Cisco Unified Workforce Optimization

Quality Management User Guide Version 11.0

First Published: First Published: August 27, 2015

Last Updated: Last Updated: October 12, 2015

Cisco Systems, Inc. www.cisco.com

Quality Management User Guide

Contents

Getting Started

This section describes how to log in to Unified Workforce Optimization and provides a brief description of Unified Workforce Optimization.

Unified Workforce Optimization supports the following products:

- Recording and Quality Management
- Workforce Management (WFM)

The information provided in this section is common to each of these products, except where noted.

Accessing the User Interface

Unified Workforce Optimization is a web application. Access it by entering the following URL in your browser:

https://<base server> or

http://<base server>

where <base server> is the host name or IP address of the server that hosts the Unified Workforce Optimization Container.

Note: If you are using Chrome to access Recording and Quality Management, the IE Tab extension from Google must be installed. To access Unified Workforce Optimization, right-click the IE icon next to the Bookmark icon on the Chrome toolbar, and enter the Unified Workforce Optimization URL in the Internet Explorer Address field that appears below the Chrome URL Address field.

Validating Your PC

Before you log in to Unified Workforce Optimization for the first time, validate your PC. Validating your PC means that Unified Workforce Optimization checks

it to make sure that it has all the features required to run your Unified Workforce Optimization products.

To validate your PC, access the Unified Workforce Optimization login page and click the Validate my PC configuration link. Unified Workforce Optimization performs the evaluation and then displays the Diagnostics page, which lists the required features for each product in your system. The Result column tells you if your PC is configured correctly or not for that feature.

Diagnostics

Product	Feature	Supported	Found	Result
QM	Browser Type and Version	Microsoft Internet Explorer 9, 10, 11; Google Chrome	Microsoft Internet Explorer 11 (32-bit)	Good
QM	Platform	Microsoft Windows	Microsoft Windows	Good
QM	Popup blocker enabled	False	False	Good
QM	Audio Playback ActiveX installed/enabled	True (Windows Media Player)	True (True)	Good
QM	Screen Playback ActiveX installed/enabled	True (Proxy v6.x Remote Control Viewer)	True (True)	Good
QM	Live Screen Monitoring ActiveX installed/enabled	True (ScreenViewerControl Class)	True (True)	Good
WFM	Browser Type and Version	Microsoft Internet Explorer 9, 10, 11; Google Chrome	Microsoft Internet Explorer 11 (32-bit)	Good
WFM	Popup blocker enabled	False	False	Good
CAS	Browser Type and Version	Microsoft Internet Explorer 9, 10, 11; Google Chrome	Microsoft Internet Explorer 11 (32-bit)	Good
CAS	Platform	Microsoft Windows	Microsoft Windows	Good
CAS	Popup blocker enabled	False	False	Good
CAS	Audio Playback ActiveX installed/enabled	True (Windows Media Player)	True (True)	Good
CAS	Screen Playback ActiveX installed/enabled	True (Proxy v6.x Remote Control Viewer)	True (True)	Good

Calabrio ONE Component Versions

Component	Version
User Interface	5.0.113.0
Calabrio Quality Management	9.3.1.146
Workforce Management	9.3.1.203
Calabrio Analytics Services	9.3.1.117

If the Diagnostics page shows Bad for any feature, you must correct that before you can log in to Unified Workforce Optimization. In some cases you will see links at the bottom of the page that will help you correct a problem. In other cases you will have to contact your supervisor or administrator for assistance.

The Component Versions section of the page displays the current versions of Unified Workforce Optimization and each installed product.

Note: Recording and Quality Management uses ActiveX Controls for recording playback and live screen monitoring. Contact your Microsoft Windows Administrator to verify that the Recording and Quality

Management users have the appropriate Group Policy required to install ActiveX on their desktop.

Adding a Trusted Site to Internet Explorer

Before you log in to Unified Workforce Optimization for the first time, it is recommended that you add the Unified Workforce Optimization URL as a trusted website to Internet Explorer (if that is the browser you are using). By adding a website to the Trusted security zone, you can control the level of security used on that site.

1. Start Internet Explorer and select Tools > Internet Options from the toolbar.
2. On the Security tab, clear the Enable Protected Mode check box.
3. Select Trusted Sites, and then click Sites.
4. In the Add this website to the zone field, enter the base server URL (https://<base server>) and click Add. The URL is added to the Websites list.

   Note: The following message might appear:

   "Sites added to this zone must use the https:// prefix. This prefix assures a secure connection."

   If you see this message, clear the Require Server Verification (https:) for all sites in this zone check box and click Add again. Then select the Require Server Verification (https:) for all sites in this zone check box.

6. Click Close to dismiss the Trusted Sites dialog box.
7. Click Apply and then OK to dismiss Internet Options.

Enabling ActiveX Controls in Internet Explorer

1. Start Internet Explorer and select Tools > Internet Options from the toolbar.
2. On the Security tab, choose one of the following options:
   - Select Local Internet and change Security level for this zone to Medium-low.
   - Select either Internet or Trusted Sites, and then click Custom Level. Scroll down to ActiveX controls and plug-ins and change the option as follows:

Option	Setting
Automatic prompting for ActiveX controls	Enable

3. Click OK to dismiss the Security Settings dialog box.
4. Click Apply and then OK to dismiss Internet Options.
5. Restart Internet Explorer.

Required Chrome Options

1. From the Chrome browser, right-click the IE Tab icon and click Options.
2. Enable the following options under General Options:
   - Enable Auto URLs
   - Open pop-up windows with Chrome
   - Use a full window when displaying pop-ups
   - Enable DEP Policy
   - Enable ATL Dep Workaround

Logging In

The Unified Workforce Optimization login page allows you to log in to a single product or to multiple products simultaneously.

The following table describes the fields on the Login page.

Field	Description
Separate Product Logins check box	This check box is present only in systems with multiple products. By default it is clear, so that when you log in, you log in to every product simultaneously. If you select the check box, you can log in to a specific product in your system.
Product name check box	This check box is present only in systems with multiple products. If you opt for separate product login, after you select the desired product you must select this check box. If you do not select it, the Username and Password fields are not enabled.
Username	Your username. If your system uses Active Directory, this is your Active Directory username. If your system does not use Active Directory, it is the username assigned to you by your administrator. **Note**: If not using Active Directory, and your administrator wants to take advantage of multiple login, your username and password must be the same in every product.
Password	Your password. If your system uses Active Directory, this is your Active Directory password. If your system does not use Active Directory, it is the password assigned to you by your administrator.
Domain	The Active Directory domain. This field is displayed only on systems that use Active Directory. Select the domain associated with your Active Directory username and password.
Language	Choose the language used in the Unified Workforce Optimization. The language you choose is used in all products, and persists from session to session for your username.

Field	Description
Product icons	These icons are displayed only in multiple product systems and if you have opted for separate product logins. When you click an icon, the name of the product appears above the Username field. Use these icons to select the product you want to log in to.
Validate my PC configuration	Click this link to make sure your PC is configured correctly to use Unified Workforce Optimization. See Validating Your PC for more information.

Logging in to One Product

To log in to one product:

1. Select the Separate product logins check box.
2. Click the product icon for the product you want to log in to.
3. Select the product name check box.
4. Complete the fields on the Login page.
5. Click Login.

Note: If there is only one product in your system, the Login page is simpler, and shows only the Username, Password, Domain (if you use Active Directory), and Language fields.

There is no limit to the number of login attempts you can make. An error message appears if your credentials are not correct.

Logging in to Multiple Products

To log in to multiple products:

1. Clear the Separate product logins check box (this is clear by default).
2. Complete the fields on the Login page and click Login.

If your credentials are the same across the product suite, your login gives you access to all those products (based on your role).

However, if your credentials are not the same for one or more of the products in the product suite, you are not notified of the error. You will be able to access only the products for which your credentials were valid.

To find out which products you could not access, log out and use the separate login option. Log in to each product in turn to find out which one is rejecting your credentials.

Access Based on Role

The following table shows the applications available by role in Recording and Quality Management.

Note: Permissions are configured per evaluation form.

Access based on role

Applications	Roles
Voice Recording	Agent or Knowledge Worker
Screen Recording	Agent or Knowledge Worker
Dashboard	Agent or Knowledge Worker Supervisor Manager Evaluator Archive User System Administrator

Access based on role

Applications		Roles
Recording	Play Voice Recording	Agent or Knowledge Worker Supervisor Manager Evaluator Archive User System Administrator
	Play Screen Recording	Agent or Knowledge Worker Supervisor Manager Evaluator Archive User System Administrator
	View Evaluation	Agent or Knowledge Worker Supervisor Manager Evaluator Archive User System Administrator
	Evaluate	Supervisor Manager Evaluator System Administrator
Live Monitoring		Supervisor Manager System Administrator

Access based on role

Applications		Roles
Recording Monitoring		Agent or Knowledge Worker Supervisor Manager Archive User System Administrator
Application Management	Performance Management	System Administrator

Access based on role

Applications		Roles
Reporting	Run Evaluation Reports	Agent or Knowledge Worker Supervisor + Agent Supervisor + Knowledge Worker Manager Evaluator
	Schedule Evaluation Report	Supervisor + Agent Supervisor + Knowledge Worker Manager Evaluator
	Run System Reports	Agent or Knowledge Worker Supervisor + Agent Supervisor + Knowledge Worker Manager Evaluator System Administrator Telephony Administrator
	Schedule System Report	Supervisor + Agent Supervisor + Knowledge Worker Manager Evaluator System Administrator Telephony Administrator

Note: Screen Recording, View Evaluation, Evaluate, and Live Monitoring require one of the following licenses: QM, QMA, AQM, or AQMA.

Note: If you want to enable Live Monitoring for an evaluator or archive user, assign to them the manager role.

Access Based on License and Role

For Call Recording and Quality Management, the following table shows the features available by role and Quality Management license.

The types of licenses available are:

- Compliance Recording (CR)
- Compliance Recording Application (CRA)
- Quality Management (QM)
- Quality Management Application (QMA)
- Advanced Quality Management (AQM)
- Advanced Quality Management Application (AQMA)

Licenses are assigned in Quality Management Administrator, in the Personnel > License and Unlicense Users dialog box.

Access based on license and role

Role	Dashboard	Recording		Live Monitoring	Recording Monitoring	Reporting
		Evaluate and Review	Search and Play			
Archive User			CR CRA		CR CRA	CR CRA
Manager			CR CRA	CR CRA	CR CRA	CR CRA
Supervisor			CR CRA	CR CRA	CR CRA	CR CRA
Agent			CR CRA			

Role	Dashboard	Recording		Live Monitoring	Recording Monitoring	Reporting
		Evaluate and Review	Search and Play			
Knowledge Worker			CR CRA			
Archive User	QM QMA AQM AQMA		QM QMA AQM AQMA			QM QMA AQM AQMA
Evaluator	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA			
Manager	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA		QM QMA AQM AQMA
Supervisor	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA		QM QMA AQM AQMA
Agent	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA			QM QMA AQM AQMA
Knowledge Worker	QM QMA AQM AQMA	QM QMA AQM AQMA	QM QMA AQM AQMA			QM QMA AQM AQMA

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

Agents and knowledge workers can run reports on themselves and review their own evaluations. They do not have access to reports or evaluations for other users.

Scoping Rules

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

Scoping Rules and HR/Training Recordings

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

Administrator ID

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

System Administrator

The system administrator can access all application in Unified Workforce Optimization.

Telephony Administrator

The telephony administrator can run and schedule system reports.

Agents and Knowledge Workers

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

Supervisors

Supervisors can view contacts (including training and HR contacts) made only by their currently active teams. For example, if a supervisor had been assigned to Team A last week, but is now assigned to Team B, that supervisor can view

only contacts recorded by currently active agents on Team B. This includes contacts recorded by the Team B agents before the supervisor was assigned to Team B.

Managers

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

Evaluators

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

Archive Users

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

Active Role Access

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

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

Using Multiple Browser Tabs

You can run applications in separate browser tabs or separate instances of your browser during the same session. For example, you can run the Reports application in one tab and the Application Management application in another.

Logging in or out from any browser tab or browser instance affects your login status in all browser tabs and browser instances. For example, if you log in as User 1 in one tab, you are logged in as User 1 in every other tab or browser instance you open. If you log out as User 1 and then log in as User 2 from any tab or instance, all tabs and instances will be logged in as User 2 after they are refreshed.

Note: If you are running an instance of two different browsers (for example, Internet Explorer and Chrome) you can be logged into each as a different user.

To run applications in separate browser tabs, follow these steps:

1. Log in to Unified Workforce Optimization.
2. Copy the URL.
3. Open a new browser tab or instance and paste the URL in the address field.
4. Navigate to the application you want to display in that tab or instance.
5. Repeat steps 3 and 4 as many times as desired.

Clearing Your Browsing History

If Unified Workforce Optimization does not display pages properly (for example, a page is blank), it is recommended that you log out and clear your browser's browsing history.

To clear Internet Explorer browsing history:

1. In Internet Explorer, choose Tools > Internet Options.
2. On the General tab, click Delete in the Browsing history section and then click OK.
3. Restart Internet Explorer.

To clear Chrome browsing history:

1. On the browser toolbar, click the Chrome menu.
2. Choose More Tools > Clear browsing data.
3. In the dialog that appears, choose how far back you want to clear data, and select the Browsing history check box.
4. Click Clear browsing data.
5. Restart Chrome.

Best practices: It is recommended that you configure Internet Explorer to clear the browsing history every time you exit. To do this, choose Tools > Internet Options > General tab. In the Browsing history section, select the Delete browsing history on exit check box.

