



DISCOVER BY UPTIVITY REPORTING MANUAL, V5.4

April 2014

Reference Guide

www.uptivity.com

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Revision History		
Revision	Change Description	Effective Date
0	Re-branded for v5.4. Expanded Matrix reports description in the Ad Hoc Reports section. Added Audio Information and Derived Audio Tags reporting groups to the Ad Hoc Reports > Analytics section.	2014-04-30

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Introduction

The Discover Reporting module enables authorized users to generate and save or print reports as well as find real-time data about the system. This information provides:

- Quality Assurance managers with insight into the performance of employees and business processes.
- System administrators with knowledge about Discover's performance and actions taken in the system.

The permission "Allow Viewing Call Reports" is needed for a user to have access to the **Reporting** tab.

This document explains:

- How to navigate the Reporting module and use its functions.
- The information that appears on the reports.
- How to create and manage reports.

Notes

Discover allows administrators to customize field names and terminology in the Web Portal to fit your unique environment. Therefore, screen examples and field names used in this manual may differ from those seen in your implementation.

Several Discover features use context menus and other windows that may be considered as "pop-ups" by some browsers. Uptivity recommends that you configure your browser to allow pop-ups for the Discover site.

Due to the differences in how dates are handled in American and British English, Discover supports only en-US for reporting.

Reporting Basics

Quick Links Page

Click the Reporting tab in the Discover web portal to access the page seen below. The Quick Links pane shows printable reports organized by various filters, and individual printable reports can be accessed by clicking on the hyperlinked name of the report.

These reports are also available from the menus on the left side of the Reporting tab.

The screenshot displays the 'Quick Links' page in the Discover web portal. On the left is a sidebar with the following sections:

- Printable Reports**
 - Analytics Reporting
 - Call Reporting
 - QA Reporting
 - System Reporting
 - Survey Reporting
- Report Tools**
- System Reports**
- Ad Hoc Reports**

The main content area is titled 'Quick Links' and is organized into five sections, each with a folder icon and a title:

- Printable Reports - Call Reporting**
 - By Agent**
 - Agent Call Summary
 - Assigned Agents Report
 - Group Membership Report
 - By Group**
 - Group Membership Report
 - By Call Type**
 - Agent Call Summary
 - Call Recording Detail
 - Duplicate All Report
- Printable Reports - Analytics Reporting**
 - Analytics Speech Top Frequency
 - Speech Category Summary
 - Speech Category Trending Report
- Printable Reports - QA Reporting**
 - By Agent**
 - Agent QA Summary
 - Agent Ranking By Period
 - Agents Needing Evaluation Detail
 - Agents Needing Evaluation Summary
 - Critical Question Summary
 - By Group**
 - Critical Question Summary
 - Group QA Summary
 - Group Summary By Month
 - Group Summary By Period
 - QA Agent Periodical Trending Report
 - By Form**
 - Agents Needing Evaluation Detail
 - Blank QA Form
 - Call Evaluation Detail
 - Completed QA Form
 - Critical Question Detail
- Printable Reports - Survey Reporting**
 - Survey Detail
 - Survey Detail Summary
 - Survey Overview
- Printable Reports - System Reporting**
 - Data History
 - System Activity Summary
 - System Usage

Reporting Tab Navigation



The menus on the left side of the **Reporting** tab provide access to reports and tools.

The **Printable Reports** menu has these links:

- **Analytics:** These reports are available only if Uptivity Speech Analytics has been purchased. For more details, see the *Uptivity Speech Analytics Administration Guide*.
- **Call Reporting:** These are the Agent Reports on the Quick Link page.
- **QA Reporting**
- **System Reporting:** See also the System Reports menu.
- **Survey Reporting:** These reports are available only if Uptivity Surveys has been purchased. For more details, see the *Uptivity Surveys SIP Administration Guide* or *Uptivity Surveys TDM Administration Guide*.

The **Report Tools** menu provides access to tools for automatically generating reports (subscriptions) and report libraries.

The **System Reports** menu provides administrators with the ability to monitor the health and performance of the system and to audit actions taken on the system. These reports cannot be printed.

The **Ad Hoc Reports** menu provides managers and others with the ability to build reports for a specific purpose or situation. Ad hoc reports can be created that run as multiple instances using different criteria. This functionality is only available to users with the ad hoc reporting permission.

Clicking a selection under Printable Reports, such as **QA Reporting**, displays that list of report types. The Date Created column indicates the date the XML file used to generate this report type was installed in the Discover system.



The Filter field allows you to search for a particular report type based on the name of the report or a key word. For example, "Agent" entered into the Filter field as a key word will bring up all of the report types with 'agent' in either the report name or description.

Click a report name to open a page for generating that report.

Printable-Report Functions

These tasks can be performed when using printable reports.

Specify Criteria and Create a Report

Each report has criteria that must be set to select data. These criteria can include date ranges, user or agent selections, and other data fields depending on the report type. Once you have the report criteria entered, click the **Generate Report** button to create the report.

Save Report Search Criteria

You can save the criteria for reports that are created frequently. Click the inverted chevron icon to see a list of saved report search criteria.

Enter a name for the report criteria in the Search Name field. Select the Public box only if you want others to be able to view your saved criteria. Then click **Save Search**.

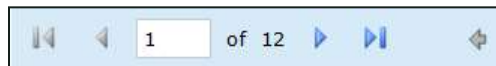
Reporting Basics

The report criteria item appears on the page. To use these criteria again, click the item. A report page with the criteria opens. Edit the criteria as needed. Then, click **Generate Report** to create the report. All saved report criteria appear in the **Report Library** in the **Report Tools** menu.



The screenshot shows a web-based report configuration interface titled "Agent Ranking By Period". At the top right, there are "Back" and "Generate Report" buttons. Below the title is a table with columns: "Creator", "Name", "Date Created", and "Date Modified". The table contains one row: "superuser", "Sales Agents Ranking Report", "8/23/2011", and "8/23/2011". Below the table is a "Search Name:" input field and a "Public:" checkbox. Further down are several dropdown menus: "Form: Sales Evaluation", "Group: Sales Team", "Period Type: Month", "Year: 2011", and "Period: June". At the bottom right, there is a "Save Search" button and a small icon.

Navigate Report Pages

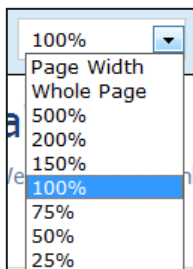
Use the navigation menu to move back and forth across appropriate report pages. The single arrow to the right takes you forward one page and the single arrow to the left takes you back one page. The double arrow to the right takes you to the last page of your report and the double arrow to the left takes you to the first page in your report.



Navigate Report Details

Some reports provide additional details in related reports. The mouse pointer turns to a hand  if an item in a report has additional detail. The  arrow allows you to go up one level if you have "drilled down" into a report.

Zoom



Use the zoom menu to format the size of the report output in your browser window.

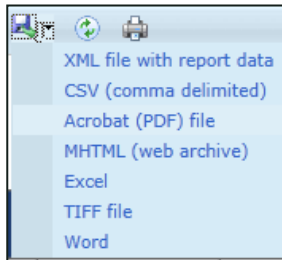
Note This feature is only supported in Internet Explorer. This is a limitation of Microsoft ReportViewer web server controls.

Search



Use the search input box to find specific text or values within the report. Select "Find" to find the first option, then "Next" to find subsequent matches.

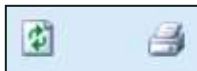
Save and Export a Report



From the report management interface, choose an option from the "Select a Format" drop-down menu. Click on the preferred format. A dialog box will open, allowing you to save or open the report in the exported format.

Note Some reports display clickable links to call recording files or other information. These links will not work in exported versions of the report.

Refresh and Print





The refresh button reloads the report display after any formatting changes were made. The print button brings up the Windows print controls with standard print options available.

Note The Print feature is only supported in Internet Explorer. This is a limitation of Microsoft ReportViewer web server controls.

Sort Report Records

Data records on some printable reports can be sorted. To sort from highest-to-lowest or A-to-Z, click the top triangles by a column label. To sort from lowest-to-highest or Z-to-A, click the bottom triangle. In this example, the records are sorted by the Phone ID as indicated by the icon. To clear all sorts, click the **Refresh** button.

 Group Membership		
Selected Group: Calibration		
Group 	Agent 	Phone ID 
Calibration	YANG, MELANIE	4001
Calibration	POTTS, JERRY	4002
Calibration	DANIEL, OFELIA	4003
Calibration	GIBBS, REGINALD	4004
Calibration	MASON, TRACY	4005
Calibration	MONTGOMERY, ALFREDO	4006

Common Report Criteria

Start Date

Indicates the start of the date range from which reporting data will be pulled. The Start Date can be selected by clicking on the calendar icon located to the right of the field, or by typing the date into the field.

End Date

Indicates the end of the date range from which reporting data will be pulled. The End Date can be selected by clicking on the calendar icon located to the right of the field, or by typing the date into the field.

Group

Allows you to select a particular group of agents. This is based on Discover Groups (groups of Agents that have been created in by your system administrator). You can select one group, multiple consecutive groups (by shift-clicking), multiple non-consecutive groups (by Ctrl-clicking), or all groups.

Call Direction

Allows you to narrow the scope of the report by selecting the directionality of the call. Options are: All, Incoming, Outgoing, or Unknown (meaning that Discover was not able to identify the directionality of the recorded contact).

Period Type

Allows you to narrow the scope of the report by selecting the duration of time. Options are: Week, Month, Quarter, and Year.

Year

Allows you to narrow the scope of the report by selecting the year.

Period

The Period field is used with the Period Type, and selections will vary based on what is selected in the Period Type drop-down list. For example, if the Period Type selected is Month, the Period options will be the months of the year. If the Period Type is Quarter, the Period options will be 1 – 4.

Form

Allows you to narrow the scope of the report to one or more specific forms. Available options are a reflection of the forms that have been built in your system and that have either active or inactive (disabled) status. You can select one form, multiple consecutive forms (by shift-clicking), multiple non-consecutive forms (by Ctrl-clicking), or All.

Agents

Allows you to narrow the report to specific agent(s). You can select one agent, multiple consecutive agents (by shift-clicking), multiple non-consecutive agents (by Ctrl-clicking), or All.

Tag Category

Only used in conjunction with Speech Analytics; allows you to narrow the report to one or more particular tags. You can select one Tag, multiple consecutive tags (by shift-clicking), multiple non-consecutive tags (by Ctrl-clicking), or All.

Status/Active

Allows you to choose the status of the agents. Options are: Active, Inactive, and All.

Date Type

Used to select the data set you want to pull in QA reporting. Options are: Call Date and Evaluation Date. Call Date is based on the date the call was recorded in the system. Evaluation date is based on when the recorded contact was evaluated in the system.

Users

Allows you to narrow the report to specific user(s). You can select one user, multiple consecutive users (by shift-clicking), multiple non-consecutive users (by Ctrl-clicking), or All.

Report Type

Allows you to narrow the scope of the report by selecting the type of report to generate. Options in this selection are: Agent, Form, Section, and Question. This is one indication that a report offers drill-down capability, to access the additional data that supports the cumulative view of the data.

Section

The Sections drop-down list is used in conjunction with the Form drop-down list and selections reflect the sections created for a form. You can select one section, multiple consecutive sections (by shift-clicking), multiple non-consecutive sections (by Ctrl-clicking), or All.

Failure Type

Allows you to report on Section or Form failures for a particular form. You can also report on All.

Month

Select the starting month for your report.

Reporting Basics

Periods

Select the number of months that you want to include in your report (1 -12).

Call Reporting

Overview of Call Reporting

Discover Call Reporting provides information about calls, such as the ANI and DNIS, and agents, such as the total number of calls that were recorded for an agent over a period of time.


To access call reports from the **Printable Reports** menu, click **Call Reporting**. On the Agent Reporting page, click the link to a report type such as Agent Call Summary.

Agent Reporting		
Filter: <input type="text"/>		<input type="button" value="Search"/>
Report	Description	Date Created
Agent Call Summary	Agent Call Summary	5/24/2011
Assigned Agents Report	Assigned agents and their device ID's	5/24/2011
Call Recording Detail	Details of a Recorded Call	5/24/2011
Duplicate ANI Report	Calls Observed During a Period with Duplicate Caller IDs.	5/24/2011
Group Membership Report	Membership of agents in Groups	5/24/2011

Pages : Go To Page : of 1

Agent Call Summary

The Agent Call Summary displays call totals captured in the call recording system. The report displays the number of calls recorded for an agent over a period of time, as well as the recording duration information. The recording duration may include on-hold and after call work depending on the customer's specific configuration and the recording scripts used. The report results returned are limited to groups with which the logged-in user shares a role.

