Cisco Unified Workforce Optimization

Call Recording and Quality Management Application User Guide Version 10.5

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Call Recording and Quality Management Application User Guide

Contents

Introduction

The *Call Recording and Quality Management Application User Guide* contains the information you need to successfully configure and use Call Recording and Quality Management. The information here is specific to this product in the Unified Workforce Optimization suite.

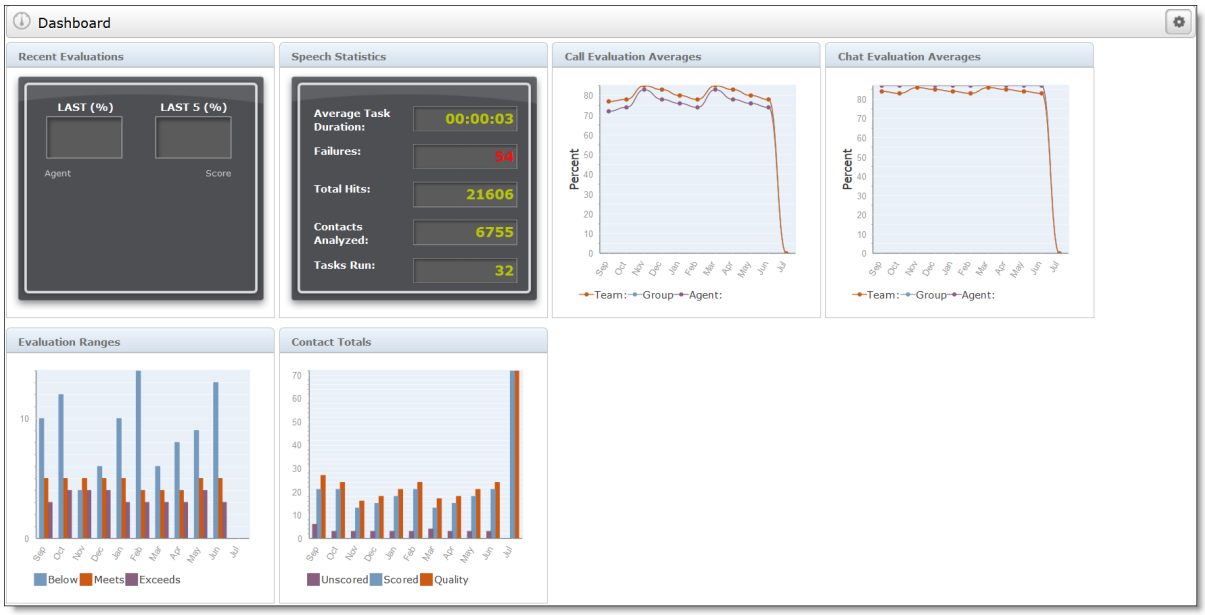
General information that is common to all of the products in the Unified Workforce Optimization suite can be found in the *Unified Workforce Optimization Getting Started Guide*. This guide includes such information as:

- Accessing Unified Workforce Optimization
- Logging in
- Configuring your PC to run Unified Workforce Optimization
- Optimizing browser settings
- How to navigate the Unified Workforce Optimization interface

For information on the Media Player, see the *Cisco Unified Workforce Optimization Media Player Guide*.

Dashboard

The Dashboard application 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 in to, your role, and the dashboard view assigned to you by the administrator.

> **Example**: If you log in to 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.

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 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.

Mobile Device

You can access the Dashboard application from a mobile device, including iPad and iPhone. The mobile device interface allows you to use a subset of the drill-down features, including playing audio recordings.

To access the Dashboard application, open a web browser application on your mobile device and log in to Unified Workforce Optimization as described under "Logging In" in the *Unified Workforce Optimization Getting Started Guide*.

Available Widgets by Role

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.

Available widgets per role

Widget	Agent/KW[1]	Supervisor	Evaluator	Archive User	Managers
Contact Totals	x	x	x	x	x
Evaluation Averages	x	x	x		x
Evaluation Ranges	x	x			x

[1] Knowledge worker (KW).

Widget	Agent/KW[1]	Supervisor	Evaluator	Archive User	Managers
Recent Evaluations	x	x	x		x
Recent Evals Performed		x	x		x
Current Best Performers		x	x	x	x
Web Link	x	x	x	x	x

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.

The following table 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.

Filtering roles and scope for Dashboard application

Role	Group	Team	Agent
Manager	Enabled[2]	Enabled	Enabled
Supervisor	Enabled	Enabled	Enabled
Archive User	Enabled	Enabled	Enabled
Evaluator	Enabled	Enabled	Enabled

[1] Knowledge worker (KW).

[2] Enabled indicates the drop-down list is populated based on the user's scope.

Role	Group	Team	Agent
Agent or Knowledge Worker	Disabled[1]	Disabled[2]	Disabled[3]

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.

The following table displays the scope for the report list.

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.The following table shows the default widget settings by role.

Default widget settings by role

Settings	Agent or Knowledge Worker	Supervisor	Manager	Evaluator	Archive User
Group	Your Group	First Group[4]	First Group	First Group	First Group
Team	Your Team	First Team	All	All	All
Agent	Yourself	All	All	All	All

[1]The drop-down list for agents, and knowledge workers is populated based on the user's group.

[2]The drop-down list is populated based on the user's team.

[3]The drop-down list displays only the user's name.

[4]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. The following table describes these toolbar buttons.

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.

The following table 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 unavailable or not applicable.

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

Field	Description
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)
Eval Form	The name of the evaluation form. Your options are: ■ All Percent-Based—all evaluation forms assigned to percentage-based scoring ■ All Point-Based—all evaluation forms assigned to point-based scoring ■ <Evaluation form>—a specific evaluation form name The default setting is All Percent-Based.
Group	The name of the group. The default setting is determined by your role. See Default Widget Settings by Role for 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 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 for more information about the default setting.

Field	Description
Bands 1-4	The bands determine the number of stars that appear in the Score field. For percentage-based scoring, the bands use integer numbers from 0-100. The default value for each band is as follows: • Band 1: 20 • Band 2: 40 • Band 3: 60 • Band 4: 80 **Example:** Four stars appear in the Score field if the agent's score is 61 or higher. Three stars appear if the agent's score is between 41 and 60. For point-based scoring, the bands uses integers. The minimum value for this range is determined by the total of all minimum values that are assigned to questions. The maximum value for this range is determined by the total of all maximum values that are assigned to questions.
Metadata Key	The metadata associated with the score. The drop-down field displays all defined metadata keys. All is the default. The metadata that appears in this drop-down list is defined by the administrator. Select a metadata key and value to filter scores based specific metadata values. **Example:** If the Metadata Key is Number and the Metadata Value is 7635555555, the Current Best Performers widget returns scores within the specified date range for all agents within your scope that includes a Metadata Value of 7635555555 .

Field	Description
Metadata Value	The value associated with the metadata key. Wildcards are supported. **Example:** The * wildcard represents any number of characters and the ? wildcard represents 1 character.

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 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

The following table summarizes how the values reported are different, based on where the information appears.

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.

Information Type	Dashboard	Reporting
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 (Exceeds, Meets, 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

A data element on a chart that represents a team.

GROUP

A data element on a chart that represents a group.

AGENT

A data element on a chart that represents an 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 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 displayed data is based on results from a specific evaluation form or type of evaluation form.

The Contact Totals widget displays these data elements by default.

SCORED

The number of scored contacts.

UNSCORED

The number of unscored contacts.

QUALITY

The number of quality calls.

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 for more information on this report.

Current Best Performers

The Current Best Performers widget displays the current list of your best performing agents. This widget allows you to use a gamification strategy where agents are rewarded for performing desired tasks. Gamification is a technique that leverages people's natural desires for competition, achievement, and status.

The Recent Evaluations widget displays the following data elements.

AGENT

The agent's name.

SCORE

The score based on calls that have been evaluated and contain the specified metadata value for the specified date range. A star appears for each scoring band.

Example: For percentage-based scoring, four stars appear in the Score field if the agent's score is between 61 and 80.

ACD STATUS

The status of ACD agents. This is the current ACD Status in Workforce Management.