Logging Out

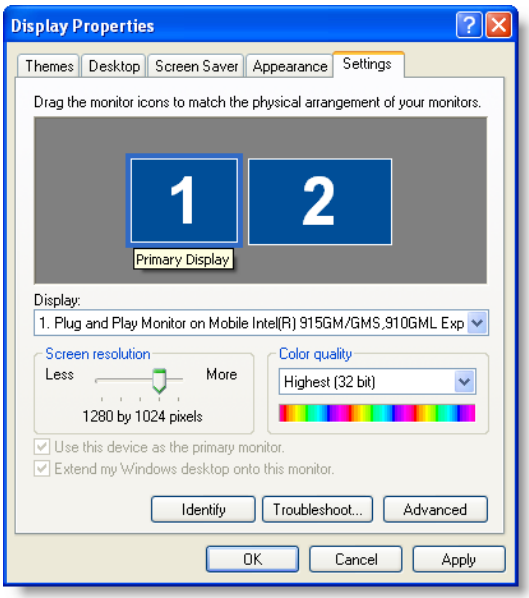
To log out of Unified Workforce Optimization, hover your mouse over your username in the upper right corner of the page, and click Log Out. This returns you to the Login page.

Note: If you are logged into multiple products, logging out from one will log you out from all.

To exit Unified Workforce Optimization completely, close your browser.

Dual Monitor Configuration for Recording and Quality Management

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



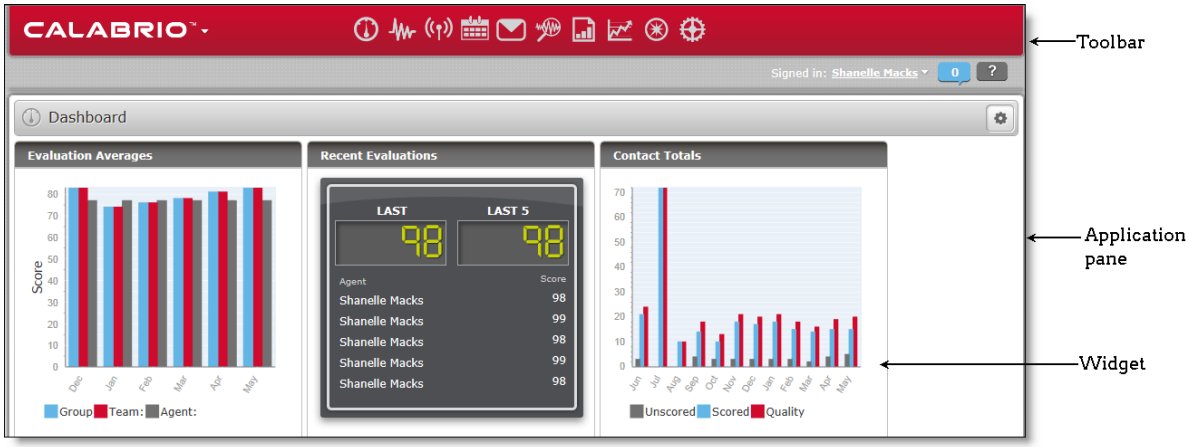
Using a Dual Monitor Configuration

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

  You can now view Unified Workforce Optimization on one monitor and the popup window on the other monitor.

User Interface

Unified Workforce Optimization is divided into three sections.



Container Bar	This toolbar at the top of the page displays navigation buttons you can use to do the following: ■ Access Unified Workforce Optimization's common applications. ■ View the name of the user who is currently signed in to Unified Workforce Optimization and log out. ■ View alerts, which occur when a significant event occurs. For more information on alerts, see the *Application User Guide*. ■ Access the online help.
Application Pane	The center section of the page that displays a selected application.
Widgets	Self-contained applications that appear on the user's dashboard and can be configured for a specific purpose.

Toolbar

The following table describes the buttons that appear in the toolbar at the top of the screen.

Toolbar

Button	Icon	Description
Logo	–	Click the logo to navigate to the website. Click the down arrow at the right of the logo to show a drop-down menu of all available applications.
Dashboard		Provides information based on the products installed. Administrators can log in to Unified Workforce Optimization and lock down the Dashboard by role.
Recordings		Allows you to do the following: ■ Search the stored archives for specific customer conversations. ■ Review a list of contacts and from this list access the associated recordings and evaluations.
Live Monitoring		Allows supervisors and managers to monitor the audio for active calls for users in their scope.
Recording Monitoring		Allows you to monitor the recording status of active calls within your scope.
Application Management		Allows system administrators to manage performance management for gamification.
Reporting		Allows you to generate evaluation reports and system reports
Signed In	NA	Displays the name of the current user and allows you to log out of Unified Workforce Optimization.
Alerts	226	Displays a list of alerts. For more information, see the *Application User Guide*.
Help	?	Displays the help by product.

Application Pane

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

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

Applications

All applications available in Unified Workforce Optimization have the same basic layout.

The following table lists the application buttons.

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

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

Tables

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

Sorting Tables

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

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

Consider the following limitations when sorting tables:

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

Managing Tables

- To sort a table by one column, click the column heading. Click again to reverse the sort order.
- To move a column, click the column header, then click in the column and drag the column to the location you want it to appear.
- To change the size of a column, drag the column edge to the required width.
- If the table is long, use the scroll bar at the right of the table to move up and down the table.
- If the table is wide, use the scroll bar at the bottom of the table to move left and right.

Moving Items between Lists

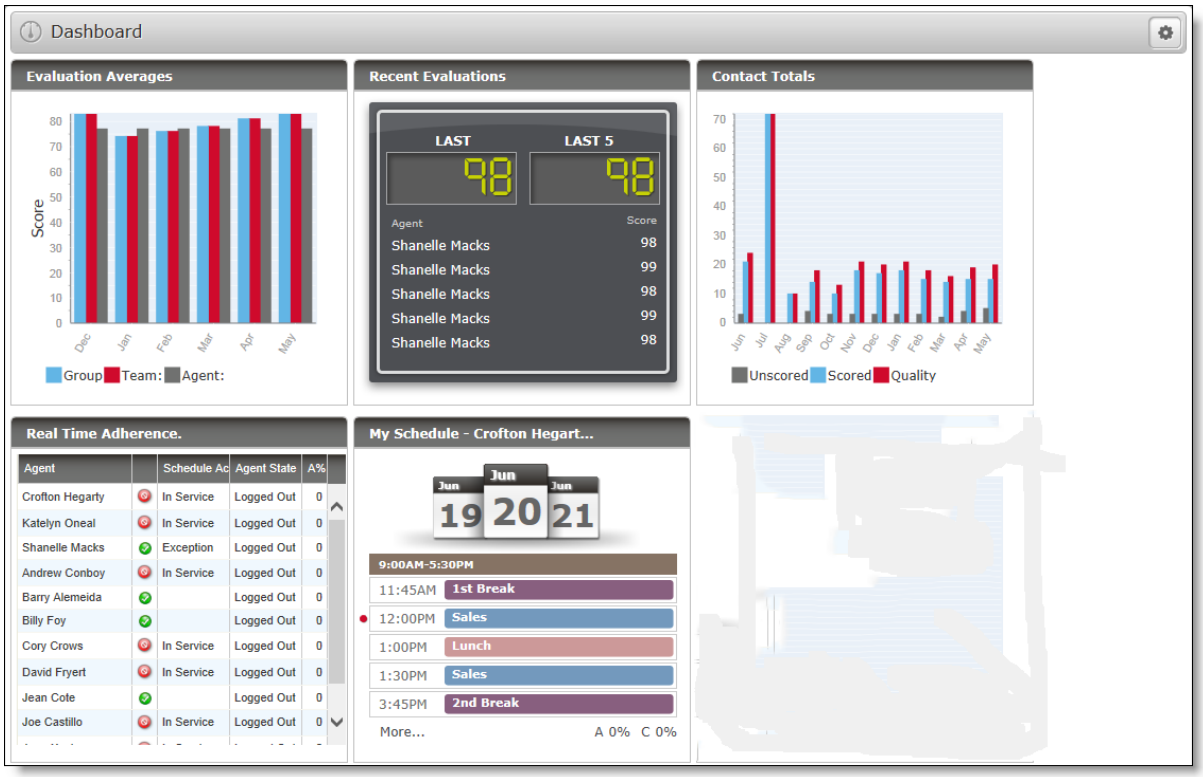
The following Recording and Quality Management applications allow you to move items between lists:

- Dashboard
- Reporting

To move an item between lists, click and drag the item from one list to another or one position to another. To move more than one item, use Shift+Click to select contiguous items and Ctr+Click to select non-contiguous items.

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, including the type of chart to be displayed (line graph, vertical bar, and stacked bar)
- Reposition the widgets in the dashboard

Changes made to the dashboard or widget settings are saved automatically after they are applied 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.

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
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
Gamification Score	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

[1]Knowledge worker (KW).
[2]Enabled indicates the drop-down list is populated based on the user's scope.

Role	Group	Team	Agent
Archive User	Enabled	Enabled	Enabled
Evaluator	Enabled	Enabled	Enabled
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.

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

[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.

Settings	Agent or Knowledge Worker	Supervisor	Manager	Evaluator	Archive User
Team	Your Team	First Team	All	All	All
Agent	Yourself	All	All	All	All

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 in a roll-out panel 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 panel.

Widget Settings

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

The fields that can appear in the Widget Settings dialog box are listed below. Only fields that apply to a specific widget appear in that widget's Settings dialog box.

Note: Some widgets might not display one or more of these settings because the data is unavailable or not applicable.

Field	Description
Range	The date range for the historical information. The default range is: ■ The past six months for the Contact Totals, Evaluation Averages, and Evaluation Ranges widgets ■ The past month for the Speech Statistics widget
Chart	The type of chart you want to appear in this widget. Your choices are: ■ Line Graph (default)–displays metrics as a line ■ Stacked Bar–displays metrics stacked on top of each other ■ Vertical Bar–displays metrics next to each other
Eval Form	The name of the evaluation form. Your options are: ■ All Percent-Based (default)–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
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 integers 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 .
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.

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

Points to Remember

Remember the following points when working with the Dashboard application.

- The Dashboard application defaults to your highest role. For example, if you are assigned the agent and supervisor roles the Dashboard application automatically displays the performance statistics associated with the supervisor role.
- Groups and teams are listed alphabetically in drop-down lists. The first group in the list appears in the Dashboard application by default. If a

group contains multiple teams, All appears in the Dashboard application by default.

- If an agent's average is the same as the team or group, the Agent average is overlayed by the Team Average or Group Average.
- All displayed scores are rounded up for the purposes of determining which category (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 first and last 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 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.

Gamification Score

The Gamification Score widget allows you to display metrics based on the following performance categories:

- QM Quality Score
- WFM Adherence Score

> **Note:** The WFM Adherence Score is only available when WFM is installed.

Agents and knowledge workers can see their current level and progression towards the next level in the Gamification Score widget. They can choose which performance category to display.

When an agent or knowledge worker configures the Gamification Score widget, it will display a badge and a progress bar. The badge is symbolic of the level achieved. The number within the badge indicates the level that the agent or knowledge worker has achieved for selected performance category. The progress bar indicates how close the agent or knowledge worker is to the next level.

Supervisors and managers can configure the Gamification Score widget to display a single agent in the widget (that would look identical to the agent's Gamification Score widget) or configure the Gamification Score widget to display all agents for a specific performance category.

The Gamification Score widget displays the following data elements.

Group

The name of the group.

Team

The name of the team.

Agent

The agent's first and last name.

Badge

There are two types of badges: quality and adherence.

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 dialog box.
   a. Drag the widgets you want to appear on the dashboard from the Available Widgets list to the Selected Widgets list. To remove widgets from the Selected 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 dialog box.
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 dialog box, 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 and hold 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 dialog box, 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 dialog box, 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 Widget Configuration 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.

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 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.
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

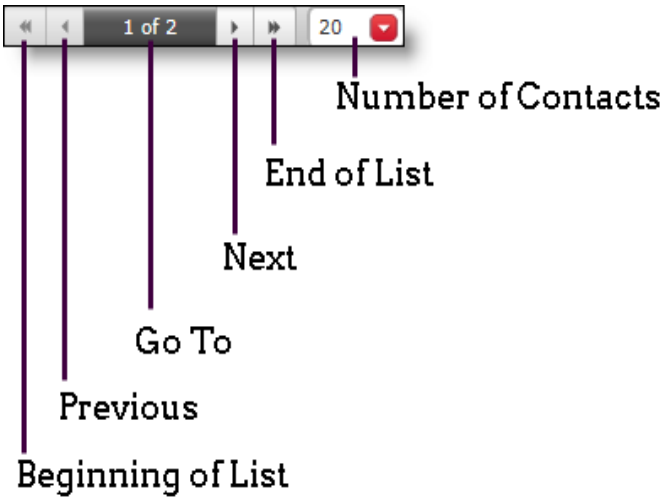
Button	Icon	Description
New or Refine Search	NA	Displays the Search Recordings window. See Search Recordings for more information.
Save		Saves your search settings. Your options are: ■ Save this Search–saves the current search ■ Saved Searches–lists the available saved searches and allows you to delete 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.

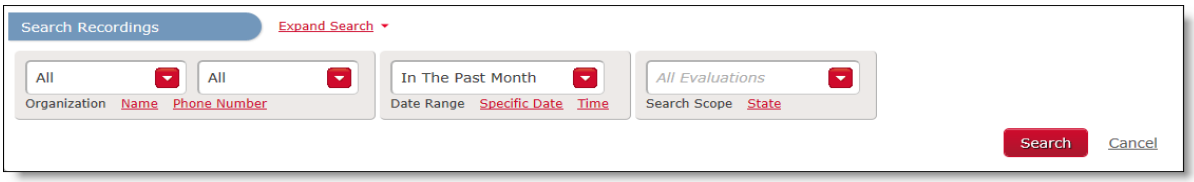
> **Note:** Unified Workforce Optimization supports up to 999 pages. If your list of contacts is greater than 999 pages, "1 of ..." appears in the Go To field.