 Agent Call Summary For period beginning 12/1/2010 and ending 12/31/2010 Selected Call Direction: Incoming					
Name	Device ID	# Calls	Average Duration	Total Duration	Max Duration
ASHLEY, RUBEN	4022	16	5m 26s	1h 27m 2s	8m 11s
BAUER, ALBERT	4002	10	5m 43s	57m 9s	8m 11s
BELL, ESTER	4036	9	6m 20s	57m 1s	8m 11s
BROOKS, LARRY	4030	12	6m 16s	1h 15m 17s	8m 11s
CANTRELL, MADELEINE	4015	13	6m 7s	1h 19m 36s	8m 11s
COHEN, JIMMIE	4010	11	6m 17s	1h 9m 5s	8m 11s
DELACRUZ, BARRY	4026	23	5m 28s	2h 5m 42s	8m 11s
DILLON, BRADLEY	4031	14	5m 17s	1h 13m 58s	8m 11s
ESTES, SALVADOR	4033	12	5m 44s	1h 8m 48s	8m 11s
EWING, WILLA	4025	13	6m 50s	1h 28m 56s	8m 11s
FARRELL, HALEY	4032	15	5m 45s	1h 26m 16s	8m 11s
FISCHER, HOWARD	4029	9	6m 39s	59m 52s	8m 11s
FOSTER, HAROLD	4038	11	6m 15s	1h 8m 49s	8m 11s
GARCIA, MICHEAL	4014	17	5m 35s	1h 34m 53s	8m 11s
GRAY, SHAWN	4013	10	5m 43s	57m 7s	8m 11s
HAYS, ANGELINA	4034	14	6m 21s	1h 28m 59s	8m 11s

Assigned Agents Report

This report displays the Active, Inactive, or All agents who are currently in the database, along with their System ID, Username (System Username), and Phone ID information. An agent is Active if the Agent option has been enabled in the agent profile. An agent is inactive if the Agent option was selected at one point and that option is now cleared.

Note Logged-in users will only be able to view their own information unless the permission "Allow Viewing of All Recordings" is granted. Be aware that this will also allow the user to view and play back all call recordings.

Assigned Agents Report

Back Generate Report

Status: Active

System ID	Agent	User Name	Status	Phone ID
1	SOLOMON, DUANE		Active	4001
2	BAUER, ALBERT		Active	4002
3	PECK, LUPE		Active	4003
4	JONES, MARVIN		Active	4004
5	MCDONALD, ANTHONY		Active	4005
6	NIEVES, LATONYA		Active	4006
7	HOOPER, LARRY		Active	4007
8	OCHOA, YOUNG		Active	4008
9	JIMENEZ, JUNE		Active	4009
10	COHEN, JIMMIE		Active	4010
11	USER, CALLCOPY	Administrator	Active	4011
12	HOLDEN, ANTHONY		Active	4012
13	GRAY, SHAWN		Active	4013
14	GARCIA, MICHEAL		Active	4014
15	CANTRELL, MADELEINE		Active	4015
16	SAMPSON, THERESA		Active	4016
17	SLOAN, SHAWN		Active	4017
18	ZIMMERMAN, KARINA		Active	4018
19	SCHNEIDER, EVANGELINA		Active	4019
20	HORN, ERIK		Active	4020
21	PADILLA, MARLENE		Active	4021
22	ASHLEY, RUBEN		Active	4022
23	NOEL, CARLA		Active	4023
24	MOSES, DIANA		Active	4024
25	EWING, WILLA		Active	4025
26	DELACRUZ, BARRY		Active	4026
27	WARD, JON		Active	4027
28	SALINAS, JIMMY		Active	4028
29	FISCHER, HOWARD		Active	4029

Call Recording Detail

This report displays the call metadata for your selected agent(s) over a period of time. The report provides the Record ID number, along with Discover Group and skill group list, critical data like ANI, DNIS, date and time recorded, duration of the call, and the Device ID where the call was recorded. If any of these field names have been customized in the Terminology settings for your Web Portal, those custom names will be shown instead of the default names listed here. The report results returned are limited to groups with which the logged-in user shares a role.

Call Recording Detail
Back Generate Report

Start Date: End Date:

Agents:
 CallCopy Administrator
 CallCopy Administrator
 CALLCOPY AGENT

Record ID:

Gate:

User 3:

CallCopyGroup:

Caller's Phone #:

User 1:

User 4:

Skill Group List:
 East Agents
 East Supervisors
 West Agents

Dialed Phone #:

User 2:

User 5:

Call Recording Detail						
For Thursday, March 01, 2012 to Friday, June 01, 2012						
Selected Groups: CallCopy Administrator, CallCopy Administrator, CALLCOPY AGENT, LAWANDA ANTHONY, JEFFERY AYALA, JEFFERY AYALA, WHITNEY BARRETT, GUADALUPE BAUER, DOMINIQUE CLARK, KRISTINE CONTRERAS, OFELIA DANIEL, Jane Doe, John Doe, LESLEY ELLISON, Ken Falk, LOLA FISCHER, TINA FLETCHER, REGINALD GIBBS, JEANNETTE HENRY, TIM HODGES, ANGELICA HULL, DUANE HUNT, ERIK JUAREZ, MARI KEMP, TRACY MASON, MARGUERITE MCLAUGHLIN, NICHOLAS MILLER, ALFREDO MONTGOMERY, BRIANNA PATEL, JERRY POTTS, MALINDA PRESTON, Cheryl Rankin, Cheryl Rankin, Jeff Rector, RENE RILEY, FELIX RIVERA, COREY RUTLEDGE, BIANCA SALINAS, MILDRED SHAFFER, Bob Smith, Sue Smith, CLINTON STRONG, KATHRINE TATE, Jackson Tremaine, test user, FRANKLIN VAZQUEZ, JEAN WARNER, TERRENCE WELCH, LARRY WINTERS, MELANIE YANG, RAFAEL YORK, MABLE ZAMORA						
Record ID: 29183						
Agent:	ZAMORA, MABLE	ANI:	6143555461	DNIS:	8001234567	Call Direction: Inbound
Time:	6/1/2012 5:54 AM	Duration:	00:04:15	Gate:	Customer Retention	Device: 4038 Channel: 58
CallCopy Group:	ClientXYZ	Labor Group:	East Agents			
Account Number:		Custom:		User3:		
Order Number:	1500203					
User5:						
Record ID: 29183						
Agent:	ZAMORA, MABLE	ANI:	6143555461	DNIS:	8001234567	Call Direction: Inbound
Time:	6/1/2012 5:54 AM	Duration:	00:04:15	Gate:	Customer Retention	Device: 4038 Channel: 58
CallCopy Group:	Support Team	Labor Group:	East Agents			
Account Number:		Custom:		User3:		
Order Number:	1500203					
User5:						

Duplicate ANI Report

This report displays the call metadata information for repeat calls into your organization from the same phone number over a period of time. If the same ANI has not called into your location multiple times over your selected timeframe, you will see the result listed below. This can be useful for determining whether a specific customer or company calls in on a regular basis.

Duplicate ANI Report Back Generate Report

Start Date End Date Call Direction

ANI

Duplicate ANI Report	
For Saturday, April 23, 2011 to Friday, December 23, 2011	
Status: All	
ANI like: '1112223333'	
ANI	# Calls Observed
1112223333	3
Duplicate ANI Report - 6/23/2011	
CallCopy Recorder Reporting Service	
Page 1 of 1	

Group Membership Report

This report displays active or inactive Agents in a particular group, along with their Phone Id information. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

Group Membership Report Back Generate Report

Group Active

 Group Membership		
Group	Agent	Phone ID
Calibration	ASHLEY, RUBEN	4022
Calibration	BAUER, ALBERT	4002
Calibration	BELL, ESTER	4036
Calibration	BROOKS, LARRY	4030
Calibration	CANTRELL, MADELEINE	4015
Calibration	COHEN, JIMMIE	4010
Calibration	DELACRUZ, BARRY	4026
Calibration	DILLON, BRADLEY	4031
Calibration	ESTES, SALVADOR	4033
Calibration	EWING, WILLA	4025
Calibration	FARRELL, HALEY	4032
Calibration	FERGUSON, LATONYA	4040
Calibration	FISCHER, HOWARD	4029
Calibration	FOSTER, HAROLD	4038
Calibration	GARCIA, MICHEAL	4014
Calibration	GRAY, SHAWN	4013
Calibration	HAYS, ANGELINA	4034
Calibration	HEBERT, FRANCISCO	4037
Calibration	HOLDEN, ANTHONY	4012
Calibration	HOOPER, LARRY	4007
Calibration	HORN, ERIK	4020
Calibration	JENNINGS, TABITHA	4035

QA Reporting

Overview of QA Reports

Discover QA Reports allow you to trend and track the Quality Assurance performance of your agents, analysts, and groups. The various QA reports give insight into critical areas such as calibration, trending, and team performance. The QA reports also serve as extremely powerful coaching tools to help close knowledge gaps, as identified through the evaluation of calls and as shown through reporting.

QA Reporting is based on the evaluations that your Quality Assurance (QA) team have performed. These reports require that one or more QA forms be created. The way that your form is created affects and impacts the reporting data that you are able to see in QA-focused reports. For more information on creating QA forms, refer to the *Discover by Uptivity QA Coaching Manual*.

Your system comes with a number of printable QA reports, as shown below.

Quality Assurance		
Filter: <input type="text"/>		<input type="button" value="Search"/>
Report	Description	Date Created
Agent QA Summary	Quality Assurance Summary By Agent	3/1/2011
Agent Ranking By Period	Agent Ranking by Period	3/1/2011
Agents Needing Evaluation Detail	Filtered list of when each evaluator has last evaluated each agent on each form.	3/1/2011
Agents Needing Evaluation Summary	Shows the last time an agent has been evaluated for the given criteria.	3/1/2011
Blank QA Form	Print out blank quality assurance forms for off line evaluations.	3/1/2011
Call Evaluation Detail	Full details of the QA evaluation and the evaluated call. For performance reasons, limited to first 500 records meeting criteria.	3/1/2011
Completed QA Form	Review or print out complete quality assurance evaluations.	3/1/2011
Critical Question Detail	Detail of performance on critical questions.	3/1/2011
Critical Question Summary	Summary of performance on critical questions by agent or group.	3/1/2011
Evaluator QA Summary	Evaluator Calibration Report	3/1/2011
Form and Section Failures Report	Displays the list of calls which were evaluated to contain a response that indicated a failure at a section or form level.	3/1/2011
Group QA Summary	Quality Assurance Summary By Group	3/1/2011
Group Summary By Month	Group performance trend over monthly intervals.	3/1/2011
Group Summary By Period	Group performance trend over time with selectable intervals.	3/1/2011
Multiple Evaluations Summary	Comparison of the prior twelve evaluations of an agent on a particular form.	3/1/2011
QA Agent Periodical Trending Report	This specialized trending report makes it easy to compare the performance of groups in different sections of a QA form over time.	3/1/2011
QA Agent Trending Report	Trending reports allow you to read across the data to see changes over time. The QA agent trending report breaks down scores by agent and allows you to easily compare the performance of an agent in different sections or on different questions.	3/1/2011
QA Calibration Trending Report	Trending reports allow you to read across the data to see changes over time. The QA calibration trending report breaks down scores by QA evaluator and allows you to easily compare the performance of a user in different sections or on different questions.	3/1/2011
QA Form Trending Report	Trending reports allow you to read across the data to see changes over time. The QA form trending report breaks down scores by form or form component, and may further break them down by subgroup for easy comparison.	3/1/2011
QA Group Periodical Trending Report	This specialized trending report makes it easy to compare the performance of groups in different sections of a QA form over time.	3/1/2011

