Unified Customer Interaction Analyzer

Release 1.0 (0)

Quick Start Guide

Contents

Portal Log In

1. Enter the Unified Customer Interaction Analyzer Portal URL into your web-browser.
2. Enter your username into the Name text box.
3. Enter your password into the Password text box.
4. Read the Terms of Use information by clicking the ‘I agree to these terms’ hyperlink.
5. Check the box after reading the Terms of Use which is located next to the ‘Sign In’ button.
6. Click the Sign-In button to enter the portal.

Toolbar/General Functionality

F5	Refreshes the portal to the welcome screen
Messages	Review any messages for coaching review from supervisor
	Brings user back to the call list
	Plays the call
	Pauses the call
	Stops the call
	Filters the calls in the call list by a specific column option
	Refreshes the call list
	Opens the report in PDF format
	Exports the report to Excel format
F11	Toggles the full screen browser on and off

Application Tab definitions

Customer Service The Customer Service Tab is where calls are sorted and stored for review and playback. It is where calls are sorted into three categories: Calls that highlight opportunities for CSR Performance Improvement, CSR Reinforcement, and Business Process Improvement Opportunities.

Self-Service The Self-Service Tab is where calls are sorted and stored for review and playback. It is where calls that highlight opportunities to introduce self service applications are automatically sorted for review.

Coaching Tab The Coaching Tab identifies coaching opportunities and reinforcement calls for the agents. It tracks coaching sessions and the impact of the coaching session on the agent’s performance. It also provides a tool for agents to request training for further education.

Metrics Tab The Metrics Tab is where users can access reports and dashboards that display results of analyzed data.

Search Function The Search Function is a tool to query call recordings. The Search Function requires that the user specify one or more of the data attributes associated with the call recordings.

Call Review The Call Review page contains a summary of the call and a review bar that displays call events marked with corresponding colored dots and line segments. The key explains the color-coding system. The call progress bar lets displays the percent status of the loading call.

- **Summary sub tab** provides an overview of the call characteristics and events that took place.
- **Statistics sub tab** provides statistics on the call duration, talk time, event history, qualitative scores and various event references.

Support Tab The Support Tab contains the application Help File and provides additional support related information to the application user.

Common Tasks

1. **Run Standard Report**
   Step 1: Click the Metrics tab.
   Step 2: Select Standard Report folder.
   Step 3: Select time period you want the report to provide (Daily, Weekly, Monthly, etc.).
   Step 4: Click either the Client or CSR folder depending which type of report you want.
   Step 5: Once the page loads, determine which report you want in the Summary Reports section of the page.
   Step 6: Determine whether you want it formatted as a PDF file or zipped into an Excel file.
   Step 7: Click on the appropriate icon (PDF or Excel) to open the report. Follow the pop-up boxes to open the reports or unzip the file.
2. **Run On-Demand Report**
   Step 1: Click the Metrics tab.
   Step 2: Select On-Demand Report folder.
   Step 3: Select time period you want the report to provide by clicking on the dates in the upper left part of the screen.
   Step 4: Click either the Client or CSR folder depending which type of report you want.
   Step 5: Once the page loads, determine which report you want in the Summary Reports section of the page.
   Step 6: Determine whether you want it formatted as a PDF file or zipped into an Excel file.
   Step 7: Click on the appropriate icon (PDF or Excel) to open the report. Follow the pop-up boxes to open the reports or unzip the file.
3. **Searching for Calls & Filtering**
   Step 1: Click the Search tab.
   Step 2: Select the time period you want to search by clicking on the dates in the upper left part of the screen and selecting the dates on the pop-up calendars.
   Step 3: Click the Search file cabinet icon in the left navigation tree.
   Step 4: Select the data attributes that you would like to search on by clicking on the links and selecting the choice from the dropdown menus. You can do this for several criteria.
   Step 5: Once you have selected all of your choices, click the Search button to complete your search.
   Step 6: Once the call list is displayed with your search results, you can choose to filter the selection using the filter icons above each column in the search results call list. To filter, click the filter icon, and choose your filter choice from the dropdown choices.
   Step 8: To listen to the call, select the call number link on the left and it will open the call detail page.
4. **Learn more through the Support Tab**
   Step 1: Click on the Support tab.
   Step 2: Click on the User Guides folder.
   Step 3: Choose the User Guide that you would like to review.
   Step 4: Review the Table of Contents and select the area you would like to review.
   Step 5: Click on the area you would like to review and read the support content.

Support

eLoyalty Technical Support provides 24-hour-a-day technical assistance. Our Technical Support is available online at https://ucia.eloyalty.com. You can use this web portal 24 hours a day to create new service requests and review existing service requests. You can also submit them through the email support channel at UCIAServiceDesk@eloyalty.com. These channels are optimal for medium to low severity requests. If you encounter a critical or high service request based on the identified service request severity definitions, then you can call our Technical Support engineers at 866-337-7040. Please take the time to review the problem severities definitions for self-assessment of your issue and contact us through the appropriate channel for the most efficient and effective support.

Online support: https://ucia.eloyalty.com

Email support: UCIAServiceDesk@eloyalty.com

Phone Support: 866-337-7040