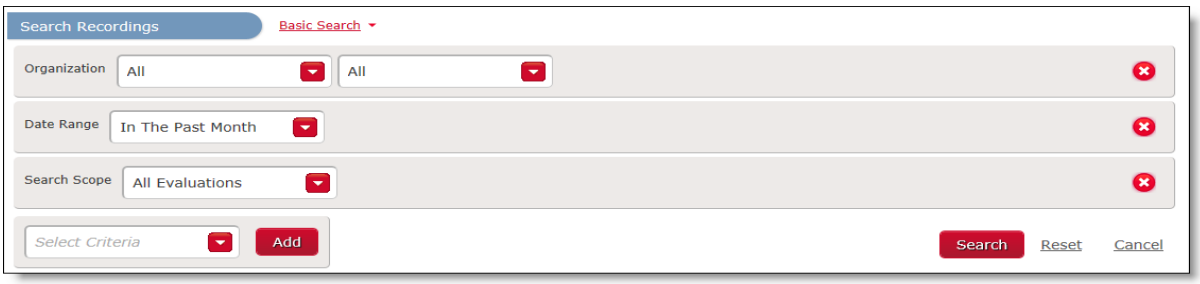
Search Recordings

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 archive users and 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.
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.
Associated Call ID	The ID for the associated 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.
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.

Field	Description
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.
Number of Associated Calls	The number of associated calls for this conversation.

Field	Description
Reason	The reason the conversations was recorded as set in the recording rule. The possible reasons are as follows: ■ Agent 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 ■ 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 to see how this value is calculated.
Select Criteria	Search conversations or columns by adding more search values.
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 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 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.
<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: ■ Data=2056–that includes text, numbers and hyperlinks. **Note:** Once the hyperlink is saved you can click the hyperlink and the link will open in a separate web browser. ■ Date–maximum length is based on the standard date format.
Agent ID	The agent's system ID.
Approved By	The name of the manager or supervisor who approved the evaluation.
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 is received from the signaling service. 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.
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.

Field	Definition
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. **Note:** If the First Name, Last Name, Group Name and Team Name fields are blank, the recording is a root call. A root call is an unreconciled contact that appears as an archive contact. Once reconciled, the call will be assigned a user.
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
Has Voice	The contacts has a voice recording. The valid values in the Has Voice field are: ■ Yes ■ No

Field	Definition
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 ■ 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 ■ Random Call ■ Shortest Call of Day

Field	Definition
	■ 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 ■ 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).
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.

Field	Definition
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.
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

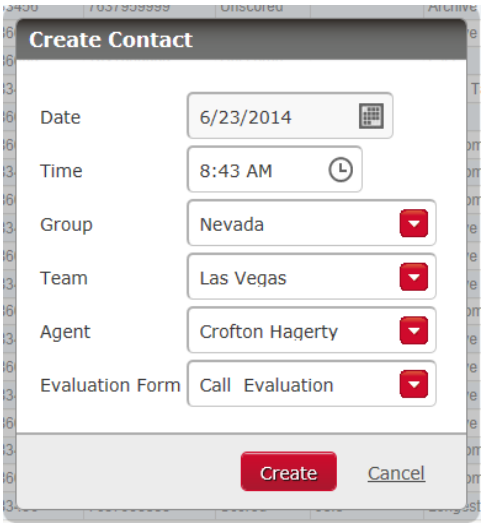
1. Run a search in the Recordings application to locate the recordings that you want to export. See Searching Recordings for more information.
2. Click Export Table Data to CSV in the Recordings toolbar, and follow the prompts.

   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.

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 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 .

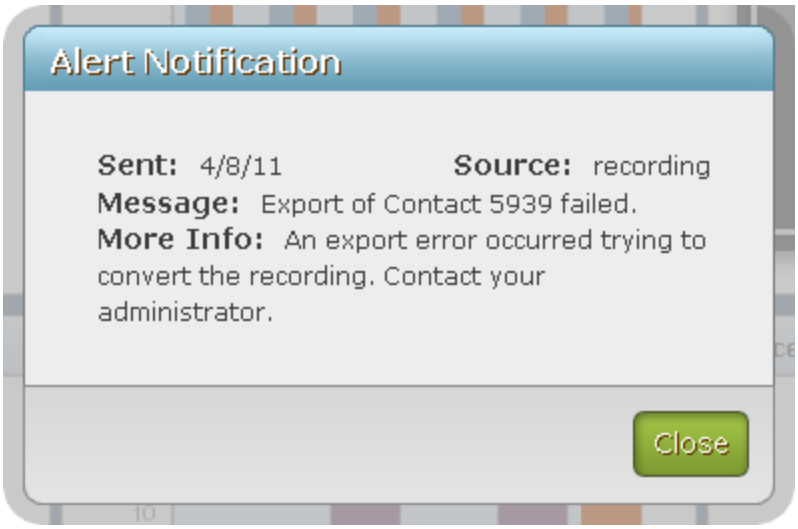
  The retention time is updated for the selected conversation.

Alerts

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 226 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.

Field	Description
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

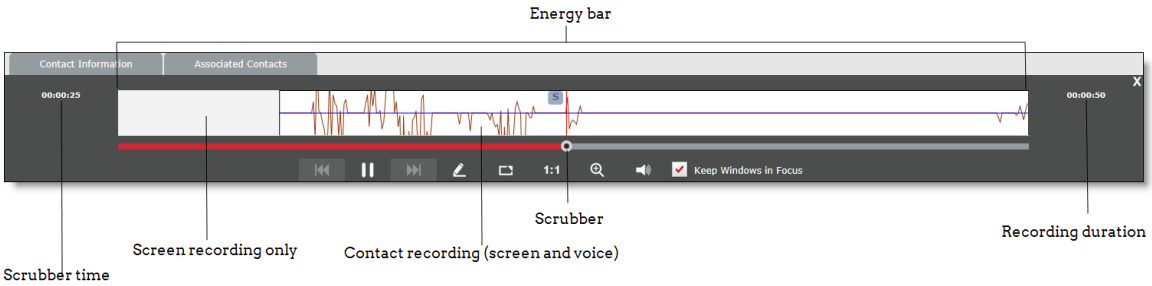
Delete this text and replace it with your own content.

- 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.

Media Player

The Media Player appears when you when you try to play back a recording or view text from a contact in the Recordings application's Contacts table.

If the contact is a recording and it is located on another machine, the Media Player starts downloading the recording (Download on Demand), plays the recording when there are enough bytes downloaded for audio playback to begin, and enables the playback control buttons.



The following table describes the components in the Media Player.

Name	Definition
Energy bar	A visual representation of the voice energy in the voice recording. If the contact is an email or screen recording, the Media Player displays the appropriate text in the energy bar.
Scrubber time	The location timestamp of the scrubber. The format is HH:MM:SS.
Screen recording only	If an agent's screen activity was recorded before or after a call ended, the energy bar will be blank during that portion of the customer conversation.
Scrubber	The scrubber identifies what portion of the recording is active.
Contact recording (screen and voice)	The actual recording of the customer conversation. The screen recording appears in a separate window.

Name	Definition
Recording duration	The total time of the recording in HH:MM:SS, including the recorded activity before and after the call ended.

Playback Controls

The Media Player provides playback controls for audio and screen recordings. Use the playback controls to play, pause, and stop a recorded contact. The Media Player also includes a recording progress bar (slider), that can be used to quickly skip forward or backward in the recording.

The following table describes the active playback controls.

Playback controls

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

Icon	Name	Description
	Mark for Quality	Marks the selected customer conversation or non-call contact for quality evaluation and displays the Evaluation Form window. This button is enabled when the selected recording has a Reason value of Archive and the recording has been uploaded.
	Bring Windows to Front	Brings the Screen window and the Evaluation Form window to the front of your screen.
	Zoom In	When clicked, increases the size of the energy bar in the Media Player. Zoom In and Zoom Out are toggle buttons.
	Zoom Out	When clicked, decreases the size of the energy bar in the Media Player.
	Mute	Silences the audio recording. Mute and Unmute are toggle buttons.
	Unmute	Restores the sound for the audio recording.
NA	Keep Windows in Focus	Brings the Screen window and the Evaluation Form window to the front of your screen.
	Close	Exit the Media Player.
NA	Position	Identifies the current playback position of this recording in HH:MM:SS format.
NA	Progress Bar	Displays the completion percentage for the recording. Drag the scrubber on the progress bar to move forward or backward in the recording. A red progress line in the energy bar lines up with the scrubber in the progress bar as the recording plays. This allows you to see how the progress bar matches the data in the energy bar.

The following table describes the playback markers that might appear on the Media Player.

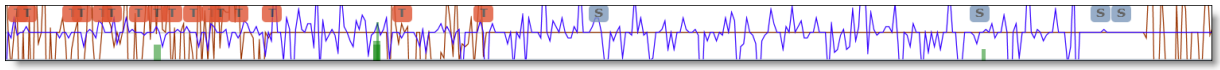
Playback markers

Icon	Name	Description
C	Comment	Identifies a comment in the energy bar that is associated with the customer conversation at the specified position in minutes and seconds. When clicked, the Evaluation Comments dialog box display all comments associated with the customer conversation. This icon only appears when a comment exists at a specified location in the customer conversation. See Evaluation Comments for more information on evaluation comments.
H	Hold	Identifies a hold event that is associated with the customer conversation.
P	Pause	Identifies a pause event that is associated with the customer conversation.
S	Silence	Identifies a Silence event that is associated with the customer conversation. See Detecting Silence and Talkover Events for more information.
T	Talkover	Identifies a Talkover event that is associated with the customer conversation. The Talkover icon appears at the beginning of a Talkover event. See Detecting Silence and Talkover Events for more information.

Detecting Silence and Talkover Events

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

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



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

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

Call streams can include non-speech noises (for example, wind, typing, background conversions, or barking dogs). Recording and Quality Management processes these noises in addition to speech when searching for silence and talkover events in a call.

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

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

- Mutual Silence (MS)—both frames are silent.
- Normal (N)—one frame contains speech while the other frame is silent. This indicates normal conversation.
- Talk Over (TO)—both frames contain speech.

VAD uses a heuristic algorithm. The algorithm is adaptive and can dynamically change based on the quality of the audio data. In a noisy environment, the VAD decision threshold will rise in order to indicate only the loudest noises as

speech. Otherwise, the entire phone conversation would be marked as constant speech, even if the noise is caused by a car engine or other non-speech background noise.

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

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

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

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

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

Creating a Hyperlink to a Recording

You can create a uniform resource locator (URL) to a recording and send it as a hyperlink to others through a chat message or email. When the recipient clicks the link, the recipient's web browser goes to the Media Player, pending authentication through the Unified Workforce Optimization Login page, and plays the recording in Recording and Quality Management.

The basic URL format is as follows:

https://<base server>/cwfo/apps/Recordings.html?loadContact=<id> or

http://<base server>/cwfo/apps/Recordings.html?loadContact=<id>

where <base server> is the host name or IP address of the server that hosts the Unified Workforce Optimization Container and <id> is the Contact ID for the recording.

The advanced URL format is as follows:

http://<base server>/cwfo/apps/Recordings.html?userLang=en&userCountry=&urlSearch=true&<search param1>=<search value1>&<search param2>=<search value2>

where <search param*X*> is the parameter that you want to include in the search and <search value*X*> is the value for that parameter. You can specify multiple parameters.

Example:
http://10.192.247.188/cwfo/apps/Recordings.html?userLang=en&userCountry=&urlSearch=true&group=13&beginTime=2010-09-13&endTime=2013-09-14

Note: The advanced search URL must include the userLang and userCountry fields.

Parameter	Example
id	.../Recordings.html?urlSearch=true&id=29340 where id is the Contact ID number.

Parameter	Example
reason	.../Recordings.html?urlSearch=true&reason=recorded
range	.../Recordings.html?urlSearch=true&range=
group	.../Recordings.html?urlSearch=true&group=<group ID> where <group ID> is the Group ID number
team	.../Recordings.html?urlSearch=true&team=<team ID> where <team ID> is the Team ID number
firstName	.../Recordings.html?urlSearch=true&firstName=<first name> where <first name> is the agent's first name.
lastName	.../Recordings.html?urlSearch=true&lastName=<last name> where <last name> is the agent's last name.
number	.../Recordings.html?urlSearch=true&number=<phone number> where <phone number> is the phone number
beginTime	.../Recordings.html?urlSearch=true beginTime=<YYYY-MM-DD> where <YYYY-MM-DD> is the date in YYYY-MM-DD format.
endTime	.../Recordings.html?urlSearch=true endTime=<YYYY-MM-DD> where <YYYY-MM-DD> is the date in YYYY-MM-DD format.
timeOfDayRange	.../Recordings.html?urlSearch=true&timeOfDayRange=
evalState	.../Recordings.html?urlSearch=true&evalState=<eval state> where <eval state> is one of the following options: ■ scored ■ unscored ■ inProgress ■ needsApproval

Parameter	Example
tagged	.../Recordings.html?urlSearch=true&tagged=<tag> where <tag> is one of the following options: ■ true ■ false
hr	.../Recordings.html?urlSearch=true&hr=<hr> where <tag> is one of the following options: ■ true ■ false
training	.../Recordings.html?urlSearch=true&training=<training> where <tag> is one of the following options: ■ true ■ false
score	.../Recordings.html?urlSearch=true&score=<number> where <number> is the actual score for the evaluation.
metadata	.../Recordings.html?urlSearch=true&metadata=<metadata> where <metadata> is the name of the metadata field.
contactType	.../Recordings.html?urlSearch=true&contactType=
recordingType	.../Recordings.html?urlSearch=true&recordingType=
silenceEvents	.../Recordings.html?urlSearch=true&silenceEvents=<number>~<value> where <number> is a number from 0-100 and <value> is one of the following options: ■ equals ■ greater ■ less

Parameter	Example
talkOverEvents	.../Recordings.html?urlSearch=true&talkOverEvents=<number>~<value> where <number> is a number from 0-100 and <value> is one of the following options: ■ equals ■ greater ■ less
silenceDuration	.../Recordings.html?urlSearch=true&silenceDuration=<number>~<value> where <number> is a number from 0-100 and <value> is one of the following options: ■ equals ■ greater ■ less
talkOverDuration	.../Recordings.html?urlSearch=true&talkOverDuration=number>~<value> where <number> is a number from 0-100 and <value> is one of the following options: ■ equals ■ greater ■ less

Agent Recording Scenarios

Agent Recording routes calls through a PBX or ACD. Call-control signaling tells Recording and Quality Management when to start recording and which agent to assign the audio to. Agent Recording includes the following recording methods:

- Desktop Recording
- Network Recording
- Server Recording (SPAN)

The Agent Recording scenarios in this section cover the following topics:

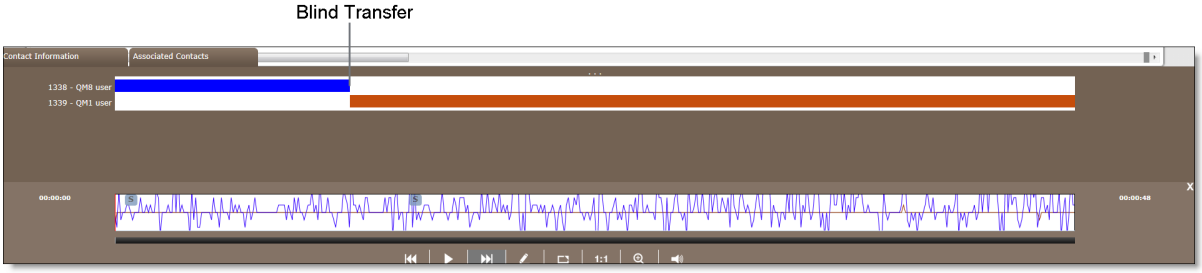
- Blind Transfer
- Intelligent Transfer
- Monitored Conference
- Hold with Call on Second Line

Each scenario shows how the action appears in the Media Player's energy bar.