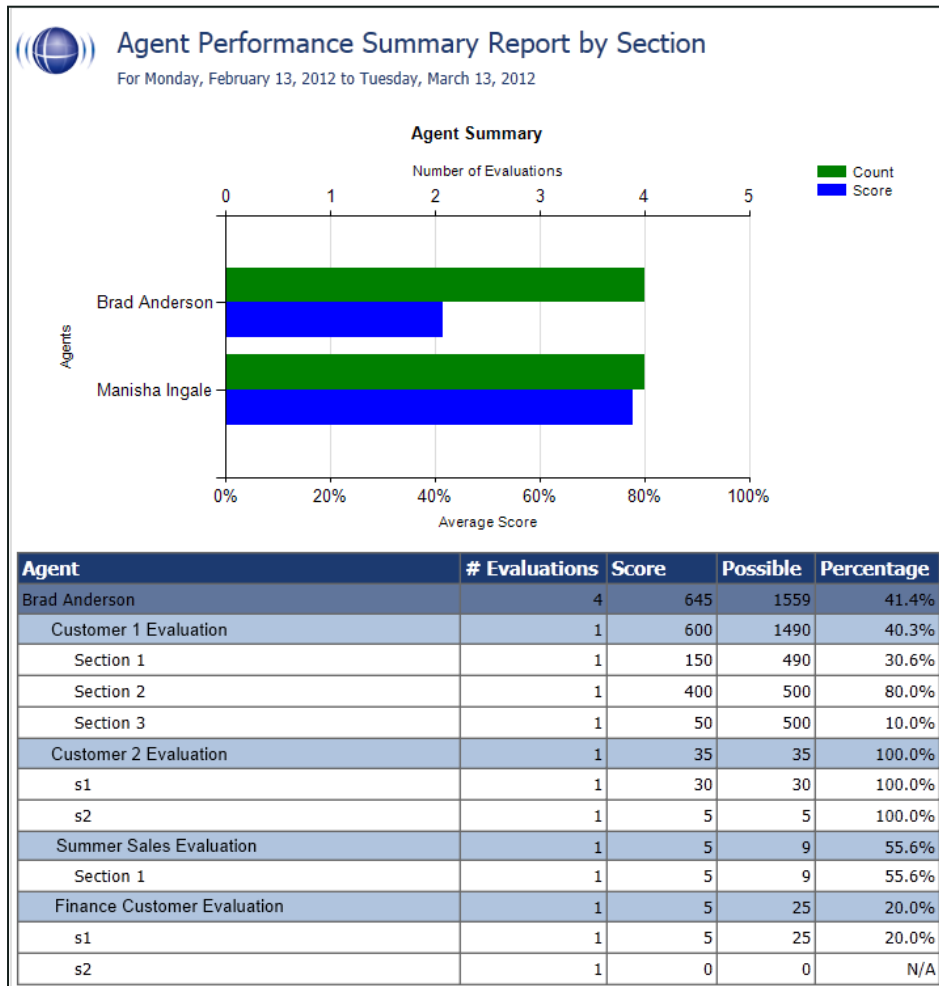
Pages : [1](#) [2](#) > >>

Go To Page : of 2

Agent QA Summary

This report displays the QA performance of selected Group(s) or Agent(s) over a period of time. The Report Type criteria specify a level of detail: Agent, Form, Section, and Question. If the report is used in Discover, users can drill-down to lower levels of detail.

In the example below, the Report Type was set to Section, and a user can drill down to Question level results by clicking a section label. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.




Agent Ranking by Period

This report compares an agent's QA performance from one time period to another: week to week, month to month, quarter to quarter, or year to year. The last column in the report ranks the agents in your system from 1 – X. Positive trending is shown with a green arrow and negative trending with a red arrow. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

Agent Ranking By Period Back Generate Report


Period Type Month Year 2010 Period December

Form All Group All

 Agent Ranking by Month For period beginning 12/1/2010 and ending 12/31/2010		Selected Month Score	Prior Month Score	Rank	
JIMENEZ, JUNE	1307 of 1355 (96.5%)	3538 of 3970 (89.1%)	1 (+36)	↑	
FISCHER, HOWARD	1287 of 1335 (96.4%)	5428 of 5820 (93.3%)	2 (+6)	↑	
DELACRUZ, BARRY	1831 of 1935 (94.6%)	3875 of 4195 (92.4%)	3 (+8)	↑	
PECK, LUPE	1333 of 1420 (93.9%)	3383 of 3720 (90.9%)	4 (+24)	↑	
BELL, ESTER	1067 of 1140 (93.6%)	3481 of 3840 (90.7%)	5 (+26)	↑	
HOOPER, LARRY	995 of 1065 (93.4%)	3226 of 3495 (92.3%)	6 (+7)	↑	
JONES, MARVIN	984 of 1055 (93.3%)	3388 of 3685 (91.9%)	7 (+10)	↑	
HORN, ERIK	1804 of 1935 (93.2%)	4159 of 4495 (92.5%)	8 (+2)	↑	
ASHLEY, RUBEN	1981 of 2140 (92.6%)	1948 of 2205 (88.3%)	9 (+29)	↑	
SOLOMON, DUANE	784 of 850 (92.2%)	2892 of 3065 (94.4%)	10 (-8)	↓	
BAUER, ALBERT	2361 of 2560 (92.2%)	3857 of 4290 (89.9%)	11 (+22)	↑	
HOLDEN, ANTHONY	1516 of 1645 (92.2%)	4423 of 4860 (91%)	12 (+14)	↑	
JENNINGS, TABITHA	1854 of 2020 (91.8%)	4114 of 4365 (94.2%)	13 (-10)	↓	
SLOAN, SHAWN	2286 of 2515 (90.9%)	2802 of 2990 (93.7%)	14 (-9)	↓	
EWING, WILLA	2511 of 2765 (90.8%)	4700 of 5095 (92.2%)	15 (0)	↑	
SAMPSON, THERESA	3561 of 3925 (90.7%)	3265 of 3580 (91.2%)	16 (+9)	↑	
FOSTER, HAROLD	771 of 850 (90.7%)	3061 of 3430 (89.2%)	17 (+18)	↑	
OCHOA, YOUNG	906 of 1000 (90.6%)	4406 of 4860 (90.7%)	18 (+12)	↑	
CANTRELL, MADELEINE	1286 of 1420 (90.6%)	3435 of 3720 (92.3%)	19 (-7)	↓	
FARRELL, HALEY	2100 of 2325 (90.3%)	4098 of 4505 (91%)	20 (+7)	↑	

Agents Needing Evaluation Detail

This report displays the last time selected active, inactive, or all Agent(s) were scored on a particular form, based on the Group(s) they are assigned to and the User (Evaluator) who last completed the QA evaluation. The report shows all the groups of which an agent is a member. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.


 **Agents Needing Evaluation Detail**

Selected Forms: Customer Service Evaluation, Sales Evaluation

Agent	Group	Form	Evaluator	Last Evaluated
JOANN ABBOTT	ClientXYZ	Customer Service Evaluation	Jeff Rector	Never
JOANN ABBOTT	ClientXYZ	Customer Service Evaluation	Cheryl Rankin	Never
JOANN ABBOTT	ClientXYZ	Customer Service Evaluation	Barry Knack	Never
JOANN ABBOTT	ClientXYZ	Customer Service Evaluation	Beki Nowlan	Never
JOANN ABBOTT	ClientXYZ	Sales Evaluation	Jeff Rector	Never
JOANN ABBOTT	ClientXYZ	Sales Evaluation	Cheryl Rankin	Never
JOANN ABBOTT	ClientXYZ	Sales Evaluation	Barry Knack	Never
JOANN ABBOTT	ClientXYZ	Sales Evaluation	Beki Nowlan	Never
JOANN ABBOTT	Support Team	Customer Service Evaluation	Jeff Rector	Never
JOANN ABBOTT	Support Team	Customer Service Evaluation	Cheryl Rankin	Never
JOANN ABBOTT	Support Team	Customer Service Evaluation	Barry Knack	Never
JOANN ABBOTT	Support Team	Customer Service Evaluation	Beki Nowlan	Never


Agents Needing Evaluation Summary

This report displays the last time an Agent was evaluated, by any Evaluator, from a selected end time. The Evaluation Summary report only shows one entry per agent, regardless of the number of groups to which they belong. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

 Agents Needing Evaluation Summary				
Selected Forms: Customer Service Evaluation, Sales Evaluation				
Agent	Group	Form	Evaluator	Last Evaluated
ABBOTT, JOANN	ClientXYZ	Customer Service Evaluation	Sue Smith	9/26/2011
BOYER, MABEL	Support Team	Sales Evaluation	Bob Smith	9/26/2011
BUCKLEY, ROBIN	Sales Team	Sales Evaluation	Administrator	9/27/2011
CAMPOS, DEIRDRE	Support Team	Sales Evaluation	John Doe	9/27/2011
CARROLL, LIZA	Calibration	Sales Evaluation	John Doe	9/27/2011
COLEMAN, THERESA	Calibration	Customer Service Evaluation	Jane Doe	9/27/2011
COLLINS, DOREEN	Support Team	Customer Service Evaluation	Administrator	9/27/2011
CONRAD, NELDA	Janes Team	Customer Service Evaluation	Administrator	9/26/2011
CROSBY, NELDA	Support Team	Sales Evaluation	Administrator	9/27/2011
DENNIS, FLORINE	Support Team	Sales Evaluation	Bob Smith	9/27/2011
ELLIOTT, CLARISSA	ClientXYZ	Customer Service Evaluation	John Doe	9/27/2011
ELLIOTT, MARIANNE	Johns Team	Customer Service Evaluation	Jane Doe	9/27/2011
ENGLAND, CANDICE	None	None		Never

Blank QA Form

This report displays a blank version of a specific Quality Assurance form in the Discover system. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

 Sales Evaluation	
Greeting	
Did Agent use branded greeting?	
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
Did the Agent state his/her name?	
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
Did the agent verify the promo code?	
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
<i>Agent should validate code against screen pop</i>	
Sales Skills	
Was sale closed?	
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
What objections were given?	
Price	<input type="checkbox"/>
Delivery time	<input type="checkbox"/>
Item not available	<input type="checkbox"/>
No objections given	<input type="checkbox"/>
How many rebuttals were used?	
None	<input type="checkbox"/>
1	<input type="checkbox"/>
2	<input type="checkbox"/>
Notes / Tips	

Call Evaluation Detail

This report shows the detailed results on a completed evaluation based on your selection criteria. The data is broken down by metadata information at the top and then a section and question level breakdown of the form, complete with individual responses. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.


Form Name				Call ID	Evaluated By	Complete Date
Customer Service Evaluation				1792	Administrator	4/6/2011
Group: #Error		ANI: 2129348361	DNIS: 8662758925	Call Direction: Inbound		
Time: 3/29/2011 3:32 PM	Duration: 00:06:12	Gate: Sales	Device: 4006	Channel: 10		
Account Number:	CSN:					
Salesforce Case: 00006035						
Public Bookmark:						
Section Name: Greeting						
Question	Evaluation	Score				
Did Agent state company name?	Yes	10.00 of 10.00 (100.0%)				
Did Agent state his/her name?	Yes	10.00 of 10.00 (100.0%)				
		Subtotal:	20.00 of 20.00 (100%)			
Section Name: Soft Skills						
Question	Evaluation	Score				
Did Agent use courtesy statements as appropriate?	Very Good	7.00 of 10.00 (70.0%)				
Did Agent demonstrate Active Listening?	Very Good	7.00 of 10.00 (70.0%)				
Did Agent use proper hold procedures?	Yes	10.00 of 10.00 (100.0%)				
Notes	Great improvement in your soft skills!					N/A
		Subtotal:	24.00 of 30.00 (80%)			
Section Name: Use of Tools						
Question	Evaluation	Score				
Did Agent find record in CRM in timely manner?	Yes	10.00 of 10.00 (100.0%)				
Did agent navigate knowledgebase efficiently (if needed)?	Yes	10.00 of 10.00 (100.0%)				
Did Agent use correct closing code in CRM?	Yes	10.00 of 10.00 (100.0%)				
		Subtotal:	30.00 of 30.00 (100%)			
Section Name: Closing						
Question	Evaluation	Score				
Did Agent resolve call within support guidelines?	Yes	30.00 of 30.00 (100.0%)				
Did Agent probe for additional concerns?	Yes	10.00 of 10.00 (100.0%)				
Did Agent thank customer for calling?	Yes	5.00 of 5.00 (100.0%)				
Did Agent offer to transfer to customer sat survey?	Yes	15.00 of 15.00 (100.0%)				
		Subtotal:	60.00 of 60.00 (100%)			
Section Name: Notes						
Question	Evaluation	Score				
Reviewer Notes	We will use your call for systems training! Thanks for your hard work.					N/A
		Subtotal:	N/A			
		Total:	134.00 of 140.00 (96%)			

Completed QA Form

This report displays the scoring data for a specific QA evaluation, and is automatically generated when you print a QA Record found via the Search QA Evaluations link on the Coaching tab of the Quality Assurance menu. Enter the **QA Record ID** to generate the report. The report results returned are limited to groups with which the logged-in user shares a role. All comments by agents, evaluators, and arbitrators appear at the bottom of the report.

Completed QA Form Back Generate Report

QA Record ID:



Customer Service Evaluation

Agent:	KIM, BOBBY	Date of Evaluation:	11/15/2010
Evaluator:	Bob Smith	Date of Recording:	11/10/2010
Call ID:	3370		

Greeting **Score: 20 of 20 (100.00%)**

Did Agent state company name?

Yes 10pts

No

Did Agent state his/her name?

Yes 10pts

No

Soft Skills **Score: 20 of 30 (66.67%)**

Did Agent use courtesy statements as appropriate?

Excellent

Very Good

Good 5pts

Fair

Poor

Did Agent demonstrate Active Listening?