Note: This field only appears when you are simultaneously logged into Call Recording and Quality Management and Workforce Management.

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 displayed data is based on results from a specific evaluation form or type of evaluation form.

The Recent Evaluations widget displays the following data elements if you select a percentage-based evaluation form from the Eval Form drop-down list.

LAST (%)

The widget in which this field appears determines the definition as follows:

- 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.

LAST 5 (%)

The average percentages score for the last five evaluations as determined by evaluation date and time.

The Recent Evaluations widget displays the following data elements if you select a point-based evaluation form from the Eval Form drop-down list.

LAST

The widget in which this field appears determines the definition as follows:

- Recent Evaluations—the point score for the last evaluation as determined by evaluation date and time.
- Recent Evaluations Performed—the point score for the last evaluation performed by you as determined by evaluation date and time.

LAST 5

The average point score for the last five evaluations as determined by evaluation date and time.

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 Evaluations Performed widget displays the following data elements if you select a percent-based evaluation form from the Eval Form drop-down list.

LAST (%)

The widget in which this field appears determines the definition as follows:

- 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.

The Recent Evaluations Performed widget displays the following data elements if you select a point-based evaluation form from the Eval Form drop-down list.

LAST

The widget in which this field appears determines the definition as follows:

- Recent Evaluations—the point score for the last evaluation as determined by evaluation date and time.
- Recent Evaluations Performed—the point score for the last evaluation performed by you as determined by evaluation date and time.

LAST 5

The average point score for the last five evaluations as determined by evaluation date and time.

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

The number of evaluated contacts that are below expectations.

MEETS

The number of evaluated contacts that meets expectations.

EXCEEDS

The number of evaluated contacts that exceeds expectations.

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 for more information on this report.

Web Link

The Web Link widget displays a user-specified website. You can use it to display the website of your choosing.

Example: A link to a CRM or customer support website.

The Web Link widget displays the following data element:

HYPERLINK URL

A web address for a website.

If Unified Workforce Optimization is on a secure website using HTTPS/SSL and you specify a non-secure website using HTTP, you might see the following error message if you are using Internet Explorer 9 or later:

```
Only secure content is displayed
```

See http://support.microsoft.com/kb/2625928 for instructions on how to resolve non-secure content.

Administrator Tasks

By default, a user's dashboard contains every widget available for their role. System 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 system administrator customizes their dashboard, those users will not see any changes in their dashboard. They will continue to see the default dashboard for their role, or the dashboard they have customized for themselves.

If the system 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 system administrator ID.

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 Settings 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 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.

Mobile Device

You can access the Recordings application from a mobile device, including iPad and iPhone. The mobile device interface allows you to use a subset of the drill-down features, including playing audio recordings.

To access the Recordings application, open a web browser application on your mobile device and log in to Unified Workforce Optimization as described under "Logging In" in the *Unified Workforce Optimization Getting Started Guide*.

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.
- Managers, supervisors, and evaluators can create a contact for evaluation.
- Archive users have access to all call 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 recordings from the

Recordings application. If the user is assigned to any role that can export a recording, the user can export any recording that appears in their Contacts table.

Your Role and Scope

Your highest role determines your scope in the Recordings application.The following table shows how your highest role determines your scope.

Your role and scope

Role (Ranked Highest to Lowest)	Scope
Archive User	All call 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

Recording Visibility and Retention

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

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

See the *Administrator User Guide* for more information on 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.

Recordings Toolbar

The following table describes the fields that appear in the Recordings toolbar. These fields display the current statistics for your contact center.

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.

Field	Description
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.

The following table describes the buttons that apply to the entire Contacts table.

Recordings toolbar buttons that applies to the entire Contacts table

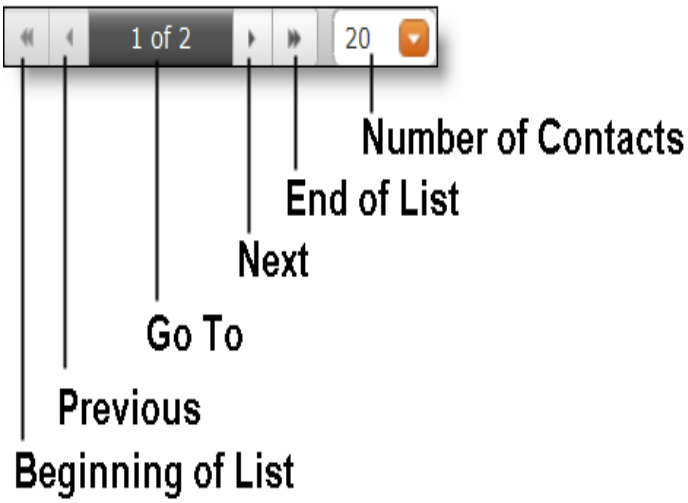
Button	Icon	Description
New or Refine Search	NA	Displays the Search Recordings window. See Search Recordings for more information.
Save		Saves your search settings. Your options are: ■ Save this Search—saves the current search ■ Saved Searches—lists the available saved searches and allows you to delete a selected search from the list
Settings		Displays the configurable settings for this application. See Configure Fields for more information.
Export Table Data to CSV		Exports the metadata for all contacts in CSV format. See Export Table Data to CSV for more information.
Create Contact		Adds a non-call contact. See Create Contact for more information.

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

Recordings toolbar buttons that applies to a selected contact

Button	Icon	Description
Export Selected Contact		Exports the selected recording. See Export Selected Contact for more information.
Mark for Quality		Marks the selected customer conversation 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 for more information.
Mark for Calibration		Marks a customer conversation for calibration. When a customer conversation is marked for calibration it allows the contact to be evaluated by multiple users with evaluation privileges. See Mark for Calibration for more information.
Tag Call		Applies the Tagged retention time to the selected contact. See Tag Call 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 allows you to quickly navigate through the Contacts table.



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.

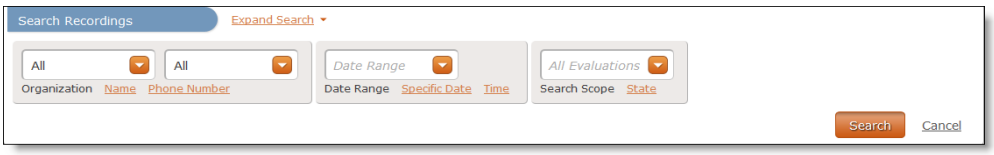
> **Note:** Unified Workforce Optimization supports up to 999 pages. If your list of contacts is greater than 999 pages, “1 of ...” appears in the Go to field.

Search Recordings

The Search Recordings window allows you to search for the following items:

- Customer conversations—Both audio recordings or non-call contacts
- Data in columns of the Contacts table

> **Note:** The available columns are determined by your Quality Management administrator and your assigned role. Agents, knowledge workers, and supervisors can only search columns that are made available by the Quality Management administrator. Archive Users, evaluators, and managers can search all columns.



When you search for customer conversations or column data 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.

The following table describes the fields and buttons you can use for a basic search. Most of these fields and buttons, where noted, also appear under the expanded search.

Basic Search fields and buttons

Field	Description
Expand Search	Displays advanced search options.
Organization	Search conversation or columns 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.
Name	Search conversations 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.

Field	Description
Phone Number	Search conversations by phone number. You can enter: ■ Specific numbers **Example:** Enter 6125551212. ■ Number ranges using wildcards **Example:** Enter 612*, where the * wildcard represents any number of digits, or 612555????, where the ? wildcard represents 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 conversations 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 conversations 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 conversations 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 conversations 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 conversations by evaluation state. You can choose one or more of the following options: **Note:** Only users who can evaluate a contact will see this field. ■ 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
Search	Search recordings. This button is available under Basic Search and Expand Search.
Cancel	Exit without saving changes. This button is available under Basic Search and Expand Search.

The following table describes the fields and buttons that only appear for an expanded search.