Blind Transfer

Blind transfer is when a call is routed to a third party, the original call is ended, and no check is made to determine whether the transferred call is answered or if the third party phone number is busy.

> **Example:** The recording for the first agent stops when the agent transfers the call. The recording continues when the second agent answers the transferred call. If the second agent does not answer the call, the recording ends when the first agent transfers the call.

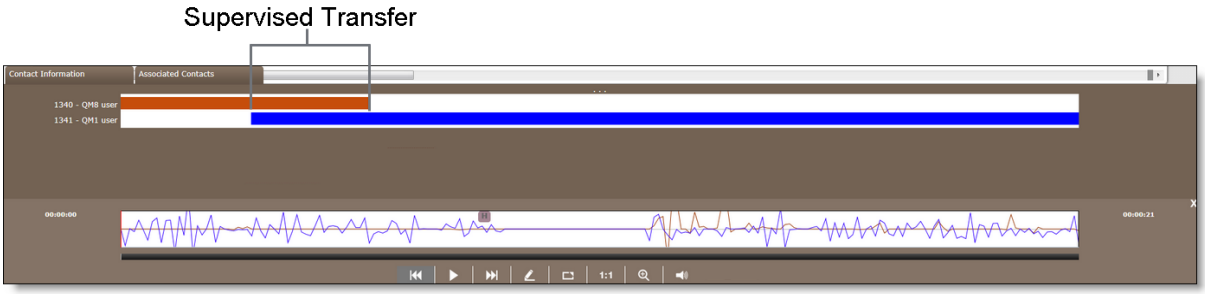


Supervised Transfer

Supervised transfer is when a call is routed to third party. The agent can choose to hang up before the third party answers, or stay on the line and speak to the third party before actually transferring the call.

> **Example:** The caller is placed on hold when the first agent transfers the call to the second agent. The discussion between the two agents is recorded during the supervised transfer. The recording for the first agent

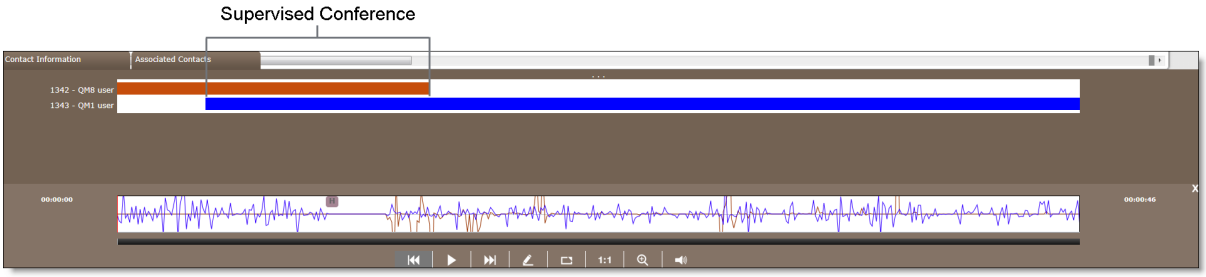
stops when the agent hangs up and the call between the second agent and the caller starts recording.



Supervised Conference

Supervised conference is when an agent adds a third party to the call. The agent can choose to add the third party to the call without first speaking to him or her, or speak to the third party before actually completing the conference call.

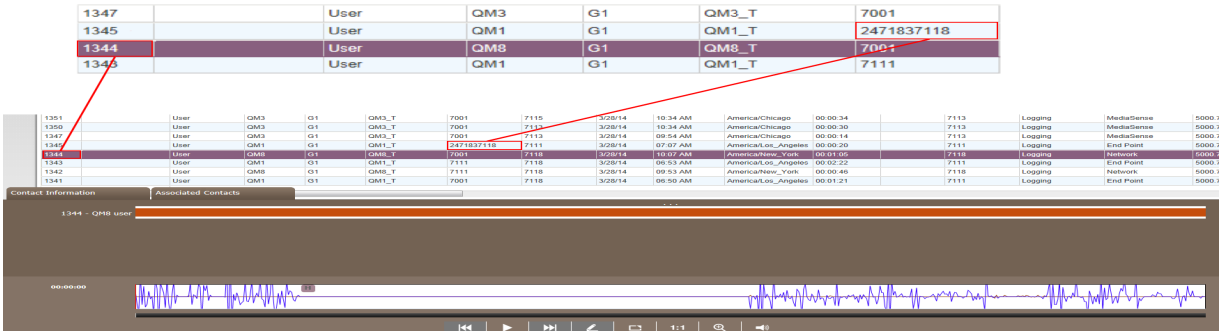
Example: The caller is placed on hold when the first agent initiates a conference call to the second agent. While the caller is on hold, the discussion between the two agents is recorded. When the caller is added to the conference the call continues to be recorded. The recording for the first agent stops when the agent hangs up and the call between the second agent and the caller continues recording.



Hold with Call on Second Line

Hold with call on second line is when an agent places the caller on hold while talking to a third party on a second line.

Example: The QM8 user places the caller on hold. The hold is represented as a flat line in the energy bar for Contact ID 1344. While on hold, the QM8 user picks up a second line and calls QM1 user at 2471827118. The call on the second line will not appear in the associated contacts for Contact ID 1344 because it is a separate call.

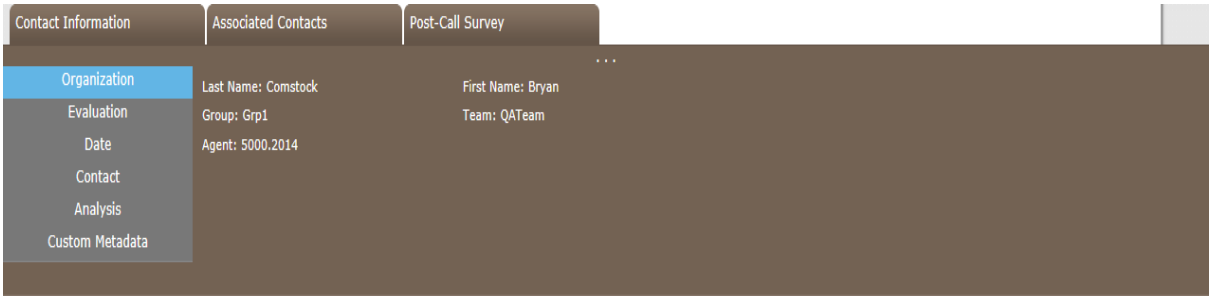


Contact Information

The Contact Information tab displays information associated with the contact.

For a call recording, the Contact Information tab displays the name of the agent, group name, team name, the agent's system ID, and the contact information (metadata) for the recording. The Contact Information tab also allows you to edit the metadata associated with the recording. If the metadata is encrypted the metadata field is disabled.

The Contact Information tab displays all fields (both selected and cleared) listed in the Configure Fields window.



Field	Definition
Organization	
Agent	The content of this field is determined by the type of contact. For a call recording, this field displays the agent's system ID.
Last Name	The agent's last name. This field is associated with call recordings.
First Name	The agent's first name. This field is associated with call recordings.
Group	The name of the group.
Team	The name of the team.
Evaluation	
% Score	The evaluation score or calibration score given to the contact.
Evaluator Name	The name of the evaluator or calibrator.
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.
Date—this tab is associated with call recordings	
Date	The contact date.
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.

Field	Definition
Time Zone	The time zone where the contact was created.
Contact–this tab is associated with call recordings	
ID	The contact's ID.
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.
Called Number	The Direct Inward Dialing (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.
Line	The extension the agent used to answer the call. This field applies only to calls.
Reason	The reason the contact was recorded as set in the recording rule (Archive, First, Last, Longest, Shortest, Random, Logging, Tagged, Performance, and New Employee).
HR	The contact has been marked as an HR contact. The valid values in this field are: ■ Yes ■ No
Training	The contact has been marked as a training contact. The valid values in the Training field are: ■ Yes ■ No

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
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
Recording Type	The recording type associated with this device. The valid values for the Recording Type field are: ■ Server—contact was recorded using Server Recording (SPAN). ■ Network—contact was recorded using Network Recording. ■ Multiple Registration—contact was recorded using Multiple Registration method. This method allows you to programmatically add participants to an existing call. ■ Single Step Conference—contact was recorded using Single Step Conferencing method. This method allows you to choose register up to three devices at a single, softphone-enabled extension. ■ Unknown—the contact was either recorded prior to 8.7, a Non-Call contact type, or the recording type could not be determined. ■ None—there is no recording associated with this non-call contact ■ Endpoint—contact was recorded using Desktop Recording (Endpoint). ■ MediaSense Recording—contact was recorded using MediaSense Recording.
Analysis—this tab is associated with call recordings	

Field	Definition
TOT DUR Silence	The total duration of silence time in HH:MM:SS.
MAX Silence	The duration of the longest silence event in HH:MM:SS.
MIN Silence	The duration of the shortest silence event in HH:MM:SS.
TOT DUR Talk Over	The total duration of talkover time in HH:MM:SS.
MAX Talk Over	The duration of the longest talkover event in HH:MM:SS.
MIN Talk Over	The duration of the shortest talkover time in HH:MM:SS.
Talk Over Events	The number of detected talkover events.
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).
% Silence	The percentage of the call spent in the Silence state.
% Talk Over	The percentage of the call spent in the Talkover state.
AVG Silence	The average duration of the silence event in HH:MM:SS.
AVG Talk Over	The average talkover time in HH:MM:SS.
Custom Meta Data—this tab is associated with call recordings	

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: ■ Data=2056–that includes text, numbers and hyperlinks. **Note:** Once the hyperlink is saved you can click the hyperlink and the link will open in a separate web browser. ■ Date–maximum length is based on the standard date format.

About Metadata

The metadata fields contain user-defined information that is related to the contact.

Call metadata is not available in WAV or MP4 files, since the WAV and MP4 file formats do not support tags.

Custom Metadata

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

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

Modifying Contact Information

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

From the Media Player, click the Contact Information tab, click Custom Meta Data, type your changes into the metadata fields, and then click Apply.

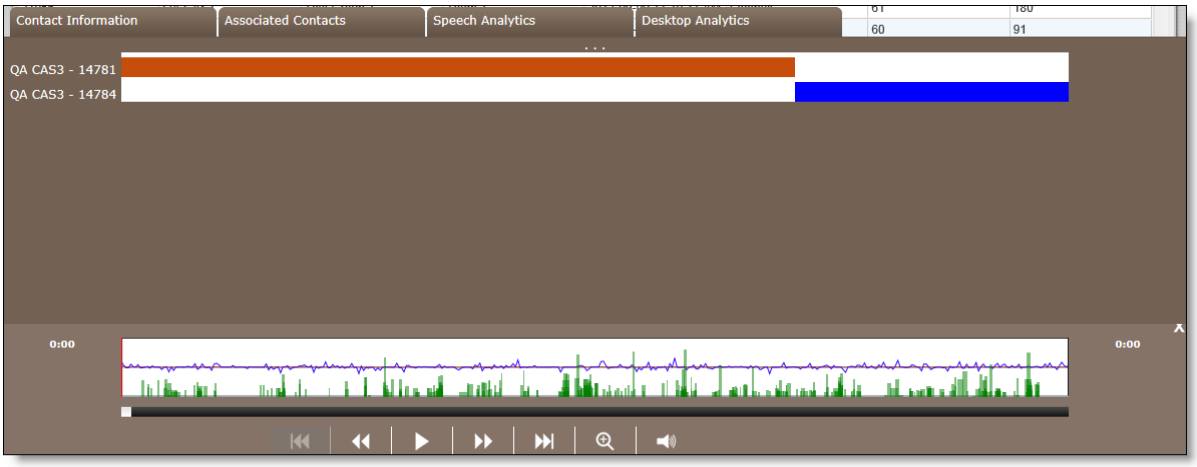
- From the Media Player, click the Contact Information tab, click Custom Meta Data, type your changes into the metadata fields, and then click Apply.

  Recording and Quality Management saves your changes and displays them in the custom metadata fields.

Associated Contacts

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

You can only play segments of a call that are within your scope. When you click a call segment that is within your scope, Associated Contacts highlights that call segment in red and loads the call segment in the Media Player.



The following example describes a segmented call.

