Cisco Unified Workforce Optimization

Quality Management Application User Guide
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Getting Started

The user interface provides the following applications.

- Dashboard
- Recordings
- Live Voice Monitoring
- Recording Monitoring
- Reporting
- Alerts

The information provided in this section is common to each of these applications.

Usernames and Passwords

The user interface requires the following login information:

- For all roles in an Active Directory environment, use your network login username, password (the password is case-sensitive), and domain.

  NOTE: The Domain field in the Login window appears only when your contact center uses Windows Active Directory.

- For administrators in a non-Active Directory environment, use the same username and password used for the administrator ID to log in to the user interface.

- All other roles in a non-Active Directory environment, ask your administrator for your username and password.

Single-User Login Authentication

The user interface supports several different products. You can log into one or more products using a single-user login. Single-user login allows you to log into all products simultaneously using a single username and password.

You can access the user interface by entering the URL in a web browser. Ask your administrator for the correct URL. The format for the URL is as follows:

`https://<Base server>` or `http://<Base server>`

where <Base server> is the IP address or hostname for the user interface.

The appearance of the Login window depends on how the user interface is configured.

- If the user interface is configured for a standalone product, the Login window (Figure 1) displays only the login fields for that product. The Separate Product Logins check box does not appear in this situation.

Figure 1.   Login window for a single product
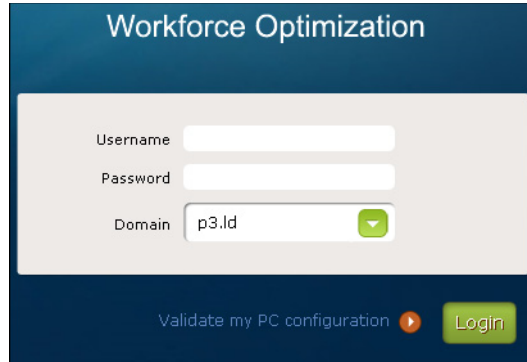
- If the user interface is configured to share common login fields for multiple products, the Login window (Figure 2) displays one common set of login fields for all products and the Separate Product Logins check box.

Figure 2.   Login window for shared products
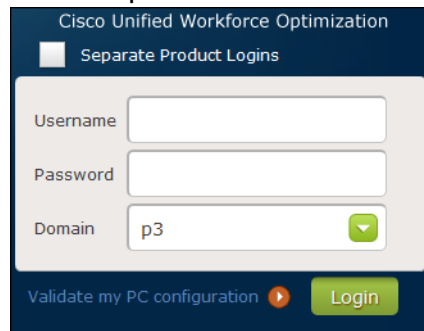
- If the user interface is configured to share common login fields for multiple products and you want to log into each product with different login credentials, select the Separate Product Logins check box. The Login window (Figure 3) will display login fields for each product. The check box for each product is selected by default. To log into only one product, clear the check box next to the product name you do not want to access, and then enter your user name, password, and domain, if required, for the selected product.

Figure 3.   Login window for multiple products

If you are using Active Directory, the Domain drop-down list displays the domains that are common to both products. This is true for both shared and unshared logins. For example, if one product has domain p1, and the other product has domain p2, the other product drop-down list displays p1 and p2. Choose the correct domain for your username and password.

If you want the user interface to display text in a different language from the default language, choose the language from the Language drop-down list. The language you choose applies to all products. When you choose a language, the page is refreshed and the Login page displays the fields in the selected language.

When you choose a language, the choice persists between sessions and per user as a cookie. For example, if two users log in to the same machine using the same username and password at different times, they are changing the same cookie when they choose a language. If two users log in to the same machine using different usernames and passwords at different time, they are using different cookies when they choose a language. The cookie is associated with the user's login profile.

Once you log into these products through the user interface, you have access to the applications associated with each product, and the applications appear enabled in the toolbar at the top of the screen. Your access to all applications for each product persists as long as you have access to at least one application.

If one of the products is unavailable when you log in, the applications for that product will not be available.

Points to Remember

When logging into the user interface, remember the following points:

- Each product has a set of unique login requirements. You cannot log in to the user interface if:

  – Your license has expired

  – You are a deactivated manager or you are a manager without a group

  – You are a deactivated supervisor or you are a supervisor without a team

  – You are an evaluator without active groups

  – You are an agent or knowledge worker and you are not assigned to a team

  – You are a deactivated agent or knowledge worker without a team

- When the login credentials are correct, the user can access all applications in the user interface assigned to their role in the following instances:

  – A single-product configuration

  – A multiple-product configuration where the user enters a common username and password for all products using the shared login feature (the Separate Products Logins check box is cleared)

  – A multiple-product configuration where the user enters the correct username and password for each product when the Separate Products Logins check box is selected.

- When the login credentials are incorrect, an error message appears and the user cannot continue until the problem is resolved in the following instances:

  – A single-product configuration

  – A multiple-product configuration where the user enters a common username and password for all products using the shared login feature

- When a user has unique usernames and passwords for two or more products, the user can only access the applications where the login credentials are correct. No error message appears if one or more of the login credentials are incorrect in the following instances:

  – A multiple-product configuration where the user enters an incorrect username and password for one or more products when the Separate Products Logins check box is selected.

  – A multiple-product configuration where the user enters an incorrect username and password for one or more products when the using the shared login feature.

If the login fails for one ore more of the products, select the Separate Product Logins check box to isolate the login issue by separately entering the login credentials for each product. The Separate Products Logins check box displays an error message that identifies the product associated with the login failure.

- If you are an administrator, log in to either one or all products as an administrator. Do not log in to one product as an administrator and another product as a user at the same time. The Dashboard might not behave as expected.

- If you are running multiple products from the same user interface, the user interface uses the same locale for each product. The Language drop-down list only displays languages that are common to all products.

- Your language selection is automatically saved as a cookie. You do not need to select the language each time you log in.

Validating Your PC

Before you log in to the user interface for the first time, validate your PC. This task ensures your PC is compatible with the user interface.

TASK

1. Enter the following URL in your web browser, where <Base server> is either the IP address or hostname of the user interface.

```
https://<Base server>
```

STEP RESULT: The Login window appears.

2. Click Validate my PC Configuration.

    - If the Results column displays Good for each feature you can log into the user interface.

    - If you get a Bad result, click Bad for additional information. A dialog box appears with instructions and, if applicable, hyperlinks to the required software. Correct the problem, and then click Validate my PC Configuration again.

        Contact your system administrator if any value other than Good appears in the Results column and you are not able to resolve the problem.

STEP RESULT: The Diagnostics window appears (Figure 4). The Diagnostics window displays the results for each product's features. If only one product is installed, the window only displays the features for that product. Some of the values that appear in the Diagnostics window are browser dependent. See the Desktop Requirements Guide for more information on browser dependencies.

Figure 4.   Diagnostics window

Diagnostics				
Product	**Feature**	**Supported**	**Found**	**Result**
QM	Browser Type and Version	Microsoft Internet Explorer 8,9	Mozilla Firefox 24.0(32-bit)	🔴 Bad
QM	Platform	Microsoft Windows	Microsoft Windows	✅ Good
QM	Min JRE Version	1.7.0.7	1.7.0.25(32-bit)	✅ Good
QM	JRE Family Version	1.7	1.7(32-bit)	✅ Good
QM	Java Plugin Installed/Enabled	True	True(32-bit)	✅ Good
QM	Popup blocker enabled	False	True	🔴 Bad
QM	Screen Playback supported	True	False	🔴 Bad

CalabrioONE Component Versions	
Component	**Version**
User Interface	3.0.304.0
Cisco Quality Management	10.0.1.3000

NOTE: The Java Plug-in is automatically installed when you install the required JRE. Depending on how the web browser you are using is configured, you might need to enable the Java Plug-in. Screen Playback is enabled when the Java Plug-in is enabled.

The Component Versions window displays the current versions of the user interface and each product associated with this user interface.

Clearing Your Cache

If the user interface does not display screens properly (for example, you see a blank screen), log out, clear your cache, and then log in again.

To clear the cache for your web browser, perform the following task:

TASK

- In Microsoft Internet Explorer, choose Tools > Internet Options, select the Delete Browsing History on Exit on the General tab, click Delete, click OK, close the browser, and then restart the browser.

Logging In

PREREQUISITE You must have a username and password for the user interface in order to log in.

This task shows you how to log in to one or more products.

TASK

1. Enter the following URL in your web browser, where <Base server> is either the IP address or hostname of the user interface.

   `https://<Base server>` or `http://<Base server>`

   STEP RESULT: The Login window appears.

2. Complete the remaining fields in the Login window, and then click Login.

   ADDITIONAL INFORMATION: Pressing the Enter key only works when your cursor is in the Password field. If your cursor is in the Domain field, pressing the Enter key will not log you in to the user interface.

   STEP RESULT: If you successfully log in to each product, the applications for each product appear in the toolbar at the top of the screen.

   If you are logging in to multiple products and the login for all products fail, the Login window appears. Reenter your username and password, and try again.

   If you are logging in to multiple products and the login fails for only one of the products, a Login Failure dialog box appears for that product. Reenter your username and password, and try again.

Logging Out

This task shows you how to log out of the user interface.

TASK

- To log out of the user interface, move your cursor over <user name> in the upper right corner, where <user name> is your name, in the Signed In field, and then click Log Out.

  STEP RESULT: You have explicitly logged out of the user interface.

- To exit the user interface, close the web browser.

ADDITIONAL INFORMATION: You have implicitly logged out of the user interface.

You can log back in to the user interface at any time.

Logging Out Due to Inactivity

The administrator can configure the user interface so that after a specified amount of idle time, it automatically times out your session. You are logged out and the web browser remains open. By default, this feature is not enabled.

If the user interface logs you off due to inactivity, the Login window displays the following message:

```
You have been logged out as a result of being inactive
for <number> minutes.
```

Where <number> specifies the number of minutes of inactivity.

NOTE: If you are in the process of exporting a recording when the user interface times out, the export will continue.

Access Based on Role

Table 1 shows the features available by role and Quality Management license.

Table 1.   Access based on license and role

| Role | Dash board | Recording | | Live Voice Monitoring[a] | Recording Monitoring | Report ing | License |
		Evaluate and Review	Search and Play				
Archive User	--	--	x	--	x	x	CR, CRA
Manager	--	--	--	x	x	x	CR, CRA
Supervisor	--	--	x	x	x	x	CR, CRA
Agent	--	--	x	--	--	--	CR, CRA
Knowledge Worker	--	--	x	--	--	--	CR, CRA

Role	Dash board	Recording		Live Voice Monitoring[a]	Recording Monitoring	Report ing	License
		Evaluate and Review	Search and Play				
Archive User	x	--	x	--	--	x	QM, QMA, AQM, AQMA
Evaluator	x	x	--	--	--	--	QM, QMA, AQM, AQMA
Manager	x	x	x	x	--	x	QM, QMA, AQM, AQMA
Supervisor	x	x	x	x	--	x	QM, QMA, AQM, AQMA
Agent	x	x	x[b]	--	--	x	QM, QMA, AQM, AQMA
Knowledge Worker	x	x	x[b]	--	--	x	QM, QMA, AQM, AQMA

a. If you want to enable Live Voice Monitoring for an evaluator or archive user, assign the manager role to the users.

b. Only if enabled by the administrator. Agents who are not assigned to a team can still log into the user interface and access their contact recordings.

Applications by Role

Table 2 shows the applications available by role.

> **NOTE:** Permissions are configured per evaluation form.

Table 2.   Access based on role

		Roles					
Applications		**Agent or Knowledge Worker**	**Super visor**	**Manag er**	**Evalu ator**	**Archive User**	**Adminis trator**
Voice Recording		x	--	--	--	--	--
Screen Recording[a]		x	--	--	--	--	--
Dashboard		x	x	x	x	x	x
Recording	Play	x	x	x	x	x	--
	View Evaluation[a]	x	x	x	x	x	--
	Evaluate[a]	--	x	x	x	--	--
Live Voice Monitoring[a, b]		--	x	x	--	--	--
Recording Monitoring		x	x	x	--	--	--
Reporting	Run Report	x	x	x	x	x	--
	Schedule Report	--	x	x	x	x	--

a. Requires one of the following licenses: QM, QMA, AQM, or AQMA.
b. If you want to enable Live Voice Monitoring for an evaluator or archive user, assign the manager role to these users.

Scoping Rules

Your role not only controls what information is available to you, but also the scope of that information. In this case, "scope" refers to the contacts you can view and/or evaluate.

Scoping Rules and HR/Training Recordings

The scoping rules described in this section do not apply to contacts marked as Training recordings, which can be reviewed by all roles. The scoping rules do apply to all other recordings, including those marked as HR recordings.

Administrator ID

The administrator ID can configure contents of the Dashboard view by role. The administrator can also lock down a dashboard.

Agents and Knowledge Workers

Agents and knowledge workers can view only training recordings and their own evaluated contacts. Agents can also see their own archive recordings if enabled by the administrator.

Supervisors

Supervisors can view contacts made only by their currently active teams. For example, if a supervisor had been assigned to Team A last week, but is now assigned to Team B, that supervisor can view only contacts recorded by currently active agents on Team B. This includes contacts recorded by the Team B agents before the supervisor was assigned to Team B.

Managers

Managers can view contacts made only by their currently active groups. For example, if a manager had been assigned to Group A last week, but is now assigned to Group B, that manager can view only contacts recorded by currently active agents on currently active teams in Group B. This includes contacts recorded by the Group B agents before the manager was assigned to Group B. Managers can also view training and HR contacts.

Evaluators

Evaluators can view contacts for all currently active groups, teams, and agents. Evaluators cannot see any contacts made by deactivated groups, teams, and agents.

Archive Users

Archive users can view all archive contacts made by all active and inactive groups, teams, and agents.

Active Role Access

Active groups and teams are currently in use. Inactive groups and teams are no longer used, but still have history that needs to be taken into account for such things as historical reporting.

With the exception of archive user, the user interface is only concerned with active groups, teams, and agents.

Displaying Multiple Browser Tabs

You can display multiple applications in different browser tabs during the same session.

Multiple Browser Tabs Guidelines

If you want to log in to the user interface using multiple browser tabs, follow these guidelines:

- You must log in to the user interface as a user from one browser tab on your PC. Each additional browser tab that you open will be associated with the username you used to log in to the first tab.

- Logging in or out of one browser tab effects all concurrent browser tabs.

- Only use multiple concurrent browser tabs to view screens. Do not initiate actions (for example, approving an agent's request, editing schedules, or adding events evaluating contacts, applying widget settings, or creating a contact).

  NOTE: Initiating actions as one user using multiple browser tabs is not supported and might cause synchronization issues.

- If you need to initiate an action, close all but one of your browser tabs before initiating the action.

Displaying Applications in Multiple Browser Tabs

TASK

1. Log in to the user interface.

2. Copy the Uniform Resource Locator (URL) from the browser's Address field.

3. Open a new browser tab, paste the URL in the browser's Address field, and press Enter.

4. Click the application button you want to appear in the new browser tab.

   STEP RESULT: The new browser tab displays the selected application.

5. Repeat step 3 through step 4 for each additional browser tab.

Dual Monitor Configuration

When configuring display properties on a machine running the user interface with dual monitors, additional host monitors must be located below or to the right of the primary display monitor in the Display Properties window. Any monitor located above and/or to the left of the primary display monitor will not be visible (this is a Windows restriction).

Figure 5 shows the Display Properties window.

Figure 5. Display Properties window
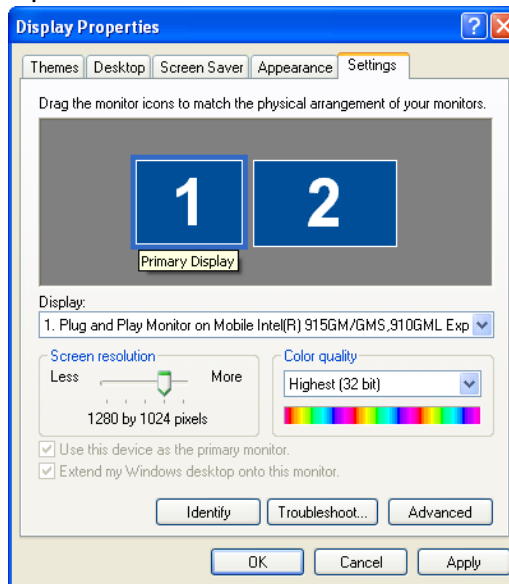
Using a Dual Monitor Configuration

TASK

- To view a popup window on another monitor, click and drag the popup window to the other monitor.

STEP RESULT: You can now view the user interface on one monitor and the popup window on the other monitor.

At a Glance

The user interface (Figure 6) is divided into the following sections.

- Toolbar—the toolbar at the top of the window that displays navigation buttons you can use to perform the following tasks:

  - Access the user interface's common applications.

  - View the name of the user who is currently signed in to the user interface. To log out, move your cursor over <user name> in the Signed In field, and then click Log Out.

  - View the number of new alerts and display a list of alerts. The Alerts button also displays number of new messages available. When you click one of the alerts in the list, an Alert Notification dialog box displays more information.

    Alerts occur when a significant event happens.

    For more information, see "Alerts" on page 24.

  - Access the available help by product.

- Application pane—the center region displays the application.

- Widget—a self-contained application that can be configured for a specific purpose.

Figure 6.   User interface
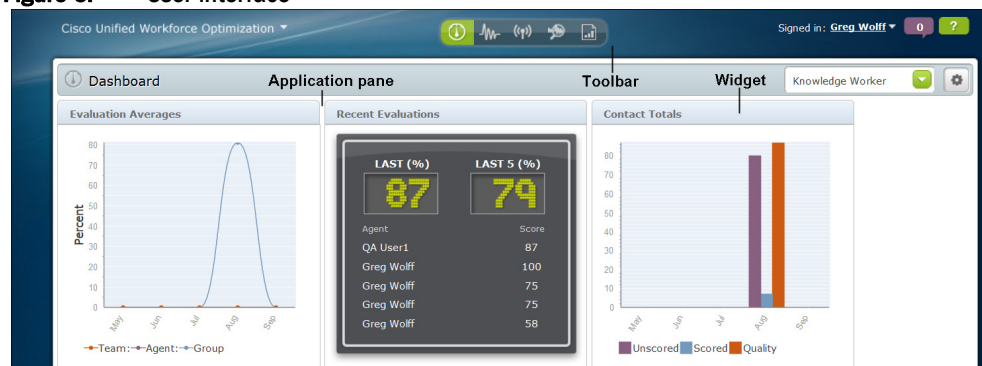
Toolbar

Table 3 describes the buttons that appear in the toolbar at the top of the screen.

Table 3.　　　Toolbar

Button	Icon	Description
Dashboard		Provides information based on the products installed with the user interface. Administrators can log in to the user interface and lock down the Dashboard by role.
Recordings		Allows you to do the following: • Search the stored archives for specific contact recordings. • Review a list of contacts and from this list access the associated recordings and evaluations.
Live Monitoring		Allows supervisors and managers to monitor the audio for active calls for users in their scope.
Recording Monitoring		Allows you to monitor the recording status of active calls within your scope.
Reporting		Allows you to generate evaluation reports and system reports
Signed In	NA	Displays the name of the current user. To log out, move your cursor over <user name> in the Signed In field, and then click Log Out.
Alerts	5	Displays a list of alerts. For more information, see "Alerts" on page 24.
Help	?	Displays the available help by product.

The drop-down menu ▼ by the logo allows you select the application you want to use. The menu lists all the applications that appear in the toolbar and any sub-menus associated with each application.

Alerts

The user interface generates alerts when a significant event happens, and sends them to agents, evaluators, supervisors, and managers.

The user interface uses the following methods to provide additional information about alerts.

- New alerts briefly appear as a popup by the Alerts button.

- The Alerts 5 button displays the number of new messages available.

- Unacknowledged alerts appear in highlighted text. You can click the alert to view the message details in the Alert Notification dialog box (Figure 7). You can only view the details of one message at a time.

Figure 7.   Alert Notification dialog box
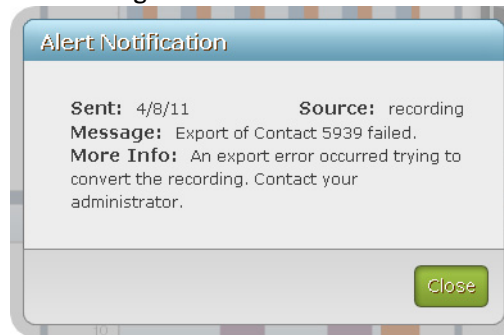
- Alerts remain in the list for seven days. After seven days, the user interface automatically deletes the alerts regardless of whether you have read them or not.

  After the seventh day, alerts might still appear in the list of alerts. You must log out of the user interface and then log back into the user interface before the alerts are removed from the Alerts application.

  NOTE: If you are logged into multiple sessions of the user interface, you must log out of all sessions before alerts are removed from the Alerts application.

Table 4 describes the fields in the Alerts Notification dialog box.

Table 4.   Alert Notification dialog box fields

Field	Description
Sent	The date the alert was sent.
Source	The component that generated the alert.
Message	A brief description of the alert.
More Info	Additional information regarding the alert.

When Alerts Appear

Alerts appear when a significant event happens, for example:

- A contact moves from Unscored, In Progress, or Scored state to the Needs Approval state. An alert is sent to all evaluators, supervisors, and managers who have access to the contact based on existing scoping rules, and are required to approve the evaluation.

- A contact moves from the Unscored, In Progress or Needs Approval state to the Scored state. An alert is to the agent associated with the contact, and the supervisors and managers who have access to the contact based on existing scoping rules.