Excellent

Very Good

Good 5pts

Fair

Poor

Active listening includes repeating information back to the customer, such as a CC number or address, as well as affirmations statements such as "OK" and "I see" that demonstrate to the caller that you are engaged in the conversation.

Did Agent use proper hold procedures?

Yes 10pts

No

Notes

We will coach you on your soft skills.

Critical Question Detail

This report provides detailed insight as to how each agent has scored on the Critical question on all evaluated calls. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

Critical Question Detail Back Generate Report

Start Date: End Date: Group List:
Calibration
ClientABC
ClientXYZ

Form List:
Customer Service Evaluation
Sales Evaluation

Agent List:
VERONICA ALVAREZ
URSULA AVERY
TRACY BLACKBURN

User List:
Administrator
Barry Knack
Bob Smith

Date Type: Active:


Critical Question Detail For Monday, February 28, 2011 to Tuesday, March 29, 2011						
Selected Forms: Critical Question Form						
Agent: CAMPOS, DEIRDRE						
Date of Call	Record	Date of Eval	Form	Question	Score	
3/29/2011	1000004	3/29/2011	Critical Question Form	Is this a critical question example?	10 of 10 (100.0%)	
Agent: GILBERT, ADELINE						
Date of Call	Record	Date of Eval	Form	Question	Score	
3/29/2011	1000003	3/29/2011	Critical Question Form	Is this a critical question example?	10 of 10 (100.0%)	
Agent: KIM, BOBBY						
Date of Call	Record	Date of Eval	Form	Question	Score	
3/29/2011	1000005	3/29/2011	Critical Question Form	Is this a critical question example?	0 of 10 (0.0%)	
Critical Question Detail - 3/29/2011			CallCopy Recorder Reporting Service			Page 1 of 1

Critical Question Summary

This report shows the summary of the critical question as a whole. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

Critical Question Summary Back Generate Report

Start Date: End Date: Group List:
 Form List: Agent List: User List:
 Report Type: Date Type: Active:

 Critical Question Summary by Agent For Monday, February 28, 2011 to Tuesday, March 29, 2011			
Selected Forms: Critical Question Form			
Agent	Form	Question	Score
CAMPOS, DEIRDRE	Critical Question Form	Is this a critical question example?	10.0 of 10.0 (100.0%)
GILBERT, ADELINE	Critical Question Form	Is this a critical question example?	10.0 of 10.0 (100.0%)
KIM, BOBBY	Critical Question Form	Is this a critical question example?	0.0 of 10.0 (0.0%)
Total:			20.0 of 30.0 (66.7%)
Critical Question Summary - 3/29/2011		CallCopy Recorder Reporting Service	Page 1 of 1

Evaluation List Report


This report generates a list of agent evaluations that were performed within the specified time period. This report provides a means of tracking the evaluation process and the scoring of evaluations. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

Evaluation List Report Back Generate Report

Start Date End Date Date Type

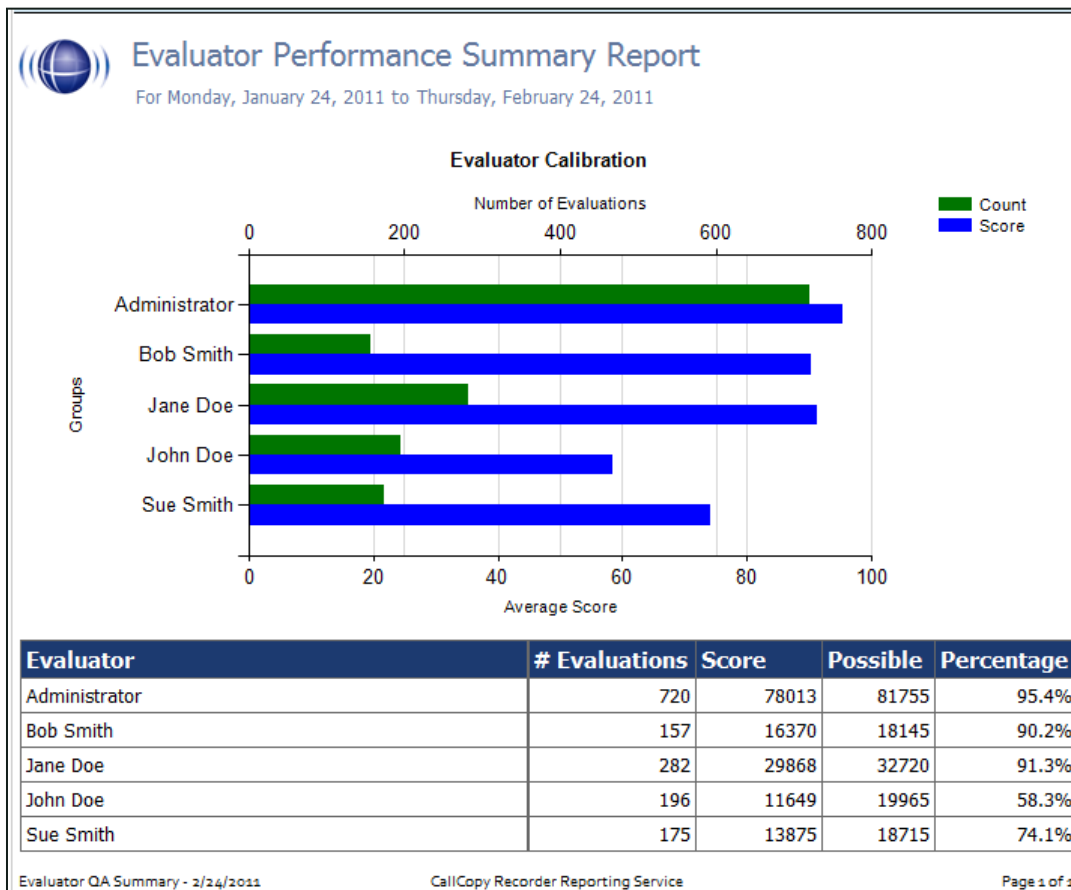
Group Agent Status Agent

Active Evaluations Form Evaluator

 Quality Assurance Evaluation List						
Form	Agent	Record ID	Recording Date	Evaluated By	Evaluation Date	Score
Customer Service Evaluation	ANTHONY, LAWANDA	5742	06/22/11	Administrator	06/22/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	ANTHONY, LAWANDA	6225	06/23/11	Administrator	06/23/2011	134.0 of 140.0 (95.7%)
Customer Service Evaluation	ANTHONY, LAWANDA	12436	06/23/11	Jane Doe	06/23/2011	120.0 of 140.0 (85.7%)
Customer Service Evaluation	AYALA, JEFFERY	25950	06/22/11	Bob Smith	06/22/2011	120.0 of 140.0 (85.7%)
Customer Service Evaluation	BARRETT, WHITNEY	21438	06/22/11	Administrator	06/22/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	BARRETT, WHITNEY	21439	06/22/11	Administrator	06/22/2011	134.0 of 140.0 (95.7%)
Customer Service Evaluation	CLARK, DOMINIQUE	22821	06/22/11	Bob Smith	06/22/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	CLARK, DOMINIQUE	22822	06/22/11	Administrator	06/22/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	CONTRERAS, KRISTINE	5119	06/23/11	Administrator	06/23/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	CONTRERAS, KRISTINE	11697	06/23/11	Jane Doe	06/23/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	DANIEL, OFELIA	14372	06/22/11	Bob Smith	06/22/2011	134.0 of 140.0 (95.7%)


Evaluator QA Summary

This report displays the results of your evaluator's QA performance over a selected period of time. It can be used to calibrate scoring practices among evaluators to ensure consistent and fair scoring. The initially generated report is a high level comparison, but you can drill down into for more granular detail. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.



Form and Section Failures Report

This report displays the critical failure points in a form(s) over a selected period of time. The top section shows a summary, indicating the total number of form and/or section failures per agent; while the lower section supplies the detail of the failure(s). The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

 Form and Section Failure Report by Agent For Monday, January 24, 2011 to Thursday, February 24, 2011 Selected Groups: ClientXYZ					
Customer Service Evaluation			Greeting		
Agent			Failure Count		
HICKMAN, RONALD			Form Failures: 0, Section Failures: 1		
PATTERSON, GRETA			Form Failures: 0, Section Failures: 1		
REEVES, CECILIA			Form Failures: 0, Section Failures: 1		
SELLERS, ELLA			Form Failures: 0, Section Failures: 1		
SHEPHERD, LETHA			Form Failures: 0, Section Failures: 1		
TUCKER, SUSAN			Form Failures: 0, Section Failures: 1		
Total:			Form Failures: 0, Section Failures: 6		
Form	Section	Agent	Failure	Call ID	Date
Customer Service Evaluation	Greeting	HICKMAN, RONALD	Section	2237	2/4/2011
HICKMAN, RONALD			Total: Form Failures: 0, Section Failures: 1		
Customer Service Evaluation	Greeting	PATTERSON, GRETA	Section	5749	1/27/2011
PATTERSON, GRETA			Total: Form Failures: 0, Section Failures: 1		
Customer Service Evaluation	Greeting	REEVES, CECILIA	Section	9716	2/23/2011
REEVES, CECILIA			Total: Form Failures: 0, Section Failures: 1		
Customer Service Evaluation	Greeting	SELLERS, ELLA	Section	3181	2/16/2011
SELLERS, ELLA			Total: Form Failures: 0, Section Failures: 1		
Customer Service Evaluation	Greeting	SHEPHERD, LETHA	Section	8832	2/18/2011
SHEPHERD, LETHA			Total: Form Failures: 0, Section Failures: 1		
Customer Service Evaluation	Greeting	TUCKER, SUSAN	Section	508	2/22/2011
TUCKER, SUSAN			Total: Form Failures: 0, Section Failures: 1		
Greeting			Total: Form Failures: 0, Section Failures: 6		

Group QA Summary

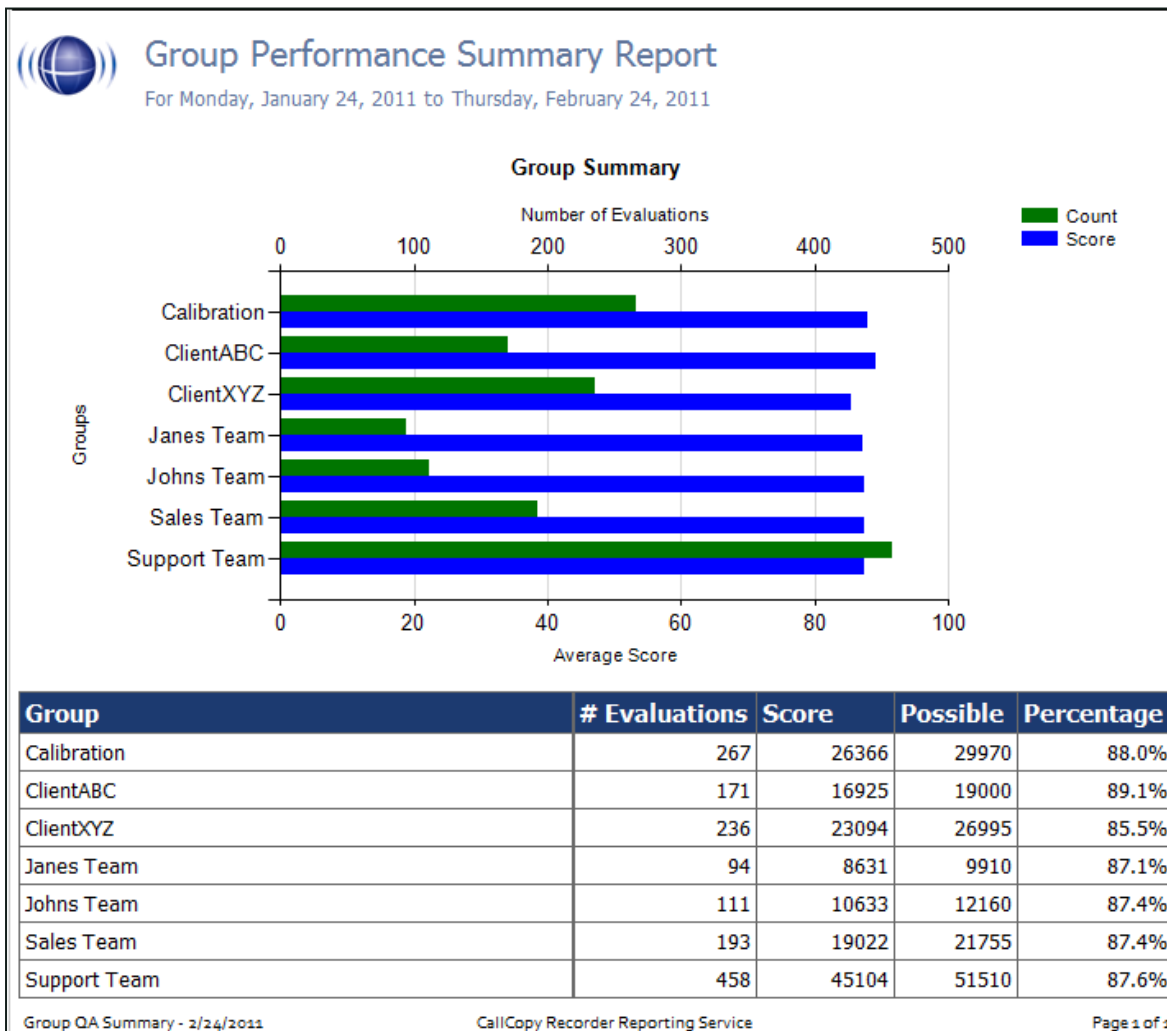
This report displays the performance of a selected team(s) on a form(s) over a period of time, for quick and easy comparison. You can drill down for more granular data on Report Type (Group, Form, Section, and Question). The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