Expand Search fields and buttons

Field	Description
Basic Search	Displays basic search options.
Agent ID	The agent's system ID.
Approved By	The name of the manager or supervisor who approved the evaluation.
Associated Call Count	The number of associated contacts for this call.
Calibrated	The conversations has been marked for calibration. Possible options for this field are: ■ Yes ■ No
Call Duration	The duration of the conversations (length of time between call answered and call dropped) in HH:MM:SS.
Called Number	The DID or Dialed Number Identification Service (DNIS) number of the phone that received the call. Displays “unknown” if the called number is unlisted or blocked. This field applies only to calls.

Field	Description
Calling Number	The caller ID or Automatic Number Identification (ANI) of the calling party. Displays “unknown” if the calling number is unlisted or blocked. This field applies only to calls.
Contact ID	Search recordings by conversation's unique 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.
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. ■ Screen Only—a screen recording contact without call recording
Custom Data	Search conversations by metadata. Enter a value in the Value field, and then choose a Select Criteria option and a Select Operator option. The options for Select Criteria are determined by the administrator.
Date Evaluated	The date range when the conversation was evaluated or calibrated.
Evaluation Form	The name of the evaluation form or calibration form used to score the conversations.
Evaluator Name	The first and last name of the evaluator or calibrator.
Line	The extension the agent used to answer the call.

Field	Description
Reason	The reason the conversations was recorded as set in the recording rule. The possible reasons are as follows: ■ Agent Tagged ■ Analytics Tagged ■ Archive On ■ Archive Tagged ■ First Call of Day ■ Last Call of Day ■ Logging ■ Longest Call of Day ■ Marked for Quality ■ New Employee ■ Non-Call Evaluation ■ Performance ■ Random Call ■ Shortest Call of Day
Recording Content	The type or recording content. Choose one or both of the following options: ■ Has Screen—The conversations has a screen recording. ■ Has Voice—The conversations has a voice recording.
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

Field	Description
Recording Type	Search conversations by recording type. Choose one of the following possible recording types: ■ Endpoint—Desktop Recording ■ Network ■ Server ■ MediaSense ■ CUBE ■ Reconciliation ■ 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
Score	Search conversations by the score from the evaluation form. Enter a desired score value in the Score field and choose a Select Operator. See "Understanding How Evaluations are Scored" in the *Media Player User Guide* to see how this value is calculated.
Select Criteria	Search conversations or columns by adding more search values.

Field	Description
Select Operator	Search conversations or columns by an operator value. Choose one of the following possible options from the Select Operator field: ■ Equals—search for score values that match your specified value. **Note:** When you use the Equals operator, the Value field is case sensitive. If you are uncertain about the case of the string in the Value field, use the Contains operator. ■ Begins With—search for values that begin with the string in the Value field. ■ Contains—search for the exact string in the Value field. This field is not case sensitive. ■ Ends With—search for values that ends with the string in the Value field. ■ Lesser Than—search for score values that are less than 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.

Field	Description
Speech Energy	Search conversations by speech energy. Enter the number of seconds in the Seconds field, and then choose a Select Criteria option and a Select Operator option. The options for Select Criteria are as follows: ■ Silence Events—filters conversations based on the number of events where neither the agent nor the caller are talking using the Silence Duration threshold. ■ Talk Over Events—filters conversations 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 talkover event. Search Recordings displays all talkover events that meets or exceeds this threshold. Search Recordings does not return conversations if the silence or talkover event is related to a pause/resume event or hold/retrieve event. This field appears under Expand Search. See "Detecting Silence and Talkover Events" in the *Media Player User Guide* for more information on speech energy.
Add	Add a new field.
	Delete. Remove the field.
Reset	Restore default settings.

Search Guidelines

When locating a customer conversation or data in a column, consider the following information.

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

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

- You can filter the number of conversations returned by specifying the contact type.

Searching Recordings

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 talkover), 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.
- To delete a saved search, click Save, choose Saved Searches, select the name of the search that you want to delete from the and then click Delete .

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.

> **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, Unified Workforce Optimization 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
% Silence	The percentage of the call spent in the Silence state.
% Talk Over	The percentage of the call spent in the Talkover state.

Field	Definition
<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 ■ Hyperlink=2056. Once the hyperlink is saved you can click the hyperlink and the link will open in a separate web browser.
Agent ID	The agent's system ID.
Approved By	The name of the manager or supervisor who approved the evaluation.
Associated Call Count	The number of associated contacts for this call.
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.
Call Inbound	The call is inbound. The valid values in the Call Inbound field are: ■ Yes ■ No
Called Number	The DID or Dialed Number Identification Service (DNIS) number of the phone that received the call. Displays “unknown” if the called number is unlisted or blocked. This field applies only to calls.

Field	Definition
Calling Number	The caller ID or Automatic Number Identification (ANI) of the calling party. Displays “unknown” if the calling number is unlisted or blocked. This field applies only to calls.
Contact ID	The conversation’s unique ID.
Contact Type	The contact type. The valid values for this field are: ■ Call—a contact with a call recording. ■ Screen Only—a screen recording contact without call recording ■ Non-Call—a contact without a call recording.
Date	The contact date.
Date Evaluated	The date when the customer conversation was evaluated or calibrated.
Evaluation Form	The name of the evaluation form or calibration form used to score the customer conversation.
Evaluator Name	The name of the evaluator or calibrator.
First Name	The agent’s first name.
Group Name	The name of the group.
Has Screen	The contact has a screen recording. The valid values in the Has Screen field are: ■ Yes ■ No

Field	Definition
Has Voice	The contacts has a voice recording. The valid values in the Has Voice field are: ■ Yes ■ No
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.

Field	Definition
Reason	The reason the conversations was recorded as set in the recording rule. The possible reasons are as follows: ■ Agent Does not Match the Who Rule for the Workflow ■ Agent Licensed for Compliance Only ■ Agent Tagged ■ Analytics Tagged ■ Archive Off ■ Archive On ■ Archive Tagged ■ Call Does not Match the When Rule for the Workflow ■ Deleted ■ Extension in Inclusion List ■ Extension Not in Inclusion List ■ First Call of Day ■ Last Call of Day ■ Logging ■ Longest Call of Day ■ Marked for Quality ■ New Employee ■ No Recording ■ No SIP event ■ No Workflow Configured for Agent's Team ■ Non-Call Evaluation ■ Not Meeting Workflow Classifier Calling/Called Number ■ Not Processed ■ Performance

Field	Definition
	■ Random Call ■ Shortest Call of Day ■ There are No Rules Defined for the Classifier ■ Under the Minimum Duration
Recording Type	The recording type associated with this device. The valid values for the Recording Type field are: ■ Endpoint—Desktop Recording ■ Network ■ Server ■ MediaSense ■ CUBE ■ Reconciliation ■ 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
Score	The evaluation score or calibration score given to the contact.
Silence Events	The number of detected silence events. In the Contact Information 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).

Field	Definition
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 audio 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.

Field	Definition
Training	The contact has been marked as a training contact. The valid values in the Training field are: ■ Yes ■ No

Configuring Fields

- 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.

  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 unencrypted contact metadata for all contacts in the Contacts table (call and non-call contacts) to CSV.

Example: You can export all unencrypted contact metadata from your last search.

Exporting Metadata to CSV

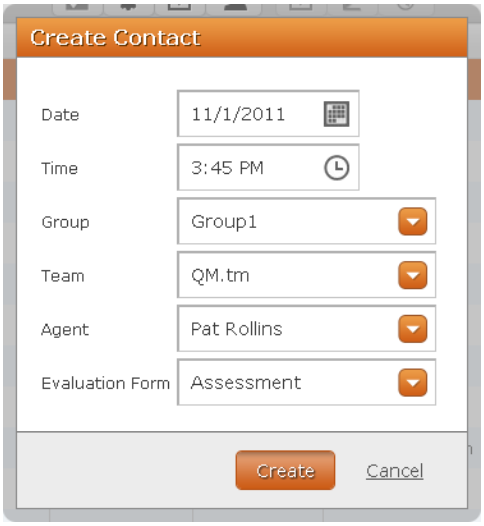
1. Run a search in the Recordings application to locate the recordings that you want to export. See Searching Recordings for more information.
2. Click Export Table Data to CSV in the Recordings toolbar, and follow the prompts.

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

   Note: The metadata that can be exported is determined by the Quality Management administrator in Quality Management Administrator. Only exportable metadata will be saved to CSV format.