- A requested contact recording has been exported and is available for download.

- A scored contact, completed for an agent, requires approval when there are no approvers configured to approve the contact recording. An alert must be sent to an approver when a contact completes. For example, a supervisor can approve but the agent is no longer on the supervisor's team or a manager can approve but the agent's team is not in the manager's group.

- Users who are not logged in when an alert is generated will get the alert when they log into the user interface.

You should also note the following:

- The user who triggers the alert does not receive the alert.

- An alert is not triggered when a new comment is added to an evaluation form.

Managing Alerts

Task

- To view an alert, click Alerts 5 in the toolbar and then click an alert in the list to display more information. When finished, click Close to dismiss the Alert Notification dialog box.

- To delete an alert, click Delete ⊠.

- To close the list of alerts, click Alerts 5.

Application Pane

The application pane displays the application you select from the toolbar. See "Toolbar" on page 24 for more information on available applications.

The applications available to you depend on your role and software license.

Applications

All applications available in the user interface have the same basic layout.

Table 5 lists the application buttons.

Table 5.   Application buttons

Icon	Name	Description
NA	Apply	Saves your changes.
NA	Cancel	Exit without saving changes.
⚙	Settings	Displays the configurable settings for this application. Click the icon again to hide the settings.

An Error icon 🔴 appears next to a field when you enter the wrong information.

Tables

The interface often displays information in tables. These tables can be modified to your preferences.

Sorting Tables

Data that is presented in tabular form can be sorted based on the contents of a single column in the table. The sort can be ascending or descending.

When you click a column header, a small triangle at the right of the primary sort column heading displays the direction of the sort, ascending or descending.

Consider the following limitations when sorting tables:

- You cannot sort encrypted metadata in the Recordings application.
- You cannot sort data in the Live Voice Monitoring application.

Managing Tables

T<small>ASK</small>

- To sort a table by one column, click the column heading. Click again to reverse the sort order.

- To move a column, click the column header, then click in the column and drag the column to the location you want it to appear.

- To change the size of a column, drag the column edge to the required width.

- If the table is long, use the scroll bar at the right of the table to move up and down the table.

- If the table is wide, use the scroll bar at the bottom of the table to move left and right.

A<small>DDITIONAL</small> I<small>NFORMATION</small>: There is no Save button.

Moving Items between Lists

The following applications allow you to move items between lists:

- Dashboard

- Reporting

T<small>ASK</small>

- Use these mouse actions to move items between lists:

  – To move an item from one list to another list, click the item in one list and drag it to the other list.

  – To move multiple contiguous items, click the first item in the list, shift-click on the last item in the list, and then drag the items to the other list.

  – To move multiple noncontiguous items, press the Ctrl key while selecting each item in the list, and then drag the items to the other list.

  – To move an item from one location in a list to another location in the same list, click and then drag the item to the location you want it to appear in the list.

  – To move multiple contiguous items in a list to another location in the same list, click the first item in the list, shift-click on the last item in the list, and then drag the items to the location you want it to appear in the list.

  – To move multiple noncontiguous items in a list to another location in the same list, press the Ctrl key while selecting each item in the list, and then drag the items to the location you want it to appear in the list.

Time Zone Considerations

The user interface displays time in two different ways, depending on where it appears.

Time in the Desktop Interface

In the user interface, the time associated with a contact is the time the contact occurred at the agent's location, expressed in a format appropriate to the locale. For example, if the agent is located in Chicago, IL, USA, the time associated with any contacts made by that agent is Central Standard Time (CST).

The contact also displays the abbreviation for the local time zone. If the time zone associated with the contact is unknown to the user interface, then the time is displayed in Greenwich Mean Time (GMT).

Time in Reports

In all reports except system status and user recording status, the time associated with a contact is the time the contact occurred at the agent's location in a format appropriate to the locale, with a designated time zone.

In system status and user recording status reports, the time associated with a contact is in a format appropriate to the locale plus the GMT offset. For example, the time for a contact made by a Chicago agent at 3:42 PM CST appears as 9:42 PM GMT -06:00.

Dashboard

The Dashboard application (Figure 8) is a common (multi-product) application that contains product-specific widgets. It is displayed by default when you log in.

The widgets that you see depends on which products you log into, your role, and the dashboard view assigned to you by the administrator. For example, if you log into two products as an agent, you will see the widgets for both those products that the administrator configured for the agent dashboard. If one of the products is down, the widgets associated with that product do not appear.

Figure 8.   Dashboard application
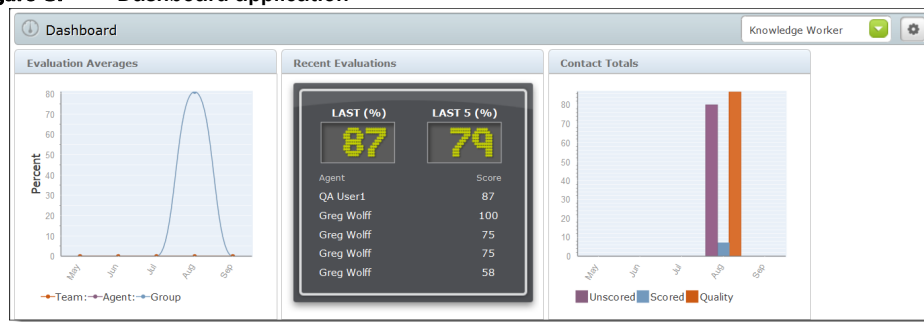
The dashboard displays all widgets in a continuous sequence, left to right and top to bottom. Blank spaces between widgets are not allowed.

If enabled by your administrator, you can click Settings to customize the layout and contents of your dashboard. You can:

- Select the widgets to display

- Rename widgets

- Configure widget settings

- Reposition the widgets in the dashboard

Changes made to the dashboard or widget settings are saved automatically and persist until they are changed by either you or the administrator.

Besides the Settings button in the toolbar, administrators have access to a drop-down list box that contains a list of roles. The administrator selects the role whose dashboard view is to be configured.

Available Widgets by Role

The the following list displays the widgets that are available to users according to their role. You might see all or a subset of these widgets in your dashboard, depending on how your administrator configured the dashboard for your role.

If you are logged into other products, you will see widgets for those products as well. Consult the user documentation for the other products for complete widget descriptions.

Agents

- Contact Totals
- Evaluation Averages
- Evaluation Ranges
- Recent Evaluations

Archive Users

- Contact Totals

Evaluators

- Contact Totals
- Evaluation Averages
- Recent Evals Performed
- Recent Evaluations

Knowledge Workers

- Contact Totals
- Evaluation Averages
- Evaluation Ranges
- Recent Evaluations

Managers

- Contact Totals
- Evaluation Averages
- Evaluation Ranges
- Recent Evals Performed
- Recent Evaluations
- Speech Statistics (must be logged into Speech Analytics)

Supervisors

- Contact Totals

- Evaluation Averages

- Evaluation Ranges

- Recent Evals Performed

- Recent Evaluations

- Speech Statistics (must be logged into Speech Analytics)

Dashboard Roles and Scope

The scope of the Dashboard application is based on your highest role. If you are a supervisor and an agent, your access to the Dashboard application is based on the supervisor role.

> NOTE: The Dashboard application does not display relevant data if the user is not assigned to a team.

Table 6 shows the filter choices available to you in the Dashboard application based on role. This table does not apply to Evaluators and Archive Users, since they do not have access to Dashboard.

Table 6. Filtering roles and scope for Dashboard application

Role	Group	Team	Agent
Manager	Enabled[a]	Enabled[a]	Enabled[a]
Supervisor	Disabled[b]	Enabled[a]	Enabled[a]
Agent	Disabled[b]	Disabled[c]	Disabled[d]
Knowledge Worker	Disabled[b]	Disabled[c]	Disabled[d]

a. The drop-down list is populated based on user's scope.
b. The drop-down list is populated based on the user's group.
c. The drop-down list is populated based on the user's team.
d. The drop-down list displays only the user's name.

This allows you to change the view (group, team, and agent) and the scope (specific group, specific team, and specific agent) in the Dashboard application. The scope of the report is based on the lowest selection you chose in the Settings pane.

Table 7 displays the scope for the report list.

Table 7.   Report list scope

Report List Scope	Selected Group Filter	Selected Team Filtered	Selected Agent Filter
Agent Scope	Yes	Yes	Yes
Team Scope	Yes	Yes	No
Group Scope	Yes	No	No

Default Widget Settings by Role

The default settings for Group, Team, and Agent are based on your highest role. Table 8 shows the default widget settings by role.

Table 8.   Default widget settings by role

Settings	Agent or Knowledge Worker	Supervisor	Manager	Evaluator	Archive User
Group	Your Group	Your Group	Your Group	First Group[a]	First Group[a]
Team	Your Team	Your Team	All	All	All
Agent	Yourself	All	All	All	All

a. The first group that appears in the list. You can choose any group that appears in the list.

Widget Toolbar

When you mouse over a widget toolbar, one or two buttons become visible. Table 9 describes these toolbar buttons.

Table 9.   Widget toolbar buttons

Button	Icon	Description
Action Link		Closes the current application and opens another application that displays information related to the widget.
Settings		Displays the configurable settings for this widget. When you apply changes to the settings, the changes persist each time you log in. Click the icon again to hide the settings.

Widget Settings

The Widget Settings window allows you to customize the settings for the selected widget.

Table 10 defines the fields that can appear in the Widget Settings window. Only fields that apply to a specific widget appear in the widget settings window.

> **NOTE:** Some widgets might not display one or more of these settings because the data is either unavailable or not applicable.

Table 10.   Widget Settings fields

Field	Description
Range	The date range for the historical information. The possible values are as follows: • 1 - 12 Months The default range is: • The past six months for the Contact Totals, Evaluation Averages, and Evaluation Ranges widgets • The past month for the Speech Statistics widget
Chart	The type of chart you want to appear in this widget. The possible values are: • Line Graph—displays metrics as a line. The default setting • Stacked Bar—displays metrics stacked on top of each other • Vertical Bar—displays metrics next to each other (for example, Below, Meets, and Exceeds)

Field	Description
Eval Form	The name of the evaluation form. The default setting is All.
Group	The name of the group. The default setting is determined by your role. See "Default Widget Settings by Role" on page 1for more information about the default setting.
Team	The name of the team. The default setting is determined by your role. See "Default Widget Settings by Role" on page 1 for more information about the default setting.
Agent	The name of the agent. The default setting is determined by your role. See "Default Widget Settings by Role" on page 1 for more information about the default setting.

Widget Descriptions

The Dashboard application provides a summary and detail display of the contact center's performance statistics for the last twelve months by agent, team, and group. The summary displays are in the form of bar charts and graphs.

There is a standard set of statistics displayed in the Dashboard application, but the level at which the statistics are presented depends on your role as agent, knowledge worker, supervisor, or manager. The Dashboard application also enables you to filter the contact center's performance statistics based on filtered search results.

See "Dashboard Roles and Scope" on page 33 for more information on the filter fields.

Scoping Differences between Dashboard and Reports

There are no differences between the Dashboard application and the following graphical reports in the Reporting application.

- Quality Averages Graph
- Evaluations Totals Graph
- Contact Totals Graph

Table 11 summarizes how the values reported are different, based on where the information appears.

Table 11.   Scoping differences between Dashboard and Reporting

Information Type	Dashboard	Reporting
Date ranges	Displays only completed months. For example, the Past Month is the last completed month. The current month is from the first day of the month to the current day.	Uses explicit date ranges selected by the user.
Roles	Displays data based on the current role.	For managers and supervisors, the current role determines the reports available. The groups, teams, and agents that are available for selection are based on the groups or teams that are currently managed or supervised, and which agents are currently on those teams.
Content and calculations	Calculations and totals are based on the current role. For example, to calculate a group's current average, all agents currently in the group and all their contacts are calculated into the average, whether or not they were in this group when those contacts occurred.	Calculations, totals and the contents of each report are based on historical configurations. For example, to calculate a group's historical average for a specified time period, all contacts that occurred for any agent that was on the team at any point in the time range is calculated into the group average for that time period. Note that if an agent was just added to the group, but all of the agent's contacts occurred before the agent was added, none of those contacts are calculated in the group average.
Organizational changes	Displays data based on the current organizational structure. For example, an agent that was recently removed from a supervisor's team will not appear in that supervisor's data.	Displays data based on the historical structure. For example, an agent will appear on a supervisor's team in a report if the agent was present on that team during the selected date range.

Points to Remember

Remember the following points when working with the Dashboard application.

- The Dashboard application defaults to your highest role. For example, if you are assigned the agent and supervisor roles the Dashboard application automatically displays the performance statistics associated with the supervisor role.

- Groups and teams are listed alphabetically in drop-down lists. The first group in the list appears in the Dashboard application by default. If a group contains multiple teams, All appears in the Dashboard application by default.

- If an agent's average is the same as the team or group, the Agent average is overlayed by the Team Average or Group Average.

- All displayed scores are rounded up for the purposes of determining which category (Exceed, Meet, or Below) the score falls in.

Evaluation Averages Widget

The Evaluation Averages widget displays the current evaluation averages for the selected group, team, or agents.

The Evaluation Averages widget displays one or more of the following data elements.

- Team
- Group
- Agent

The Action Link displays the Quality Averages Graph (Reporting > QM > Quality Averages Graph) using the filter values specified in Widget Settings. See "Quality Averages Graph" on page 133 for more information on this report.

Contact Totals Widget

The Contact Totals widget displays the current contact totals for the selected group, team, or agents.

The Contact Totals widget displays these data elements by default.

- Scored
- Unscored
- Quality

See "Widget Dictionary" on page 40 for a description of the data elements.

The Action Link displays the Contact Totals Graph (Reporting > QM > Contact Totals Graph) using the filter values specified in Widget Settings. See "Contact Totals Graph" on page 134 for more information on this report.

Recent Evaluations Widget

The Recent Evaluations widget displays the results for the most recent evaluations performed by all evaluators for the selected group, team, or agents.

The Recent Evaluations widget displays the following data elements.

- Last (%)
- Last 5 (%)

See "Widget Dictionary" on page 40 for a description of the data elements.

The Action Link displays the Recordings application.

Recent Evals Performed Widget

The Recent Evals Performed widget displays the results for the most recent evaluations performed by you for the selected group, team, or agents.

The Recent Evals Performed widget displays the following data elements.

- Last (%)
- Last 10 (%)

See "Widget Dictionary" on page 40 for a description of the data elements.

The Action Link displays the Recordings application.

Evaluation Ranges Widget

The Evaluation Ranges widget displays the current evaluation ranges for the selected group, team, or agents.

The Evaluation Ranges widget displays the following data elements.

- Below
- Meets
- Exceeds

The Action Link displays the Evaluation Totals Graph (Reporting > QM > Evaluation Totals Graph) using the filter values specified in Widget Settings. See "Evaluation Totals Graph" on page 134 for more information on this report.

Speech Statistics Widget

The Speech Statistics widget displays run-time statistics for the analytics tasks.

> NOTE: This widget only appears when you are simultaneously logged into CAS and Quality Management.

The Speech Statistics widget displays these data elements by default.

- Average Task Duration
- Failures
- Total Hits
- Contacts Analyzed
- Tasks Run

See "Widget Dictionary" on page 40 for a description of the data elements.

Widget Dictionary

Table 12 describes the fields in the widgets.

Table 12. Widget dictionary

Field	Description
Agent	A data element on a chart that represents an agent.
Agent Average	The average score the agent has earned for the selected date range.
Average Task Duration	The average duration of an analytics task.
Below	The total number of evaluated contacts whose scores fall below expectations. The default score range is 0–74%. The administrator can modify this range.
Call Duration	The duration of the contact (length of time between call answered and call dropped) in HH:MM:SS.

Field	Description
Contacts Analyzed	The number of contact recordings analyzed.
Date	The contact date.
Evaluations	The number of evaluations
Exceeds	The total number of evaluated contacts whose scores exceeds expectations. The default score range is 90–100%. The administrator can modify this range.
Failures	The number of analytic task failures.
First Name	The agent's first name.
Group	A data element on a chart that represents a group.
Group Average	The average score the group has earned for the selected date range.
Last 5 (%)	The average percentages score for the last five evaluations as determined by evaluation date and time.
Last 10 (%)	The average percentages score for the last ten evaluations performed by you as determined by evaluation date and time.
Last Name	The agent's last name.
Last (%)	The widget in which this field appears determines the definition. • Recent Evaluations—the percentage score for the last evaluation as determined by evaluation date and time • Recent Evaluations Performed—the percentage score for the last evaluation performed by you as determined by evaluation date and time
Meets	The total number of evaluated contacts whose scores meets expectations. The default score range is 75–89%. The administrator can modify this range.
Name	The name of the group, team, or agent.
Quality	The number of quality calls.
Score	The evaluation score given to the contact.
Scored	The number of scored contacts.

Field	Description
Score Std Dev	The standard deviation of the group's score or team's score. A low standard deviation (closer to 0) indicates that scores are grouped closely to the mean score. A higher standard deviation (further from 0) indicates that scores are far from the mean. A lower standard deviation is an indicator of consistent performance; a higher standard deviation is an indicator of variable performance.
StdDev	The standard deviation of the agent's score. A low standard deviation (closer to 0) indicates that scores are grouped closely to the mean score. A higher standard deviation (further from 0) indicates that scores are far from the mean. A lower standard deviation is an indicator of consistent performance; a higher standard deviation is an indicator of variable performance.
Tasks Run	The number of analytics tasks run.
Team	A data element on a chart that represents a team.
Team Average	The average score the team has earned for the selected date range.
Team Name	The name of the team.
Total Evaluations	The total number of evaluations.
Total Hits	The number of analytic hits.
Unscored	The number of unscored contacts.

Administrators

By default, a user's dashboard contains every widget available for their role. Administrators can customize dashboards by role by configuring which widgets appear, how they are named, what information they contain, and how that information is presented.

If users are already logged in when the administrator customizes their dashboard, those users will not see any changes in their dashboard. They will continue to see either the default dashboard for their role, or the dashboard they have customized for themselves.

If the administrator customizes a dashboard for a role and then locks it down, users with that role will see the customized dashboard the next time they log in. The locked-down dashboard overrides default and user-defined dashboards, and individual users will no longer be able to change anything in their dashboard.

Configuring the Dashboard by Role

PREREQUISITE

You must log in using the username and password for the administrator ID.

TASK

1. Select a role from the Role drop-down list in the Dashboard toolbar and then click Settings to display the Configure Dashboard Widgets window.

   a. Drag the widgets you want to appear on the dashboard from the Available Widgets list to the Selected Widgets list. To move widgets back to the Available Widgets list, select them and then click Delete Selected Widgets.

   b. If you want to rename a widget, double-click the widget in the Selected Widgets list and customize its name as desired.

   c. If you want to lock down the dashboard so that users cannot change it, select the Lock Down check box.

2. Click Apply to save your changes and close the Configure Dashboard Widgets window.

3. If desired, rearrange the order in which the widgets appear in the dashboard by dragging them into place. A Down Arrow ⬇ appears when you drag the widget to a legitimate position.

   – You can also arrange widgets in the Configure Dashboard Widgets window, but it is recommended you arrange them in the dashboard to show you what the users will actually see.

   – You cannot drag a widget to an empty space.

4. Configure the settings for each individual widget as desired.

Agents, Knowledge Workers, Supervisors, Managers, Evaluators, and Archive Users

The content of your dashboard depends on if the dashboard is unlocked, or if the administrator has configured the dashboard for your highest role and then locked it down.

Managing Your Unlocked Dashboard

If the administrator has not locked your dashboard, you are free to customize it as you desire. The changes you make override the default dashboard or the customized dashboard your administrator has configured for your role. Your customized dashboard will persist in future login sessions unless your administrator configures and then locks a dashboard for your role.

With an unlocked dashboard, you can do the following:

- Rearrange the widgets on your dashboard. Click the widget toolbar and drag the widget to a new location. A downward-pointing arrow appears when the widget is dragged to a legitimate location.

- Add or delete widgets from your dashboard. Click Settings on the dashboard toolbar to open the Configure Dashboard Widgets window, To add widgets, drag them from the Available Widgets list to the Selected Widgets list. To delete widgets, select them in the Selected Widgets list and click Delete Selected Widgets.

- Rename widgets. In the Configure Dashboard Widgets window, double-click the widget you want to rename, type the new name in the Rename Widget dialog box, and click Apply.

- Configure the content and appearance of widgets. Click Widget Configuration in the widget toolbar and set up the data and type of chart you want to see displayed in the widget. See "Widget Descriptions" on page 36 for more information on what you can configure for individual widgets.

Managing Your Locked Dashboard

If the administrator has locked your dashboard, you can no longer change most features. The dashboard Settings icon is disabled.

When the dashboard is locked, you cannot do the following:

- Add or remove widgets from the dashboard.

- Reposition widgets in the dashboard.

- Rename widgets.

- Configure individual widgets to change the data and type of chart displayed.

If the widget does not include selections for agent or service, the Configure Widget icon is disabled in the widget toolbar.

Recordings

The Recordings application allows you to perform the following tasks depending on your role and scope.

- Search for specific contacts

- Configure the columns in the Contacts table

- Export contact metadata from a call or non-call contact to Comma-Separated Values (CSV)

- Create a non-call contact

- Review a list of contacts and from this list access the associated recordings, if applicable, and evaluations

- Mark an archive recording for quality

- Mark a contact (call or non-call for calibration)

- Evaluate quality management contacts or non-call contacts

- Export contact recordings

- Tag a contact for Training or Human Resources (HR)

Information about recordings (metadata), if configured, is available immediately after a call is recorded, even though the recording itself has not yet been uploaded. If you need to review such a recording immediately, you can download the recording on-demand as long as the client desktop is on and available.