Group QA Summary Back Generate Report

Start Date: 1/24/2011 End Date: 2/24/2011 Date Type: Call Date

Active: Active Forms: All Customer Service Evaluation Sales Evaluation Agents: All VERONICA ALVAREZ URSULA AVERY TRACY BLACKBURN

Groups: All Calibration ClientABC ClientXYZ Users: All Administrator Barry Knack Bob Smith Report Type: Group



Group Summary by Month

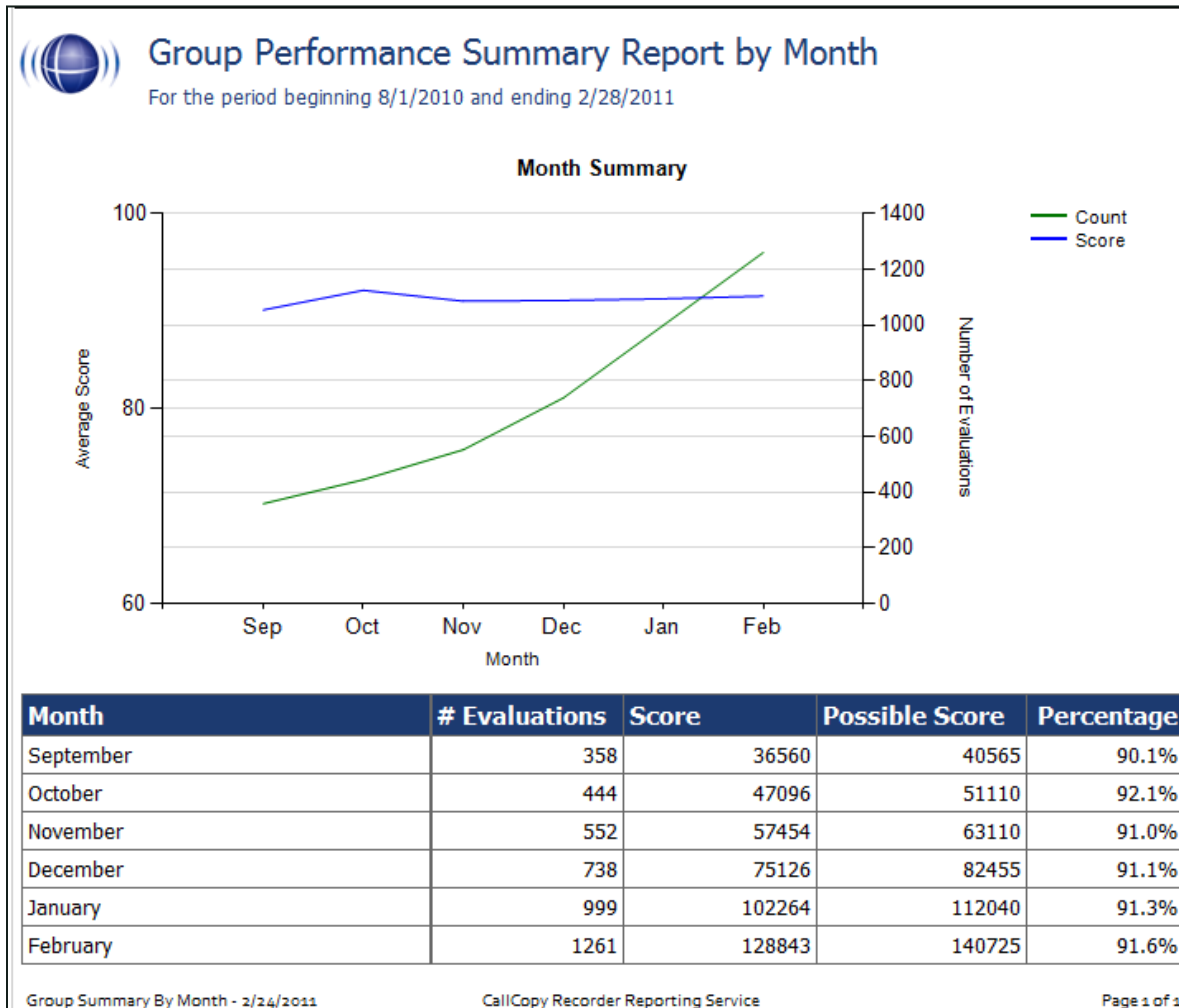
This report displays the performance of a selected team(s) on a form(s), charted over a certain number of months based on your selection of a targeted end month. Choosing a Report Type of "Month" shows total data for each month. Choosing a Report Type of "Group" shows evaluation data by group for each month. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

Group Summary By Month Back Generate Report

Month: February Year: 2011 Periods: 6

Active: Active Forms: All
Customer Service Evaluation
Sales Evaluation Agents: All
VERONICA ALVAREZ
URSULA AVERY
TRACY BLACKBURN

Groups: All
Calibration
ClientABC
ClientXYZ Users: All
Administrator
Barry Knack
Bob Smith Report Type: Month



Group Summary by Period

This report displays the performance of a selected team(s) on a form(s), charted over a certain number of periods (week, month, quarter, or year) based on your selection of a targeted end period. The Period Name field specifies a starting point and the number of periods goes back from it. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

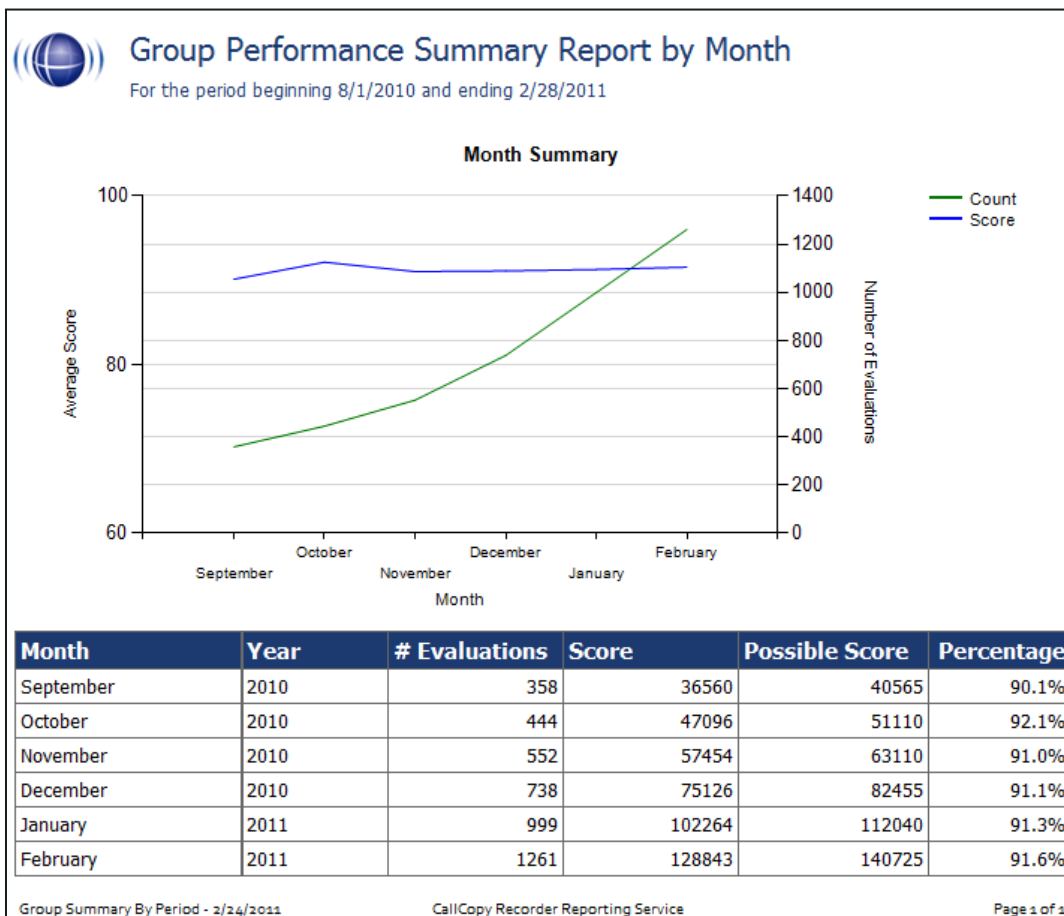
Group Summary By Period Back Generate Report

Period Type: Year: Period Name:

Periods: Active: Forms:

Agents: Groups: Users:

Report Type:



Multiple Evaluations Summary

This report displays the last 12 evaluations that were conducted on a selected agent and form, based on a selected end date. Agent ID, Supervisor ID, and Form ID are required fields. The **Overall Average %** at the top of the report is the average score of all the evaluations done using the selected form regardless of agent or evaluator. The **Average Score for this Form %** is the total average of the last 12 evaluations performed using the selected form, by the selected evaluator, for the selected agent. The individual percentages in the **Overall Percentage** column are the Section totals. The individual question **Totals** are for the last 12 evaluations performed on the selected form, by the selected evaluator, for the selected agent.

Multiple Evaluations Summary Report															
Contact Date Range: December 19, 2010 - February 23, 2011															
Agent Name: ALVAREZ, VERONICA															
Supervisor Name: Administrator Overall Average: 92.3%															
Form: Customer Service Evaluation Average Score for this Form: 97.9%															
Section/Questions	Total Possible	1	2	3	4	5	6	7	8	9	10	11	12	Total	Overall Percentage
Greeting	240													240	100.0%
Did Agent state company name?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did Agent state his/her name?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Soft Skills	360													324	90.0%
Did Agent demonstrate Active Listening?	120	10	10	7	7	10	7	10	7	10	10	7	7	102	85.0%
Did Agent use courtesy statements as appropriate?	120	10	10	7	7	10	7	10	7	10	10	7	7	102	85.0%
Did Agent use proper hold procedures?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Notes	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%
Use of Tools	360													360	100.0%
Did Agent find record in CRM in timely manner?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did agent navigate knowledgebase efficiently (if needed)?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did Agent use correct closing code in CRM?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Closing	720													720	100.0%
Did Agent offer to transfer to customer sat survey?	180	15	15	15	15	15	15	15	15	15	15	15	15	180	100.0%
Did Agent probe for additional concerns?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did Agent resolve call within support guidelines?	360	30	30	30	30	30	30	30	30	30	30	30	30	360	100.0%
Did Agent thank customer for calling?	60	5	5	5	5	5	5	5	5	5	5	5	5	60	100.0%
Notes	0													0	0.0%
Reviewer Notes	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%

QA Agent Periodical Trending Report

This report displays the summary of an agent's performance over a selected period of time. This time period begins with the date or period selected and looks backward over the specified number of periods. The reporting period can be daily, weekly, monthly, quarterly or yearly. In the example shown here, the report includes the six months from September, 2010 through February, 2011.