Create Contact

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



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.

The following table describes the fields that appear in the Create Contact dialog box.

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.

The following table describes the buttons appear in the Create Contact dialog box.

Create Contact dialog box buttons

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

Managing Non-call Contacts

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

  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 the Contact

Information tab.

The Contact Information tab displays the metadata.

- To change metadata from the Contact Information 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, Screen Only, or Email, and complete the evaluation form.

Export Selected Contact

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

- Waveform Audio File Format (WAV)—Uncompressed audio files.
- MPEG-4 Video (MP4)—Compressed audio and video files. This option is only available if the customer conversation has a screen recording associated with it.

Recordings can be exported from the Contacts table in the Recordings application.

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 Unified Workforce Optimization times out due to inactivity, the export process will continue to completion.

Exporting Recordings

- To export a recording, click a recording in the Contacts table, and then click Export Selected Contact. Choose the format that 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.

  If the Windows Media Player opens when you click Export Selected Contact, you need to configure Windows Media Player before you export the recordings. See Configuring Windows Media Player for more information.

Configuring Windows Media Player

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

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

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

   The Options dialog box appears.

2. Select the File Types tab and clear the following check boxes.
   - Windows audio file (WAV)
   - MPEG-4 Video (MP4)
3. Click OK to save your changes and dismiss the dialog box.

Mark for Quality

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

To Marking a Conversation for Quality

- To mark a conversation for quality, select a recording with a Reason value of Archive from the Contacts table, click Mark for Quality , choose an evaluation form from the Evaluation form drop-down list, and then click OK.

  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 can choose an evaluation form. When you click OK, the contact can be evaluated by multiple users with evaluation privileges. For more information on calibration, see "Calibration" in the *Media Player User Guide*.

Marking a Conversation for Calibration

- To mark a customer conversation for calibration, select a contact in the Contacts table, click Mark for Calibration , choose an evaluation form from the Evaluation form drop-down list, and then click OK.

Tag Call

You can change a conversation with a Reason code of Archive to Archive 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 Conversation's Retention Time

- To change the retention time for a conversation, select a contact with a Reason code of Archive from the Contacts table, and then click Tag Call .

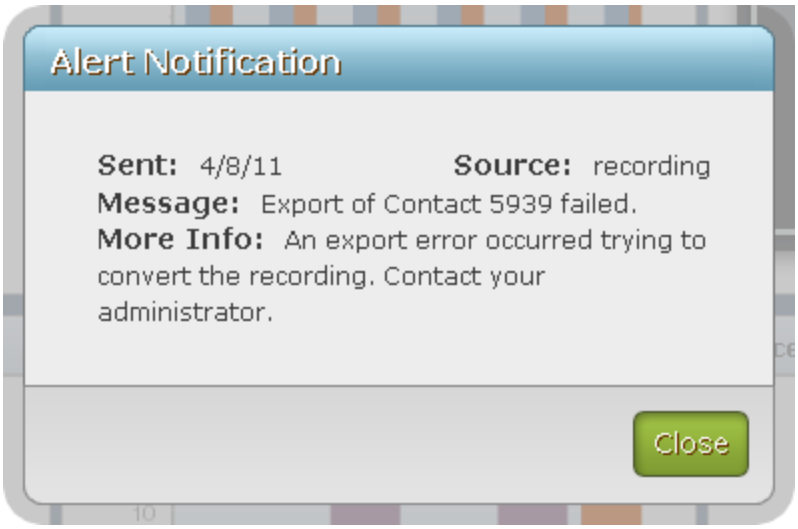
  The retention time is updated for the selected conversation.

Alerts

Call Recording and Quality Management generates alerts when a significant event happens, and sends them to agents, evaluators, supervisors, and managers.

Unified Workforce Optimization uses the following methods to provide additional information about alerts.

- The Alerts 9 bubble 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. You can only view the details of one message at a time.



- Alerts remain in the list for seven days. After seven days, Unified Workforce Optimization 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 Unified Workforce Optimization and then log back into Unified Workforce Optimization before the alerts are removed from the Alerts application.

  > **Note:** If you are logged into multiple sessions of Unified Workforce Optimization, you must log out of all sessions before alerts are removed from the Alerts application.

The following table describes the fields in the Alerts Notification dialog box.

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 sent 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 recording has been exported and is available for download.
- If an evaluator completes an evaluation and there are no managers or supervisors for the agent, the evaluator will get the alert.
- Users who are not logged in when an alert is generated will get the alert when they log in to Unified Workforce Optimization.

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

Delete this text and replace it with your own content.

- To view an alert, click Alerts 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.

Live Monitoring

Use Live Monitoring to ensure the quality of service to customers and the agents' proficiency in handling customer contacts and associated applications.

Only managers and supervisors can access Live Monitoring. The following features are:

- Live Screen Monitoring —When the icon is enabled, you can watch an agent's desktop activities. Live Screen Monitoring is supported for all recording types. Live Screen Monitoring is enabled when the Desktop Recording service is running on the agent's desktop and the agent is logged into Call Recording and Quality Management.

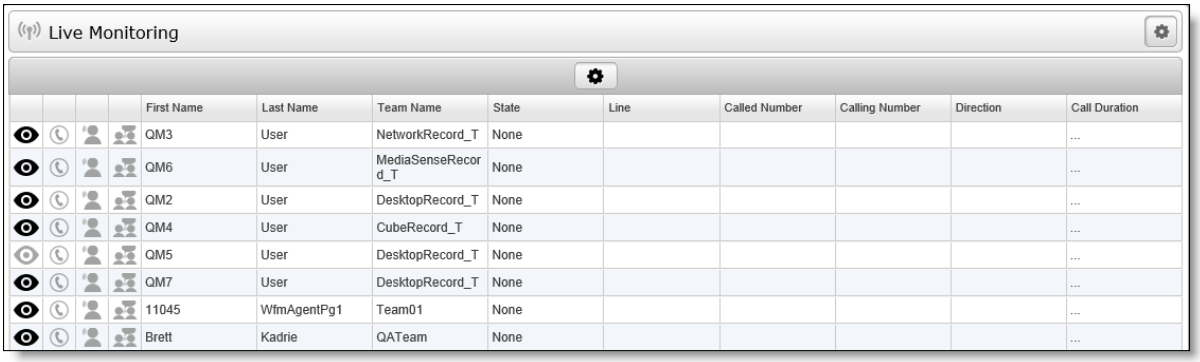
  > **Important:** Before you use the Live Screen Monitoring feature in Call Recording and Quality Management, you must enable Automatic prompting for ActiveX controls. If you do not enable Automatic prompting for ActiveX controls, Live Screen Monitoring will not work as expected. See "Enabling ActiveX Controls in Internet Explorer" in the *Getting Started Guide* for more information.

- Live Audio Monitoring —When the icon is enabled, you can silently listen to an agent's active call. This feature is enabled when the agent is in the Talk state.
- Whisper —When the icon is enabled, you can listen to an agent's active call and talk to the agent without the customer hearing your conversation. This feature allows you to provide advice to the agent. Cisco refers to this type of conversation as "whisper coaching". This icon is only enabled when the agent is in the Talk state.

  > **Note:** The live monitoring modes, Live Screen Monitoring or Whisper, must be determined before the Live Monitoring call is placed. If you want to change from Live Screen Monitoring to Whisper, you must hang up the current live monitoring session and then start a new live monitoring session.

- Barge In —When the icon is enabled, you can join an agent's call with a customer. It is a forced conference call. This feature allows you to take control of the situation and talk directly to the customer. This icon is only enabled when the agent is in the Talk state.

> **Note:** Only one monitor session is allowed per call. Any attempt to monitor a call that is already being monitored by another supervisor or manager will fail.



First Name	Last Name	Team Name	State	Line	Called Number	Calling Number	Direction	Call Duration
QM3	User	NetworkRecord_T	None					...
QM6	User	MediaSenseRecord_T	None					...
QM2	User	DesktopRecord_T	None					...
QM4	User	CubeRecord_T	None					...
QM5	User	DesktopRecord_T	None					...
QM7	User	DesktopRecord_T	None					...
11045	WfmAgentPg1	Team01	None					...
Brett	Kadrie	QATeam	None					...