1. Customer dials in and is routed to Agent A.
2. Agent A transfers customer to Agent B.
3. Agent B conferences call with Supervisor A.

The list of associated contacts is presented in chronological order in the Associated Contacts tab. You might not be able to play back some of the contacts listed in the Associated Contacts tab. This is due to various reasons: they are for agents not on your team; they were deleted; they did not meet workflow criteria; or they were under the minimum length. When this type of contact, the energy bar associated with the contact is empty and the recording

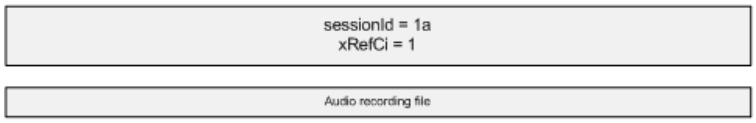
is not available. You cannot listen to those segments of the call, but you can view them so that you can follow how the call moved through the contact center. When you use the call control buttons to move through the list of contacts, it automatically skips over contacts you cannot listen to.

Associated Contacts and Cisco MediaSense Recording

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

Normal Call

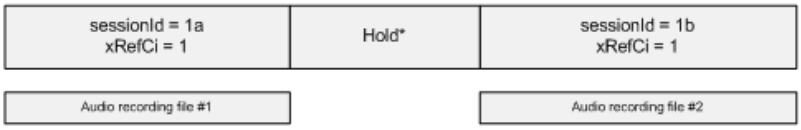
A normal call is where a customer speaks to an agent.



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

Call with Hold Time

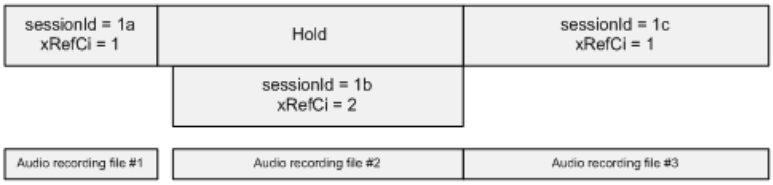
A call with hold time is where an agent places customer on hold during a call then later resumes the call with the customer.



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

Bracketed Call

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



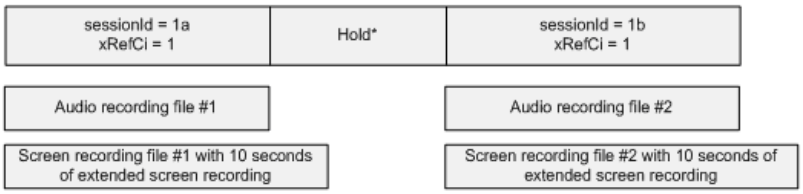
In this scenario, Cisco MediaSense creates three contact files and three SPX files (one session ID). Again, this is different from other recording types where the capture methods result in a single contact and single SPX file that contain the audio from the consultation (or bracketed) call in between the audio from the customer and agent. Cisco MediaSense Recordings do not include the silence that represents hold time.

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

See Cisco MediaSense Call Flow Examples for more call flow examples.

Screen Recording

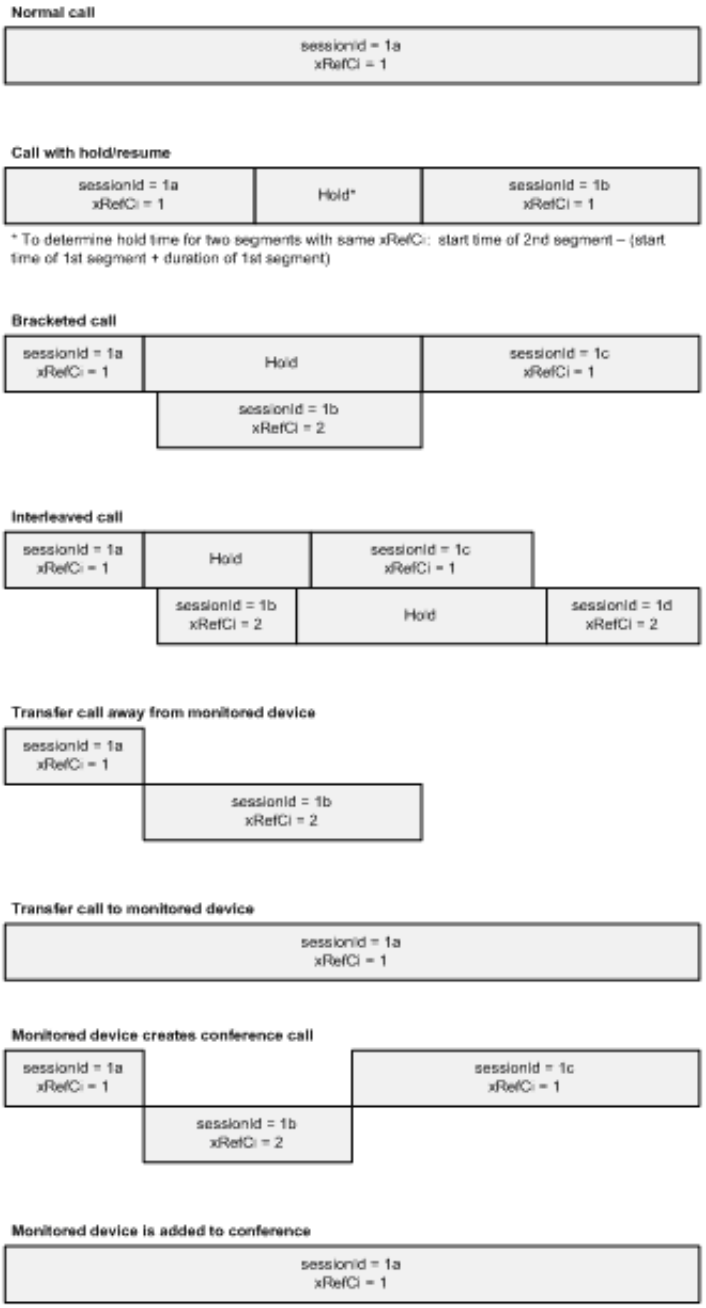
The Recordings application supports screen recording with MediaSense Recording. Screen recording behaves similar to audio recording such that a single call may have multiple screen recording files that correspond to a session ID. If the administrator enabled Extended Screen Recording (for quality management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



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

Cisco MediaSense Call Flow Examples

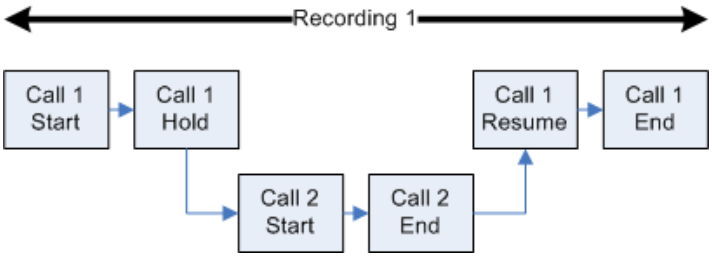
The following figure displays call flow examples for Cisco MediaSense.



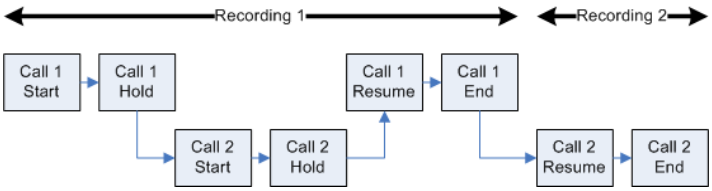
Bracketed and Interleaved Call Recordings

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

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

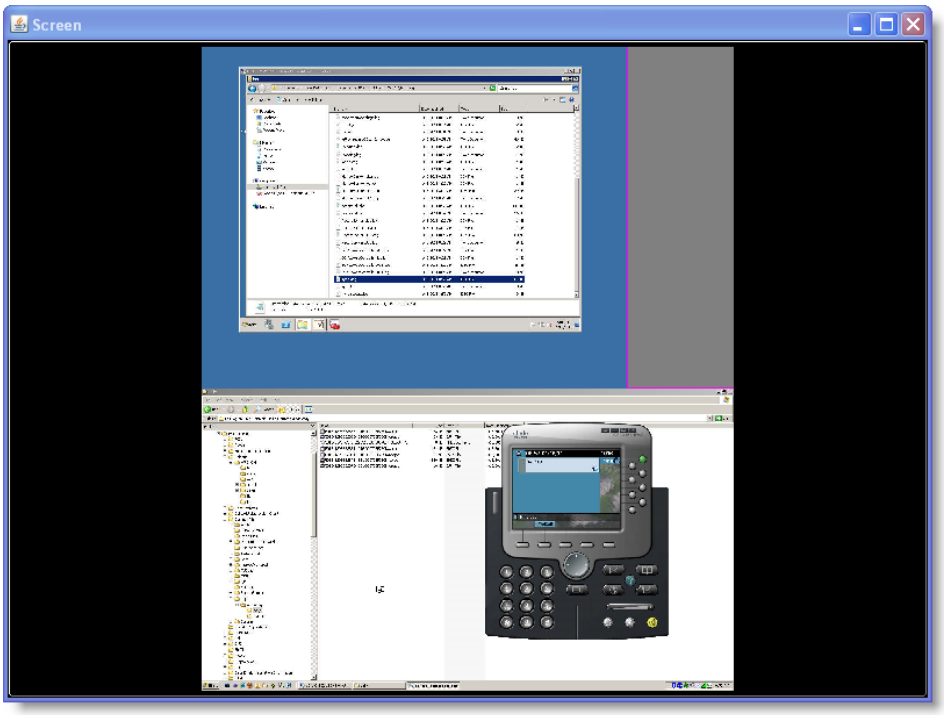


In the following figure, Recording 1 is created for Call 1. It will also contain the portion of audio from Call 2 during the time when both calls are active. Recording 2 is created for Call 2 when Call 1 ends. Recording 2 only contains the portion of audio from Call 2 from the time Call 1 ends. Call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



Screen

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



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

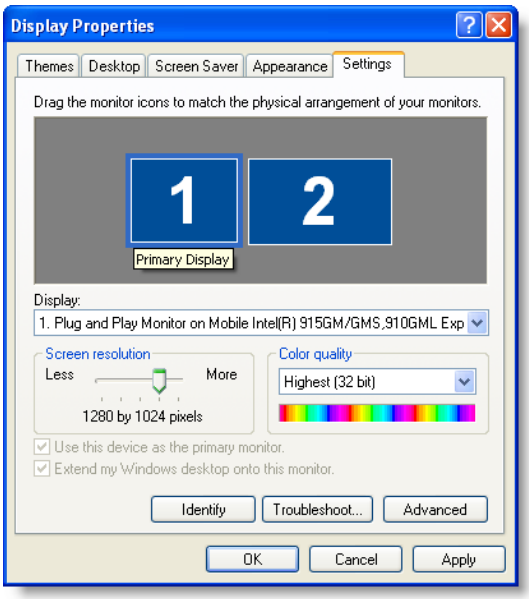
Screen Recording Playback

The screen size for screen recording playback is 1920 × 1088. If the total screen size for the screen recording is larger than 1920 × 1088, it will be reduced to appear in the Screen window. When you adjust the size of the Screen window or use the Maximize button on the Screen window, the screen recording resizes accordingly.

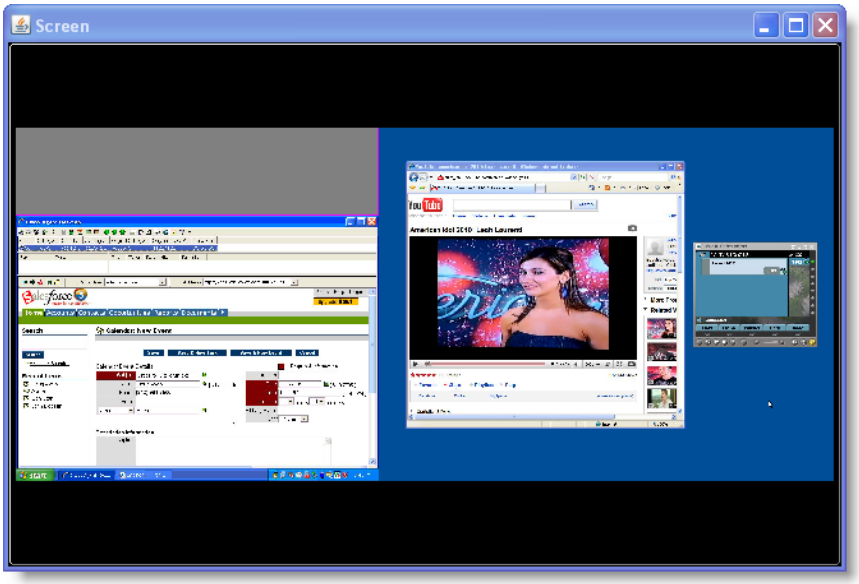
Single- and Multiple-Monitor Recordings

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

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



Screen window can also play a recording of a multiple-monitor setup.



Note: Multiple-monitor recordings are twice the size of recordings for single monitors.

Download on Demand

The Download on Demand feature allows you to download the recording for play back by double-clicking a contact with a Contact Type of Call in the Contacts table. A Message dialog box displays the following message when the recording is being downloaded.

```
Please wait while the audio file is requested.
```

When the download completes the Message dialog box goes away.

If a recording is already in the process of downloading when you try to play it, you will see the following error message:

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

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

If Mark for Quality appears in the Reason field and the screen recording has not been uploaded from the agent's desktop, only the audio recording appears when you double-click the contact. To download the screen recording, double-click the contact again.

Playing Recordings

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

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

    > **Note:** The recording is downloaded on demand. See Download on Demand for more information.

  - To start a recording, click Play in the Media Player.
  - To skip forwards or backwards in a recording, move the Position progress bar to the desired location.

- To return to the previous segment in the recording, click Previous .
- To go to the next segment in the recording, click Next .
- To pause a recording, click Pause .
- To view an evaluation comment associated with a specified location in the recording, click Evaluation Comments .
- To edit metadata associated with a recording, click the Contact Information tab, Click Custom Meta Data, type the information in the metadata fields, and then click Apply.
- To listen to an associated contact, click Associated Contacts, and then double-click the associated contact you want to listen to.