The performance can be shown on a per-form basis as well as for selected agents, groups or users. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

QA Agent Periodical Trending Report Back Generate Report

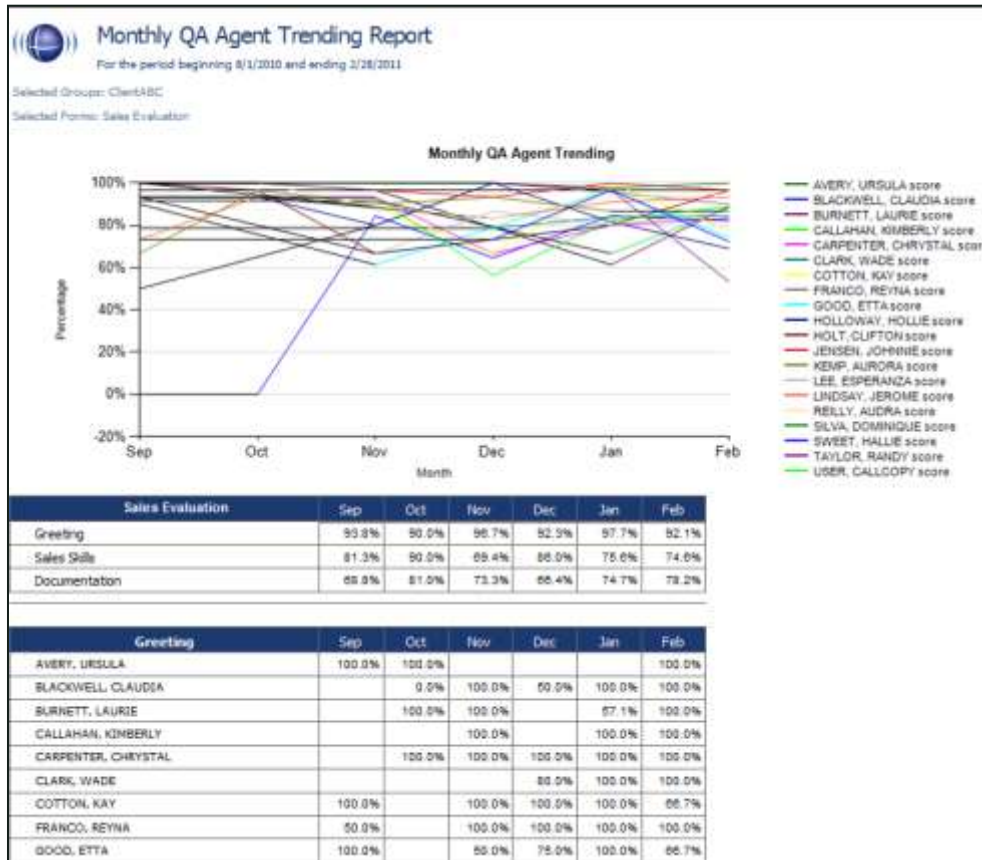
Report Type: Monthly Year: 2011 Period Name: February

Periods: 6 Active: Active group list: All
Calibration
ClientABC
ClientXYZ

form list: All agent list: All user list: All
Customer Service Evaluation VERONICA ALVAREZ
Sales Evaluation URSULA AVERY
 TRACY BLACKBURN

Administrator
 Barry Knack
 Bob Smith

Date Type: Evaluation Date



QA Agent Trending Report

This report displays the summary of an agent's performance on a particular form over a selected period of time. The performance can be broken down on a section by section, and question by question basis, depending on how your QA form is created in the system. The report results returned are limited to groups with which the logged-in user shares a role, even if "All" is selected.

QA Agent Trending Report Back

Start Date: 1/24/2011 End Date: 2/24/2011 Date Type: Call Date:

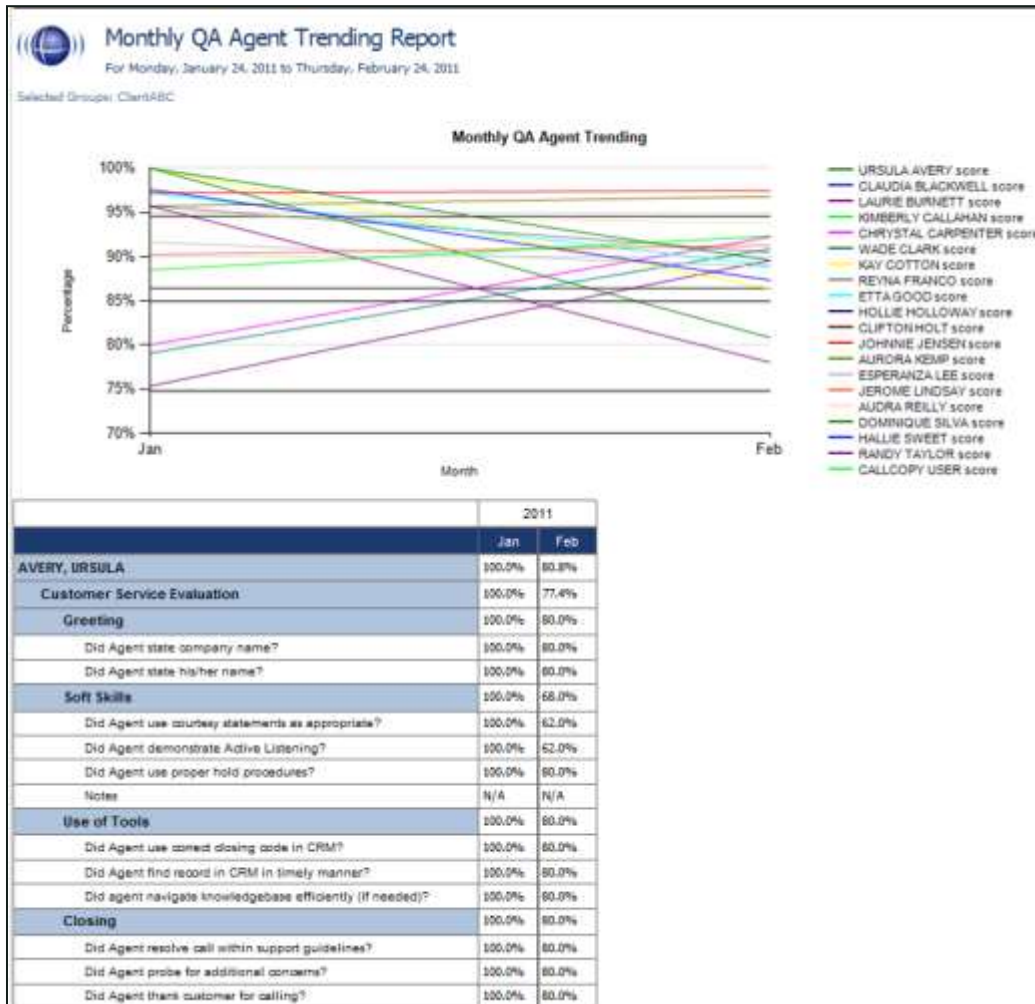
Active: Groups:
 Calibration
 ClientABC
 ClientXYZ

Forms:
 Customer Service Evaluation
 Sales Evaluation

Agents:
 VERONICA ALVAREZ
 URSULA AVERY
 TRACY BLACKBURN

Users:
 Administrator
 Barry Knack
 Bob Smith

Reporting Period:



QA Calibration Trending Report

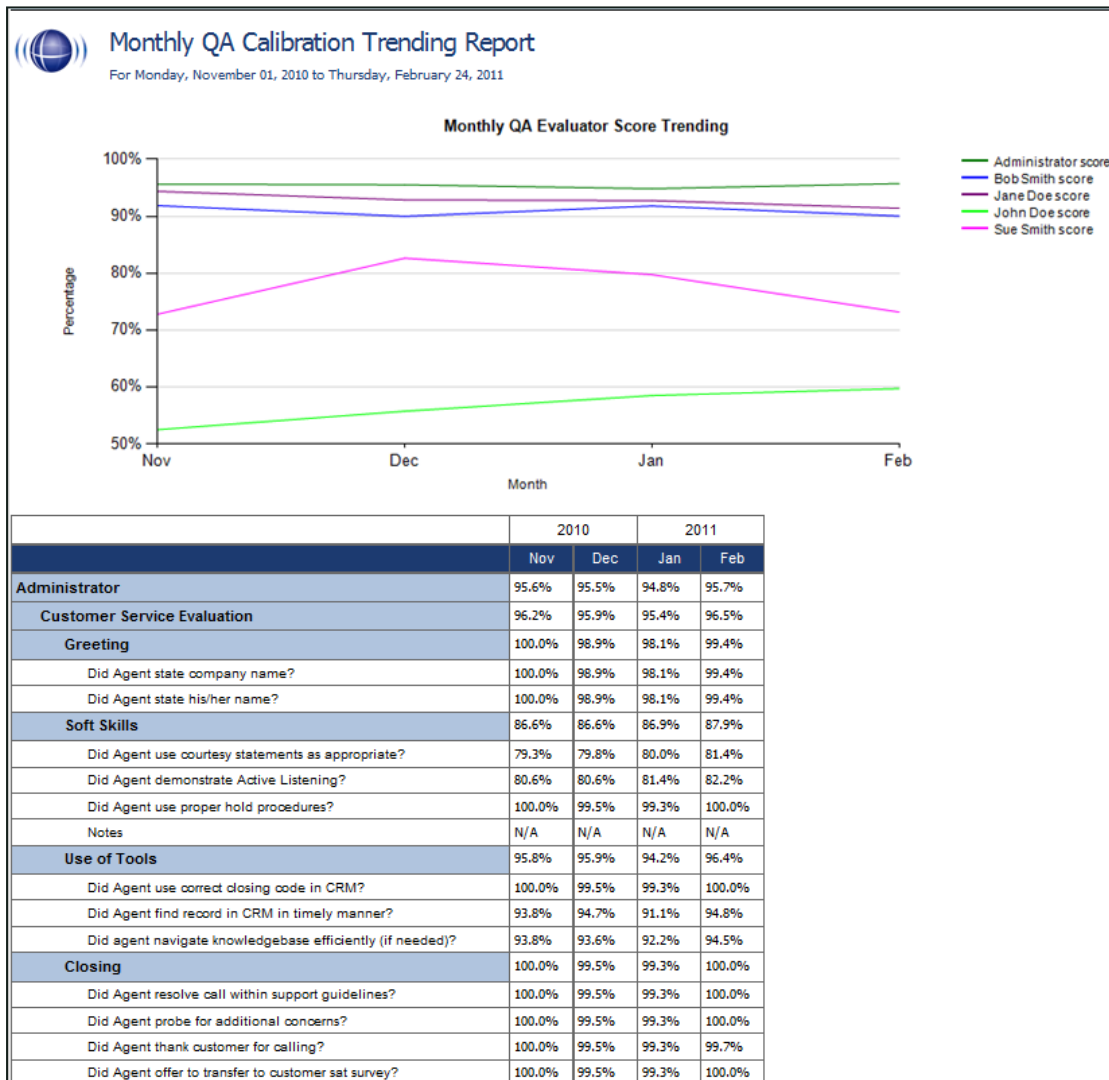
This report displays the detail of an Evaluator's performance on a particular form over a selected period of time. The performance can be broken down on a section by section, and question by question basis, depending on how your QA form is created in the system.

QA Calibration Trending Report Back Generate Report

Start Date: 1/24/2011 End Date: 2/24/2011 Date Type: Call Date: [v]

Active: Active Groups: [AI Calibration ClientABC ClientXYZ] Forms: [AI Customer Service Evaluation Sales Evaluation]

Agents: [AI VERONICA ALVAREZ URSULA AVERY TRACY BLACKBURN] Users: [AI Administrator Barry Knack Bob Smith] Reporting Period: Monthly



QA Form Trending Report

This report displays the total quality performance on a particular form over a selected period of time.

QA Form Trending Report Back

Start Date: End Date: Reporting Period:

Active: Group List:
 Calibration
 ClientABC
 ClientXYZ

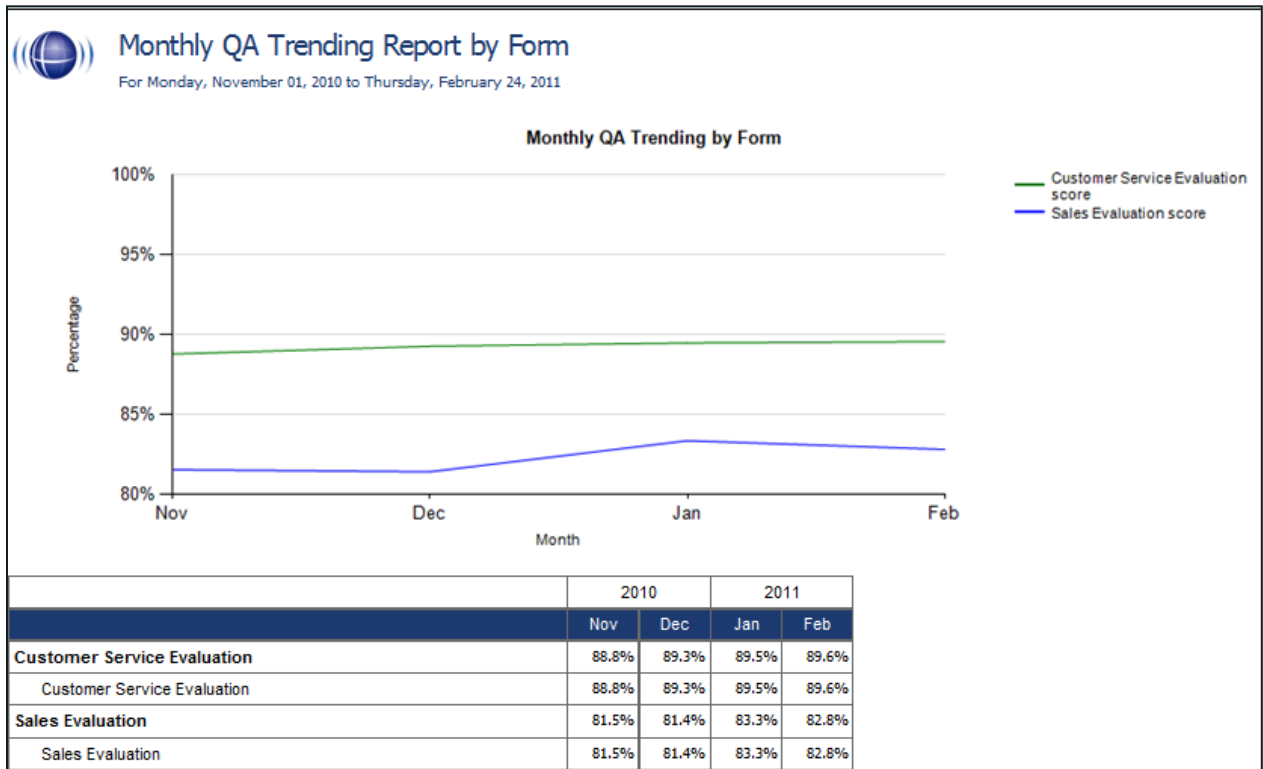
Form List:
 Customer Service Evaluation
 Sales Evaluation

