. 4. Enter the phone number:    * Format = + (1) (area code) (number)    * Example = +12104444444 5. Click the **Search** button.   **Note:** When searching for multiple numbers at once, for example with a Commercial family, separate them by commas (+12104444444, +12102222222). |
| **Call Categories** | Path – Verint > Interactions > Search > Search > Advanced Search   1. Access **Advanced Search**. 2. Select Search type – **Interactions** or **Evaluations**.   **LDRs:** Click the **Employees Tab** (Employees or Org/Group to search for) following Step 2.   1. Click **Date Range** tab. 2. Click the **Categories** tab. 3. Review the Select Categories options. 4. Move selected options to the Selected Search Categories bucket: 5. Select & click the right arrow to move over.   -OR-   1. Select and drag over (via mouse). 2. Click the **Search** button. |
| **Member ID** | Path – Verint > Interactions > Search > Search > Advanced Search   1. Access **Advanced Search**. 2. Select Search type – **Interactions** or **Evaluations**.   **LDRs:** Click the **Employees Tab** (Employees or Org/Group to search for) following Step 2.   1. Click **Date Range** tab. 2. Click the **Custom Data** tab. 3. Select **Internal Member ID** from the drop-down menu. 4. Enter the Member ID (open cell which opens). 5. Click the **Search** button.   **Note:** You can add the **Internal Member ID** column to your Interactions & Evaluation search results. |
| **Contact ID (Call Interaction)** | Path – Verint > Interactions > Search > Search > Advanced Search   1. Access **Advanced Search**. 2. Select Search type – **Interactions** or **Evaluations**. 3. Click **Date Range** tab. 4. Click the **Contacts** tab. 5. Enter the number into the Contact ID cell. 6. Click the **Search** button. |
| **Client Name** | Path – Verint > Interactions > Search > Search > Advanced Search   1. Access **Advanced Search**. 2. Select Search type – **Interactions** or **Evaluations**.   **LDRs:** Click the **Employees Tab** (Employees or Org/Group to search for) following Step 2.   1. Click **Date Range** tab. 2. Click the **Custom Data** tab. 3. Select **Client** from the dropdown menu. 4. Enter the Client with a \* wildcard before and after the name.   **Example:** \*GEHA\*.   1. Alternatively, you can enter the Five9 Client Name for an exact match. 2. Click the **Search** button.   **Note:** In the Interactions & Evaluation search results, you can add the **Client** column to visually see the various client names. |
| **Skill Name** | Path – Verint > Interactions > Search > Search > Advanced Search   1. Access **Advanced Search**. 2. Select Search type – **Interactions** or **Evaluations**.   **LDRs:** Click the **Employees Tab** (Employees or Org/Group to search for) following Step 2.   1. Click **Date Range** tab. 2. Click the **Custom Data** tab. 3. Select **Skill Name** from the dropdown menu. 4. Enter the **Skill Name** with a \* wildcard before and after the name.   **Example:** \*GEHA\*.   1. Alternatively, you can enter the Five9 full Skill Name for an exact match.   **Tip:** Remove the prefix cvs2 in the skill name.  **Example:** COM.GEHA.CV.EN.441000.0101   1. Click the **Search** button.   **Note:** In the Interactions & Evaluation search results, you can add the **Skill Name** column to visually see the various skill names. |
| **Flagged Evaluations** | Path – Verint > Interactions > Search > Search > Advanced Search   1. Access **Advanced Search.** 2. Select Search type – **Evaluations**.   **LDRs:** Click the **Employees Tab** (Employees or Org/Group to search for) following Step 2.   1. Click **Date Range** tab (31 days max). 2. Click the **Evaluations** tab. 3. Select **Require Attention**. 4. Click the **Search** button.   **Note:** This will only display calls for the selected Employees or Org/Group that have been flagged. |
| **Medallia Surveyed Calls** | **Finding the Call ID in Medallia:**  Refer to [LDR: Medallia (066735)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=5f374ddf-0c3c-43c4-ad02-3a76b48c483d) (Locating Surveys to Coach for your Team section) to find the specific call information.   1. Copy the Caremark Call ID from the survey details screen. 2. Ensure you know the date of the call (top right of Medallia Detail screen).   **Finding the Call in Verint:**  Path – Verint > Interactions > Search > Search > Advanced Search   1. Access **Advanced Search**. 2. Select Search Type – **Interactions**. 3. Click **Date Range** Tab. 4. Enter a date range to include the date of the surveyed call from Medallia and at least 7 days prior. (Members have up to a week to respond to surveys.) 5. Click the **Custom Data** Tab. 6. Select **Caller Data** from the drop-down list. 7. In the Caller Data box, enter an asterisk (\*), then paste the Caremark Call ID. **Note:** Ensure there is no space between the asterisk and the Caremark Call ID. 8. Click the **Search** Button. |

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| Related Documents |

[Verint Index for Representatives (056742)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=4d933ca8-d490-4acb-b133-04372045cc33)

[Customer Care Abbreviations, Definitions, and Terms Index (017428)](https://thesource.cvshealth.com/nuxeo/thesource/#!/view?docid=c1f1028b-e42c-4b4f-a4cf-cc0b42c91606)

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