  Note: You can only play associated contacts that are within your scope. The cursor changes to a Hand ( ) and the contact segment row is highlighted when the associated contact is within your scope.

- To increase the size of the energy bar, click Zoom In .
- To decrease the size of the energy bar, click Zoom Out .
- To mark a selected recording for quality evaluation and display the Evaluation Form window, click Evaluation .
- To evaluate a recording, click Play to start the recording, and then complete the fields in the Evaluation window. If the Evaluation window does not appear, click Evaluation .
- To exit the Media Player, click Close .

About Evaluations

You can evaluate customer conversations (both audio recording and non-call contacts). If the customer conversation is a recording you can playing back contact audio and screen recordings made during a call when evaluating and scoring the customer conversation.

In Recording and Quality Management, the performance statistics available in the Dashboard application and Reporting application are based on these evaluation scores.

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

The evaluation types are as follows:

Percentage-based scoring (Percentage)

The evaluation is scored based on a percentage. Sections and Questions are weighted (0-100%) and the final score is a percentage.

Example: If an agent scores 4 out of 5 questions correctly and the questions are evenly weighted, the agent's final score is 80%.

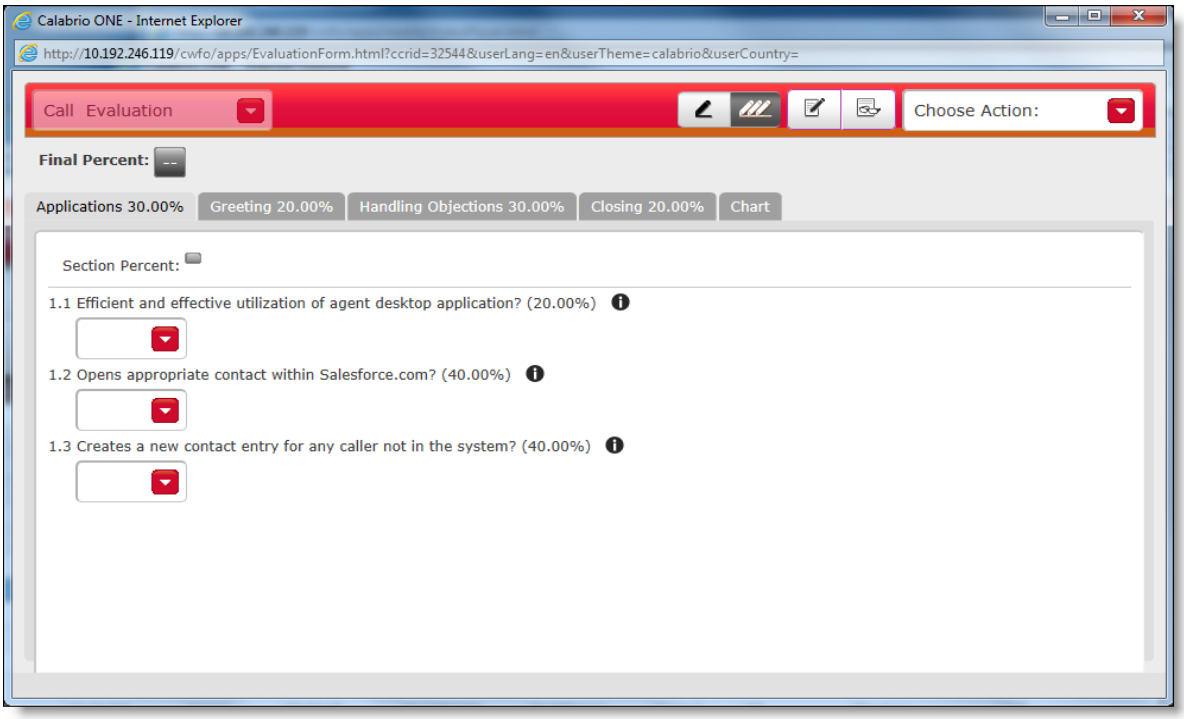
Point-based scoring (Points)

The evaluation is scored based on a point system. Point-based scoring is often used in incentive-based performance. Agents accumulate points and when they have enough points they can cash the points in for tangible rewards (much like credit card points). In this environment, 0 is the normal score and points are awarded for going above and beyond the normal expected outcome. Points can also be subtracted for poor service. The evaluation form allows you to assign positive or negative scores to questions.

Example: If an agent positively demonstrates understanding during a call, the value is 10 points. If the agent fails to demonstrate understanding during a call, the value is -5 points.

Evaluation Form

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



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

You are not allowed to evaluate this contact.

The Evaluation Form window is divided into the following sections.

- Evaluation toolbar—enables you to tag the evaluation as an HR or Training contact, add or read a form or section comment, and mark the evaluation as complete, edit a completed evaluation, or mark as approved. It also enables you to choose an evaluation form to go with the customer conversation, if enabled by the administrator.
- Evaluation form—displays the form used to evaluate the contact. Only users configured to evaluate users can complete the form; all other roles can only review it.

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

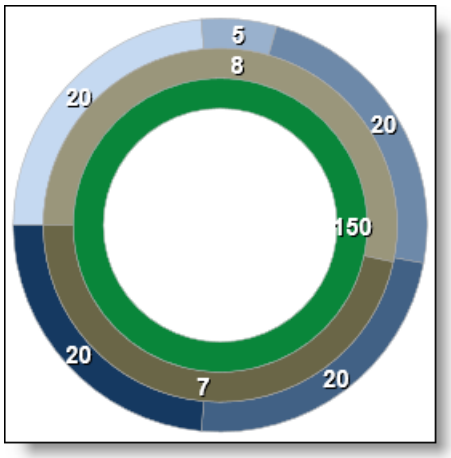
Evaluation Form fields

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

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

Field	Icon	Description
Choose Action	N/A	Choose one of the following actions: ■ Mark for HR—marks a contact for HR and claims the evaluation for you. ■ Mark for Training—marks a contact for training and claims the evaluation for you. **Note:** Mark for HR and Mark for Training do not appear in the list when a contact is marked for calibration. ■ Reset Form—reset an evaluation in the In Progress state. When selected, the value in the State field changes from In Progress to Unscored and the evaluator's name is removed from the Evaluator Name field. The following action appears if you are an evaluator. Or you are a manager or supervisor who has been designated by the administrator to evaluate a specific evaluation form. ■ Complete—mark the evaluation as scored. This option appears when you complete all questions in the evaluation form. When selected, the State field changes to Needs Approval and an alert is sent to the manager or supervisor responsible for approving the evaluation. If no approval is required, the State field changes to Scored. The action appears if you are an evaluator. Or you are a manager or supervisor who has been designated by the administrator to evaluate a specific evaluation form. **Note:** Once an evaluation is completed the score can no longer be changed. ■ Edit—allows you to edit a completed evaluation form. Note that this action appears only if you are the original evaluator of this form. If selected, the evaluation returns to the In Progress state and the Complete action reappears in the drop-down list. ■ Approve—approve an evaluation in the Needs Approval state. When

Field	Icon	Description
		selected, the value in the State field changes to Scored. This action appears if you are an evaluator, supervisor, or manager configured to approve this evaluation and the contact is in the Needs Approval state. ■ Print—prints the evaluation form. This option only appears when an evaluation is in the Scored state. When you choose this option, the report appears in PDF format in a new tab or a web browser depending on your web browser preferences.
Evaluation form		
Final Percent	N/A	The final percentage received for the entire evaluation form. This field appears when you use an evaluation form that is associated with percentage-based scoring.
Section Percent	N/A	The percentage received for a section in the evaluation form. This field appears when you use an evaluation form that is associated with percentage-based scoring.
Final Points	N/A	The total number of points received for the entire evaluation form. This field appears when you use an evaluation form that is associated with point-based scoring.
Section Points	N/A	The total number of points received for a section in the evaluation form. This field appears when you use an evaluation form that is associated with point-based scoring.

Field	Icon	Description
Chart	N/A	The Chart tab displays a cumulative progress chart. Each ring in the chart represents a section in the evaluation. The colors in the chart are associated with each section in the form. There is a gradient change to the color for each question that is answered with a positive integer (0 and negative integers are not included) in the evaluation form. The value associated with each gradient color is the score for that question in the section.  The chart only appears when you start scoring a point-based evaluation form.
Information	ⓘ	Displays a tooltip that provides information related to the evaluation question.

Understanding Percentage-Based Evaluation Scoring

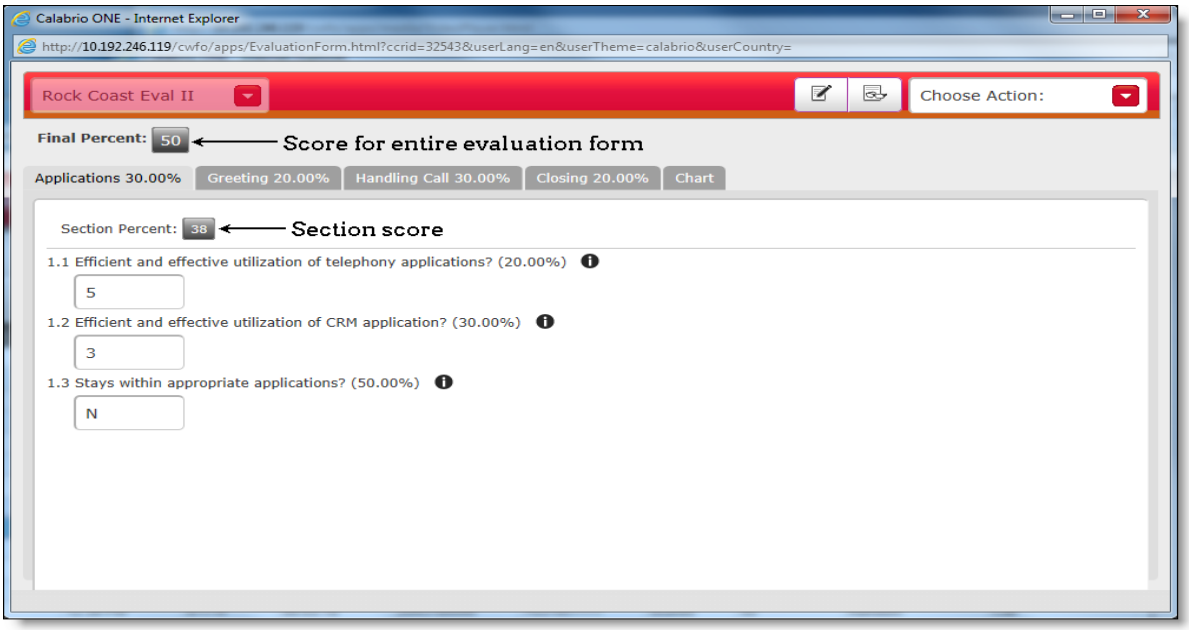
Percentage-based scoring is based on a range of whole numbers from 0 to 100.

As the evaluator scores a section on an percentage-based evaluation form, a rolling total and percent is displayed on that section.

Example: Assume the completed form has two sections called Greet and Assess. The Greet section has a possible total of 15 points. As the evaluator scores each question in the section, the total section score earned is displayed. The agent has earned 8 out of the possible 15 points, or 60%. Likewise, the Assess section has a possible total of 10 points and the agent earned 8 points, or 80%. The score (72%) for entire evaluation form

appears at the top of the form. These numbers are calculated as you complete each section.

The following figure shows a completed form with two sections.



Understanding How Sections are Weighted

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

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

The overall score is calculated as follows:

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

In this example:

- Greeting section = 60% x 0.4 = 24%
- Assess section = 80% x 0.6 =48%
- 24% + 48% =72% overall score

Understanding How Questions are Weighted

Note: This information only applies to percentage-based scoring.

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

Example: In a section with 3 questions, question 1 has a weight of 50%. Questions 2 and 3 each have a weight of 25%. This means question 1 is worth a maximum of 50 points and questions 2 and 3 are each worth a maximum of 25 points.

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

- 20 = 10 points
- 40 = 20 points
- 60 = 30 points
- 80 = 40 points
- 100 = 50 points

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

- 20 = 5 points
- 40 = 10 points
- 60 =15 points
- 80 = 20 points
- 100 = 25 points

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

- No = 0
- Yes = 50

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

- No = 0
- Yes = 25

The following tables show the results for several sections in a sample evaluation form.

Scored example for a 3 question section

Question	Weight	Type	Score	Weighted Score
1	50	0-5	80	40
2	25	0-5	60	15
3	25	Yes/No	Yes	25
Section Score				80%

Scored example for a 4 question section

Question	Weight	Type	Score	Weighted Score
1	60	0-5	60	36
2	15	0-5	80	12
3	20	Yes/No	No	0
4	5	Yes/No	Yes	5
Section Score				53%

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

Question	Weight	Type	Score	Weighted Score
1	60	0-5	NA	-
2	15	0-5	80	12

Question	Weight	Type	Score	Weighted Score
3	20	Yes/No	No	0
4	5	Yes/No	Yes	5
Section Score				42.5%

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

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

Yes/No Question	No	Yes	N/A
Score	0	100	-
Possible	100	100	-

0-5 Question	0	1	2	3	4	5	N/A
Answer	0	20	40	60	80	100	-
Possible	100	100	100	100	100	100	-

In the current scoring system, the maximum score per question for a Yes/No question is 100 points. For a 0–5 question the maximum score per question is 100. N/A is ignored.

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

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

Here are some example calculations for weighted question scores:

Question type	Maximum score	Actual score	Weight	Formula	Weighted score
0-5	100	60	40%	(60/100) * 0.40	24%

Question type	Maximum score	Actual score	Weight	Formula	Weighted score
0-5	100	40	17%	(40/100) * 0.17	6.8%
Yes/No	100	No	30%	(0/100) * 0.30	0%
Yes/No	100	Yes	45%	(100/100) * 0.45	45%

Understanding How Evaluations are Scored

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

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

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

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

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

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

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

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

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

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

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

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

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

Understanding Point-Based Evaluation Scoring

Point-based scoring is based on an integer value range. The minimum integer value can be less than 0.