For Unified CCX, the Live 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 for more information.

Points to Remember

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

- Live Audio Monitoring:
  - You can only initiate Live Audio Monitoring 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 the Live 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 Audio 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 Audio Monitoring calls are “fire and forget.” Once the live monitoring session is established, the Live Monitoring application 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.

  Note: When using a Cisco phone without the headset, you might need to lift the handset before initiating Live Audio Monitoring.

- Once you establish a Live Audio 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 Live Audio Monitoring session, just end the call on your phone or wait for the monitored call to end.

■ Live Screen Monitoring:

- Live Screen Monitoring is not affected by the call state. You can monitor an agent's screen whether they are on a call or not.
- Live Screen Monitoring works regardless of recording type.
- Live Screen Monitoring is not supported on Windows XP.
- Automatic prompting for ActiveX controls must be enabled on your web browser. See "Enabling ActiveX Controls in Internet Explorer" in the *Getting Started Guide* for more information.
- If an agent locks their screen, the Live Screen Monitoring windows display a pause message. Live Screen Monitoring does not automatically resume when the agent logs back into their machine. To resume monitoring the agent when the agent logs back into their machine, close the current Live Screen Monitoring window and try again.

- If the agent's machine goes into sleep mode, the Live Screen Monitoring window stops displaying activity. Live Screen Monitoring does not automatically resume when the agent logs back into their machine. To resume monitoring the agent when the agent logs back into their machine, close the current Live Screen Monitoring window and try again.

- Barge In
  - A Barge In call does not appear as a Barge In call in JTAPI events or reports, it will appear as a normal agent conference call to their supervisor or manager.
  - If any leg of the call sequence fails, the entire Barge In will fail, and the conference call be torn down and cleaned up.
  - The Barge In feature will attempt to drop any existing Live Monitoring call between the supervisor and agent.

Configure Fields

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

The following table lists all fields that appear in the Configure Fields popup dialog.

Configure Fields popup dialog

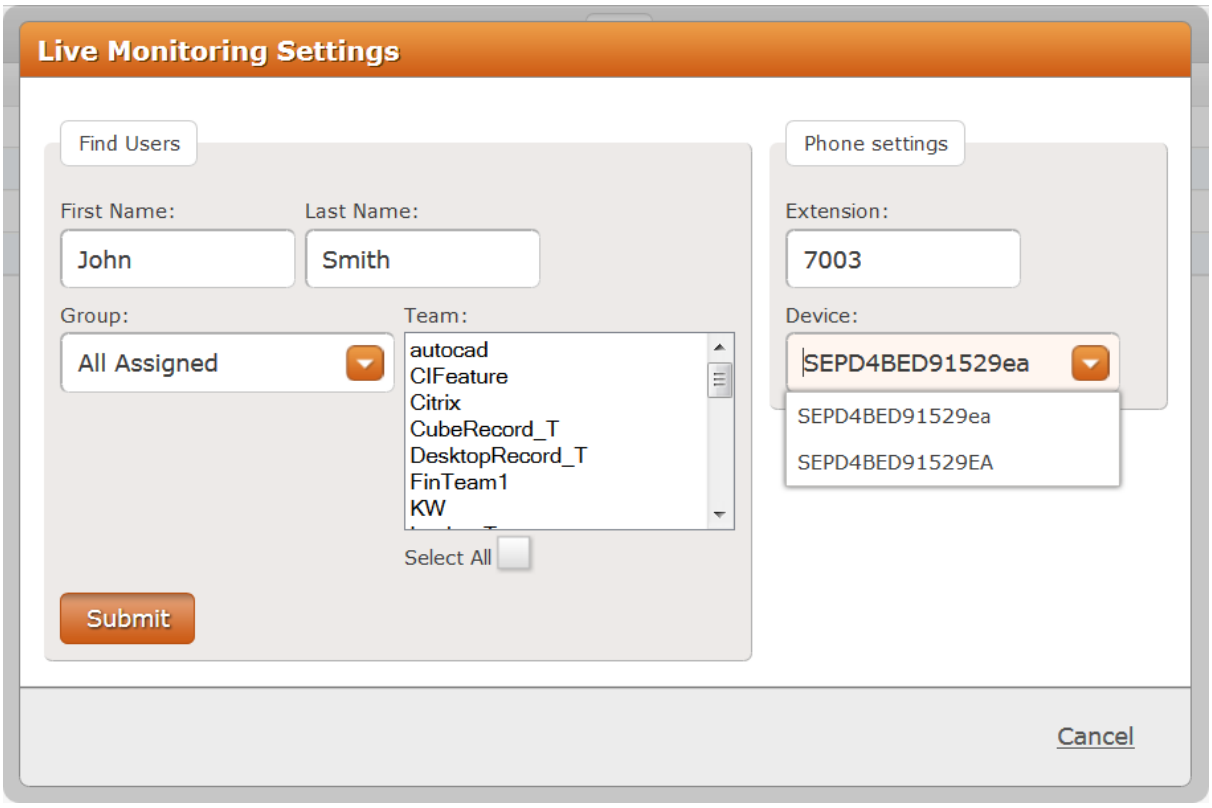
Field	Definition
Organization	
First Name	The agent’s first name.
Last Name	The agent’s last name.
Team Name	The name of the team.
Contact	

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 extension the agent used to answer the call. **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.

Field	Definition
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.

Live Monitoring Settings

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



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.

The following table defines the fields and buttons in the Live Monitoring Settings popup dialog.

Live Monitor Settings fields and buttons

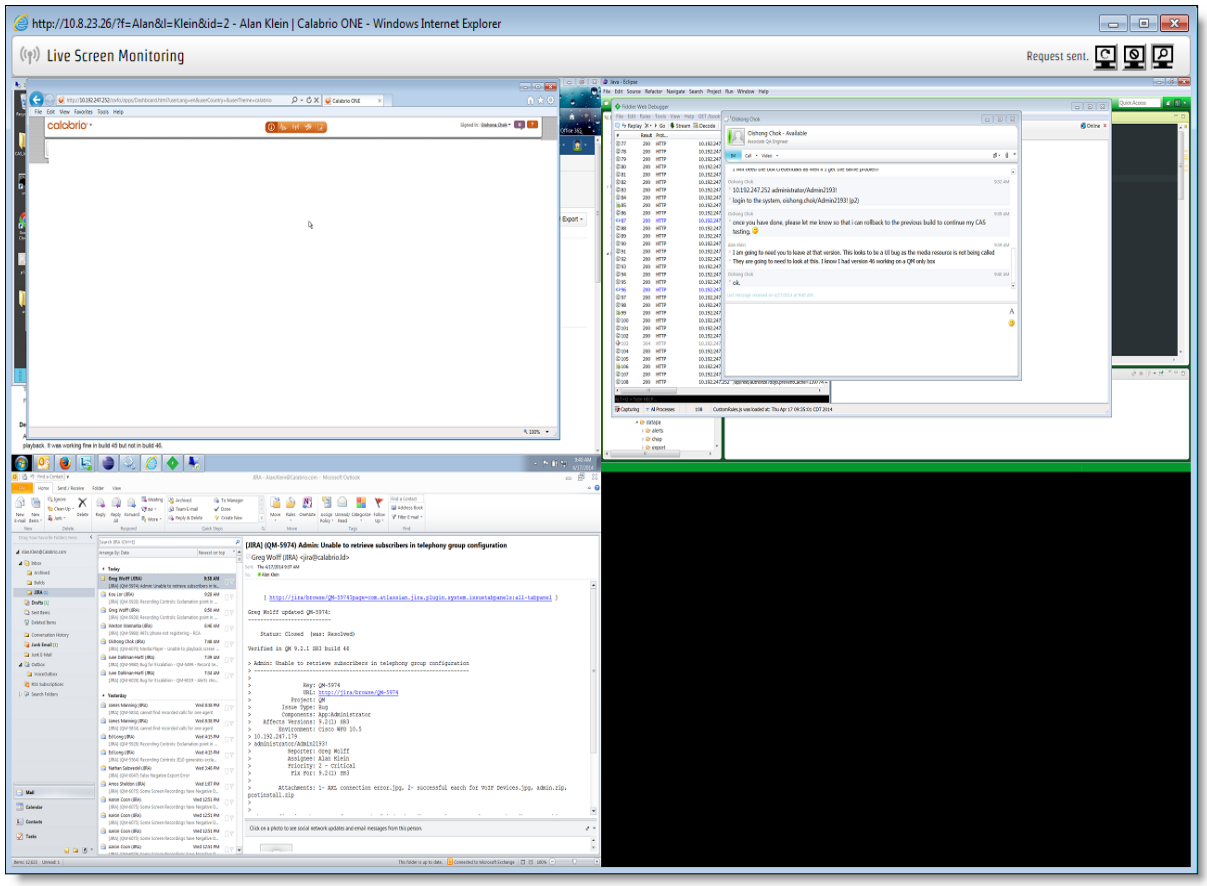
Field	Description
Find Users	
First Name	Filters active agents based on the agent’s first name. You can enter an exact match of the name or use wildcards. An asterisk (*) matches zero or more characters, and the question mark (?) matches a single characters.