> **NOTE:** The Media Player is very large. The first time you access the Recordings application it will take several minutes to initialize the Media player. Once the Media Player is cached subsequent loads are much faster.

Roles and Scope

The roles and scope that apply to the Recordings application depend on the type of available contacts and the roles assigned to the user.

The availability of contacts in the Contacts table depends on your role:

- Supervisors have access to archived contacts made by currently active agents on their currently active assigned teams.

- Managers have access to contacts made by currently active agents of their currently active assigned groups.

- Managers and supervisors can play all recordings within their scope.

  If a manager or supervisor opens an Unscored contact within their scope, but does not have the ability to evaluate the Unscored contact, they can still play the contact. In this scenario, the following message appears instead of the evaluation form.

  ```
  You are not allowed to evaluate this contact.
  ```

  If a manager or supervisor chooses All Evaluations and In Progress, the Contacts table displays all In Progress evaluations in their scope.

  If a manager or supervisor chooses My Evaluations and In Progress, the Contacts table displays all In Progress evaluations in their scope that they evaluated.

  If a manager or supervisor logs into both Quality Management and CAS, they can access the Speech Analytics tab in the Media Player and play back phrases.

- Managers, supervisors, and evaluators can create a contact for evaluation.

- Archive users have access to all contacts.

- Evaluators see all active agents' contacts (scored, unscored, in progress, needs approval).

- Agents and knowledge workers see only their own scored contacts and contacts designated as Training.

- Knowledge workers can see all of their own contacts.

- Agents can see recordings tagged only for Archive, if enabled by the administrator.

- The highest role assigned to a user controls the ability to export contact recordings from the Recordings application. If the user is assigned to any role that can export a contact recording, the user can export any contact recording that appears in their Contacts table.

Your Role and Scope

Your highest role determines your scope in the Recordings application. Table 13 shows how your highest role determines your scope.

Table 13.   Your role and scope

Role (Ranked Highest to Lowest)	Scope
Archive User	All contacts of all active and inactive users
Evaluator	All contacts of all active users
Manager	All contacts of active users in the manager's group
Supervisor	All contacts of active users on the supervisor's team
Knowledge Worker	All contacts of self
Agent	Evaluated contacts of self plus archived recordings of self, if enabled

Contact Recording Visibility and Retention

The administrator controls how long contacts recordings are visible in the Recordings application by role. When the time expires for a contact recording, that contact recording is no longer available to the user.

The administrator also controls the amount of time contact recordings are retained for quality management workflows and archive workflows.

See the *Administrator User Guide* for more information on contact recording visibility and retention periods by workflow.

Recording Security Features

All recordings have the following security features.

- Encryption—audio and screen recordings are encrypted for security purposes
  - Audio and screen recordings are compressed and encrypted during network transport
  - Encrypted recordings are uploaded via Hypertext Transfer Protocol (HTTP)

– Stored audio recordings are encrypted with 128 bit Advanced Encryption Standard (AES)

– Stored screen recordings are unencrypted, but they are re-encrypted when streamed to a client for playback via sockets

- Role-based permissions—only authorized users can play back or export recordings

- Audit trail—tracks who accessed the recording system, what they accessed, and when they accessed the recording system

- Payment Card Industry (PCI) compliant—a set of comprehensive requirements for enhancing payment account data security. For a complete description of this feature, see the *PCI Overview* document available on the portal.calabrio.com website.

Recordings Toolbar

Table 14 describes the fields that appear in the Recordings toolbar. These fields display the current statistics for your contact center.

Table 14. Recordings toolbar fields

Field	Description
AQP	Average Quality Percentage for the recordings. The average qualities score for recordings returned by the search.
ATT	Average Talk Time, in seconds, it takes an agent to handle calls. Talk time is elapsed time from when an agent answers a call until the agent disconnects or transfers the call. This includes the time when the agent is actively talking to the caller and the time when the agent places the caller on hold. The average time that agent was in the Talk In, Talking Out, and Talking other states during an interval.
Total	The number of records that match the search. **NOTE:** The table does lazy loading, so it is possible not all the records will initially appear. Also, records are added to the table when you scroll down.

Table 15 describes the buttons that apply to the entire Contacts table.

Table 15.   Recordings toolbar buttons that applies to the entire Contacts table

| Button	Icon	Description
New or Refine Search	NA	Displays the Search Recordings window. See "Search Recordings" on page 51 for more information.
Save		Saves your search settings. Your options are: • Save this Search—saves the current search • Saved Searches—lists the available saved searches
Settings		Displays the configurable settings for this application. See "Configure Fields" on page 58 for more information.
Export Table Data to CSV		Exports the metadata for all contacts in CSV format. See "Export Table Data to CSV" on page 63 for more information.
Create Contact		Adds a non-call contact. See "Create Contact" on page 64 for more information.

Table 16 describes buttons that requires you to select a contact in the Contacts table before the buttons are enabled.

Table 16.   Recordings toolbar buttons that applies to a selected contact

Button	Icon	Description
Export Selected Contact		Exports the selected contact recording. See "Export Selected Contact" on page 66 for more information.
Mark for Quality		Marks the selected contact recording for quality management. This button is enabled when the selected recording has a Reason value of Archive and the recording has been uploaded. See "Mark for Quality" on page 68 for more information.
Mark for Calibration		Marks a contact for calibration. When a contact is marked for calibration it allows the contact to be evaluated by multiple users with evaluation privileges. See "Mark for Calibration" on page 68 for more information.
Tag Call		Applies the Tagged retention time to the selected contact. See "Tag Call" on page 69 for more information.

The Contacts table sometimes contains more contacts than can be viewed in the Recordings window. When a large number of contacts are available, the navigation bar (Figure 9) allows you to quickly navigate through the Contacts table.

Figure 9.   Navigation bar
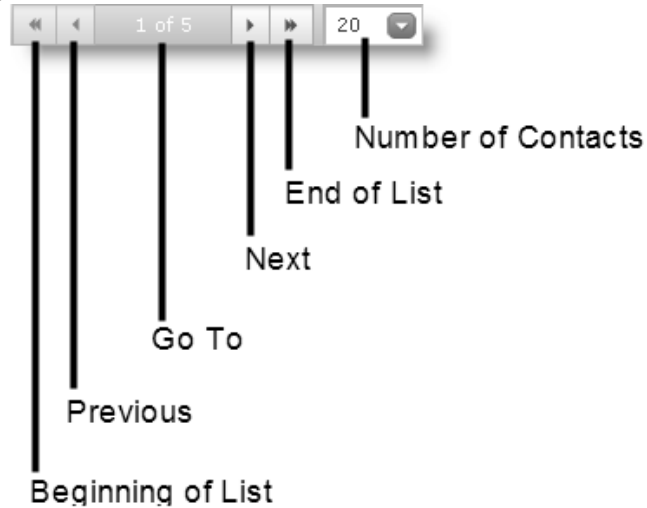
Use the following mouse actions to view contacts in a large table:

- To specify the number of contacts per page, click the Number of Contacts drop-down list and choose a number from the list, or type a number in the field, and then click enter.

- To go to the end of the list, click End of List .

- To go to the beginning of the list, click Beginning of List .

- To go to the next page, click Next .

- To go to the previous page, click Previous .

- To go to a specific page, Click Go To, type a number within the displayed range, and then press Enter.

  NOTE: The user interface supports up to 999 pages. If your list of contacts is greater than 999 pages, "1 of …" appears in the Go to field.

Search Recordings

The Search Recordings window (Figure 10 and Figure 11) allows you to search for contacts using filters.

When you search for recordings or non-call contacts you must specify a date range, specific date or time, or a contact ID. You cannot run a search without specifying at least one of these options.

The selected fields are automatically saved when you click Search. The field settings persist until you add or delete more fields.

Figure 10.　　　Search Recordings window

Figure 11.　　　Search Recordings window after you click Expand Search

Table 17 describes the fields you can use to filter your search.

Table 17.　　　Search Recordings fields

Field	Description
Organization	Search contacts by organization. You can choose from the following options: • Group (first field)—the name of the group. If you choose All, Search Recordings searches all groups • Team (second field)—the name of the team. If you choose All, Search Recordings searches all teams This field is available under Basic Search and Expand Search.

Field	Description
Name	Search contacts by name. You can choose from the following options: • First Name—the user's first name • Last Name—the user's last name. If you are using Active Directory, Search Recordings uses the first and last name created in Active Directory. If you are using QM Authentication, Search Recordings uses the first and last name created in the administrator interface. This field is available under Basic Search and Expand Search.
Phone Number	Search contacts by phone number. You can enter: • Specific numbers (for example, 6125551212). • Number ranges using wildcards (for example, 612*, where the * wildcard stands for any number of digits, or 612555????, where the ? wildcard stands for 1 digit). • The * wildcard to record all calls. The numbers you enter cannot contain dashes or parentheses. This field is available under Basic Search and Expand Search.
Date Range	Search contacts by date range. You can choose from the following options: • Today—the current day • Yesterday—the previous day • In the Past Week—the last seven days • In the Past Month—the last 30 days • In the Past Year—the last 365 days This field is available under Basic Search and Expand Search.
Specific Date	Search contacts by calendar date range. The default date when you switch from Date Range to Specific Date is today's date. This field is available under Basic Search and Expand Search.
Time	Search contacts by range of time. If the start time is greater than the end time, the Search Recordings feature searches contacts over midnight. This field is available under Basic Search and Expand Search.

Field	Description
Search Scope	Search contacts by scope. You can choose from the following options: • All Evaluations—returns all contacts based on the scope of your combined roles • My Evaluations—returns contacts that you can act upon • My Calibrations—returns contacts marked for calibration This field is available under Basic Search and Expand Search.
State	Search contacts by evaluation state. **NOTE:** Only users who can evaluate a contact will see this field. You can choose one or more of the following options: • All States—adds all evaluations within your scope to your search results. This option only appears in the drop-down list under Basic Search. • Scored—adds scored evaluations within your scope to your search results • Unscored—adds unscored evaluations within your scope to your search results • In Progress—adds in progress evaluations within your scope to your search results • Needs Approval—adds evaluations within your scope that need approval to your search results. Searches that include the State field returns only calls recorded for quality purposes. The basic search allows you to choose from one of these evaluation states. To choose multiple evaluation states, click Expand Search and then choose one or more evaluation state check boxes. This field is available under Basic Search and Expand Search.

Field	Description
Select Criteria	Search contacts by adding more search values. You can choose from the following options: • Organization • Name • Phone Number • Date Range • Specific Date • Time • Search Scope • State • Contact ID • Recording Flags • Score • Speech Energy • Custom Data • Contact Type • Recording Type • Desktop Events This field is available under Expand Search.
Contact ID	Search recordings by Contact ID. **NOTE:** If you choose to search recordings by Contact ID, the search ignores the values for all other filters (for example, Specific Date and Score), and only displays recordings associated with the specified Contact ID. This field appears under Expand Search.
Recording Flags	Search contacts by flags. You can choose from the following options: • Tagged—search for recordings tagged for quality management • HR—search for recordings tagged for HR • Training—search recordings that are marked for training This field appears under Expand Search.
Score	Search contacts by Form Percentage score from the evaluation form. Enter a desired score value in the Score field. See "Understanding How Evaluations are Scored" on page 100 to see how this value is calculated. This field appears under Expand Search.

Field	Description
Select Operator	Search contacts by an operator value. Choose one of the following options from the Select Operator field: • Lesser Than—search for score values that are less than your specified value • Equals—search for score values that match your specified value • Greater Than—search for score values that are greater than you specified value This field appears when you select Score, Speech Energy, or Custom Data under Expand Search.
Speech Energy	Search recordings by speech energy. Enter the number of seconds in the Seconds field, and then choose a Select Criteria option and a Select Operator option. **NOTE:** This feature is not supported in an Avaya environment due to a limitation with Avaya Recording. The options for Select Criteria are as follows: • Silence Events—filters recordings based on the number of events where neither the agent nor the caller are talking using the Silence Duration threshold. • Talk Over Events—filters contact recordings based on the number of events where the agent and the caller are talking at the same time using the Talk Over Duration threshold. • Silence Duration—the minimum number seconds for the silence event. Search Recordings displays all silence events that meets or exceeds this threshold. • Talk Over Duration—the minimum number seconds for the talk over event. Search Recordings displays all talk over events that meets or exceeds this threshold. Search Recordings does not return contact recordings if the silence or talk over event is related to a pause/resume event or hold/retrieve event. This field appears under Expand Search. See "Detecting Silence and Talk Over Events" on page 72 for more information on speech energy.
Custom Data	Search contacts by metadata. Enter a value in the Value field, and then choose a Select Criteria option and a Select Operator options. The options for Select Criteria are determined by the administrator. This field appears under Expand Search.

Field	Description
Contact Type	Search contacts by contact type. Choose one of the following contact types: • Call—a contact with a call recording • Non-Call—a contact without call recording **NOTE:** If you choose Non-Call, the search will return the last non-call contact that you created. This field is available under Expand Search.
Recording Type	Search contacts by recording type. Choose one of the following possible recording types: • Endpoint—Desktop Recording • Network • Server • MediaSense • Multiple Registration—Avaya Recording using the Multiple Registration method • Single Step Conference—Avaya Recording using the Single Step Conference method • None—there is no recording associated with this non-call contact • Unknown—the contact was either recorded prior to 8.7, a Non-Call contact type, or the recording type could not be determined This field is available under Expand Search.
Desktop Events	Search recordings by desktop events. **NOTE:** This feature is not supported in an Avaya environment due to a limitation with Avaya Recording. The options for Desktop Events are as follows: • Non Approved Application—displays user activity using applications that are not allowed. • Non Approved Content—displays user activity using websites that are not allowed. • Event Occurrence—displays desktop events. Search Recordings does not return contact recordings if the event is related to a pause/resume event or hold/retrieve event. This field appears under Expand Search. See "Desktop Analytics" on page 81 for more information on desktop events.

Table 18.   Search Recordings buttons

Field	Icon	Description
Search	NA	Search recordings.
Reset	NA	Restore default settings. This button appears under Expand Search.
Cancel	NA	Exit without saving changes.
Basic Search	NA	Displays basic search options. This button appears under Expand Search.
Expand Search	NA	Displays advanced search options. This button appears under Basic Search.
Add	NA	Add a new field. This button appears under Expand Search.
Delete		Remove the field. This button appears under Expand Search.

Search Guidelines

When locating a contact, consider the following information.

- An agent who is currently not on a team can search archived contacts (including all training recordings) and play back their own recordings. The cell in the Team Name column associated with the selected contact recording appears blank.

  NOTE: An agent must be associated with a team to ensure the agent's contacts are recorded.

- You can filter the number of contacts returned by specifying the contact type (Call or Non-call).

Searching Recordings

TASK

- To search recordings, choose one of the following tasks:
  - To perform a simple search, click New or Refine Search from the Recordings toolbar, complete the fields in the Search Recordings window, and then click Search.
  - To perform an advanced search, click Expand Search in the Search Recordings window, complete the fields, and then click Search.

- To search for specific speech energy (for example, silence or talk over), click Expand Search in the Search Recordings window, choose Speech Energy from the Select Criteria drop-down list, complete the fields, and then click Search.

- To save the current search, click Save ⬜, choose Save this Search, type the name of the search in the Type a Name field, and then click Save.

- To rename an existing search, click Save ⬜, choose Save this Search, select the search from the Select A Search drop-down list, type the new name for the search in the Type a Name field, and then click Save.

- To use a saved search, click Save ⬜, choose Saved Searches, and then select the name of the search you want to use from the menu.

Configure Fields

By default, the Recordings application displays the columns in the Contacts table in the same order as listed in the Configure Fields window with the exception of the metadata fields, HR field, and Training field.

The administrator controls the fields that appear in the user interface for agents, knowledge workers, and supervisors. Evaluators, archive users, and managers can configure any field (regardless of the Desktop Configuration Administration settings).

The Configure Fields dialog box lists the available field names for the Contacts table. You can use this window to choose the fields that you want to appear in the Contacts table. By default, all fields are selected.

The fields are described in "Field Dictionary" on page 59.

> NOTE: This list does not include any metadata fields added by the administrator.

Column Width

You can change the width of a column in Contacts table that contains the search results. The column size remains the same between sessions. When you remove a column, the user interface does not remember the column size when you add it to the table again.

When you change a column width, remember the following guidelines:

- If you switch PCs or change browsers on the same PC, the column width settings are not maintained. New settings are generated on the new PC and/or browser.

- If a different user logs in to the same PC or browser, that user will have their own set of column widths.

- If you clear the cookies in your browser, the column width settings disappear.

    NOTE: The cookies expire after a year of inactivity.

Field Dictionary

This section is an alphabetical listing of all fields that appear in the Contacts Information dialog box and the Contacts table in the Recordings application.

These columns appear when configured by the administrator.

Field	Definition
% Score	The evaluation score or calibration score given to the contact.
% Silence	The percentage of the call spent in the Silence state.
% Talk Over	The percentage of the call spent in the Talk Over state.
<Metadata Fields>	One or more columns may appear in the table for custom metadata field names and values. The cells in these columns are editable. The maximum character length for metadata fields are as follows: - Text=2056 - Number=205. - Date—maximum length is based on the standard date format
Agent ID	The agent's system ID.
Approved By	The name of the manager or supervisor who approved the evaluation.
AVG Silence	The average duration of the silence event in HH:MM:SS.
AVG Talk Over	The average talkover time in HH:MM:SS.
Calibrated	The contact has been marked for calibration. The valid values in this field are: - Yes - No This field only appears in the Contacts table.

Field	Definition
Call Duration	The duration of the contact (length of time between call answered and call dropped) in HH:MM:SS. The call duration shown in the Contacts table and the Media Player might not be the same due to the difference in "event duration" (the time between events) and "recording duration" (the duration within the actual recorded file). The events are used to start or stop recording. However, there are two different sources of information that lends itself to differences even in a normal scenario. In these scenarios the call duration is supposed to be different. Scenarios where the duration would be different are as follows: • Recording API can be used to Pause/Resume/Restart recording. In this case, the recording could be much less than the actual call duration. If a recording is restarted a minute into the call, the call duration would be more than the recording duration. • An archive or cleaned quality call (no screen) with a long ring time will show call duration as the full ring to hang up duration whereas the media player would show only the audio length. This field applies only to calls.
Called Number	The number of the phone that received the call. Displays "unknown" if the called number is unlisted or blocked. This field applies only to calls.
Calling Number	The number of the phone that made the call. Displays "unknown" if the calling number is unlisted or blocked. This field applies only to calls.
Contact ID	The contact's ID.
Contact Type	The contact type. The valid values for this field are: • Call—a contact with a call recording • Non-Call—a contact without a call recording
Date	The contact date.
Device	The device type (for example, Queue or IVR) associated with a segment of a call.
Date Evaluated	The date when the contact recording was evaluated or calibrated.
Evaluation Form	The name of the evaluation form or calibration form used to score the contact recording.
Evaluator Name	The name of the evaluator or calibrator.

Field	Definition
First Name	The agent's first name.
Group Name	The name of the group.
HR	The contact has been marked as an HR contact. The valid values in this field are: • Yes • No
Last Name	The agent's last name.
Line	The extension the agent used to answer the call. This field applies only to calls.
MAX Silence	The duration of the longest silence event in HH:MM:SS.
MAX Talk Over	The duration of the longest talkover event in HH:MM:SS.
MIN Silence	The duration of the shortest silence event in HH:MM:SS.
MIN Talk Over	The duration of the shortest talkover time in HH:MM:SS.
Recording Type	The recording type associated with this device. The valid values for the Recording Type field are: • Server Recording—contact was recorded using Server Recording (SPAN). • Network Recording—contact was recorded using Network Recording. • Multiple Registration—contact was recorded using Multiple Registration method. This method allows you to programmatically add participants to an existing call. • Single Step Conference—contact was recorded using Single Step Conferencing method. This method allows you to choose register up to three devices at a single, softphone-enabled extension. • Unknown—the contact was either recorded prior to 8.7, a Non-Call contact type, or the recording type could not be determined. • None—there is no recording associated with this non-call contact • Endpoint—contact was recorded using Desktop Recording (Endpoint). • MediaSense Recording—contact was recorded using MediaSense Recording.

Field	Definition
Reason	The reason the contact was recorded as set in the recording rule (Archive, First, Last, Longest, Shortest, Random, Logging, Tagged, Performance, and New Employee).
Silence Events	The number of detected silence events. In the <user name> - ID tab under Analysis, Silence Events displays the number of detected silence events and a timestamp indicating when the silent event occurred during the call (ordered by earliest to latest).
State	The current evaluation state of the contact. The valid values in the State field are: • Scored—contacts that are claimed by an evaluator, fully scored, and, if approval is required, are approved • Unscored—contacts that are as yet unclaimed by an evaluator and unscored • In Progress—contacts that are claimed by an evaluator but which are not yet completely scored • Needs Approval—contacts that are claimed by an evaluator, are fully scored, and are awaiting approval
TOT DUR Silence	The total duration of silence time in HH:MM:SS.
TOT DUR Talk Over	The total duration of talkover time in HH:MM:SS.
Talk Over Events	The number of detected talkover events.
Team Name	The name of the team.
Time	The call start time for the contact in HH:MM:SS. **NOTE:** If your site is using Cisco MediaSense Recording, the contact time is generated by the MediaSense Recording server, not the Record Server. For contact recordings, the timestamp is based on the agent's timezone. For non-call contacts, the timestamp is based on the browser's timezone of the user who created the non-call contact.
Time Zone	The time zone where the contact was created.
Training	The contact has been marked as a training contact. The valid values in the Training field are: • Yes • No

Configuring Fields

TASK

- To choose the fields that appears in the Contacts table, click Settings ⚙, click a tab, select the check box next to each field name you want to appear in the table, repeat for each tab, and then click Apply.