> **Example:** The minimum value could be -50 and the maximum value could be 150.

When negative values are used, 0 can be considered an adequate or average score. Positive values are awarded for exceptional service when the agent performs beyond the normal expected outcome. Negative values are subtracted for poor service and indicates the agent needs additional coaching.

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.

Points to Remember

When completing the evaluation form, remember the following points.

- You can only select one answer per question.
- If you leave the evaluation form before you complete the evaluation, the evaluation form is automatically saved and the evaluation form is marked as In Progress.
- When the evaluation is saved but not completed, only the original evaluator can change the evaluation form. If for some reason Evaluator A is no longer available and Evaluator B must take over Evaluator A's evaluations, Evaluator B choose one of the following options:
  - Log in as Evaluator A and complete the evaluation form.
  - Log in as Evaluator A and choose the Reset Form from the Actions drop-down list in the evaluation form. Then log in as Evaluator B and complete the evaluation form.
- Once the evaluation is completed, only the original evaluator can modify the evaluation scoring. If for some reason Evaluator A is no longer available and Evaluator B must take over Evaluator A's evaluations, Evaluator B must log in as Evaluator A.
- Only an administrator can create a form. A form can use the types of answers:
  - Yes/No
  - Scale of 0-5
  - Mixed questions (Yes/No and scale of 0-5)
  - Custom

  There can be up to 10 sections in an evaluation form, and each evaluation form can include up to 100 questions.
- When you mark a question as N/A, the weight for that question is not used in the section scores and the evaluation score calculations.

Key Performance Indicator Questions

The administrator who creates the evaluation form might designate some answers to questions as Key Performance Indicator (KPI) answers. A question with one or more KPI answers is labeled.

A KPI can have a positive or negative impact on your contact center's business goals. The value assigned to the KPI answer reflects that impact.

> **Example:** If an agent turned an unhappy customer into a happy customer, the agent had a positive impact on the your contact center's business goals. If another agent lost a potential sale, that would have a negative impact on your contact center's business goals.

A KPI overrides the final evaluation score. If multiple KPI answers are defined, the KPI answers will be prioritized to determine which KPI answer will be used to determine the final score. See "KPI Order" in the *Administrator Guide* for more information.

You must continue to score the entire evaluation when a KPI answer triggers a final score.

When a KPI appears in a section, the KPI question is counted like any other question in that section and the total value for that section appears in the section score.

The scores you assign to all questions and sections are retained and are available for review.

Evaluation Guidelines

When locating a customer conversation for evaluation, consider the following information.

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

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

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

so) for an agent who belongs to a team supervised by the supervisor when the team does not belong to a group.

> **Note:** A team must be associated with a group for quality management purposes.

Evaluating Agent-Tagged Recordings

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

Evaluation Comments

The Comment button C displays the Evaluation Comments dialog box. The Evaluation Comments dialog box displays all comments associated with the customer conversation and highlights the selected comment. You can select the text of a comment and use standard Windows commands to copy and paste it into another application.

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

Comments

Evaluators, managers, and supervisors can add comments to an evaluation form either while they are scoring it, or after they have completed scoring the evaluation form. Agents and knowledge workers can add comments to a contact only after the evaluation has been scored.

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

- An agent can only edit their own comments
- A supervisor can edit the comments made by agents within the

supervisor's scope and the supervisor's own comments.

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

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

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

Note: Each comment can contain up to 3000 characters, and the total number of characters for all comments in an evaluation form is 65,000 characters. If your comment exceeds 3000 characters, create multiple comments.

Training and HR Tags

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

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

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

Calibration

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

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

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

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

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

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

Managing Evaluations

- To evaluate a contact, double-click a contact in the Contacts table. Score the contact, add comments, and add tags as needed in the Evaluation Form window. The Evaluation Form window allows you to perform the following tasks:
  - Choose the type of evaluation you want to view or evaluate by clicking Evaluation to access the quality evaluation or Calibration to access the calibration evaluation.

    Note: These options only appear when both the quality evaluation and calibration evaluation are available.
  - To add a comment to an evaluation form, click Add Comments ,

type your comment, type the time in minutes and seconds where you want the comment to appear, and then click Save.

> **Note:** The evaluation form must be saved before you can add a comment.

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

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

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

  > **Note:** If the contact is scored for quality management purposes, it will appear as scored when you search for All Evaluations or My Evaluations in Recording and Quality Management. If you scored a contact for calibration purposes, it will appear as scored when you search for My Calibrations.

- To edit a completed evaluation, choose Edit from the Choose Action drop-down list.

  > **Note:** This action appears only if you are the original evaluator of this form.

- To read comments in an evaluation form, click Read Comments, and when finished click OK.
- To edit comments within your scope in an evaluation form, click Read Comments, click Edit next to the comment that you want to modify, complete the fields, and then click Save.
- To mark a customer conversation for HR, choose Mark for HR from

the Choose Action drop-down list.

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

- To mark a recording for training, choose Mark for Training from the Choose Action drop-down list.
- To approve an evaluation in the Needs Approval state, choose Approve from the Choose Action drop-down list.

  If you choose Approve, the State field for the customer conversation changes to Scored.

  > **Note:** A manager can only approve an evaluation that is in the Needs Approval state.

- To reset an evaluation in the In Progress state, choose Reset Form from the Choose Action drop-down list.

  If you choose Reset Form, the State field for the customer conversation changes from In Progress to Unscored and the evaluator's name is removed from the Evaluator Name field.

- To print an evaluation form in the Scored state, choose Print from the Choose Action drop-down list.

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 Recording and Quality Management.

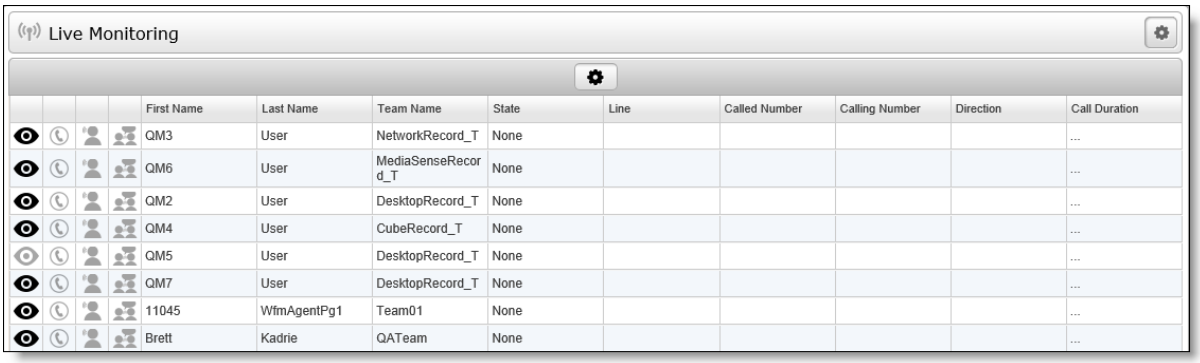
  > **Important:** Before you use the Live Screen Monitoring feature in Recording and Quality Management, you must enable Automatic prompting for ActiveX controls. If you do not enable Automatic prompting for ActiveX controls, Live Screen Monitoring will not work as expected. See Enabling ActiveX Controls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

- Live Audio Monitoring —When the icon is enabled, the manager or supervisor can listen but not speak to any party on the 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 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.

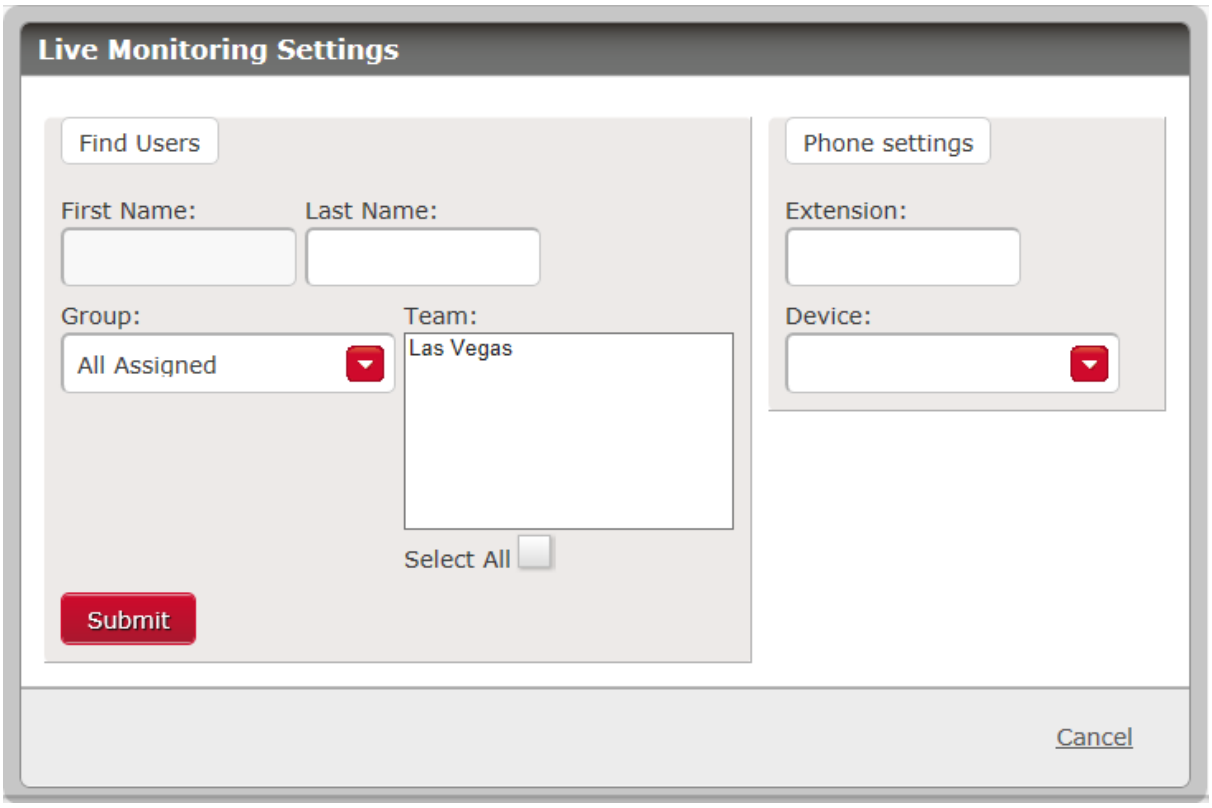
Configure Fields popup dialog

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	
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.

Field	Definition
Calling Number	The caller ID or ANI of the calling party. Displays “unknown” if the calling number is unlisted or blocked. **Note:** This field is populated only if a call is in the Talk state.
Direction	The direction of the call. The possible values are: ■ In–Indicates an incoming call. ■ Out–Indicates an outbound call initiated by the agent. **Note:** This field is populated only if a call is in the Talk state.
Call Duration	The amount of time in HH:MM:SS format that has elapsed since the call was answered. **Note:** This field is populated only if a call is in the Talk state.

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.

Live Monitor Settings fields and buttons

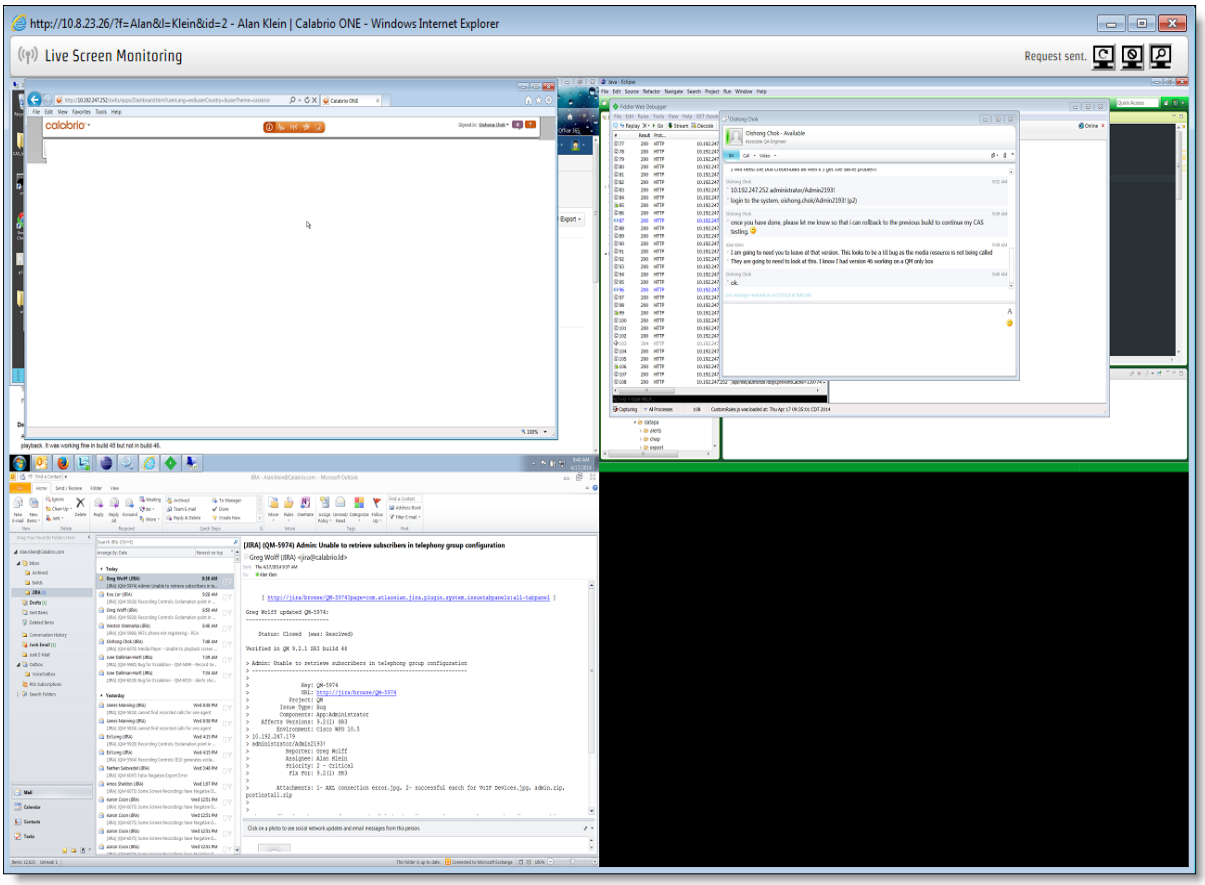
Field	Description
Find Users	
First Name	Filters active agents based on the agent's first name. You can enter an exact match of the name or use wildcards. An asterisk (*) matches zero or more characters, and the question mark (?) matches a single characters.
Last Name	Filters active agents based on the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

Field	Description
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	
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.