Field	Description
Last Name	Filters active agents based on the agent's last name. You can 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 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.
Submit	When clicked, locates the active users that match the filter parameters.
Phone Settings	

Field	Description
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. **Example:** 5555551234 For Unified CCX, you can only monitor agents who are assigned to the same Unified CM cluster as the extension you provide in this field.
Device	The device's MAC address associated with the extension. If the extension is a shared line, the Device drop-down list will display all devices associated with the shared line. **Example:** Extension 7003 is associated with a hard phone that has a MAC address of SEPD4BED91529ea and a soft phone that has a MAC address of SEPD4BED91529EA.
Cancel	Exit the Live Monitor Settings popup dialog.

Live Screen Monitoring

The Live Screen Monitoring window appears when you click the Live Screen Monitoring icon and follow the prompts.



The following table describes the toolbar buttons.

Widget toolbar buttons

Button	Icon	Description
Connect		Connect to the agent's monitor. **Note:** The connection to the agent's monitor is not complete until you click this button.
Disconnect		Disconnect from the agent's monitor.
Magnify		Enlarges the screen so that you can clearly view an object on an agent's screen. Use the scroll bars to move around the screen.

Button	Icon	Description
Close	✕	Closes the Live Screen Monitoring window

Managing Live Monitoring

- To configure fields in the Live Monitoring table:
  - Click Settings ⚙ in the Live 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.

    The Live 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 configure your extension, click Settings ⚙ in the Live Monitor toolbar and choose one of the following options:
  - To add your extension, type your extension in the Extension field under Phone Settings, choose a device from the Device drop-down list, and then click Submit
  - To delete your extension, clear the Extension field, and then click Submit.
- To search for active users, click Settings ⚙ in the Live Monitor toolbar and complete the fields under Find Users in the Live Monitoring Settings window, and then click Submit.

  The Live Monitoring table displays the users that match your search.
- To listen to an active call, click Live Audio Monitoring .

  The Live 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.

  While listening to an active call, you can choose one of the following options:

- To coach an agent on an active call, click Whisper . You can now listen to the call and provide advice to the agent.
- To join the agent on an active call, click Barge In . You can now talk to the customer and agent.
- To end a Live Monitoring session, click End Call on your phone.

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

  The Live Monitoring session ends.

- To monitor an agent's screen, click the Screen Monitoring and then click Connect . While monitoring an agent's screen, you can choose one of the following options:
  - To enlarge an agent's screen, click Magnify .
  - To stop monitoring an agent's screen, click Disconnect .

Recording Monitoring

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

Recording Monitoring

Define Filters | Filter Rows

License	Extensions	Recording Type	Recording Device	PC Logged In	ACD Logged In	▲Voice	Screen	Last Success	Last Error	Last Error Cause
Advanced		End Point	SEP0026B98F0F67	Yes	No	✓	✓	2013-08-30, 1:19 PM	N/A	N/A
Advanced	N/A	End Point	N/A	No	No	✓	✓	2013-08-30, 1:19 PM	N/A	N/A
Advanced		Network	SEPD4BED91529EA	Yes	No	✓	✗	2013-08-30, 12:07 PM	2013-08-30, 12:07 PM	No Clients Connected To Receive Events
Advanced		Network	SEPB8AC6F39E7ED	Yes	No	✓	✓	2013-08-30, 1:59 PM	2013-08-30, 1:16 PM	N/A
Advanced		Network	SEPB8AC6F39D50D	Yes	No	✓	✓	2013-08-30, 12:12 PM	N/A	N/A
Advanced		Network	SEP001E4FACFA60	Yes	No	✓	⊖	2013-08-30, 12:08 PM	N/A	N/A

You can use the Recording Monitoring application to identify when calls and screens are not being recorded and why they are not being recorded. When you know a call or screen 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.

The following table 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 Cisco MediaSense Recording is not supported.

Configure Fields dialog box

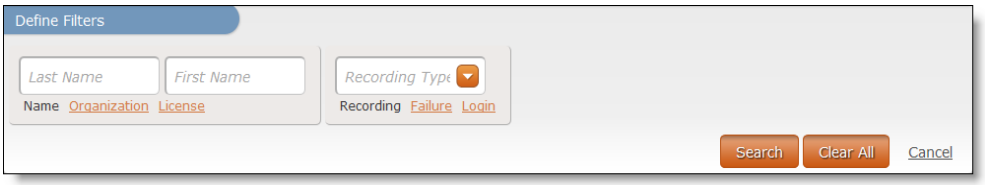
Field	Definition
Organization	
Last Name	The agent's last name.
First Name	The agent's first name.
Group Name	The name of the group.
Team Name	The name of the team.
Site	The name of the site.
License	The license type assigned to the user. The possible values are: ■ Unlicensed ■ Advanced ■ Basic ■ Compliance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

Field	Definition
Recording Type	The type of recording. The possible values are as follows: ■ Endpoint—Desktop Recording ■ Network ■ Server ■ MediaSense ■ CUBE ■ Reconciliation ■ 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.
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.
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

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

Define Filters

The Define Filters window 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.

The following table describes the fields and buttons you can use to filter your search.

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. You can use the *, %, and ? wildcards in the Last Name and First Name fields. **Example:** John* or John%,where the * or % wildcards represent any number of digits, or John???, were the ? wildcard represents 1 digit.

Field	Description
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.
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	Search contacts by recording type. You can choose from the following options: ■ Endpoint ■ Network ■ Server ■ MediaSense ■ CUBE ■ Reconciliation ■ Events ■ Unknown
Failure	Search contacts by failure for voice recording and/or screen recording.
Voice	Search contacts by voice. You can choose from the following options: ■ Failure—Filter by failed recordings. ■ Success—Filter by successful recordings. ■ Unknown—Filter by unknown recordings.

Field	Description
Screen	Search contacts 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: ■ Yes—Filter by PCs that are logged in. ■ No—Filter by PCs that are not logged in. ■ Unknown—Filter by PCs that have an unknown login state
ACD Logged In	Search contacts by ACD login. You can choose from the following options: ■ Yes—Filter by ACDs that are logged in. ■ No—Filter by ACDs that are not logged in. ■ Unknown—Filter by ACDs that have an unknown login state
Search	Search agents who are actively recording contacts.
Clear All	This button displays all results. Everyone who is configured appears in the list, even if they do not have a license.
Cancel	Exit without saving changes.

Managing Recording Monitoring

- 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.

  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 Filter Rows field.
  - Click Define Filters, complete the fields, and then click Search.

  The Recording Monitoring table displays the users that match your search requirements.

Reporting

The Reporting application is a common (multi-product) application that contains reports for all the products you are logged into. The reports that you can access are determined by your role.

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.

The following table shows the filter choices available to you in the Reporting application based on role.

Filtering roles and scope for Reporting application

Reports	Agent or KW[1]	Supervisor +Agent	Supervisor +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	--	--

[1] Knowledge worker (KW).