Agent List:
 VERONICA ALVAREZ
 URSULA AVERY
 TRACY BLACKBURN

User List:
 Administrator
 Barry Knack
 Bob Smith

Report Type:

Report Detail:



QA Group Periodical Trending Report

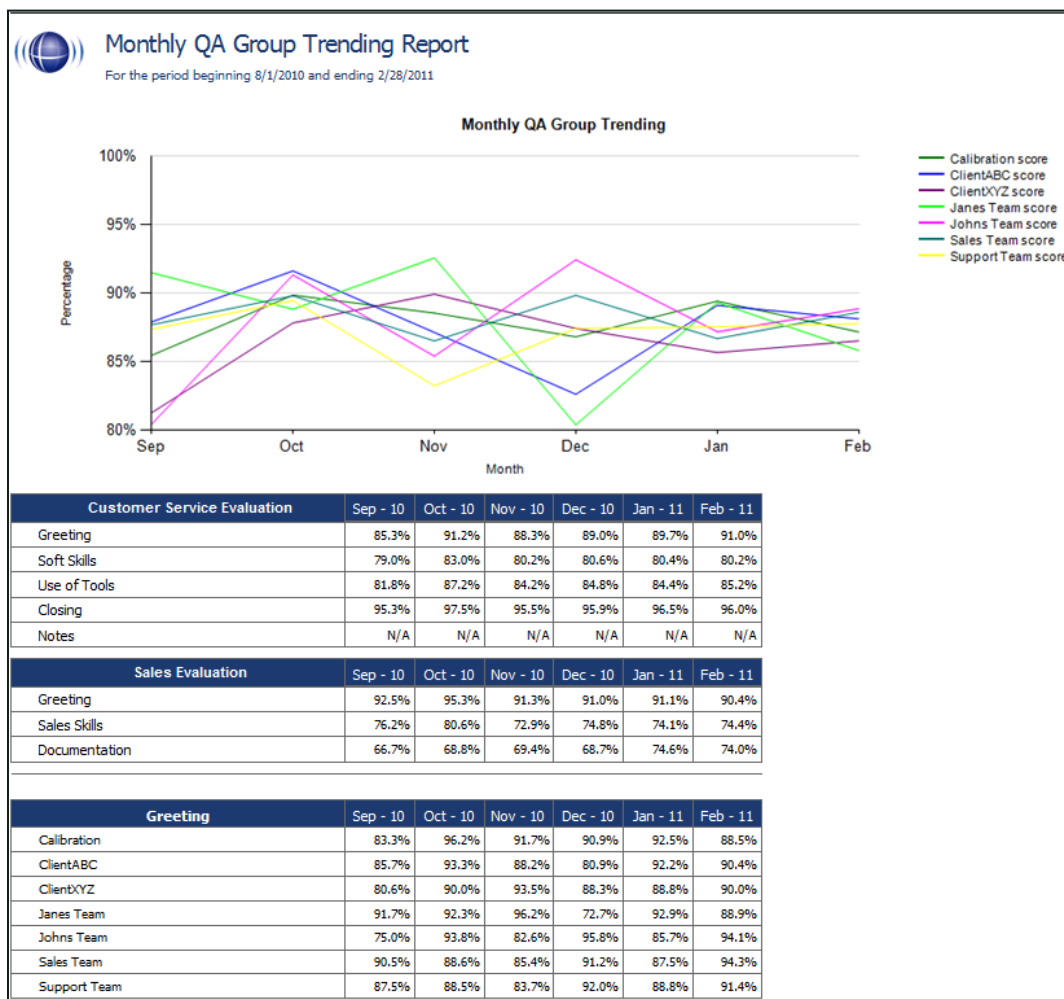
This report displays the performance of one or more selected group(s) on one or more selected form(s) over a period of time. This time period begins with the date or period selected and looks backward over the specified number of periods. The reporting period can be daily, weekly, monthly, quarterly or yearly. In the example shown here, the report includes the six months from September, 2010 through February, 2011. The data is broken down by section.

QA Group Periodical Trending Report Back Generate Report

Report Type: Monthly Year: 2011 Period Name: February

Periods: 6 Active: Active group list: All, Calibration, ClientABC, ClientXYZ

form list: All, Customer Service Evaluation, Sales Evaluation agent list: All, VERONICA ALVAREZ, URSULA AVERY, TRACY BLACKBURN user list: All, Administrator, Barry Knack, Bob Smith



QA Group Scorecard

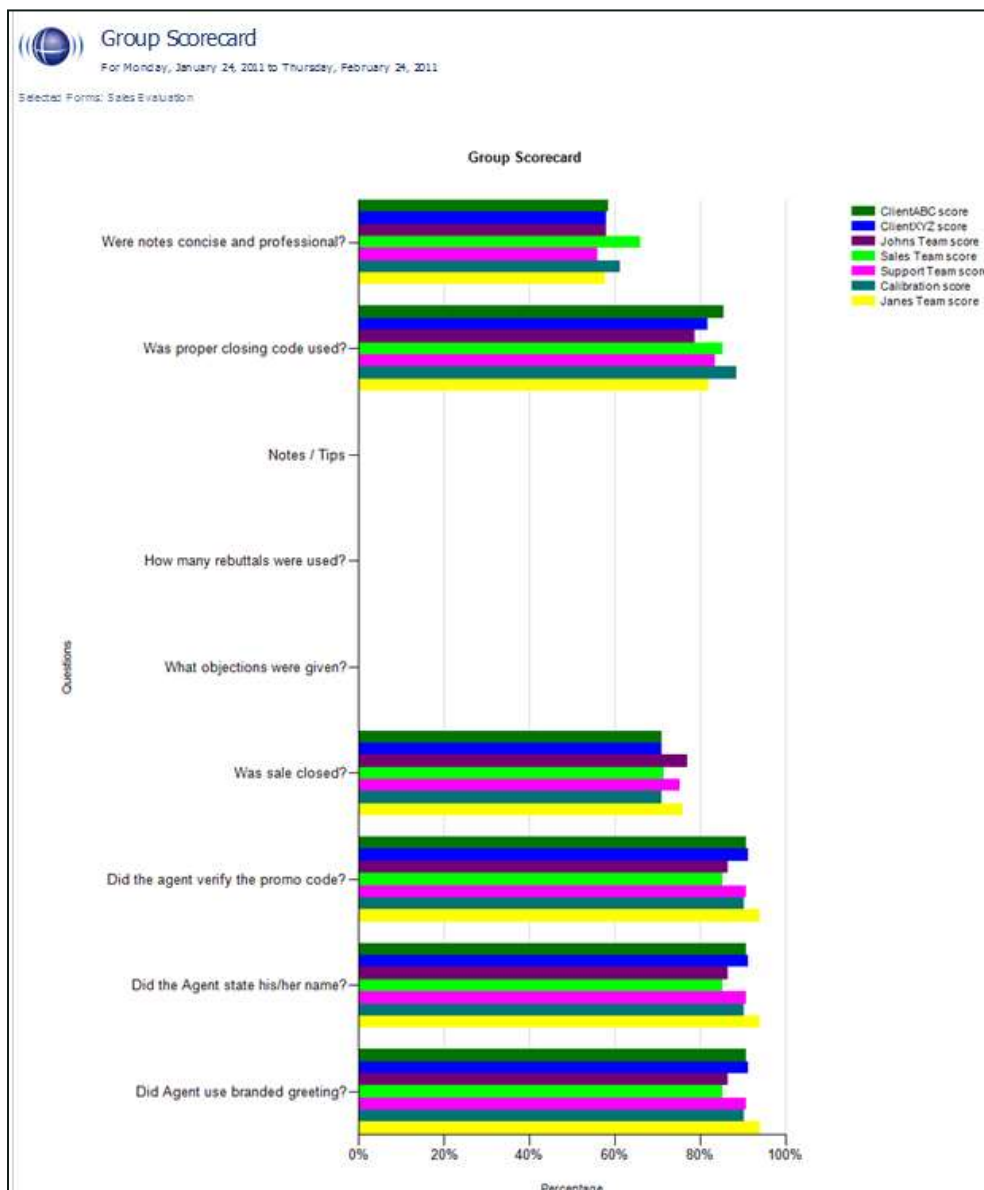
This report displays a group by group comparison of quality results of a form, at a question level, based on a selected period of time.

QA Group Scorecard Back Generate Report

Start Date: 1/24/2011 End Date: 2/24/2011 Date Type: Call Date

Active: Active Group List: Calibration, ClientABC, ClientXYZ Form List: Customer Service Evaluation, Sales Evaluation

Agent List: VERÓNICA ALVAREZ, URSULA AVERY, TRACY BLACKBURN Evaluator: Administrator, Barry Knack, Bob Smith



QA Group Trending Report

This report displays a group by group comparison of quality results for a selected form, at a per-question level. The data is compared daily, weekly, monthly, or yearly based on your selections for a specific period of time.

QA Group Trending Report Back

Start Date: End Date: Date Type:

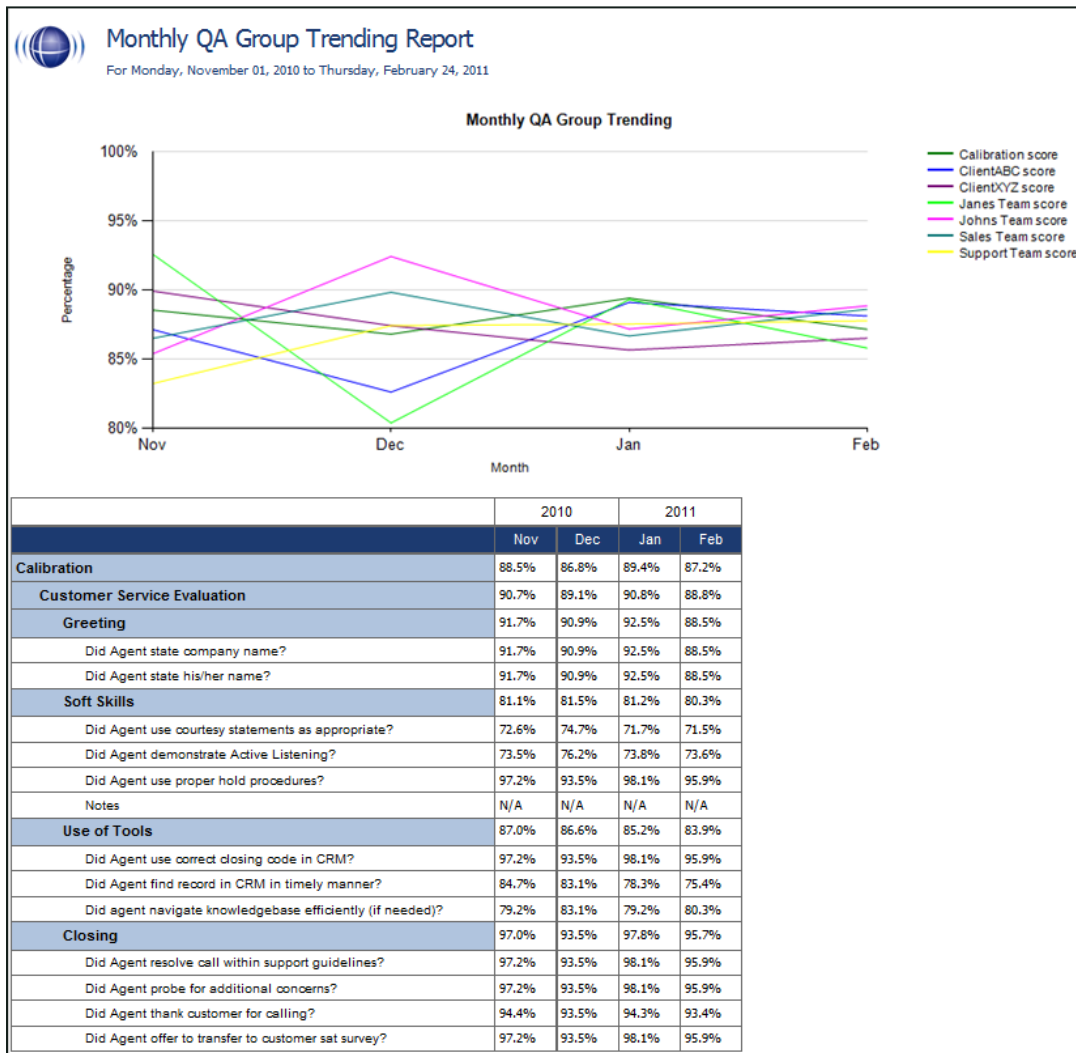
Active: Groups:
ClientABC
ClientXYZ

Forms:
Customer Service Evaluation
Sales Evaluation

Agents:
VERONICA ALVAREZ
URSULA AVERY
TRACY BLACKBURN

Users:
Administrator
Barry Knack
Bob Smith

Reporting Period:



QA Pending Acknowledgment

This report displays a list of the unacknowledged QA evaluations that are still in the system, on an agent by agent, and form by form basis. This report is only needed if you are sending Acknowledgment requests to your agents using the Uptivity system.