Field	Description
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.



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.
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.

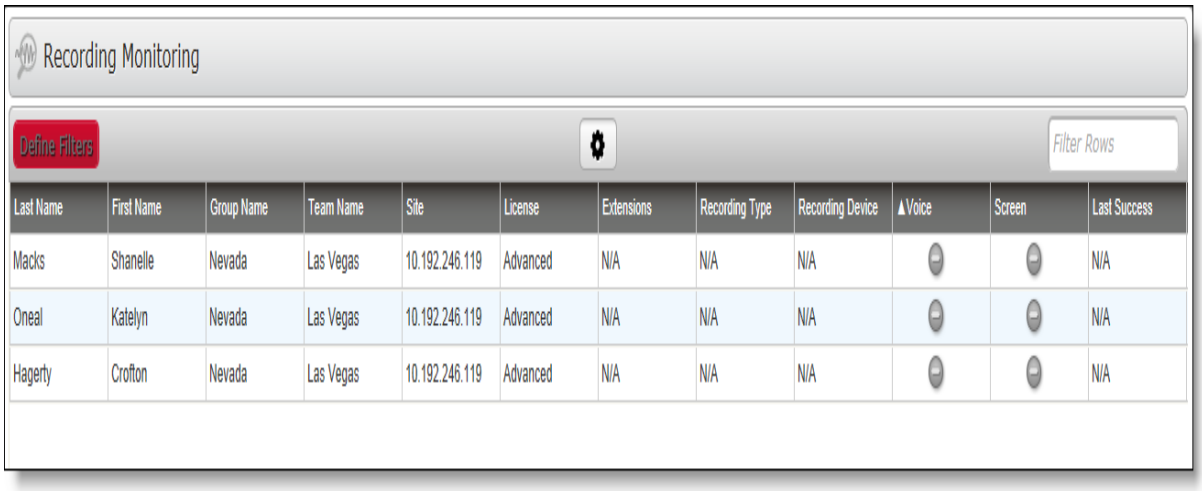
    The Live Monitoring session ends.

- 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.



Last Name	First Name	Group Name	Team Name	Site	License	Extensions	Recording Type	Recording Device	▲Voice	Screen	Last Success
Macks	Shanelle	Nevada	Las Vegas	10.192.246.119	Advanced	N/A	N/A	N/A			N/A
Oneal	Katelyn	Nevada	Las Vegas	10.192.246.119	Advanced	N/A	N/A	N/A			N/A
Hagerty	Crofton	Nevada	Las Vegas	10.192.246.119	Advanced	N/A	N/A	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

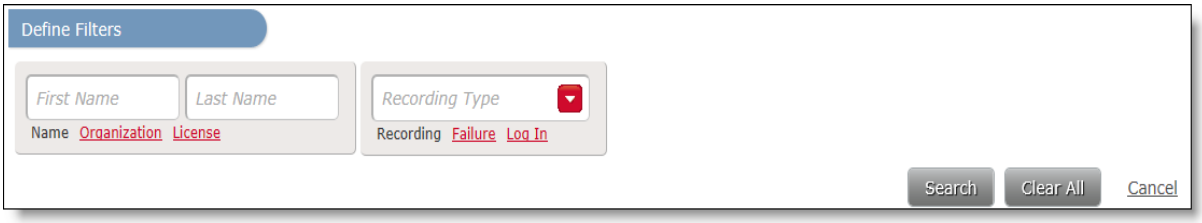
Field	Definition
Organization	
Last Name	The agent's last name.
First Name	The agent's first name.
Group Name	The name of the group.
Team Name	The name of the team.
Site	The name of the site.
License	The license type assigned to the user. The possible values are: ■ Unlicensed ■ Advanced ■ Basic ■ Compliance ■ 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 ■ 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
Last Success	The last time in yyyy-mm-dd hh:mm that a call was recorded successfully.
Last Error	The last time in yyyy--mm-dd hh:mm that a call recording failed.

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

Define Filters

The Define Filters window 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.

Application Management

The Application Management application is used by system administrators to configure product features. If users have access to more than one product, all configurable features for the products are available through this application. Products must be running for the associated configurable features to be available.

Performance Manager

The pages in this section of Application Management is used by administrators to configure product performance features.

In Recording and Quality Management, the Performance Manager allows you to configure the gamification feature.

Long View Navigation

The navigation pane at the left of any Performance Management page is called the "long view".

Use the long view to help you move up and down on the page. A navigation link in the long view will turn bold blue when you select it, and that section of the page will jump to the top of the window.

Check marks next to each navigation link tell you if a section of the page has been completed or not. When all links are checked, you have provided all the information necessary to configure that record.

Configure Gamification

The pages in this section of Performance Management enable you to configure gamification.

Note: Only System Administrators can access Configuration Gamification.

These pages are:

- Points
- Levels
- Performance Categories
- Collect Performance Data

Point

The Point page allows you to assign points to a range of scores for a single metric.

Two or more ranges with point values associated with each range are required. You can define points for up to 10 ranges.

For example:

Range Start	Range End (inclusive)	Points
-	10	-5
10	20	-3
20	40	0
40	60	1

Range Start	Range End (inclusive)	Points
60	90	3
90	-	5

The Range Start for the 1st row is always - (meaning anything below the Range End).

The Range End for the last row is always - (meaning anything above the Range Start).

No Points Versus 0 Points

An important distinction needs to be made between no points and 0 points.

0 points means that you scored a 0 based on the points system that was defined.

No points means that there was no metric data for an agent on a particular day so that scoring could not be done.

Managing Points

Use the Points page (Performance Management > Gamification > Points) to create and manage points. Points are awarded to ranges of scores for a single metric.

The fields on the page are described below.

Field	Description
Point Range Name	Enter the name of the point range.
Select Point Range	Select a point range.
Start	The Range Start column is exclusive and read-only. Its value is taken from the Range End in the previous row.
End	Enter an integer value associated with the Range End.
Points	Enter an integer value associated with the Range Start and End.

To delete a point range, click Delete to the right of the point range.

Levels

Gamification levels can be associated with badges that identifies the agent's level of achievement. Each level is based on a specific points value. When an agent reaches the minimum number of points for the next level, they get a new badge.

The Levels page allows you to create level groups, associate badge with each level, and define a period range for each level. The period range (in days) for each level allows you to control how far back to gather data for scoring.

> **Example:** You can defined a period range to collect data for the last 30 days.

You can specify a minimum of three levels. The range for the first level includes negative values. The first level is required and cannot be deleted. The second level is the range for the minimum value. The second level has to be a value of 0 or greater. The third level is the range for the maximum value.

The Gamification Score widget in the Dashboard application will not show activity in the progress bar if the score is less than 0.

Managing Levels

Use the Levels page (Performance Management > Gamification > Levels) to create and manage the level groups.

The fields on the page are described below.

Field	Description
New Level Name	Enter the name of the level group.
Select Level	Select a level group.
Enter the Period Range for this Level	Enter the number of days for this period range.
Level	Displays the level number. This field is not editable.
Points	Enter an integer value for the points.
Badge	Choose a badge from the drop-down list.

To delete a level, click Delete to right of the level.

Performance Categories

The Performance Categories page allows you to create a performance group and assign metrics, levels, and agents to that performance group.

Managing Performance Categories

Use the Managing Performance Categories page (Performance Management > Gamification > Performance Categories) to create and manage the gamification performance groups. This is where you assign point metrics, levels, and users to create gamification scores.

The fields on the page are described below.

Field	Description
Performance Group Name	Enter the name of the performance category.
Select Performance Metric	Select a performance metric. Your options are options are as follows: ■ Adherence—pulls the agents' adherence data from WFM ■ Quality—pulls the agents' performance data from evaluations in Recording and Quality Management
Select Level	Select the name of a level.
Select Point Range	Select the name of a point range.
Filter	Enter the group, team, or agent name in this field to quickly search the lists of groups, teams, or agents.
Group, Team, or Agent	Select the group, team, or agents you want to assign to this performance category.

Collect Performance Data

The Collect Performance Data page allows you configure how to retrieve that the historical data that is pulled by the Gamification service. This is particularly useful in fresh installations of Performance Management where preexisting

data metrics have been collected for some time prior to the existence of the gamification feature.

Performance data is automatically captured each day so that option is not normally needed for periods after the installation date.

Managing the Performance Collector

Use the Collect Performance Data page (Performance Management > Gamification > Collect Performance Data) to retrieve historical performance data for Gamification calculations.

The fields on the page are described below.

Field	Description
Select Performance Metric	You define what information is pulled or pushed based the connection configuration setting for that metric.
Date Range	Select a date range.
Filter	Enter the group, team, or agent name in this field to quickly search the lists of groups, teams, or agents.
Group, Team, or Agent	Select the group, team, or agents you want to assign to this performance collector.

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 Evaluation Reports

Reports	Roles
Scores All Data	Agent or Knowledge Worker Supervisor + Agent Supervisor + Knowledge Worker Manager
Evaluation Totals Graph	Agent or Knowledge Worker Supervisor + Agent Supervisor + Knowledge Worker Manager

Reports	Roles
Evaluation Scores	Agent or Knowledge Worker Supervisor + Agent Supervisor + Knowledge Worker Manager
Contact Totals Graph	Agent or Knowledge Worker Supervisor + Agent Supervisor + Knowledge Worker Manager
Section Scores	Agent or Knowledge Worker Supervisor + Agent Supervisor + Knowledge Worker Manager
Agent Trend Graph	Agent or Knowledge Worker Supervisor + Agent Supervisor + Knowledge Worker Manager
Question Scores	Agent or Knowledge Worker Supervisor + Agent Supervisor + Knowledge Worker Manager
Agent Scored Evaluation	Agent or Knowledge Worker Supervisor + Agent Supervisor + Knowledge Worker Manager

Reports	Roles
Quality Averages Graph	Agent or Knowledge Worker Supervisor + Agent Supervisor + Knowledge Worker Manager
Evaluator Performance	Manager
Contact Detail	Agent or Knowledge Worker Supervisor + Agent Supervisor + Knowledge Worker Manager
Evaluation Calibration	Manager Evaluator

Filtering roles and scope for System Reports

Reports	Roles
Recording Access by User	System Administrator Telephony Administrator Archive User Manager
Recording Access by Contact	System Administrator Telephony Administrator Archive User Manager
User Recording Status	System Administrator Telephony Administrator Manager Supervisor

Reports	Roles
System Status	System Administrator Telephony Administrator
Audit Trail	System Administrator

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.
   - 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 WFM is configured to email reports, and 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. Email addresses are separated by semicolons, for example:

   john.smith@example.com;mary.jones@example.com

   > **Note:** To use the Recurrence feature, you must save the report for future use.

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

Reports output in HTML, PDF, and XLS format contain a logo in the upper left corner next to the report title.

An administrator can customize the logo by replacing the default logo with a new logo. This is done in the System Configuration Setup (PostInstall.exe) utility.

For information on how to customize the report logo, see "Report Logo Configuration" in the *Server Installation Guide*.

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.
Criteria	
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.)
Area	All modifiable areas within the user's scope. (You can select more than one area.) This filter only appears in the Audit Trail report.
Action	All possible actions within the user's scope. You can select more than one action.) This filter only appears in the Audit Trail report.
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.
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.)
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.
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.

Report Filters	Description
Recurrence—The Recurrence fields are only displayed if the Allow Emailing of Reports check box is selected under Enterprise Settings in Quality Management Administrator. **Note:** To use the Recurrence feature, you must save the report for future use.	
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	
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.

QM Reports

The types of reports that are available for Recording and Quality Management 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.

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

In 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).

In all 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.

Evaluation Reports

The following evaluation reports are available for Recording and Quality Management.

- Scores all Data
- Evaluation Scores
- Section Scores
- Question Scores
- Evaluator Performance
- Quality Averages Graph
- Evaluation Totals Graph
- Contact Totals Graph
- Agent Trend Graph
- Agent Scored Evaluation
- Contact Detail
- Evaluation Calibration

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.

Contact Detail

The Contact Detail 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 Detail 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

The following system reports are available for Recording and Quality Management.

- Recording Access by User
- Recording Access by Contact
- User Recording Status
- System Activity
- System Status
- Audit Trail

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.

Audit Trail

The Audit Trail report displays the administrative changes to Recording and Quality Management. This allows you to determine when a change was made that could have impacted performance, who made the change, and when the change was applied. You can use this report to help diagnose issues and immediately correct them.

The following fields appear in the report.

Date

The date when the data was changed.

Time

The time when the data was changed.

User

The name of the user.

Area

The location of the change in Quality Management Administrator. The areas are as follows:

- Evaluation Form
- Global Settings—this includes metadata, export permissions, call events, desktop configuration, and recording visibility
- Personnel Configuration
- Record Server Configuration
- System Configuration
- Unknown—the location of the change is unknown.
- Workflow Configuration
- Evaluation Settings

Action

The type of action applied to the data. The possible actions are as follows:

- Add
- Delete
- Update

Description

An explanation of the change.