    STEP RESULT: The Contacts table displays the fields that you selected.

- To change the size of a column, drag the column edge to the required width.

- To move a column to another location, click the column header, click the column body, and then drag the column to a new location.

Export Table Data to CSV

The Export Table Data to CSV feature allows you to export contact metadata for all contacts in the Contacts table (call and non-call contacts) to CSV. For example, you can export all contact metadata from your last search.

Exporting Metadata to CSV

TASK

1. Run a search in the Recordings application to locate the recordings that you want to export. See "Searching Recordings" on page 57 for more information.

2. Click Export Table Data to CSV 🖳 in the Recordings toolbar, complete the fields in Opening recording.CSV dialog box, and then click OK.

    ADDITIONAL INFORMATION: The Export Table Data to CSV returns all rows found during the last search.

    STEP RESULT: The metadata is saved to CSV format. You can open it with Microsoft Excel or save it to a file.

Create Contact

The Create Contact dialog box (Figure 12) allows you to create a contact for evaluating non-call activities.

Figure 12.   Create Contact dialog box

The non-call activities can be evaluated in real time or after the fact. For example:

- Live monitor of voice or screen
- Counter work
- Customer service counter
- Chat
- Email
- Social media

You can only create a non-call contact for an agent who belongs to a team that is associated with a quality management workflow.

> NOTE: Only roles with evaluation privileges can evaluate a non-call contact, including managers, supervisors, and evaluators.

An evaluator can assign an evaluation form, evaluate the contact, and insert contact metadata.

If you plan to evaluate a contact, we recommend that you also use an evaluation form that is specifically created for non-call activities. This allows the Dashboard and Reporting applications to accurately report non-call activities.

Table 19 describes the fields that appear in the Create Contact dialog box.

Table 19. Create Contact dialog box fields

Field	Description
Date	The date the contact occurred. The current date appears by default.
Time	The time the contact occurred. The current time appears by default.
	You cannot create two contacts at the exact same time for the same person. If you intend to create several contacts at the same time (within the same minute) for the same person, ensure you enter a unique time for each contact in the Time field.
Group	The name of the group.
Team	The name of the team.
Agent	The name of the agent.
Evaluation Form	The name of the evaluation form associated with this contact.
	NOTE: You cannot change the evaluation form after you created the contact.

Table 20 describes the buttons appear in the Create Contact dialog box.

Table 20. Create Contact dialog box buttons

Button	Description
Create	Adds a non-call contact.
Cancel	Exit without saving changes.

Managing Non-call Contacts

TASK

- To add a non-call contact, click Create Contact 👥, complete the fields, and then click save.

  STEP RESULT: The non-call contact appears in the Contacts table.

- To view the metadata for a non-call contact, double-click the non-call contact in the Contacts table to display the Media Player. From the Media Player, click <user name> - ID tab, where <user name> is the name of the agent.

  STEP RESULT: The <user name> - ID tab displays the metadata.

- To change metadata from the <user name> - ID tab, type your changes into the metadata fields, and then click Apply.

- To evaluate a non-call contact, double-click a contact in the Contacts table with a Contact Type of Non-Call and complete the evaluation form.

Export Selected Contact

The administrator can enable the export feature to allow you to export contact recordings from the Recordings application. Exported contact recordings can be saved in the following formats.

- Windows Media Audio (WMA)—Compressed audio files.

- Waveform Audio File Format (WAV)—Uncompressed audio files.

- Windows Media Video (WMV)—Compressed audio/video files. This option is only available if the contact recording has a screen recording associated with it.

Recordings can be exported from Contacts table and the Media Player in the Recordings application. When you select a recording for export, all available data connected with the recording—audio, video, and metadata—are included in the exported file (except WAV files, which cannot include metadata).

You can play exported recordings using Microsoft Windows Media Player 9 or later.

The time needed to export a recording depends on the length of the recording and whether it includes video. If a recording is in the process of being exported and the user interface times out due to inactivity, the export process will continue to completion.

Exporting Recordings

TASK

- To export recordings from the Contacts table, choose one of the following tasks:

    – To export a recording, click a recording in the Contacts table, and then click Export Selected Contact ⬇. Choose the option you want for the exported recording from the Export Selected Contact dialog box, and then click Export Selected Contact.

    – To download an exported recording, click Alerts ⬚5, double-click the Export of Contact <ID> is Ready for Download message, click Here in the Alert Notification dialog box to download the file and then follow the prompts to download the recording.

    In Microsoft Internet Explorer, click Save and choose a location from the Save as dialog box.

ADDITIONAL INFORMATION: If the Windows Media Player opens when you click Export Selected Contact, you need to configure Windows Media Player before you export contact recordings. See "Configuring Windows Media Player" on page 67 for more information.

Configuring Windows Media Player

Use this task to configure Windows Media Player to allow you to play exported recordings.

TASK

1. In Windows Media Play, choose Tools > Options.

    ADDITIONAL INFORMATION: If you do not automatically see Tools in your Windows Media Player toolbar, right-click on the tool bar and choose Tools > Options.

    STEP RESULT: The Options dialog box appears.

2. Select the File Types tab and clear the following check boxes.

    –   Windows Media Audio file (wma)

    –   Windows Media Video file (wmv)

    –   Windows audio file (wav)

3. Click OK to save your changes and dismiss the dialog box.

Viewing Exported Metadata in an Exported Recording

This task describes how to use Windows Media Player to view metadata in an exported recording.

TASK

1. Download the exported recording from Workforce Optimization. See "Exporting Recordings" on page 66 for more information.

    STEP RESULT: The Windows Media Player launches and starts playing the recording.

2. Click the Alt key and choose File > Save as from the menu.

3. Exit Windows Media Player and go to the folder where you saved the recording.

4. Right-click the recording and choose Properties from the menu.

5. Click the Details tab to see information associated with this recording.

ADDITIONAL INFORMATION: If this is a WMA file, the metadata appears in the Comments field.

Mark for Quality

When you mark a contact for quality, Archive changes to Marked for Quality in the Reason column and the contact can be evaluated for quality by an evaluator. A contact that is marked for quality has the same retention time as specified for a quality management workflow.

Marking a Contact for Quality

TASK

- To mark a contact for quality, select a recording with a Reason value of Archive from the Contacts table, and then click Mark for Quality ✎.

STEP RESULT: The Reason value changes to Marked for Quality. The Open Evaluation ✎ button is enabled in the Media Player and the Evaluation window appears, and the evaluation form is enabled.

Mark for Calibration

When you mark a contact for calibration you allow the contact to be evaluated by multiple users with evaluation privileges. For more information on calibration, see .

Figure 13.   Choose Evaluation Form dialog box appears when you mark contact for calibration
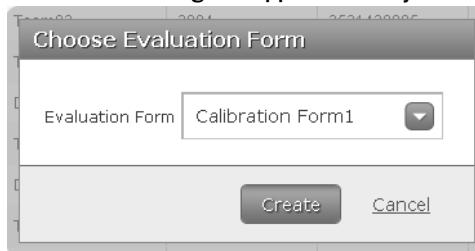
describes the fields that appear in the Choose Evaluation Form dialog box.

Table 21.   Choose Evaluation Form dialog box fields

Field	Description
Evaluation Form	The name of the evaluation form associated with this contact. **NOTE:** You cannot change the evaluation form after you mark the contact for calibration.

Table 22 describes the buttons appear in the Choose Evaluation Form dialog box.

Table 22. Choose Evaluation Form dialog box buttons

Button	Description
Create	Adds a calibrated contact.
Cancel	Exit without saving changes.

Marking a Contact for Calibration

TASK

- To mark a contact for calibration, select a contact in the Contacts table, click Mark for Calibration ![icon], choose an evaluation form from the Evaluation form drop-down list, and then click Create.

Tag Call

You can change a contact with a Reason code of Archive to Tagged. When you do this the Tagged retention time is applied to the contact. See "Quality Management Workflow Retention" and "Archive Workflow Retention" in the Administrator User Guide for more information on the Tagged retention time.

Changing a Contacts Retention Time

TASK

- To change the retention time for a contact, select a contact from the Contacts table, and then click Tag Call ![icon].

  STEP RESULT: The retention time is updated for the selected contact.

Media Player

The Media Player (Figure 14) appears at the bottom of the Recordings window when you double-click a contact recording in the Contacts table. If the recording is located on another machine, Media Player starts downloading the recording (Download on Demand), plays the recording when there are enough bytes downloaded for audio playback to begin, and enables the playback control buttons.

The Media Player pane allows you to play a contact recording while you are:

- Scoring the contact recording in the Evaluation Form window
- Displaying contact information in the <user name> - ID tab
- Reviewing associated contacts in the Associated Contacts tab

- Auditing a contact recording in the Speech Analytics tab

- Reviewing application usage in the Desktop Analytics tab

Use the Playback Controls in Media Player to play back, pause, and stop a recorded contact. The Media Player also includes a recording progress bar (slider), which can be used to quickly skip forward or backward in the recording.

Figure 14.   Media Player
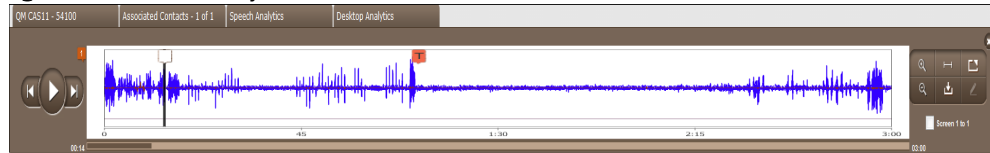
Playback Controls

The Media Player provides playback controls for audio and screen recordings. This topic explains how to use the playback controls in the Media Player.

Table 23 describes the active playback controls.

Table 23.   Playback controls

Icon	Name	Description
⏮	Previous	Return to the previous segment in the recording. If there is only one segment associated with the recording, and you click this button, The Media Player starts playing at the beginning of the segment. If there is more than one segment and you click this button when you finish the last segment, the Media Player starts playing the first segment of the recording.
⏭	Next	Go to the next segment in the recording. If there is only one segment associated with the recording, and you click this button, The Media Player starts playing at the beginning of the segment. If there is more than one segment and you click this button when you finish the first segment, the Media Player starts playing the last segment of the recording.
▶	Play	Start the recording playback (alternates with Pause). When you click Play, the video portion of the recording starts streaming from the Screen Services server. NOTE: Video is available only with the AQM license.

Icon	Name	Description
	Pause	Pause the recording playback (alternates with Play).
NA	Position	Identifies the current playback position of this recording in HH:MM:SS format.
NA	Progress Bar	Displays the completion percentage for the recording. Drag the slider on the progress bar to move forward or backward in the recording.
	Zoom In	When clicked, increases the size of the energy bar in the Media Player.
	Zoom Out	When clicked, decreases the size of the energy bar in the Media Player.
	Resize	Restores the energy bar to its original size.
	Export Selected Contact	Export a contact recording. Choose the format you want to export the contact recording to, and then click OK. You can choose from the following: • WAV • WMA • WMV You can also mark contact recordings designated as Archive in the Reason column of the Recordings application for quality scoring.
	Layout Screen and Evaluation Frames	Displays the Screen window and Evaluation window in their original size and position.
	Mark for Quality	Marks the selected recording for quality evaluation and displays the Evaluation Form window. This button is enabled when the selected recording has a Reason value of Archive and the recording has been uploaded.
NA	Screen 1 to 1	When selected, the Screen window resizes the recording to its actual size. When cleared, the entire screen is visible within the Screen window.
	Close	Exit the Media Player

Table 24 describes the playback markers that might appear on the Media Player.

Table 24.   Playback markers

Icon	Name	Description
	Comments	Identifies the number of comments associated with the contact recording at the 0 minutes and 0 seconds position. When clicked, the Evaluation Comments dialog box display all comments associated with the contact recording. This icon only appears when a comment exists at the beginning of the contact recording. See "Evaluation Comments" on page 103 for more information on evaluation comments.
	Comments	Identifies a comment in the energy bar that is associated with the contact recording at the specified position in minutes and seconds. When clicked, the Evaluation Comments dialog box display all comments associated with the contact recording. This icon only appears when a comment exists at a specified location in the contact recording. See "Evaluation Comments" on page 103 for more information on evaluation comments.
	Silence	Identifies a Silence event that is associated with the contact recording.
	Talkover	Identifies a Talkover event that is associated with the contact recording. The Talkover icon appears at the beginning of a Talkover event.

Detecting Silence and Talk Over Events

NOTE: This feature is not supported in an Avaya environment due to a limitation with Avaya Recording.

The Recordings application can analyze recorded calls for silence and talk over events. When found, information about the event is stored with the call recording as metadata and a marker is placed in the energy bar when you play back the recording. You can use this metadata to search call recordings for silence or talk over events.

A recorded call contains two streams of audio that represent the two sides of a call. The Media Player displays the inbound stream in blue and the outbound stream in red in the energy bar (Figure 15).

Figure 15.   Energy bar

In a normal conversation, you will see the energy alternate between the outbound call and the inbound call. A talk over event occurs when the inbound call and the outbound call spike simultaneously. The Media Player displays a Talkover 🇹 icon in the energy bar where a Talkover event occurs. When the both parties are silent (silence event), the line in the energy bar is flat. The Media Player displays a Silence 🇸 icon in the energy bar where a Silence event occurs.

Normally, each stream contains the voice of a single party; either the agent or the customer. Occasionally, a stream includes multiple voices. For example, a conference call contains the agent stream where you hear the agent's voice, and a second stream where you hear the voices of all other parties in the conference call.

Call streams can include non-speech noises (for example, wind, typing, background conversions, or barking dogs). The Recordings application processes these noises in addition to speech when searching for silence and talk over events in a call.

The Recordings application uses a Voice Activity Detection (VAD) module to determine whether the analyzed audio is classified as silence or speech. VAD analyzes discrete blocks of audio data and derives an average amplitude or volume for that block. The blocks are called frames. A frame size is measured in milliseconds of audio. VAD uses the same frame size when processing all audio in a file.

VAD reads a frame and determines if the frame indicates silence or speech based on the VAD decision threshold. If the average value for the frame falls below the VAD decision threshold, the frame is marked as mutual silence. VAD processes each frame of each stream and then compares the frames from stream 1 and stream 2. VAD assigns an audio type to each pair of frames. The audio types are as follows.

- Mutual Silence (MS)—both frames are silent.

- Normal (N)—one frame contains speech while the other frame is silent. This indicates normal conversation.

- Talk Over (TO)—both frames contain speech.

VAD uses a heuristic algorithm. The algorithm is adaptive and can dynamically change based on the quality of the audio data. In a noisy environment, the VAD decision threshold will rise in order to indicate only the loudest noises as speech. Otherwise, the entire phone conversation would be marked as constant speech, even if the noise is caused by a car engine or other non-speech background noise.

In a quiet environment where the person is not speaking loudly, the VAD decision threshold will fall so it can correctly identify speech at a low volume. This allows the entire call to be marked as normal speech instead of silence.

This adaptability allows VAD to be more accurate when determining speech or silence in recorded call, but it is not always 100% accurate. During the few seconds required for VAD to adapt to changes in background noise levels, audio might be marked as normal speech when no one was speaking or marked as mutual silence when someone was speaking. Because speech and silence are determined by average sound amplitude, there will always be instances where normal speech or mutual silence is incorrectly assigned to a frame of audio. Essentially, VAD does not know the difference between human speech and the sound of a car engine. VAD is designed to analyze phone calls where you expect to hear two or more people talking to each other.

You can configure the threshold values for talk over and silence events from the Call Events Administration window in administrator interface. The events are saved when the minimum duration is equal to or greater than the threshold value. Information about the event includes the type (silence or talk over), the duration of the event (in milliseconds), and the start of the event as an offset from the beginning of the audio.

It is possible that a talk over or silence event might not be identified. For example, a talk over event might be missed even when two people are clearly talking to each other on a call at the same time. If one of the speakers during the talk over event paused to think or take a breath for at least a quarter of a second, VAD could mark the frame as an instance of silence. From the speaker's perspective, they were constantly talking so VAD should correctly indicate a talk over event. From VAD's perspective, there was a period of silence during the conversation so it cannot be considered a talk over event.

During mutual silence, a sudden noise like typing on the keyboard or a cough might be loud enough to cause a frame to be identified as talking even though no one is speaking. These momentary transitions in state will result in instances where expected VAD events are not indicated and stored with the call recording. This is not an error with the software.

Detect Speech Hits

> NOTE: This feature only appears when you are simultaneously logged into Calabrio Analytics Speech and Quality Management.

When you are simultaneously logged into Calabrio Analytics Speech and Quality Management, speech hits are displayed in the energy bar for contact recordings that have been indexed by Calabrio Analytics Speech (Figure 16).

Figure 16.   Energy bar
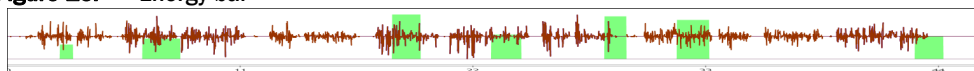
The green highlighted areas on the energy bar are approximate locations of hits based on the Confidence value. Because the Confidence value is based on probability, the exact hit might not line up exactly with the highlighted area.

The highlighted hit starts two seconds before and ends two seconds after the hit.

User Name - ID

The <user name> - ID tab displays the name of the user, the user ID associated with the user, and the contact information (metadata) for the recording and allows you to edit the metadata associated with the recording. If the metadata is encrypted the metadata field is disabled.

The <user name> - ID tab displays all fields (both selected and cleared) listed in the Configure Fields window.

Figure 17.   <User name> - ID tab
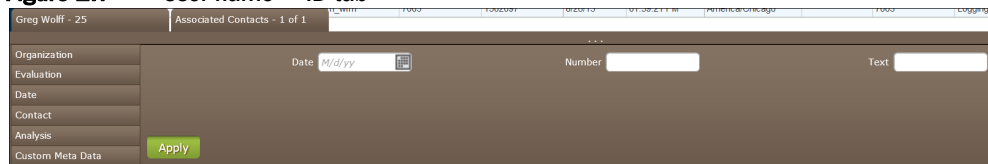
See "Field Dictionary" on page 59 for a description of the fields in the <user name> - ID tab.

About Metadata

Call metadata is inserted into WMV and WMA files. Call metadata is not available in WAV files, since the WAV file format does not support tags.

The supported tags are displayed in the Windows Media Player Properties window, in the Description field on the Content tab. Windows Media Player only displays system metadata and metadata that is enabled for export in the administrator interface. System metadata includes Identification (ID), Automatic Number Identification (ANI), Dialed Number Identification Service (DNIS), ACD Call ID (acdCallId), Last Name (lastName), First Name (firstName), Agent ID (agentId), Username, and Start Time (startTime).

Custom Metadata

Custom metadata enables better and faster search capabilities. Custom metadata allows you to:

- Pass any data collected from the caller (for example, the account number or call type) to the call recording metadata
- Saves management time searching call archives

- Evaluate calls that are important to the business

Modifying Contact Information

Use this task to modify contact information (metadata) for a contact recording.

Tᴀsκ

- From the Media Player, click <user name> - ID tab, click Custom Meta Data, type your changes into the metadata fields, and then click Apply.

    Sᴛᴇᴘ Rᴇsᴜʟᴛ: The Recordings application saves your changes and displays them in the custom metadata fields.

Associated Contacts

The Associated Contacts tab (Figure 18) displays a table of all contacts associated with the recording. You can only play segments of a call that are within your scope. When you click a call segment that is within your scope, Associated Contacts highlights that call segment.

**Figure 18.** Associated Contacts tab

See "Field Dictionary" on page 59 for a description of the fields in the Associated Contacts tab.

Bracketed and Interleaved Call Recordings

When an agent or knowledge worker handles two calls simultaneously by putting one on hold and switching between them, the result can be either one or two recordings, depending on if the calls are bracketed or interleaved.

In Figure 19, Recording 1 is created for Call 1. It also contains the entire audio from Call 2. Call 2 is bracketed within Call 1.

Figure 19. Bracketed call
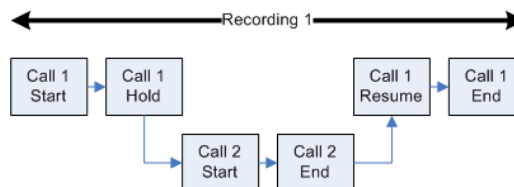
In Figure 20, Recording 1 is created for Call 1. It will also contain the portion of audio from Call 2 during the time when both calls are active. Recording 2 is created for Call 2 when Call 1 ends. Recording 2 only contains the portion of audio from Call 2 from the time Call 1 ends. Call 1 is interleaved with Call 2. The duration reported for Call 2 is from the time when Call 2 starts until the time that Call 2 ends. However, the actual duration of Recording 2 will be from the time Call 1 ends until the time Call 2 ends.