Reports	Agent or KW[1]	Supervisor +Agent	Supervisor +KW	Manager	Evaluator	Archive User
Agent Scored Evaluation	x	x	x	x	--	--
Quality Averages Graph	x	x	x	x	--	--
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	--	--

Running a Report

Follow these steps to run a report:

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.

[1] Knowledge worker (KW).

- 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.

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.

> **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."

Customizing the Report Logo

Starting with Service Release 3, reports output in HTML, PDF, and XLS format contain a logo in the upper left corner next to the report title. By default, the logo is the Cisco logo.

You can customize the logo by replacing the default logo with one of your own.

Report Filters

The following table 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.

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.

Report Filters	Description
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.)
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	

Report Filters	Description
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.

Report Filters	Description
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.
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	

Report Filters	Description
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.

Quality Management Reports

This topic describes the quality management reports.

Time Zone Considerations

Call Recording and Quality Management displays time in two different ways, depending on where it appears.

Time in the Desktop Interface

In Call Recording and Quality Management, 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 Unified Workforce Optimization, then the time is displayed in Greenwich Mean Time (GMT).

Time in Reports

In all Call Recording and Quality Management reports, except for system status and user recording status, the time associated with a contact is the time the contact occurred at the agent's location. The time appears 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.

Report Types

The types of quality management reports that are available are:

- Evaluation Reports
- System Reports

> **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.

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

The start date for this report period.

END

The end date for this report period.

GROUP

The name of the group.

TEAM

The name of the team.

LAST NAME

The agent's or evaluator's last name.

FIRST NAME

The agent's or evaluator's first name.

AGENT ID

The agent's system ID.

FORM

The name of the evaluation form.

RECORDINGS

The number of recordings.

EVALUATIONS

The total number of evaluations.

EXCEEDS

The number of evaluated contacts that exceeds expectations.

MEETS

The number of evaluated contacts that meets expectations.

BELOW

The number of evaluated contacts that are below expectations.

Average Score (%)

The average score for one of the follow items: Form, Section, and Question.

Section Weight

A percentage applied to a section in an evaluation form. The sum of section weights in an evaluation form is 100%.

Section

The name of the section in the evaluation form.

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%.

[Agent]

The agents' first and last names based on selection filter criteria for this report.

[Team]

The name of the teams based on selection filter criteria for this report.

[Group]

The names of the groups based on selection filter criteria for this report.

[Form]

The names of the evaluation forms based on selection filter criteria for this report.

Page

The current page of this report and the total number of pages for this report.

Run Date

The date this report was generated.

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.

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

The start date for this report period.

END

The end date for this report period.

AGENT ID

The agent's system ID.

BELOW

The number of evaluated contacts that are below expectations.

EVALUATIONS

The total number of evaluations.

EXCEEDS

The number of evaluated contacts 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.

GROUP

The name of the group.

[GROUP]

The names of the groups based on selection filter criteria for this report.

LAST NAME

The agent's or evaluator's last name.

MEETS

The number of evaluated contacts that meets expectations.

PAGE

The current page of this report and the total number of pages for this report.

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%.

RECORDINGS

The number of recordings.

RUN DATE

The date this report was generated.

SECTION

The name of the section in the evaluation form.

SECTION WEIGHT

A percentage applied to a section in an evaluation form. The sum of section weights in an evaluation form is 100%.

TEAM

The name of the team.

[TEAM]

The name of the teams based on selection filter criteria for this report.

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.

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

The start date for this report period.

END

The end date for this report period.

[AGENT]

The agents' first and last names based on selection filter criteria for this report.

AGENT ID

The agent's system ID.

AVERAGE SCORE (%)

The average score for one of the follow items: Form, Section, and Question.

BELOW

The number of evaluated contacts that are below expectations.

END

The end date for this report period.

EVALUATIONS

The total number of evaluations.

EXCEEDS

The number of evaluated contacts that exceeds expectations.

FIRST NAME

The agent's or evaluator's first name.

[FORM]

The names of the evaluation forms based on selection filter criteria for this report.

FORM

The name of the evaluation form.

[GROUP]

The names of the groups based on selection filter criteria for this report.

GROUP

The name of the group.

Last Name

The agent's or evaluator's last name.

Meets

The number of evaluated contacts that meets expectations.

Page

The current page of this report and the total number of pages for this report.

Recordings

The number of recordings.

Run Date

The date this report was generated.

Section

The name of the section in the evaluation form.

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.

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 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.

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]

The agents' first and last names based on selection filter criteria for this report.

AGENT ID

The agent's system ID.

AVERAGE SCORE (%)

The average score for one of the follow items: Form, Section, and Question.

BELOW

The number of evaluated contacts that are below expectations.

END

The end date for this report period.

EVALUATIONS

The total number of evaluations.

EXCEEDS

The number of evaluated contacts that exceeds expectations.

FIRST NAME

The agent's or evaluator's first name.

[FORM]

The names of the evaluation forms based on selection filter criteria for this report.

FORM

The name of the evaluation form.

[GROUP]

The names of the groups based on selection filter criteria for this report.

GROUP

The name of the group.

LAST NAME

The agent's or evaluator's last name.

MEETS

The number of evaluated contacts that meets expectations.

PAGE

The current page of this report and the total number of pages for this report.

RECORDINGS

The number of recordings.

RUN DATE

The date this report was generated.

SECTION

The name of the section in the evaluation form.

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.

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%.

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.

The following fields appear in the report.

START

The start date for this report period.

END

The end date for this report period.

Last Name

The agent's or evaluator's last name.

First Name

The agent's or evaluator's first name.

User ID

The Windows login (and domain, if an Active Directory system) of the person who accessed the archives.

Eval Form

The evaluation form used to score the contact.

Total Evaluations

The total number of evaluations during the specified time period using the specified evaluation form.

Average Score (%)

The average score for one of the follow items: Form, Section, and Question.

[Form]

The names of the evaluation forms based on selection filter criteria for this report.

Page

The current page of this report and the total number of pages for this report.

Run Date

The date this report was generated.

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.

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

The start date for this report period.

END

The end date for this report period.

GROUP AVERAGE

The average score of all contacts evaluated for agents in the group.

TEAM AVERAGE

The average evaluation score of all the team's evaluations.

AGENT AVERAGE

The average evaluation score of all the agent's evaluations.

[AGENT]

The agents' first and last names based on selection filter criteria for this report.

[TEAM]

The name of the teams based on selection filter criteria for this report.

[GROUP]

The names of the groups based on selection filter criteria for this report.

[FORM]

The names of the evaluation forms based on selection filter criteria for this report.

PAGE

The current page of this report and the total number of pages for this report.

RUN DATE

The date this report was generated.

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.

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

The start date for this report period.

END

The end date for this report period.

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.

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.

[AGENT]

The agents' first and last names based on selection filter criteria for this report.

[TEAM]

The name of the teams based on selection filter criteria for this report.

[GROUP]

The names of the groups based on selection filter criteria for this report.

[FORM]

The names of the evaluation forms based on selection filter criteria for this report.

PAGE

The current page of this report and the total number of pages for this report.

RUN DATE

The date this report was generated.

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.

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

The start date for this report period.

END

The end date for this report period.

TOTAL QM RECORDINGS

The total number of quality management recordings.

TOTAL EVALUATIONS

The total number of evaluations during the specified time period using the specified evaluation form.

[AGENT]

The agents' first and last names based on selection filter criteria for this report.

[TEAM]

The name of the teams based on selection filter criteria for this report.

[GROUP]

The names of the groups based on selection filter criteria for this report.

[FORM]

The names of the evaluation forms based on selection filter criteria for this report.

PAGE

The current page of this report and the total number of pages for this report.

RUN DATE

The date this report was generated.

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.

The following fields appear in the report.

START

The start date for this report period.

END

The end date for this report period.

SCORE

The evaluation score given to the contact.

TREND

The average evaluation score over time.

ID

The ID of the contact.

CONTACT ID

The conversation's unique ID.

FORM

The name of the evaluation form.

CONTACT DATE

The date the contact occurred.

CONTACT TIME

The time when the contact occurred.

CONTACT TIME ZONE

The time zone where the contact occurred.

CALL DURATION

The contact's talk time (length of time between call answered and call dropped).