Figure 20.   Interleaved calls
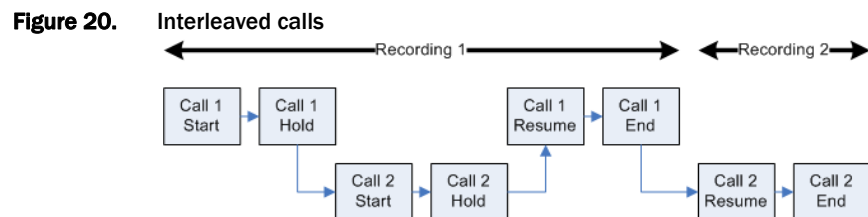
You can play all segments of a call, from when it enters the contact center to when it terminates, using the Associated Contacts tab on the Media Player pane. Clicking Associated Contacts enables you to see every call segment associated with a call. See "Playing All Segments of a Call" on page 77 for more information on associated contacts.

Playing All Segments of a Call

You can display all segments of a call from when it enters the contact center to when it is terminated, using the Associated Contacts feature.

When you open the Media Player and click the Associated Contacts tab, you can see every call segment associated with that contact recording.

The following example describes a segmented call.

1. Customer dials in and is routed to Agent A.

2. Agent A transfers customer to Agent B.

3. Agent B conferences call with Supervisor A.

The list of associated contacts is presented in chronological order in the Associated Contacts tab. You might not be able to play back some of the contacts listed in the Associated Contacts tab. This is due to various reasons: they are for agents not on your team; they were deleted; they did not meet workflow criteria; or they were under the minimum length. These segments are listed in red. You cannot listen to or export those segments of the call, but you can view them so that you can follow how the call moved through the contact center. When you use the call control buttons to move through the list of contacts, it automatically skips over contacts you cannot listen to (those displayed in red).

By default, Associated Contacts highlights the call segment you chose from the Contacts table. When you choose another segment, that segment is highlighted.

Figure 21 shows an example of the Associated Contacts dialog box.

Figure 21. Associated Contacts tab

You can also choose to export a segment of a call.

You cannot export a call segment when:

- The call segment is not in your scope. In this case, the row for the call segment is highlighted in red.

- The call segment is 0 Kb or an invalid file. In this case, the row for the call segment is disabled and displays the following message:

  ```
  This contact has an invalid audio file and cannot be
  played or exported.
  ```

- The call segment is not uploaded yet. In this case, the row for the call segment is disabled and displays the following message:

  ```
  This contact has not uploaded and cannot be exported.
  ```

  Wait for the call segment to download before exporting the call segment.

If the call segment cannot be exported, the Export Recording feature is disabled.

Speech Analytics

The Speech Analytics tab (Figure 22) displays a table of speech analytics information associated with the recording. You can only view phrases associated with the call that are within your scope.

> **NOTE:** This widget only appears when you are simultaneously logged into Call Recording and Quality Management and Calabrio Speech Analytics.

Figure 22. Speech Analytics tab

Table 25 describes the columns that appear in the Speech Analytics tab.

Table 25. Speech Analytics columns

Column	Definition
Phrase	A list of phrases that appear in this recording. These phrases are also highlighted in green on the energy bar. This column can be sorted and filtered.
Category	The category assigned to the phrase. This column can be sorted and filtered.
Start	The start time for the phrase in HH:MM:SS.
Duration	The duration of the phrase (length of time between start of the phrase and the end of the phrase) in HH:MM:SS. **NOTE:** The Duration field does not display values in milliseconds. If the duration is less than 1 second, the field displays 00:00:00.
Confidence	The minimum confidence value for a hit. This value ensures accuracy and minimizes false positives by assigning probability scores to results. For example, when you specify a value of 20, Calabrio Analytics Speech returns hits where the Confidence value is 20% or greater. This column can be sorted and filtered.
Channel	The call stream. The possible values are: • 1—The agent stream. • 2—The outside stream. This can include, the customer, another agent, or a conference call. This column can be sorted and filtered.
Auditing	Use this column to validate phrase hits when you listen to the recording. • Approve 👍—The phrase has not been reviewed. Click this icon when you hear the phrase in the recording. The icon changes to 👍 and the Confidence value for this hit changes to 100%. • Reject 👎—The phrase has not been reviewed. Click this icon when you do not hear the phrase in the recording. The icon changes to 👎 and the Confidence value for this hit changes to 0%. This field only appears for supervisors and managers.

Table 26 describes the button that appear in the Speech Analytics tab.

Table 26.   Speech Analytics button

Button	Icon	Description
Sort		Filter a columns contents.
		Cleared items do not appear in the Speech Analytics tab and the speech analytics hits for the selected items no longer appear in the energy bar.

Manage Speech Analytics

TASK

- To display details for a chart or cloud widget, click a data point in a widget.

STEP RESULT: The Details pane appears.

- To view the contents of the Speech Analytics tab, click Speech Analytics on the Media Player.

- To sort a column in the Speech Analytics tab, double-click the column header.

- To filter a column's contents, click Sort to clear the check box next to the items that you do not want to appear in the list.

- To audit a phrase in the recording, choose one of the following options.

    – Click Approve if you hear the phrase in the recording.

    – Click Reject if you do not hear the phrase in the recording.

STEP RESULT: When you click Approve or Reject, the icon changes to a solid color.

Desktop Analytics

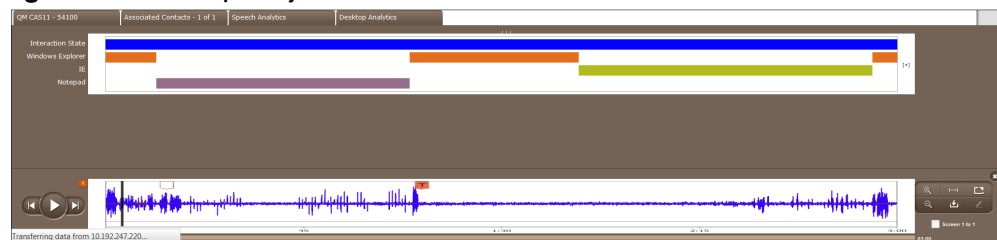The Desktop Analytics tab (Figure 23) displays a list of applications used when the call was recorded and shows when each application was used during the recording. The applications in the Desktop Analytics tab line up with the energy bar in the Media Player so you can see when the applications were used during the recorded call. You can only view applications associated with the call that are within your scope.

> NOTE: This widget only appears when you are simultaneously logged into Call Recording and Quality Management and Calabrio Desktop Analytics.

Figure 23.　　Desktop Analytics tab

An interaction state tooltip (Figure 24) appears when you hover over an interaction state in the Desktop Analytics tab. The tooltip identifies interaction state (state), date, start time, duration, calling number, called number, and QM ID (contact ID).

Figure 24.　　Interaction state tooltip

A document tooltip (Figure 25) appears when you hover over a document associated with an application. The tooltip identifies the document accessed by the application, the document's start time and duration, and the approved state.

**Figure 25.**　　Documentation tooltip example

An event tooltip (Figure 26) appears when you hover over an Event marker. The tooltip identifies the server URL, path, fields, and time.

Figure 26.   Event tooltip

Server: wellsfargo.com
Path: /tas
Fields: ids, RequestType
Time: 7:52 AM
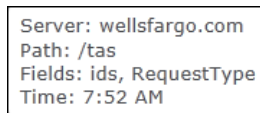
Use the Show/Hide After Call (+) button to display the applications used during After Call Work. The Desktop Analytics tab highlights the After Call Work applications in gray (Figure 27). Note that in this instance the applications in the Desktop Analytics tab do not line up with the energy bar in the Media Player

Figure 27.   After Call Work example
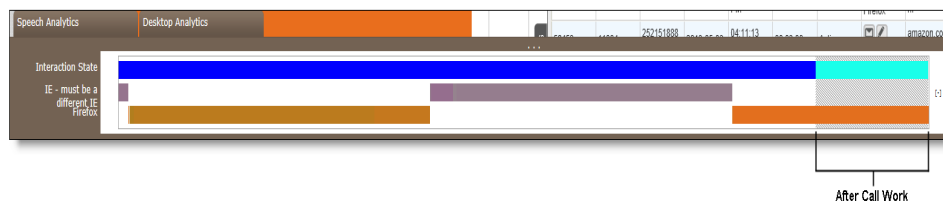
Manage Desktop Analytics

TASK

- To display details for a chart widget, click a data point in a widget.

  STEP RESULT: The Details pane appears.

- To view the applications used during the call, click the Desktop Analytics tab on the Media Player.

- To view the applications used during After Call Work, click the Show/Hide After Call button in the Desktop Analytics tab.

Associated Contacts and Cisco MediaSense Recording

If your site is using MediaSense Recording, note that MediaSense Recording behaves different from other recording types. When a call is placed on hold, MediaSense Recording stops and the raw files are closed. When the call is retrieved from hold, a new set of raw files is created. This means a single call from your perspective can result in multiple call sessions or segments. Associated Contacts displays each session as a distinct call. Multiple sessions that are logically related (contain the same session ID) will be linked as Associated Calls. When you play back a MediaSense-recorded call, you must play each of the associated calls to hear the entire call from your perspective.

Normal Call

A normal call is where a customer speaks to an agent (Figure 28).

Figure 28.   Normal Call
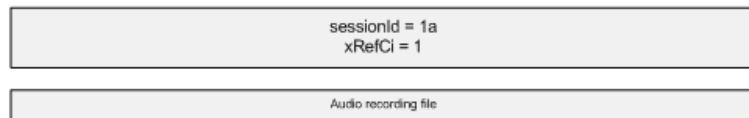
A normal call is never placed on hold, transferred, or conferenced and the session ID remains the same. This applies to all recording types, including Cisco MediaSense.

Call with Hold Time

A call with hold time (Figure 29) is where an agent places customer on hold during a call then later resumes the call with the customer.

Figure 29.   Call with hold time
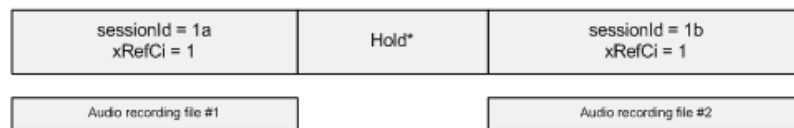

Cisco MediaSense treats each part of this call as separate from the hold time and creates two separate sessions. In this scenario, two contacts and 2 SPX files are created. This is different from other recording types where the capture methods result in a single contact and single SPX file that represents the hold time as silence in the middle of the recording. Cisco MediaSense Recordings do not include the silence that represents hold time.

Bracketed Call

A bracketed call (Figure 30) is where an agent places a customer on hold during a call to consult with another agent. After finishing the consultation call, the agent resumes talking with the customer.

Figure 30.   Bracketed call
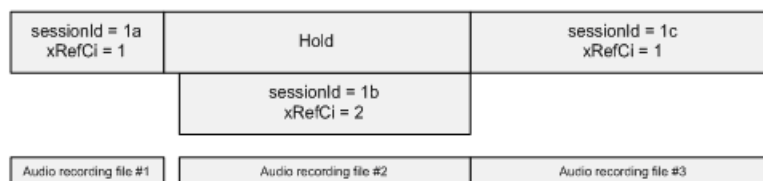
In this scenario, Cisco MediaSense creates three contact files and three SPX files (one session ID). Again, this is different from other recording types where the capture

methods result in a single contact and single SPX file that contain the audio from the consultation (or bracketed) call in between the audio from the customer and agent. Cisco MediaSense Recordings do not include the silence that represents hold time.

Notice that for each MediaSense call flow there is a session ID that corresponds with a single contact and SPX file. Also notice that the "xRecCi" remains constant across holds. This is important when determining associated contacts. See "Associated Contacts and Cisco MediaSense Recording" on page 82

See "Cisco MediaSense Call Flow Examples" on page 85 for more call flow examples.

Screen Recording

The Recordings application supports screen recording with MediaSense Recording. Screen recording behaves similar to audio recording such that a single call may have multiple screen recording files that correspond to a session ID. If the administrator enabled Extended Screen Recording (for quality management workflows), the screen recording for each session will be longer than the audio recording (Figure 31).

Figure 31.   Call with hold/resume with 10 seconds of extended screen recording
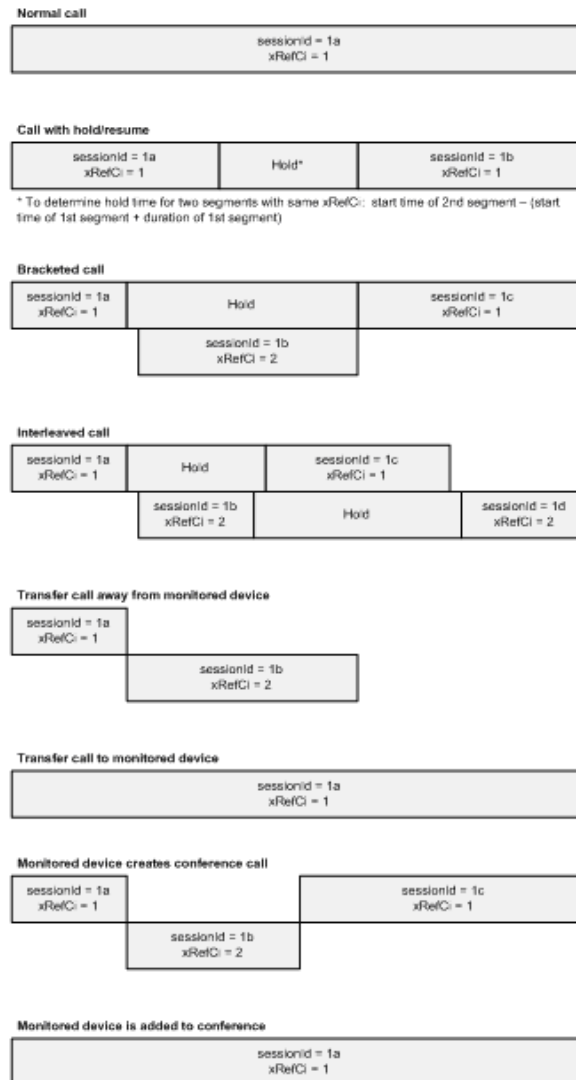

> **NOTE:** If the MediaSense Subscription service fails, screen recording stops and the screen recording is deleted. The audio portion of the call continues recording.

Cisco MediaSense Call Flow Examples

Figure 32 displays call flow examples for Cisco MediaSense.

Figure 32. Call flow examples

Screen

The Media Player can play both voice and screen recordings. If this is a quality management recording, and a screen recording is associated with the audio recording, the screen appears in a separate window (Figure 33). You can resize the Screen window to your requirements. If your machine is configured for dual monitor display you can display the Screen window on one monitor and the user interface on another monitor.

Figure 33.   Screen window
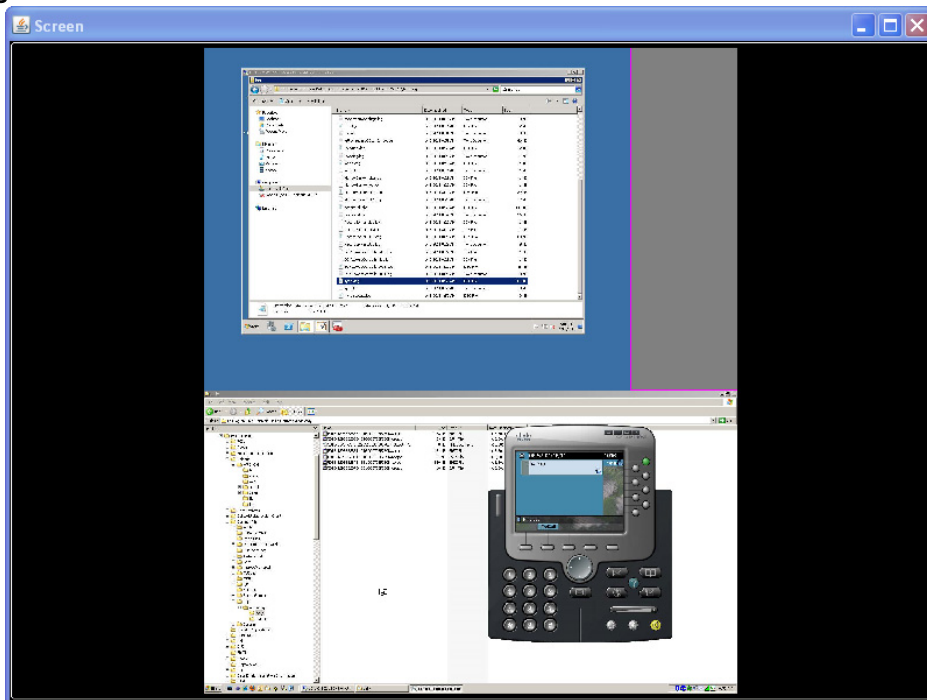
If a recording is audio only, the Screen window does not appear.

Screen Recording Playback

You can control the size of the screen recording when you view it. By default, the screen recording automatically fits in the Screen window and maintains the aspect ratio (4:3 or 16:9) used when it was recorded. If you adjust the size of the Screen window, the recording resizes accordingly.

To view the screen recording using the same resolution used when recorded, select the Screen 1 to 1 check box in the lower right corner of the Media Player. The Screen 1 to 1 check box resizes the screen recording to its actual size. Use the scroll bars to view the entire screen recording. Clearing the check box returns the screen recording to its default size so that the entire screen recording is visible within the Screen window.

You can also use the Maximize button on the Screen window to view the screen recording at its actual size. If you clear the Screen 1 to 1 check box, you must also click the Minimize button to return the Screen window to the default size.

Single- and Multiple-Monitor Recordings

The Screen window can display recordings of both single- and multiple-monitor setups.

When configuring display properties on a machine for recordings, additional host monitors must be located below or to the right of the primary display monitor in the Display Properties window (Figure 34). Any monitor located above and/or to the left of the primary display monitor will be cut off (this is a Windows restriction). The Screen window will display the screens in the recording according to how you arranged them in the Display Properties window.

Figure 34.   Display Properties window
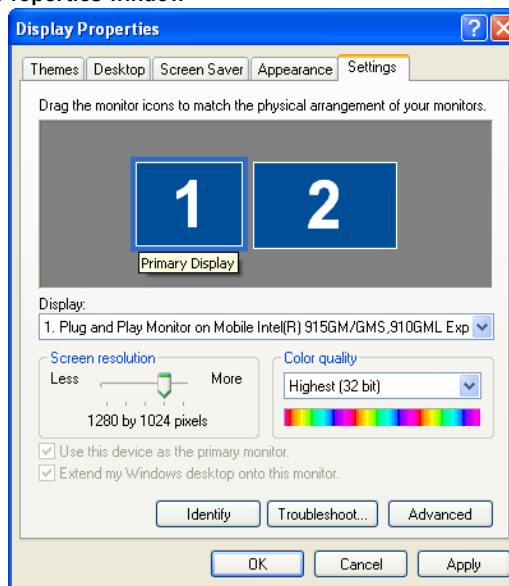
Figure 35 shows the Screen window playing a recording of a multiple-monitor setup.

Figure 35. Screen window displaying multiple monitors
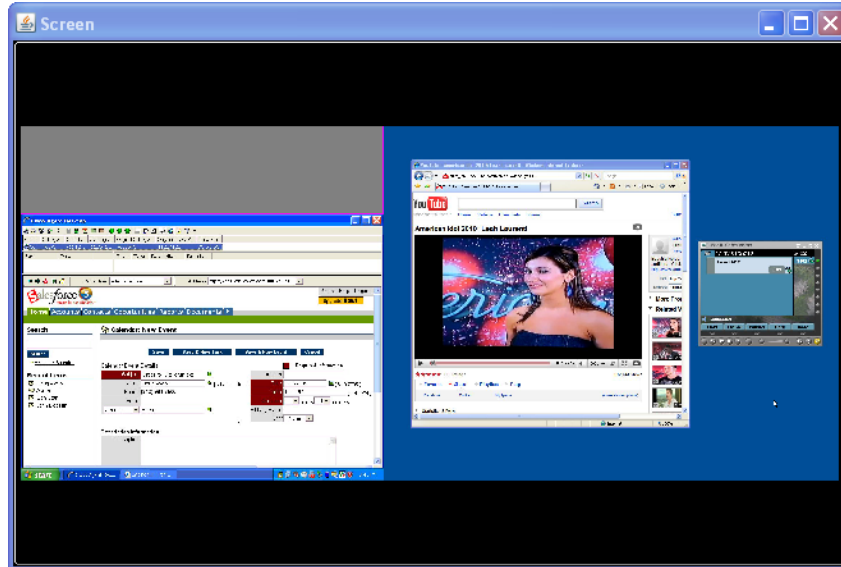
> NOTE: Multiple-monitor recordings are twice the size of recordings for single monitors.

Download on Demand

The Download on Demand feature allows you to download the recording for play back by double-clicking a contact with a Contact Type of Call in the Contacts table. A Message (Figure 36) dialog box appears when the recording is being downloaded. When the download completed the Message dialog box goes away.

Figure 36. Message dialog box
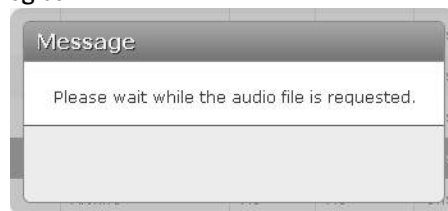
If a recording is already in the process of downloading when you try to play it, you will see the following error message:

```
Download on Demand for contact <contact ID>. Try again.
```

Try playing the recording after it is uploaded or after the End of Day.

Playing Recordings

TASK

- To play a recording, choose one of the following tasks:
    - To play a recording, double-click a contact with the Contact Type of Call in the Contacts table.

        The Media Player appears and plays the recording when there are enough bytes downloaded for audio and screen playback to begin.

        NOTE: The recording is downloaded on demand. See "Download on Demand" on page 88 for more information.
    - To start a recording, click Play ▶ in the Media Player.
    - To view a screen recording in its original size, select the Screen 1 to 1 check box.
    - To view a screen recording in its default size, clear the Screen 1 to 1 check box.
    - To skip forwards or backwards in a recording, move the Position progress bar to the desired location.
    - To return to the previous segment in the recording, click Previous ◀.
    - To go to the next segment in the recording, click Next ▶.
    - To pause a recording, click Pause ❚❚.
    - To view evaluation comments associated with the beginning of a recording, click Comments ▤.
    - To view an evaluation comment associated with a specified location in the recording, click Evaluation Comments ▭.
    - To edit metadata associated with a recording, click the <user name> - ID tab, type the information in the metadata fields, and then click Save.
    - To listen to an associated contact, click Associated Contacts, and then double-click the associated contact you want to listen to.

        NOTE: You can only play associated contacts that are within your scope. The cursor changes to a Hand (🖑) and the contact segment row is highlighted when the associated contact is within your scope.
    - To increase the size of the energy bar, click Zoom In ⊕.
    - To decrease the size of the energy bar, click Zoom Out ⊖.
    - To view the energy bar at its original size, choose Resize ▬.
    - To restore the original size and position of the Screen window and Evaluation window, click Layout Screen and Evaluation Frames ▣.
    - To mark a selected recording for quality evaluation and display the Evaluation Form window, click Mark for Quality ▨.

– To evaluate a recording, click Play ◩ to start the recording, and then complete the fields in the Evaluation window. If the Evaluation window does not appear, click Mark for Quality ◩.

– To export a recording from the Media Player, click Export Selected Contact ◩, choose the option you want for the exported recording from the Export Selected Contact dialog box, and then click Export Selected Contact.

– To exit the Media Player, click Close ⊗.

About Evaluations

Contact recordings can be evaluated and scored by playing back contact audio and screen recordings made during a call. The performance statistics available in the Dashboard application and Reporting application are based on these evaluation scores.

Your role and scope determines your ability to play and evaluate a contact recording in the Recordings application.

Evaluation Form

The Evaluation Form window (Figure 37) allows you to evaluate a contact recording. Only users configured to evaluate a contact recording can complete the form; all other roles can only review it.

If you are not allowed to evaluate a contact, the following message appears in the Evaluation window:

```
You are not allowed to evaluate this contact.
```

Figure 37.   Evaluation Form window

The Evaluation Form window is divided into the following sections.

- Evaluation toolbar—enables you to tag the evaluation as an HR or Training contact, add or read a form or section comment, mark the evaluation as complete or as approved, and to save any changes made to the evaluation. It also enables you to choose an evaluation form to go with the contact recording, if enabled by the administrator.

- Evaluation form—displays the form used to evaluate the contact. Only users configured to evaluate users can complete the form; all other roles can only review it.

  NOTE: Supervisors and/or managers can also complete evaluations if enabled by the administrator.

Table 27 describes the fields in the Evaluation Form window.

Table 27.   Evaluation Form fields

Field	Icon	Description
Evaluation toolbar		
Evaluation Form	NA	Choose the evaluation form you want to use when evaluating the contact. The list of evaluation forms that appear in this drop-down list is determined by your administrator.
		If only one evaluation form is available for this contact recording, only the name of the assigned evaluation form appears in the Evaluation Form field.
		If more than one evaluation form is available, you can switch to a different form at any time, even if the contact recording was partially scored (In Progress). If the contact is partially scored and you switch evaluation forms, the following happens:
		• The score is reset to zero (0)
		• Any form or section comments are deleted
		NOTE: After saving and evaluation, only an evaluator who originally evaluated the contact can change the evaluation form.
		• The HR and Training check boxes are cleared
		• When a user changes an evaluation form and clicks Save, the evaluation belongs to the user who changed the form, and the evaluation form remains in the In Progress state
		NOTE: You cannot change an evaluation form when the evaluation is in the Needs Approval or Scored state. To change the evaluation form when the evaluation is in the Needs Approval or Scored state, the approver must reject the evaluation. When the evaluation is rejected it returns to the In Progress state, and you can change the evaluation form and re-do the evaluation.

Field	Icon	Description
Evaluation		Displays the evaluation as a quality evaluation. Evaluation and Calibration are toggle buttons. When these buttons appear, you can decide to save the evaluation as calibration only or quality evaluation. The following rules govern the toggle settings and when the toggle is enabled: • If you have not started a quality evaluation (and it is not in an in progress or approval state), and you have not started a calibrated evaluation, the toggle is enabled and the default is Calibration. • If you have not started a quality evaluation and you start a calibrated evaluation, the toggle is set to Calibration. • If another evaluator started scoring the quality evaluation, the toggle is set to Calibration and Evaluation is disabled. You can view your calibrations. If no calibration exists, you can create a calibrated evaluation. • If you created a quality evaluation, the toggle is set to Evaluation. You can then edit your existing evaluation.
Calibration		Displays the evaluation as a calibrated evaluation.
Add Comments		Add a comment about the contact recording.
Read Comments		Displays a window containing all comments entered for the contact recording. This button is only enabled if there are form comments.

Field	Icon	Description
Choose Action	NA	Choose one of the following actions: • Mark for HR—marks a contact for HR and claims the evaluation for you. • Mark for Training—marks a contact for training and claims the evaluation for you. NOTE: Mark for HR and Mark for Training do not appear in the list when a contact is marked for calibration. • Reject—reject an evaluation in the Needs Approval state. When selected, the value in the State field changes to In Progress. The following actions appear if you are an evaluator. Or you are a manager or supervisor who has been designated by the administrator to evaluate a specific evaluation form. • Save—save the evaluation. • Complete—mark the evaluation as scored. This option appears when you complete all questions in the evaluation form. When selected, the State field changes to Needs Approval and an alert is sent to the manager or supervisor responsible for approving the evaluation. If no approval is required, the State field changes to Scored. The following actions only appear if you are an evaluator, supervisor, or manager configured to approve this evaluation and the contact recording is in the Needs Approval state. • Approve—approve an evaluation in the Needs Approval state. When selected, the value in the State field changes to Scored. • Print—prints the evaluation form. This option only appears when an evaluation is in the Scored state. When you choose this option, the report appears in PDF format in a new tab or a web browser depending on your web browser preferences.
Evaluation form		
Total	NA	Total number of points received for the form and by section.
Possible	NA	Total possible number of points for the form and by section.
Percent	NA	The percentage score for the form and by section.
Information	ⓘ	Displays a tooltip that provides information related to the evaluation question.

Understanding Evaluation Scoring

As the evaluator scores a section on an evaluation form, a rolling total and percent is displayed on that section. For this example, assume the completed form has two sections called Greet and Assess.

The Greet section has a possible total of 15 points. As the evaluator scores each question in the section, the total section score earned is displayed. The agent has earned 8 out of the possible 15 points, or 60%.

Likewise, the Assess section has a possible total of 10 points and the agent earned 8 points, or 80%.

The score (72%) for entire evaluation form appears at the top of the form. These numbers are calculated as you complete each section.

Figure 38 shows a completed form with two sections.

Figure 38.   Sample scored evaluation form
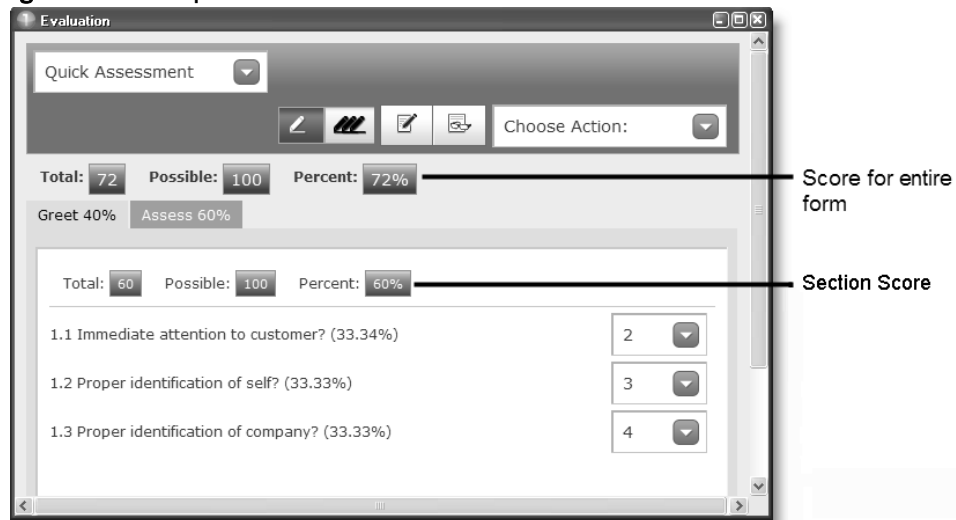
Understanding How Sections are Weighted

For this example, assume the completed form has two sections called Greet and Assess. The administrator who set up the evaluation form determined that the score of the Greet section would contribute 40% towards the overall score and the score of the Assess section would contribute 60%. A section weight is indicated on each section tab. The sum of all of the section weights must be 100.

These weights are applied after all sections are scored to arrive at the overall score (as a percentage) for the evaluation.

The overall score is calculated as follows:

- Section score (as a percentage) × section weight = weighted section score

- Sum of all weighted section scores = total score (as a percentage)

In this example:

- Greeting section = 60% x 0.4 = 24%

- Assess section = 80% x 0.6 =48%

- 24% + 48% =72% overall score

Understanding How Questions are Weighted

The maximum score for a section is 100%, no matter how many questions it contains.

For example, in a section with 3 questions:

- Question 1 has a weight of 50%

- Questions 2 and 3 each have a weight of 25%

This means question 1 is worth a maximum of 50 points and questions 2 and 3 are each worth a maximum of 25 points.

If a 0–5 question has a weight of 50%, then points are given for each possible score as follows:

- 1=10 points

- 2=20 points

- 3=30 points

- 4=40 points

- 5=50 points

If a 0–5 question has a weight of 25%, then points are given for each possible score as follows:

- 1=5 points

- 2=10 points

- 3=15 points

- 4=20 points

- 5=25 points

If a Yes/No question has a weight of 50%, then points are given for each possible score as follows:

- No=0
- Yes=50

If a Yes/No question has a weight of 25%, then points are given for each possible sore as follows:

- No=0
- Yes=25

Table 28 through Table 30 show the results for several sections in a sample evaluation form.

Table 28. Scored example for a 3 question section

Question	Weight	Type	Score	Weighted Score
1	50	0–5	4	40
2	25	0–5	3	15
3	25	Yes/No	Yes	25
			Section Score	80%

Table 29. Scored example for a 4 question section

Question	Weight	Type	Score	Weighted Score
1	60	0–5	3	36
2	15	0–5	4	12
3	20	Yes/No	No	0
4	5	Yes/No	Yes	5
			Section Score	53%

Table 30.   Scored example with Not Applicable (NA) as an answer to one of the questions

Question	Weight	Type	Score	Weighted Score
1	60	0–5	NA	-
2	15	0–5	4	12
3	20	Yes/No	No	0
4	5	Yes/No	Yes	5
			Section Score	42.5%

NOTE: An answer of NA removes that question from the total possible. So for this example, the score of 43% is based on a score of 17 out of a total of 40.

The formula used for weighting questions considers the underlying scoring system used today. The following example shows this scoring system.

Label	No	Yes	NA
Score	0	1	-

Label	0	1	2	3	4	5	NA
Score	0	1	2	3	4	5	-

In the current scoring system, the maximum score per question for a Yes/No question is 1 point. For a 0–5 question the maximum score per question is 5. NA is ignored.

So the formula used to calculate the weighted score for a single question is:

(Actual score/ Maximum score) * Weight = Weighted score

Here are some example calculations for weighted question scores:

Question type	Maximum score	Actual score	Weight	Formula	Weighted score
0–5	5	3	40%	(3/5) * 0.40	24%
0–5	5	2	17%	(2/5) * 0.17	6.8%
Yes/No	1	No	30%	(0/1) * 0.30	0%
Yes/No	1	Yes	45%	(1/1) * 0.45	45%

Understanding How Evaluations are Scored

When you save an evaluation form, the Evaluation Form calculates the points for Total, Possible, and the Percentage (or score). These formulas are based on the number of sections in an evaluation form.

The total number of points for a scored evaluation form is calculated using the following formula.

```
Form Total Points =
+ (Section 1 weight ÷ 100) × Section 1 Total Points
+ (Section 2 weight ÷ 100) × Section 2 Total Points
+ (Section 3 weight ÷ 100) × Section 3 Total Points
+ (Section 4 weight ÷ 100) × Section 4 Total Points
…
```

The following example shows how the total number of points for a scored evaluation form with four sections is calculated.

```
+ (25 ÷ 100) × 75    = 18.75
+ (25 ÷ 100) × 33.33 = 8.3325
+ (25 ÷ 100) × 56    = 14
+ (25 ÷ 100) × 75    = 18.75
Form Total Points    = 59.83
```

The total possible number of points for a scored evaluation form is the sum of each section possible points times the total number of points.

```
Form Possible Points =
+ (Section 1 weight ÷ 100) × Section 1 Possible Points
+ (Section 2 weight ÷ 100) × Section 2 Possible Points
+ (Section 3 weight ÷ 100) × Section 3 Possible Points
+ (Section 4 weight ÷ 100) × Section 4 Possible Points
…
```

The following example shows how the total possible number of points for a scored evaluation form with four sections is calculated.

```
+ (25 ÷ 100) × 100   = 25
+ (25 ÷ 100) × 66.66 = 16.6649
+ (25 ÷ 100) × 80    = 20
+ (25 ÷ 100) × 100   = 25
Form Possible Points = 86.6649
```

The percentage for a scored evaluation form is calculated using the following formula:

```
Form Percentage = (Form Total Points ÷ Form Possible Points) × 100
```

The following example shows how the percentage for a scored evaluation form with four sections is calculated.

```
(59.83 ÷ 86.6649) × 100 = 69.04%
```

Points to Remember

When completing the evaluation form, remember the following points.

- You can only select one score per question.

- If you leave the evaluation form before you complete the evaluation, choose Save from the Choose Action drop-down list to mark the evaluation form as In Progress.

- When the evaluation is saved but not completed, only the original evaluator can change the evaluation form. If for some reason Evaluator A is no longer available and Evaluator B must take over Evaluator A's evaluations, Evaluator B must log in as Evaluator A.

- Once the evaluation is saved and completed, only the original evaluator can modify the evaluation scoring. If for some reason Evaluator A is no longer available and Evaluator B must take over Evaluator A's evaluations, Evaluator B must log in as Evaluator A.

- Only an administrator can create a form. A form can use the following scoring methods:

  - Yes/No

  - Scale of 0-5

  - Yes/No and scale of 0-5

  There can be up to 10 sections in an evaluation form, and each evaluation form can include up to 100 questions.

- If you choose NA for each score in a section, the section score appears as follows:

```
Total: 0   Possible: 0   Percentage: 0%
```

- If you choose NA for each score in the entire evaluation form, the evaluation score appears as follows:

```
Total: 0   Possible: 0   Percentage: 0%
```

- When a section includes a KPI question and you answer the KPI question with zero (0) or No, and then click Complete, the entire evaluation fails.

  The section score containing a KPI failure appears as follows:

```
Total: 0   Possible: <variable 1>   Percentage: 0%
```

  Where <variable 1> changes based on how you answer the questions in the section.

  The evaluation score containing a KPI failure appears as follows:

```
Total: 0   Possible: <variable 2>   Percentage: 0%
```

  Where <variable 2> changes based on how you answer the questions in the entire evaluation form.

  See "Key Performance Indicator Questions" on page 102 for more information on KPI questions.

- When you leave a KPI question in a section unanswered, choose NA for the remaining questions, and then click Complete, the KPI question is marked as NA. There is no KPI failure in this instance.

  See "Key Performance Indicator Questions" on page 102 for more information on KPI questions.

- When you mark a question as NA, the weight for that question is not used in the section scores and the evaluation score calculations.

Key Performance Indicator Questions

The administrator who creates the evaluation form might designate some questions as Key Performance Indicator (KPI) questions. A question designated as a KPI question is labeled. A poor score on a KPI question ("no" on a Yes/No question or "zero" on a 0–5 question) results in a zero score for the entire evaluation, no matter how the agent scores on other questions.

You must continue to score the entire evaluation when a KPI question triggers a final zero score. The scores you assign to all questions and sections are retained and are available for review.

Evaluation Guidelines

When locating and playing back a contact recording for evaluation, consider the following information.

- An agent who is currently not on a team can search and play back their own scored recordings (and all training recordings). The cell in the Team column associated with the selected contact recording appears blank.

  NOTE: An agent must be associated with a team if you want the agent's contacts to be recorded.

- An evaluator can search, play back, and score contacts for an agent who is not currently in a team or group. If the agent does not belong to a team or group, the cell in the Team or Group column associated with the selected contact recording appears blank.

- A supervisor can search, play back, and score contact recordings (if configured to do so) for an agent who belongs to a team supervised by the supervisor when the team does not belong to a group.

  NOTE: A team must be associated with a group for quality management purposes.

Evaluating Agent-Tagged Recordings

When an agent tags a contact for retention, the contacts are recorded and Tagged appears in the Reason column of the Contacts table. Tagged recordings are not associated with an evaluation form until the first person who evaluates the recording assigns an evaluation form.

Evaluation Comments

The Comments button (■ or ▢) displays the Evaluation Comments dialog box. The Evaluation Comments dialog box displays all comments associated with the contact recording and highlights the selected comment. You can select the text of a comment and use standard Windows commands to copy and paste it into another application.

The evaluation comments are also available for viewing and printing in the Agent Scored Evaluation report. See for more information.

Comments

Evaluators, managers, and supervisors can add comments to an evaluation form either while they are scoring it, or after they have completed scoring the evaluation form.

Agents and knowledge workers can add comments to a recording only after the evaluation has been scored.

The Read ⌨ button in the Evaluation Form window displays a list of comments saved with the contact recording in the Comments dialog box. If you want to change an existing comment that is within your scope, click Edit. For example:

- An agent can only edit their own comments

- A supervisor can edit the comments made by agents within the supervisor's scope and the supervisor's own comments.

The Add Comments ✎ button displays the Comments dialog box where you can add a comment to the contact recording. By default, the Comments dialog box automatically populates the current time in the recording in the minute and seconds fields. When you click save, your comment will appear in the energy bar at the specified time.

> NOTE: If you enter a time that is greater than the call duration, the comment appears at the last second of the call duration in the energy bar.

The Comments window displays the name of the person who entered the comment and the date and time it was entered.

> NOTE: Each comment can contain up to 1300 characters, and the total number of characters for all comments in an evaluation form is 65,000 characters. If your comment exceeds 1300 characters, create multiple comments.

Training and HR Tags

The evaluator, supervisor, or manager mark a contact for training by choosing Mark for Training from the Choose Action drop-down list in the Evaluation Form when they decide the scored contact recording can serve as a training example. By default, any contact recording with a Training tag is kept for 6 months, unless otherwise specified by the administrator, and can be viewed by any role. The evaluator, supervisor, or manager can remove a Training tag from a contact recording.

An evaluator, supervisor, or manager can mark a contact for Human resources (HR) by choosing Mark for HR from the Choose Action drop-down list in the Evaluation Form when they decide the recording should be reviewed by Human Resources for some reason. By default, any recording with an HR tag is kept for 6 months. The retention time is configured by the administrator. Only an evaluator, supervisor, or manager can remove an HR tag from a contact recording.

When you mark an unscored evaluation for HR or Training, the evaluation is saved and claimed for you.

Calibration

Calibration helps your contact center achieve the highest measurement quality and productivity.

If you have permission to evaluate contacts (evaluator or manager within scope), you can mark a contact for calibration by choosing Mark for Calibration from the Recordings toolbar. This allows users to search for a contact marked for calibration and evaluate that contact.

A contact marked for calibration can be evaluated by multiple users with evaluation privileges. The calibration feature allows one calibration per user with evaluator privileges. A calibrated evaluation allows you to evaluate the evaluators and ensure the evaluators are using the same standards to evaluate contacts.

An evaluator can separately evaluate and calibrate a contact. To locate unscored calibrations, in search feature select My Calibration and Unscored filters.

You can then meet with the other evaluators and discuss how to score calls of this type in the future.

If a contact is marked for calibration evaluation, the calibration score does not appear in the team and agent results in dashboards or reports. The calibration score only appears in the Evaluation Calibration report.

Managing Evaluations

TASK

- To evaluate a contact, double-click a contact in the Contacts table. Score the contact, add comments, and add tags as needed in the Evaluation Form window. The Evaluation Form window allows you to perform the following tasks:

  – Choose the type of evaluation you want to view or evaluation by clicking Evaluation ✎ to access the quality evaluation or Calibration ⚖ to access the calibration evaluation.

  NOTE: These options only appear when both the quality evaluation and calibration evaluation are available.

  – To save an evaluation, choose Save from the Choose Action drop-down list.

    When you save an unfinished evaluation, the State field displays In Progress. You can continue the evaluation at a later time.

  NOTE: An evaluation form cannot be changed after you save an evaluation.

– To complete an evaluation, choose Complete from the Choose Action drop-down list.

If the evaluation must be approved when you complete the evaluation, the State field changes to Needs Approval and an alert is sent to the Manager or Supervisor responsible for approving the evaluation. If no approval is required, the State field changes to Scored.

NOTE: If the contact is scored for quality management purposes, it will appear as scored when search for All Evaluations or My Evaluations. If you scored a contact for calibration purposes, it will appear as scored when you search for My Calibrations.