SCORE(%)

The evaluation's score given to the contact.

[AGENT]

The agents' first and last names based on selection filter criteria for this report.

[FORM]

The names of the evaluation forms based on selection filter criteria for this report.

PAGE

The current page of this report and the total number of pages for this report.

RUN DATE

The date this report was generated.

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.

The following fields appear in the report.

START

The start date for this report period.

END

The end date for this report period.

EVAL FORM

The evaluation form used to score the contact.

CONTACT ID

The conversation's unique ID.

Called Number

The DID or Dialed Number Identification Service (DNIS) number of the phone that received the call. Displays “unknown” if the called number is unlisted or blocked.

Calling Number

The caller ID or Automatic Number Identification (ANI) of the calling party. Displays “unknown” if the calling number is unlisted or blocked.

Call Duration

The contact’s talk time (length of time between call answered and call dropped).

Contact Date

The date the contact occurred.

Contact Time

The time when the contact occurred.

Contact Time Zone

The time zone where the contact occurred.

Eval Date

The date the contact was evaluated.

Eval Time

The time when the evaluator evaluated the contact.

Eval Time Zone

The time zone where the contact was evaluated.

Eval Last Name

The last name of the evaluator.

Eval First Name

The first name of the evaluator.

SCORE(%)

The evaluation's score given to the contact.

SECTION

The name of the section in the evaluation form.

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%.

SCORE

The evaluation score given to the contact.

POSSIBLE SCORE

The actual question that appears in the evaluation form.

POSSIBLE

The total possible score.

KPI

Key Performance Indicator.

QUESTION

The actual question that appears in the evaluation form.

SECTION TOTAL

The total score for the section.

FORM COMMENTS

The comments for a form. Anyone who can view the evaluation can add a comment.

First Name

The agent's or evaluator's first name.

Last Name

The agent's or evaluator's last name.

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.

Comment

The comments related to a specific form or section. Anyone who can view the evaluation can add a comment.

Total Evaluations

The total number of evaluations during the specified time period using the specified evaluation form.

[Agent]

The agents' first and last names based on selection filter criteria for this report.

[Form]

The names of the evaluation forms based on selection filter criteria for this report.

Page

The current page of this report and the total number of pages for this report.

Run Date

The date this report was generated.

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.

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

The start date for this report period.

END

The end date for this report period.

DATE

The contact date.

SCORE(%)

The evaluation's score given to the contact.

EXCEEDS

The number of evaluated contacts that exceeds expectations.

MEETS

The number of evaluated contacts that meets expectations.

BELOW

The number of evaluated contacts that are below expectations.

Call Duration

The contact's talk time (length of time between call answered and call dropped).

[Agent]

The agents' first and last names based on selection filter criteria for this report.

[Form]

The names of the evaluation forms based on selection filter criteria for this report.

Page

The current page of this report and the total number of pages for this report.

Run Date

The date this report was generated.

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.

> **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

The evaluation form used to score the contact.

Contact ID

The conversation's unique ID.

CALLED NUMBER

The DID or Dialed Number Identification Service (DNIS) number of the phone that received the call. Displays “unknown” if the called number is unlisted or blocked.

CALLING NUMBER

The caller ID or Automatic Number Identification (ANI) of the calling party. Displays “unknown” if the calling number is unlisted or blocked.

CALL DURATION

The contact’s talk time (length of time between call answered and call dropped).

CONTACT DATE

The date the contact occurred.

CONTACT TIME

The time when the contact occurred.

EVALUATOR NAME

The first and last name of the evaluator or calibrator.

SECTION

The name of the section in the evaluation form.

SECTION SCORE (%)

The section score given to the contact.

QUESTION

The actual question that appears in the evaluation form.

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%.

KPI

Key Performance Indicator.

QUESTION TYPE

The type of question. The possible question types are Yes-No and 0-5.

POSSIBLE SCORE

The actual question that appears in the evaluation form.

SCORE(%)

The evaluation's score given to the contact.

FORM COMMENTS

The comments for a form. Anyone who can view the evaluation can add a comment.

[CONTACT]

The contact's unique ID.

PAGE

The current page of this report and the total number of pages for this report.

RUN DATE

The date this report was generated.

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.

The following fields appear in the report:

START

The start date for this report period.

END

The end date for this report period.

USER LAST NAME

The user's last name.

USER FIRST NAME

The user's first name.

USER ID

The Windows login (and domain, if an Active Directory system) of the person who accessed the archives.

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 LAST NAME

The agent's last name.

AGENT FIRST NAME

The agent's first name.

AGENT ID

The agent's system ID.

CONTACT ID

The conversation's unique ID.

CONTACT DATE

The date the contact occurred.

CALLING NUMBER

The caller ID or Automatic Number Identification (ANI) of the calling party. Displays "unknown" if the calling number is unlisted or blocked.

CALLED NUMBER

The DID or Dialed Number Identification Service (DNIS) number of the phone that received the call. Displays "unknown" if the called number is unlisted or blocked.

[USER]

The names of the users based on selection filter criteria for this report.

PAGE

The current page of this report and the total number of pages for this report.

RUN DATE

The date this report was generated.

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.

The following fields appear in the report:

START

The start date for this report period.

END

The end date for this report period.

AGENT LAST NAME

The agent's last name.

AGENT FIRST NAME

The agent's first name.

AGENT ID

The agent's system ID.

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.

USER LAST NAME

The user's last name.

USER FIRST NAME

The user's first name.

USER ID

The Windows login (and domain, if an Active Directory system) of the person who accessed the archives.

CONTACT ID

The conversation's unique ID.

CONTACT DATE

The date the contact occurred.

CALLING NUMBER

The caller ID or Automatic Number Identification (ANI) of the calling party. Displays “unknown” if the calling number is unlisted or blocked.

CALLED NUMBER

The DID or Dialed Number Identification Service (DNIS) number of the phone that received the call. Displays “unknown” if the called number is unlisted or blocked.

[AGENT]

The agents’ first and last names based on selection filter criteria for this report.

PAGE

The current page of this report and the total number of pages for this report.

RUN DATE

The date this report was generated.

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.

The following fields appear in the report.

START

The start date for this report period.

END

The end date for this report period.

TEAM

The name of the team.

LAST NAME

The agent's or evaluator's last name.

FIRST NAME

The agent's or evaluator's first name.

USER ID

The Windows login (and domain, if an Active Directory system) of the person who accessed the archives.

MACHINE

The MAC address on the computer where the event occurred.

IP ADDRESS

The IP address of the computer on which the event occurred.

DATE

The contact date.

TIME

The time of the contact.

LEVEL

The level of the event. The possible options are as follows:

- ALL displays all event level messages.
- INFO displays only informational messages that is not an error but might be useful for troubleshooting.

- WARN displays only warning messages indicating that there is a malfunction that is a nuisance but does not interfere with the program's operation.
- ERROR displays only error messages where the program cannot continue.

CATEGORY

The application associated with the event.

MESSAGE

The event message.

[TEAM]

The name of the teams based on selection filter criteria for this report.

[LEVEL]

The names of the levels based on selection filter criteria for this report.

PAGE

The current page of this report and the total number of pages for this report.

RUN DATE

The date this report was generated.

System Activity

The System Activity report shows how the system is performing and includes information such as:

- How the system is performing
- How many recordings were created
- How many of those recordings were uploaded
- Why a call failed to be reconciled

The following fields appear in this report:

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.

The Media webapp 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

The start date for this report period.

END

The end date for this report period.

DATE

The contact date.

TIME

The time of the contact.

MACHINE

The MAC address on the computer where the event occurred.

IP ADDRESS

The IP address of the computer on which the event occurred.

LEVEL

The level of the event. The possible options are as follows:

- ALL displays all event level messages.
- INFO displays only informational messages that is not an error but might be useful for troubleshooting.
- WARN displays only warning messages indicating that there is a malfunction that is a nuisance but does not interfere with the program's operation.
- ERROR displays only error messages where the program cannot continue.

CATEGORY

The application associated with the event.

MESSAGE

The event message.

PAGE

The current page of this report and the total number of pages for this report.

RUN DATE

The date this report was generated.

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