– To add a comment to an evaluation form, click Add Comments , type your comment, type the time in minutes and seconds where you want the comment to appear, and then click Save.

NOTE: The evaluation form must be saved before you can add a comment.

The comment is saved, and the Comments (or) button appears on the Media Player. If the contact is unscored, it also claims that evaluation for you.

– To read comments in an evaluation form, click Read Comments , and when finished click OK.

– To edit comments within your scope in an evaluation form, click Read Comments , click Edit next to the comment that you want to modify, complete the fields, and then click Save.

– To mark a contact recording for HR, choose Mark for HR from the Choose Action drop-down list.

The recording is tagged as Training or HR. If the contact is unscored, it also claims that evaluation for you.

– To mark a recording for training, choose Mark for Training from the Choose Action drop-down list.

– To approve an evaluation in the Needs Approval state, choose Approve from the Choose Action drop-down list.

– To reject an evaluation in the Needs Approval state, choose Reject from the Choose Action drop-down list.

If you choose Approve, the State field for the contact recording changes to Scored. If you choose Reject, the State field for the contact recording changes to In Progress.

NOTE: A manager can only approve or reject an evaluation that is in the Needs Approval state.
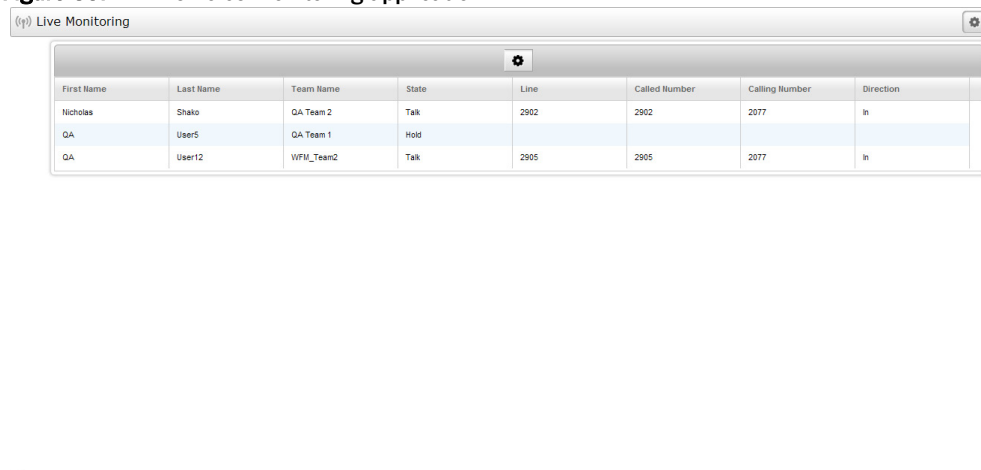
– To print an evaluation form in the Scored state, choose Print from the Choose Action drop-down list.

Live Voice Monitoring

The Live Voice Monitoring application ([Figure 39](#)) allows supervisors and managers to listen to active calls within their scope.

> **NOTE:** Live Voice Monitoring is not supported with Cisco MediaSense Recording.

Figure 39. Live Voice Monitoring application

For Unified CCE or Unified CCX, the Live Voice Monitoring application displays agents for every configured Unified CM cluster. You can only monitor agents who are assigned to the same Unified CM cluster as the extensions you provide in the Live Monitoring Settings popup dialog. See ["Live Monitoring Settings" on page 112](#) for more information on the Live Monitoring Settings popup dialog.

Roles and Scope

The Live Voice Monitoring application is only available for supervisors, managers, and the administrator. Agents, knowledge workers, evaluators, and archive users cannot access Live Voice Monitoring.

A supervisor or manager can monitor any active user whose phone is configured for Live Voice Monitoring regardless of scope. The supervisor or manager can continue monitoring the agent who has logged out of the user interface but are still logged into their PC.

Live Voice Monitoring only supports Unified CCX or Unified CCE within a single Unified CM cluster. For example, if a supervisor in cluster A tries to monitor an agent in cluster

A, Live Voice Monitoring is supported. If a supervisor in cluster A tries to monitor an agent in cluster B, Live Voice Monitoring is not supported.

When an agent uses the Pause command during a live voice monitoring session, the audio stops for the duration of the pause. When the agent resumes recording, the audio starts.

If your system is configured for Avaya, the number of supervisors and managers that can monitor a single call is limited by the number of conference participants (which is 6). Each supervisor or manager counts as a conference participant.

If your system is configured for Unified CCX or Unified CCE, Unified CM's Silent Call Monitoring feature does not allow multiple supervisors or managers to monitor a single call. As a result, multiple supervisors or managers cannot monitor a single call using the Live Voice Monitoring application.

Points to Remember

Remember the following points when working with the Live Monitor application.

- If you, as a supervisor or manager, are configured to be recorded using any recording method (for example, Desktop Recording, Server Recording, or Network Recording), any live voice monitoring sessions you conduct might be recorded. The calls will only be uploaded and displayed as calls in the Recordings application if they match either an archive workflow or a quality management workflow. To avoid this behavior, the administrator can configure a second extension in the administrator interface, and possibly Unified CM that is not configured to be recorded. Therefore, all calls on the first extension will be recorded, but live monitor sessions conducted on the second extension will not be recorded.

- You can only initiate monitor sessions on calls that are in the Talk state. You cannot monitor a line before a call appears, or initiate a monitoring session for a call that is in the Hold state. Calls that are in the Hold state after you initiated a monitoring session will continue to be monitored.

- If Live Voice Monitoring application returns a failure message when you start monitoring an agent, it could be for one of the following reasons.

  - Unified CM could not place a call to the provided extension.

  - The agent is already being monitored by another user.

  - The agent's phone does not support Network Recording.

  - The Built In Bridge is not enabled on the agent's phone.

- Live Voice Monitoring is call-by-call based, not device or line-based. That is to say you initiate the monitor on a particular call, once the call is over your monitor session is over. You cannot continually monitor a user or a line.

- Live Voice Monitoring calls are "fire and forget." Once the live voice monitoring session is established, Live Voice Monitoring does not track monitor session or provide call control for the monitor session.

- Your extension automatically answers monitored calls. If your phone is on the hook, the call will automatically go to your speaker phone. If you are not using a headset, you might want to lift the handset before initiating live voice monitoring.

- Once you establish a monitoring session on your phone, you can transfer it anywhere just like a normal call. For example, you could transfer it to your cell phone.

- If you try to monitor a call that is already being monitored by another supervisor or manager, you will hear a busy signal on your extension and the phone displays the extension of the agent you are trying to monitor. However, monitored users can still be recorded through Network Recording.

- To end a monitoring session, just end the call on your phone or wait for the monitored call to end.

- Live Voice Monitoring is not supported in an Avaya environment when the supervisor uses an analog device.

Configure Fields

The Configure Fields window allows you to choose the fields that you want to appear in the Live Voice Monitoring table. By default, all fields are selected.

Table 31 lists all fields that appear in the Configure Fields window.

Table 31.   Live Voice Monitoring table fields

Field	Definition
Organization	
First Name	The agent's first name.
Last Name	The agent's last name.
Team Name	The name of the team.
Contact	

Field	Definition
State	The current activity state for the call or line. The possible states are as follows: • None—There are no calls on the user's monitorable extensions. This includes calls that are ringing but have not been answered. You cannot monitor this user. • Talk—The user answered a call and is talking. The Talk state takes precedence over any other. (That is, if any call is active then the state is Talk.) A user can only have one call in the Talk state at a time (this is a Unified CM constraint). You can monitor this user. • Hold—The user answered a call and is on hold. You cannot monitor this user. If a call is in a Talk state, the following fields are populated: Line, Called Number, Calling Number, Direction, and Duration.
Line	The line's extension. **NOTE:** This field is populated only if a call is in the Talk state.
Called Number	The DID or DNIS number that was used to dial this extension. **NOTE:** This field is populated only if a call is in the Talk state.
Calling Number	The caller ID or ANI of the calling party. Displays "unknown" if the calling number is unlisted or blocked. **NOTE:** This field is populated only if a call is in the Talk state.
Direction	The direction of the call. The possible values are: • In—Indicates an incoming call. • Out—Indicates an outbound call initiated by the agent. **NOTE:** This field is populated only if a call is in the Talk state.
Call Duration	The amount of time in HH:MM:SS format that has elapsed since the call was answered. **NOTE:** This field is populated only if a call is in the Talk state.

Managing Live Voice Monitoring

TASK

• To configure fields in the Live Voice Monitoring table, click Settings ⚙ in the Live Voice Monitoring table toolbar, click a tab, select the check box next to each field name you want to appear in the table, repeat for each tab, and then click Apply.

STEP RESULT: The Live Voice Monitoring table displays the fields that you selected.

- To move a column to another location, click the column header, click the column body, and then drag the column to a new location.

- To search for active users, click Settings ⚙ in the Live Voice Monitoring toolbar, complete the fields in the Live Monitoring Settings window, and then click Submit.

STEP RESULT: The Live Voice Monitoring table displays the users that match your search.

- To configure your extension, click Settings in the Live Voice Monitoring toolbar, type your extension in the My Extension field, and then click save.

- To delete your extension, clear the My extension field.

- To start a Live Voice Monitoring session, double-click a user in the Live Monitor Settings table.

ADDITIONAL INFORMATION: You can only monitor calls in the Talk state.

Your extension automatically answers monitored calls. If your phone is on the hook, the call will automatically go to your speaker phone. If you are not using a headset, you might want to lift the handset before initiating Live Voice Monitoring.

STEP RESULT: The Live Voice Monitoring application starts monitoring the call for the selected user from the line you identified when you configured My Extension. You can now listen to the call.

> **NOTE:** If your phone has multiple extensions, and you want to monitor more than one user at a time, repeat this step for each extension on your phone. Or use the same extension to monitor another call. If you use the same extension to monitor a second user simultaneously, the first call is placed on hold.

- To end a Live Voice Monitoring session, click End Call on your phone.

ADDITIONAL INFORMATION: If you are monitoring multiple calls, repeat this step for each extension on your phone.

STEP RESULT: The Live Voice Monitoring session ends.

Live Monitoring Settings

The Live Monitoring Settings popup dialog (Figure 40) allows you to search for specific active users in a Network Recording or Avaya Recording environment. When you first access the Live Voice Monitoring application, the User table shows all users in your scope.

Figure 40. Live Monitoring Settings popup dialog

All search criteria fields except Group and Team accept any defined unicode character, plus wildcards ("?" and "*"). A defined unicode character is any character that can be typed on your keyboard. The asterisk (*) matches one or more characters. The question mark (?) in a string can be replaced by any character, but the length of the string must be exactly as represented.

Table 32 defines the fields in the Live Monitoring Settings popup dialog.

Table 32. Live Monitor Settings fields

Field	Description
First Name	Filters active agents based on the agent's first name. You can either enter an exact match of the name or use wildcards. An asterisk (*) matches zero or more characters, and the question mark (?) matches a single characters.

Field	Description
Last Name	Filters active agents based on the agent's last name. You can either enter an exact match of the name or use wildcards. An asterisk (*) matches zero or more characters, and the question mark (?) matches a single characters.
Group	Filters active agents based on the assigned group. The Group drop-down list displays all groups within your scope. You can select one, more, or All Assigned groups. If you choose All Assigned, Live Voice Monitoring filters the search based on all groups within your scope. To select multiple groups, choose one of the following options. • Use Shift + Click to select contiguous rows in the list of teams • Use Ctrl + Click to select non-contiguous rows in the list of teams NOTE: The Group drop-down list is only available to managers.
Team	Filters active agents based on the selected team. The Team list displays all teams within your scope. You can select one or more teams. To select multiple teams choose one of the following options. • Use Shift + Click to select contiguous rows in the list of teams • Use Ctrl + Click to select non-contiguous rows in the list of teams • Select the check box to select all teams If you do not select any teams, it assumed you want them all (that is, you want the selected group).
Select All	When selected, selects all teams in the list. This check box is clear by default.
My Extension	The extension used to receive the monitored call for the selected user. You can choose to change the extension before issuing each monitor request and monitor different sessions on different extensions. Enter your number as it appears on the upper right of your phone display, this may include the area code and prefix. Do not enter hyphens (-) in the field (for example, 5555551234). For Unified CCX or Unified CCE, you can only monitor agents who are assigned to the same Unified CM cluster as the extension you provide in this field.

Table 33 defines the buttons in the Live Monitoring Settings popup dialog.

Table 33.   Live Monitor Settings buttons

Button	Description
Find Users	When clicked, locates the active users that match the filter parameters.
Remember my extension	When clicked, saves the extension number entered in My Extension after you initiate a successful Live Voice Monitoring session and then logout or close the web browser.
	NOTE: The extension will not be not saved if you exit the browser without initiating a Live Voice Monitoring session, and then logout or close the web browser.
	When clicked, the extension is deleted.
	If your browser does not support cookies, this check box is disabled.
	The extension is saved on a user-by-user basis, so multiple users using the same client machine can have different extensions. For example, one user may choose to remember their extension and another user might choose not to remember their extension.
Close	Exit the Live Monitor Settings popup dialog.

Recording Monitoring

The Recording Monitoring application (Figure 41) allows managers, supervisors, and archive users to monitor the recording status of active calls for users in their scope.

Figure 41. Recording Monitoring application

You can use the Recording Monitoring application to identify when calls are not being recorded and why they are not being recorded. When you know a call is not being recorded you can correct the situation immediately.

The Filter Rows field allows you to filter active calls by text that appears in a column. Each row in the table is associated with an agent.

Configure Fields

The Configure Fields dialog box allows you to choose the fields that you want to appear in the Recording Monitoring table. By default, all fields are selected.

Table 34 lists all fields that appear in the Configure Fields dialog box. When these fields are displayed in the Recording Monitoring application they are refreshed automatically when the status changes with the exception of the ACD Logged In field.

> **NOTE:** Real-time updates for MediaSense Recording is not supported.

Table 34.   Configure Fields dialog box

Field	Definition
Organization	
Last Name	The agent's last name.
First Name	The agent's first name.
Group Name	The name of the group.
Team Name	The name of the team.
Site	The name of the site.
License	The license type assigned to the user. The possible values are: • Unlicensed • Advanced • Basic • Compliance • SPAdvanced • SPBasic • SPCompliance
Recording	
Extensions	The agent's extension. **NOTE:** This field is populated only if a call is in the Talk state.

Field	Definition
Recording Type	The type of recording. Choose one of the following possible recording types: • Endpoint—Desktop Recording (Endpoint) • Network Recording • Server Recording (SPAN) • MediaSense—Cisco MediaSense recording • Multiple Registration—Avaya Recording using the Multiple Registration method • Single Step Conference—Avaya Recording using the Single Step Conference method • Unknown—the recording type could not be determined This field is available under Expand Search.
Recording Device	The MAC address of the user's phone.
Screen Address	The IP address for the Screen Record server.
Voice Address	The IP address Voice Record server.
User Recording Status	
PC Logged In	The logged in status for the QM user.
ACD Logged In	The logged in status for the ACD user. This field is updated once every 10 minutes. **NOTE:** This field is only supported in a Unified CCE environment.
Voice	The current voice recording state. The possible states are as follows: • 🟢—voice recording is successful • 🔴—voice recording is unsuccessful • ⊖—no information on voice recording
Screen	The current screen recording state. The states are as follows: • 🟢—screen recording is successful • 🔴—screen recording is unsuccessful • ⊖—no information on screen recording
Last Success	The last time in yyyy--mm-dd hh:mm that a call was recorded successfully.
Last Error	The last time in yyyy--mm-dd hh:mm that a call recording failed.

Field	Definition
Last Error Cause	The reason why the recording failed.

Define Filters

The Define Filters window (Figure 42) allows you to search for agents who are actively recording contacts.

By default, the Recording Monitoring application displays only unsuccessful results in the Voice and Screen fields. Click Clear All to display all results. Everyone who is configured appears in the list, even if they do not have a license.

Figure 42. Define Filters window
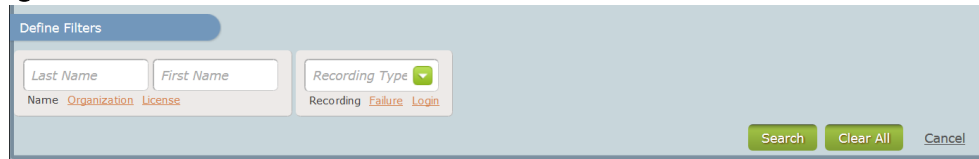
Table 35 describes the fields you can use to filter your search.

Table 35. Search Recordings fields

Field	Description
Name	Search contacts by name.
Last Name	The user's last name. If you are using Active Directory, Define Filters uses the first and last name created in Active Directory. If you are using QM Authentication, Define Filters uses the first and last name created in the administrator interface.
First Name	The user's first name.
Organization	Search contacts by organization.
Group Name	The name of the group.
Team Name	The name of the team.
Site	The name of the site.

Field	Description
License	The available license types. The drop-down lists only the license types assigned to your configured users and includes Unlicensed.
Recording	Search contacts by recording type.
Recording Type	The recording type. You can choose from the following options: • Endpoint • Network • Server • MediaSense
Failure	Search contacts by failure for voice recording and/or screen recording.
Voice	Search failure by voice. You can choose from the following options: • Failure—Filter by failed recordings. • Success—Filter by successful recordings. • Unknown—Filter by unknown recordings.
Screen	Search failure by screen. You can choose from the following options: • Failure—Filter by failed recordings. • Success—Filter by successful recordings. • Unknown—Filter by unknown recordings.
Login	Search contacts by login type.
PC Logged In	Search contacts by PC login. You can choose from the following options: • Failure—Filter by failed login attempts. • Success—Filter by successful login attempts.
ACD Logged In	Search failure by ACD login. You can choose from the following options: • Failure—Filter by failed login attempts. • Success—Filter by successful login attempts.

Table 36 describes the buttons.

Table 36.   Search Recordings buttons

Buttons	Icon	Description
Search	NA	Search recordings.
Clear All	NA	Clear all filter fields.
Cancel	NA	Exit without saving changes.
Delete		Remove the field. This button appears under Expand Search.

Managing Recording Monitoring

TASK

- To configure fields in the Recording Monitoring table, click Settings ⚙ in the Recording Monitoring table toolbar, click a tab, select the check box next to each field name you want to appear in the table, repeat for each tab, and then click Apply.

    STEP RESULT: The Recording Monitoring table displays the fields that you selected.

- To move a column to another location, click the column header, click the column body, and then drag the column to a new location.

- To filter active calls, choose one of the following options:

    – Type text in the Search field.

    – Click Define Filters, complete the fields, and then click Search.

    STEP RESULT: The Recording Monitoring table displays the users that match your search.

Reporting

The Reporting application is a common (multi-product) application that contains a set of reports. These reports are product specific. Initially, Reporting displays reports for all products that you logged into. The default set of reports are defined by the role assigned to you.

Reporting Roles and Scope

The scope of the Reporting application is based on your highest role. If you are a supervisor and an agent, your access to the Reporting application is based on the supervisor role.

The Reporting application allows you to choose a report and the scope of the report (specific group, specific team, or specific agent). The scope of the report is based on the lowest selection you choose in the Reporting application.

Table 37 shows the filter choices available to you in the Reporting application based on role.

Table 37.　　　Filtering roles and scope for Reporting application

Reports	Agent or KW[a]	Super-visor +Agent	Super-visor +KW	Manager	Evaluator	Archive User
Scores All Data	x	x	x	x	--	--
Evaluation Totals Graph	x	x	x	x	--	--
Evaluation Scores	x	x	x	x	--	--
Contact Totals Graph	x	x	x	x	--	--
Section Scores	x	x	x	x	--	--
Agent Trend Graph	x	x	x	x	--	--
Question Scores	x	x	x	x	--	--
Agent Scored Evaluation	x	x	x	x	--	--
Quality Averages Graph	x	x	x	x	--	--

Reports	Agent or KW[a]	Super- visor +Agent	Super- visor +KW	Manager	Evaluator	Archive User
Evaluator Performance	--	--	--	x	--	--
Contact Detail	x	x	x	x	--	--
Evaluation Calibration	--	--	--	x	x	--
User Recording Status	--	x	x	x	--	--
Recording Access by User	--	--	--	x	--	x
Recording Access by Contact	--	--	--	x	--	x
System Status	--	--	--	x	--	--

a. Knowledge worker (KW).

Best Practices for Running a Report

When requesting multiple large reports, you might run out of memory. The best practice is to request only what you want to see. When you run a report with fewer records, less memory is required, and the report runs quicker. Use the following guidelines when generating a report:

- Before you run a report, know what data you need to access and how best to filter that data. If you can limit the results to a few hundred evaluations/contacts/events, the queries used to generate the data, with few exceptions, will be quick and the memory usage will be minimal.

- Use the smallest date range possible—If you have a very large number of evaluations in your database, running reports on a smaller timeframe will use less memory. You should consider how much data a report might return before choosing to run it for a full year.

- For the Agent Scored Evaluation report, try not to request a time period that would include more than 50 evaluations for the agent.

- Use many targeted searches rather than one large search.

- Use group, team, and agent filters to get a small amount of data instead of running a report for all groups or teams in your system.

- For reports that run over multiple teams and groups, select the specific groups or teams than you need to see in the report. The reports will generate much faster, and with less chance of failing if you run a report per team instead of one report for all teams.

- Verify a report has finished running before requesting another report. Less memory is used when fewer reports are running at the same time.

Points to Remember

When running reports, remember the following points:

- When you save a report, the settings are saved for that report. For example, you can save a report for one group, team, or agent, and then modify the report and save it for another group, team, or agent.

- Some reports allow you to choose the fields that appear in the report and the order in which those fields appear. When you click Run Report or Save As, the selected fields become the default fields for the report.

- Supervisors, managers, evaluators, and archive users can schedule a report to run on a recurring basis and specify when to run the report. The report is sent by email to specified email addresses.

- The email for a scheduled report includes the email address of the user who scheduled the report in the From field. If the user's email address is not available, the email address will be <First name>.<Last name>@automated.report. Where <First name> and <Last name> is the name of the user.

- When you run a default report, the default value prefixing each report title that can be run for group, team, or agent is a variable. It changes according to the options you select when generating a report and the report becomes a summary for a group, team, or agent.

  - If you are logged in as a manager, the default value prefixing each report title is Group.

  - If you are a supervisor, the default value prefixing each report title is Team.

  - If you are an agent, the default value prefixing each report title is Agent.

  For example, if you are a manager and you generate a report for Evaluation Scores using the default settings, the title of the report is "Group Evaluation Scores." If you choose a team from the Team list, the title of the report is "Team Evaluation Scores." If you choose an agent from the Agent list, the title of the report is "Agent Evaluation Scores." By default, an agent only sees "Agent Evaluation Scores."

Report Filters

Table 38 describes the filters for available reports. These fields appear when you select a report to run. The fields are grouped according to where they appear.

The values in the fields are saved when you click Search.

Table 38.　　Report filters

Report Filters	Description
Date(s)	
Start Date	The start date for this report period.
End Date	The end date for this report period.
Date Range	Run a report by date range. The possible options are: • Today—the current day • Yesterday—the previous day • Tomorrow—the next day • In the Past Week—the last seven days • In the Past Month—the last 30 days • In the Past Year—the last 365 days
Specific Date	Run a report by calendar date. The default date when you switch from Date Range to Specific Date is today's date.
Group	All available groups within the user's scope. (Whether you can select only one or multiple groups depends on the report type.) For some reports, Group is used for filtering only and does not appear in the report.
Team	All available teams within the user's scope. (Whether you can select only one or multiple teams depends on the report type.) For some reports, Team is used for filtering only and does not appear in the report.
Agent	All available agents within the user's scope. (Whether you can select only one or multiple agents depends on the report type.)
Select All	When selected, selects all agents or teams in the list. This check box is clear by default. (The ability to select all depends on the report type and your role.)

Report Filters	Description
User	All users who have accessed calls in the Recording archives. (You can select more than one user.) This filter only appears in the Recording Access By User report.
Form	
Evaluation	All available evaluation forms. (Whether you can select only one or multiple reports depends on the report type.) If there is only one evaluation form available, the name of the evaluation form appears in the Evaluation Form drop-down list as the default evaluation form. If there is more than one evaluation form available, All is the default option.
Level	
Level	The level of the event. Choose one or more of the following options. • ALL—displays all even level messages • INFO—displays only informational messages. Not an error, this is related information that may be useful for troubleshooting. • WARN—displays only warning messages. There is a malfunction that is a nuisance but that does not interfere with the program's operation • ERROR—displays only error messages. The program cannot continue This filter only appears in the User Recording Status report and the System Status report.
Format	

Report Filters	Description
Output	The following options are available. • HTML—Reports in HTML format can be viewed and printed from your web browser. When you select this option and click Generate Report, the report appears in the browser. HTML is the default option. • PDF—Reports in PDF format can be viewed and printed from Adobe Acrobat version 6.0 or higher. The free Adobe Acrobat Reader is available for downloading from www.adobe.com. When you select this option and click Generate Report, the File Download dialog box appears. You can choose to open or save the PDF file. • CSV—Reports in CSV (comma separated values) format can be viewed and printed from spreadsheet or word processing program for further manipulation. Note that there may be minor differences between the CSV reports and the HTML/PDF reports due to limitations of the file format. When you select this option and click Generate Report, the File Download dialog box appears. You can choose to open or save the CSV file. The default file name for a PDF or CSV report is <report name>_<current date>.<extension type>, for example report_scores_all_data_20113.18.pdf. NOTE: If the report does not open in PDF or CSV format, make sure your web browser settings are correct. In Microsoft Internet Explorer, you must select the Enable option for Automatic Prompting for File Downloads.
Fields	
Available	The columns that are available for the report. These columns do not appear in the report.
Selected	The columns that appear in the report and the order in which those columns appear. These are the default columns for the report when you click Run Report.
Recurrence	
Off	This report will not run automatically. The Off option is the default setting.

Report Filters	Description
On	This report will run automatically on the specified days and time. Your options are: • Run Every \<days of week\> at \<time\>—where \<days of week\> specifies one or more days of the week when the report runs and \<time\> specifies the time, in 30 minute intervals, when the report runs. The default for day and time is Sunday at 12:00 PM. • Run Every Month on Day \<day of month\> at \<time\>—where \<day of month\> specifies the day (1st-31st and Last Day) during the month when the report runs. Use the Last Day option to run the report on the last day of the month. The default for day and time is the 1st at 12:00 PM.
Execution	
Start Date	The first possible day when the report can automatically run.
No End Date	The recurring scheduled report has no end date. The report will run forever.
End After \<number\> Occurrences	The report stops running after \<number\> of occurrences, where \<number\> is the number of times the report will run (from 1-999).
End Date	The last day the recurring report is run.
Destination	
Addresses	The email address of each person who will receive this report. Each email address must be separated by a semicolon. This field supports up to 1350 characters or approximately 50-60 email addresses.

Running a Report

Follow these steps to run a report.

TASK

1. In the Reporting application toolbar, click one of these buttons:

   – The button for the product whose reports you want to run. If you use a shared login, there will be a button for each product.

   – The Saved button to access reports that have already been set up and saved for reuse.

2. From the resulting page, click the report you want to run to display that report's setup page.

3. Complete the report setup information. Choose the criteria, the date range, the format, and the fields to be included in the report.

4. If your role enables you to, set the recurrence of the report. You can set up the report to run automatically at specified intervals for a specified length of time or indefinitely. Recurring reports are emailed to the email addresses you enter in the Destination section. At least one email address is required.

5. Click Run Report to run the report immediately, or Save As to save the report for future use.

Quality Management Reports

This topic describes the quality management reports.

Report Types

The types of quality management reports that are available are:

- "Evaluation Reports" on page 128
- "System Reports" on page 139

NOTE: Scores are rounded up for individual sections in evaluation forms. However, in reports that show section averages for agents, teams, and groups, the section scores are first added and averaged before being rounded up. As a result, the average displayed in reports will vary slightly from the number calculated by adding up section scores as displayed in an evaluation form and then averaging them.

Evaluation Reports

This topic describes the report templates in the Evaluation Reports category.

Scores All Data

The Scores All Data report displays collective evaluation scores. The fields that appear in the report are listed in their default order from left to right as they appear in the report, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The Scores All Data template allows you to generate the following reports.

- Group Scores All Data—to view this report, choose a group

- Team Scores All Data—to view this report, choose a group and a team

- Agent Scores All Data—to view this report, choose a group, team, and agent

The following fields appear in this report.

- Start

- End

- Group

- Team

- Last Name

- First Name

- Agent ID

- Form (Optional)

- Recordings

- Evaluations (Optional)

- Exceeds

- Meet

- Below

- Average Score(%)

- Section Weight

- Section

- Question

- Question Weight

- [Agent]

- [Team]

- [Group]

- [Form]

- Page

- Run Date

Evaluation Scores

The Evaluations Scores report displays the scores for each evaluation. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The Evaluation Scores template allows you to generate the following reports.

- Group Evaluation Scores—to view this report, choose a group
- Team Evaluation Scores—to view this report, choose a group and a team
- Agent Evaluation Scores—to view this report, choose a group, team, and agent

The following fields can appear in this report:

- Start
- End
- Agent ID (Optional)
- Below (Optional)
- Evaluations (Optional)
- Exceeds (Optional)
- First Name (Optional)
- Form (Optional)
- [Form]
- Group (Optional)
- [Group]
- Last Name (Optional)
- Meet (Optional)
- Page
- Question (Optional)
- Question Weight (Optional)
- Recordings (Optional)
- Run Date
- Section (Optional)
- Section Weight (Optional)
- Team (Optional)
- [Team]

Section Scores

The Section Scores report displays the average score for each section of an evaluation form over a specified period. The averages can be of scores from multiple evaluations using the same form. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The Sections Scores template allows you to generate the following reports.

- Group Section Scores—to view this report, choose a group

- Team Section Scores—to view this report, choose a group and a team

- Agent Section Scores—to view this report, choose a group, team, and agent

The following fields can appear in this report.

- Start

- End

- [Agent]

- Agent ID (optional)

- Average Score(%)

- Below (optional)

- End

- Evaluations (optional)

- Exceeds (Optional)

- First Name (optional)

- [Form]

- Form (optional)

- [Group]

- Group (optional)

- Last Name (optional)

- Meet (optional)

- Page

- Recordings (optional)

- Run Date

- Section (optional)

- Section Weight (optional)

- Start
- Team (optional)
- [Team]
- Question (optional)
- Question Weight (optional)

Question Scores

The Question Scores report displays the scores for each question. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The Question Scores template allows you to generate the following reports.

- Group Question Scores—to view this report, choose a group
- Team Question Scores—to view this report, choose a group and a team
- Agent Question Scores—to view this report, choose a group, team, and agent

The following fields can appear in this report.

- [Agent]
- Agent ID (optional)
- Average Score(%)
- Below (optional)
- End
- Evaluations (optional)
- Exceeds (optional)
- First Name (optional)
- [Form]
- Form (optional)
- [Group]
- Group (optional)
- Last Name (optional)
- Meet (optional)
- Page
- Recordings (optional)
- Run Date
- Section (optional)

- Section Weight (optional)

- Start

- Team (optional)

- Question (optional)

- Question Weight (optional)

Evaluator Performance

The Evaluator Performance report provides a summary of all evaluators' productivity by displaying the number of evaluations they have performed over a specified time period, and the average score they have awarded to those evaluations. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The following fields appear in the report.

- Start

- End

- Last Name

- First Name

- User ID

- Eval Form

- Total Evaluations

- Average Score(%)

- [Form]

- Page

- Run Date

Quality Averages Graph

The Quality Averages Graph report displays the quality averages. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The Quality Averages Graph template allows you to generate the following reports.

- Group Quality Averages Graph—to view this report, choose a group

- Team Quality Averages Graph—to view this report, choose a group and a team

- Agent Quality Averages Graph—to view this report, choose a group, team, and agent

The following fields can appear in this report.

- Start
- End
- Group Average
- Team Average
- Agent Average
- [Agent]
- [Team]
- [Group]
- [Form]
- Page
- Run Date

Evaluation Totals Graph

The Evaluation Totals Graph report displays the evaluation totals by month. The fields that appear in the report are listed in alphabetical order, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The Evaluation Totals Graph template allows you to generate the following reports.

- Group Evaluation Totals Graph—to view this report, choose a group
- Team Evaluation Totals Graph—to view this report, choose a group and a team
- Agent Evaluation Totals Graph—to view this report, choose a group, team, and agent

The following fields can appear in this report.

- Start
- End
- Total Exceed
- Total Meet
- Total Below
- [Agent]
- [Team]
- [Group]
- [Form]
- Page

- Run Date

Contact Totals Graph

The Contact Totals Graph report displays the total number of quality management recordings and evaluations per month for a specified group. The fields that appear in the report are listed in their default order from left to right as they appear in the report, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The Contact Totals Graph template allows you to generate the following reports.

- Group Contact Totals Graph—to view this report, choose a group
- Team Contact Totals Graph—to view this report, choose a group and a team
- Agent Contact Totals Graph—to view this report, choose a group, team, and agent

The following fields can appear in this report.

- Start
- End
- Total QM Recordings
- Total Evaluations
- [Agent]
- [Team]
- [Group]
- [Form]
- Page
- Run Date

Agent Trend Graph

The Agent Trend Graph report displays a specific agent's or knowledge worker's average score for each evaluation made over a specified time period, along with an indicator if that score meets, exceeds, or is below expectations for that form. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The following fields appear in the report.

- Start
- End
- Score

- Trend
- ID
- Contact ID
- Form
- Contact Date
- Contact Time
- Contact Time Zone
- Call Duration
- Score(%)
- [Agent]
- [Form]
- Page
- Run Date

Agent Scored Evaluation

The Agent Scored Evaluation report displays the details of all evaluations scored for a specific agent or knowledge worker during a specified time period, including the scores given on each evaluation question, the score for each section, the overall score, and any added comments. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The following fields appear in the report.

- Start
- End
- Eval Form
- Contact ID
- Called Number
- Calling Number
- Call Duration
- Contact Date
- Contact Time
- Contact Time Zone
- Eval Date
- Eval Time

- Eval Time Zone

- Eval Last Name

- Eval First Name

- Score(%)

- Section

- Weight(%)

- Question Type

- Score

- Possible Score

- Possible

- KPI

- Question

- Section Total

- Form Comments

- First Name

- Last Name

- Comment Date

- Comment Time

- Comment Time Zone

- Comment

- Total Evaluations

- [Agent]

- [Form]

- Page

- Run Date

Contacts Detail

The Contact Details report displays the average evaluation scores, ranges, and contact total data for a specific agent. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The Contact Details template allows you to generate the Agent Contact Detail report. To view this report, choose a group, team, and agent.

NOTE: Statistics for scored contacts do not include evaluations in progress or evaluations waiting for approval.

The following fields appear in the report.

- Start
- End
- Date
- Score(%)
- Exceeds
- Meet
- Below
- Call Duration
- [Agent]
- [Form]
- Page
- Run Date

Evaluation Calibration

The Evaluation report displays calibrated evaluation score results. It only reports scored evaluations marked for calibration. It does not display standard evaluation scores. Use this report to evaluate your evaluators.

The fields that appear in the report are listed in their default order from left to right as they appear in the report, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

NOTE: This report might take several minutes to generate.

The Evaluation Calibration template allows you to generate the Evaluation Calibration report.

The following fields appear in the report.

- Eval Form
- Contact ID
- Called Number
- Calling Number
- Call Duration
- Contact Date

- Contact Time

- Evaluator Name

- Section

- Section Score (%)

- Question

- Weight(%)

- KPI

- Question Type

- Possible Score

- Score(%)

- Form Comments

- [Contact]

- Page

- Run Date

System Reports

This topic describes the report templates in the System Reports category.

Recording Access by User

The Recording Access by User report displays users who accessed the recordings over a specified period. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The following fields appear in the report.

- Start

- End

- User Last Name

- User First Name

- User ID

- Accessed Date

- Accessed Time

- Accessed Time Zone

- Agent Last Name

- Agent First Name

- Agent ID

- Contact ID

- Contact Date

- Calling Number

- Called Number

- [User]

- Page

- Run Date

Recording Access by Contact

The Recording Access by Contact report displays a list of archived recordings for a specific agent that were accessed over a specified period. It enables you to determine if a significant number of recordings concerning a particular contact, called number, or calling number were reviewed. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The following fields appear in the report.

- Start

- End

- Agent Last Name

- Agent First Name

- Agent ID

- Accessed Date

- Accessed Time

- Accessed Time Zone

- User Last Name

- User First Name

- User ID

- Contact ID

- Contact Date

- Calling Number

- Called Number

- [Agent]

- Page
- Run Date

User Recording Status

The User Recording Status report displays user and recording events associated with the agents configured for recording. You can choose to view messaged generated by the service at the INFO, WARN, or ERROR level, or at all levels. Information is available for the past 7 days, including the current day. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The following fields appear in the report.

- Start
- End
- Team
- Last Name
- First Name
- User ID
- Machine
- IP Address
- Date
- Time
- Level
- Category
- Message
- [Team]
- [Level]
- Page
- Run Date

System Status

The System Status report displays system and administrative events associated with agents configured for recording. You can choose to view messaged generated by the service at the INFO, WARN, or ERROR level, or at all levels. Information is available for the past 7 days, including the current day. The fields that appear in the report are listed in the order they appear, and are hyperlinked to their definitions in the "Field Dictionary for Reporting" on page 142.

The File Transfer Servlet writes events that warn when free space is low on the Site Upload server or when uploads stop because free space is too low.

The following fields appear in the report.

- Start
- End
- Date
- Time
- Machine
- IP Address
- Level
- Category
- Message
- Page
- Run Date

Field Dictionary for Reporting

This section is an alphabetical listing of all fields that appear in quality management reports and their definitions.

Field	Definition
Accessed Date	The date when the contact was accessed.
Accessed Time	The time when the contact was accessed.
Accessed Time Zone	The time zone where the contact was accessed.
[Agent]	The agents' first and last names based on selection filter criteria for this report.
Agent	The agent's first and last name.
Agent Average	The average evaluation score of all the agent's evaluations.
Agent First Name	The agent's first name.
Agent ID	The agent's ID.

Field	Definition
Agent Last Name	The agent's last name.
Agent Name	The agent's first and last name.
Average Score(%)	The average score for one of the follow items. • Form • Section • Question
Below	The number of evaluated contact recordings that are below expectations.
Category	The application associated with the event.
Call Duration	The contact's talk time (length of time between call answered and call dropped).
Called Number	The number of the phone that received the call.
Calling Number	The number of the phone that made the call. Displays "unknown" if the calling number is unlisted or blocked.
Comment	The comments related to a specific form or section. Anyone who can view the evaluation can add a comment.
Comment Date	The date when the comment was entered.
Comment Time	The time when the comment was entered.
Comment Time Zone	The time zone where the comment was entered.
Comments	The comments for an evaluation. Anyone who can view the evaluation can add a comment.
[Contact]	The contact's unique ID.
Contact Date	The date the contact occurred.
Contact ID	The contact's unique ID.
Contact Time	The time when the contact occurred.
Contact Time Zone	The time zone where the contact occurred.
Date	The contact date.

Field	Definition
End	The end date for this report period.
Eval Date	The date the contact was evaluated.
Eval First Name	The first name of the evaluator.
Eval Form	The evaluation form used to score the contact.
Eval Last Name	The last name of the evaluator.
Evaluator Name	The first and last name of the evaluator
Eval Time	The time when the evaluator evaluated the contact.
Eval Time Zone	The time zone where the contact was evaluated.
Evaluations	The total number of evaluations.
Exceeds	The number of evaluated contact that exceeds expectations.
First Name	The agent's or evaluator's first name.
Form	The name of the evaluation form.
[Form]	The names of the evaluation forms based on selection filter criteria for this report.
Form Comments	The comments for a form. Anyone who can view the evaluation can add a comment.
Group	The name of the group.
[Group]	The names of the groups based on selection filter criteria for this report.
Group Average	The average score of all contacts evaluated for agents in the group.
ID	The ID of the contact.
IP Address	The IP address of the computer on which the event occurred.
KPI	Key Performance Indicator.
Last Name	The agent's or evaluator's last name.

Field	Definition
Level	The level of the event. The possible options are: • ALL—displays all even level messages. • INFO—displays only informational messages. Not an error, this is related information that may be useful for troubleshooting. • WARN—displays only warning messages. There is a malfunction that is a nuisance but that does not interfere with the program's operation. • ERROR—displays only error messages. The program cannot continue.
[Level]	The names of the levels based on selection filter criteria for this report.
Machine	The name of the computer on which the event occurred.
Meet	The number of evaluated contact that meets expectations.
Message	The event message.
Page	The current page of this report and the total number of pages for this report.
Possible	The total possible score.
Possible Score	The total possible score.
Question	The actual question that appears in the evaluation form.
Question Weight	A percentage applied to a question in an evaluation form. The sum of question weights in a section of an evaluation form is 100%.
Question Type	The type of question. The possible question types are Yes-No and 0-5.
Recordings	The number of recordings.
Run Date	The date this report was generated.
Score	The evaluation score given to the contact.
Score(%)	The evaluation's score given to the contact.

Field	Definition
Score Std Dev	The standard deviation of the group's score or team's score. A low standard deviation (closer to 0) indicates that scores are grouped closely to the mean score. A higher standard deviation (further from 0) indicates that scores are far from the mean. A lower standard deviation is an indicator of consistent performance; a higher standard deviation is an indicator of variable performance.
Section	The name of the section in the evaluation form.
Section Score (%)	The section score given to the contact.
Section Comments	The comments for a section. Anyone who can view the evaluation can add a comment.
Section Total	The total score for the section.
Section Weight	A percentage applied to a section in an evaluation form. The sum of section weights in an evaluation form is 100%.
Start	The start date for this report period.
Team	The name of the team.
[Team]	The name of the teams based on selection filter criteria for this report.
Team Average	The average evaluation score of all the team's evaluations.
Team ID	The team's unique contact ID.
Team Name	The name of the team.
Time	The time of the contact.
Total Below	The total number of evaluated contacts whose scores fall below expectations. The default score range is 0–74%. This range can be modified by the administrator.
Total Evaluations	The total number of evaluations during the specified time period using the specified evaluation form.
Total Exceed	The total number of evaluated contacts whose scores exceeds expectations. The default score range is 90–100%. This range can be modified by the administrator.
Total Meet	The total number of evaluated contacts whose scores meets expectations. The default score range is 75–89%. This range can be modified by the administrator.

Field	Definition
Total QM Recordings	The total number of quality management recordings.
Trend	The average evaluation score over time.
[User]	The names of the users based on selection filter criteria for this report.
User ID	The Windows login (and domain, if an Active Directory system) of the person who accessed the archives.
User First Name	The user's first name.
User Last Name	The user's last name.
Weight(%)	A percentage applied to a section or question in an evaluation form. The sum of question weights in a section of an evaluation form is 100%.

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