QA Pending Acknowledgment

Back Generate Report

Older Than

Groups

- Leaders Team
- Legends Team
- MultipleEvalTeam
- QATeam

QA Pending Acknowledgment

Selected Groups: Leaders Team, Legends Team

Form	Agent	Call ID	Evaluator	Completed Date	Status
1Support Call	Ayala, Daniel	1773	Gina George	2/4/2014	Unacknowledged
1Support Call	Ayala, Daniel	1772	Gina George	2/4/2014	Unacknowledged
1Support Call	Ayala, Daniel	1747	Gina George	2/4/2014	Unacknowledged
1Support Call	Ayala, Daniel	1774	Gina George	2/4/2014	Unacknowledged

QA Pending Acknowledgment - 4/7/2014
CallCopy Recorder Reporting Service
Page 1 of 1

QA Summary by Form

This report displays QA performance on a form(s) over a period of time. You can drill down into the report for additional details.

QA Summary By Form Back

Start Date: End Date: Date Type:

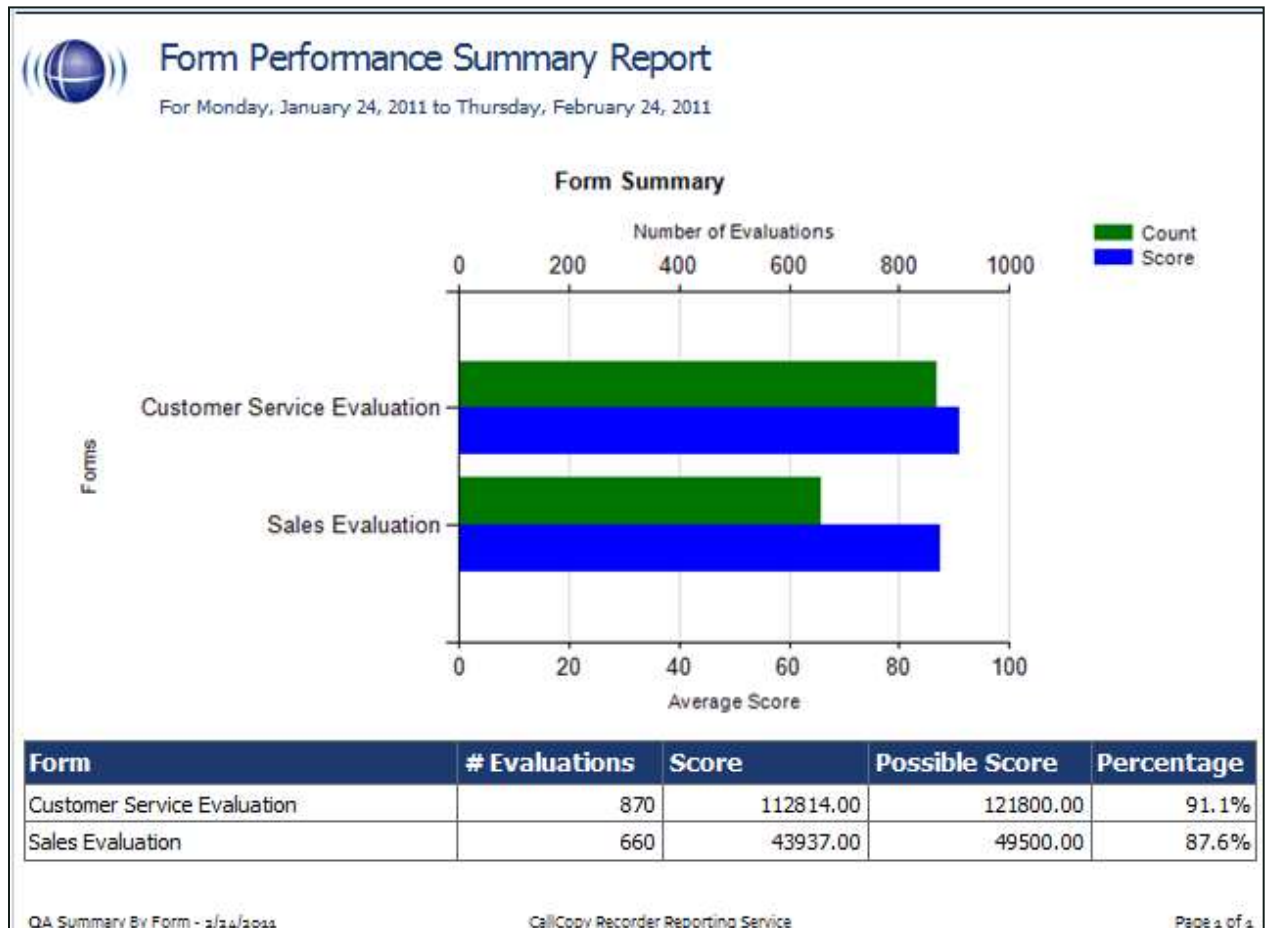
Active: Forms:
Customer Service Evaluation
Sales Evaluation

Agents:
VERONICA ALVAREZ
URSULA AVERY
TRACY BLACKBURN

Groups:
Calibration
ClientABC
ClientXYZ

Users:
Administrator
Barry Knack
Bob Smith

Report Type:



QA Summary by Question

This report displays the QA performance on a form's individual questions over a period of time. You can drill down into the report for additional details.

QA Summary By Question Back Generate Report

Start Date: End Date: Date Type:

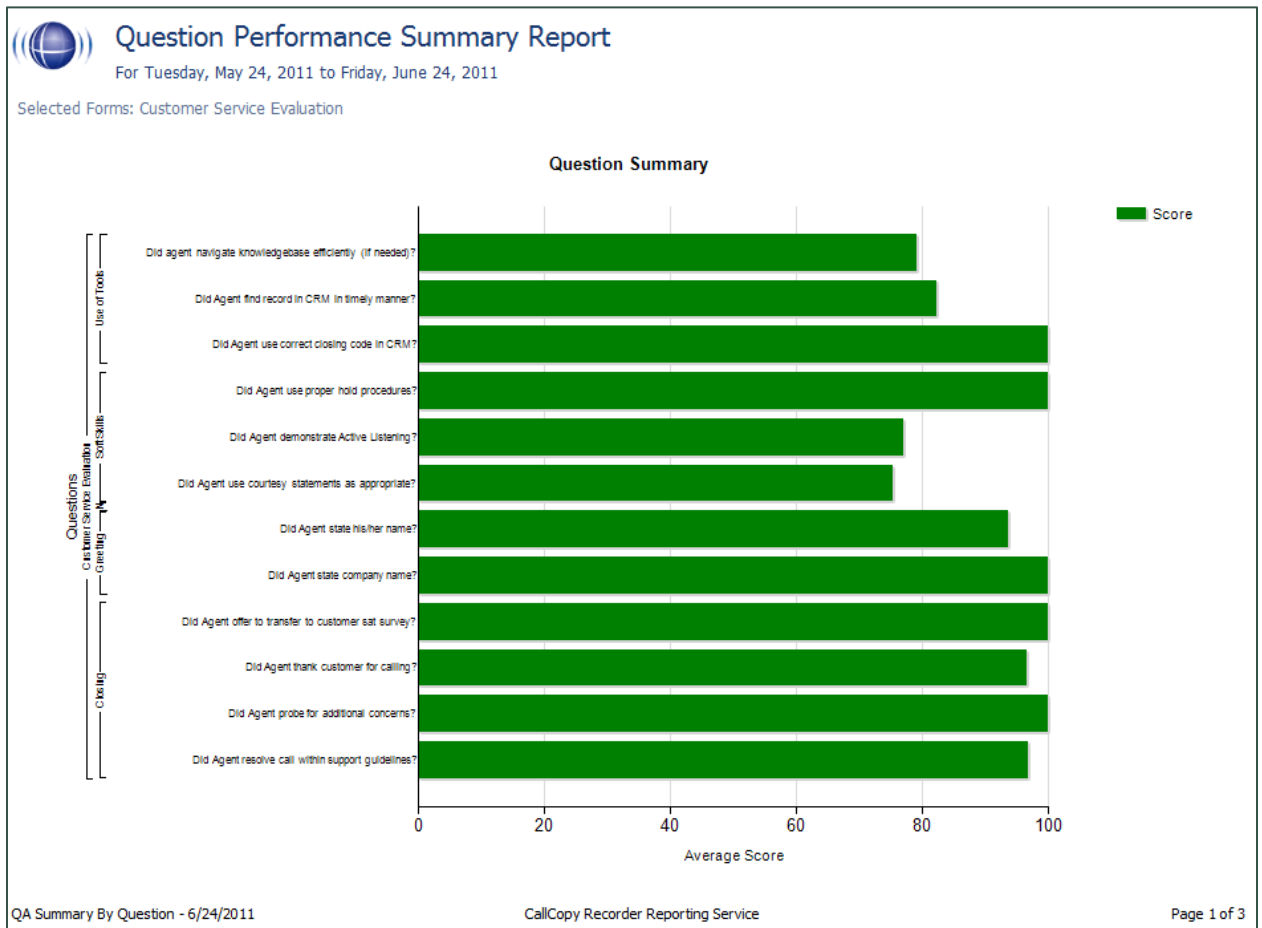
Active: Groups:
Calibration
ClientABC
ClientXYZ


Forms:
Customer Service Evaluation
Sales Evaluation

Agents:
VERONICA ALVAREZ
URSULA AVERY
TRACY BLACKBURN

Users:
Administrator
Barry Knack
Bob Smith

Report Type:



 Question Performance Summary Report For Monday, January 24, 2011 to Thursday, February 24, 2011				
Form: Sales Evaluation		660 Forms Scored		Grade: 88.8%
Section: Greeting				Grade: 98%
Did Agent use branded greeting?		Auto-Fail	Value	Grade: 97.0%
Yes	640 (97%)	None	10.00 of 10.00	
No	20 (3%)	Section	0.00 of 10.00	
Did the Agent state his/her name?		Auto-Fail	Value	Grade: 100.0%
Yes	637 (97%)	None	10.00 of 10.00	
No	23 (3%)	Section	0.00 of 10.00	
Did the agent verify the promo code?		Auto-Fail	Value	Grade: 96.5%
Yes	637 (97%)	None	20.00 of 20.00	
No	23 (3%)	Form	0.00 of 20.00	
Section: Sales Skills				Grade: 77%
Was sale closed?		Auto-Fail	Value	Grade: 76.7%
Yes	506 (77%)	None	10.00 of 0.00	
No	154 (23%)	None	0.00 of 0.00	
What objections were given?		Auto-Fail	Value	Grade: N/A
Price	401 (61%)	None	0.00 of 0.00	
Delivery time	20 (3%)	None	0.00 of 0.00	
Item not available	134 (20%)	None	0.00 of 0.00	
No objections given	105 (16%)	None	0.00 of 0.00	
How many rebuttals were used?		Auto-Fail	Value	Grade: N/A
None	216 (33%)	None	0.00 of 0.00	
1	20 (3%)	None	0.00 of 0.00	
2	424 (64%)	None	0.00 of 0.00	
Notes / Tips		Auto-Fail	Value	Grade: N/A
	660 (100%)	None	N/A	
Section: Documentation				Grade: 80%
Were notes concise and professional?		Auto-Fail	Value	Grade: 67.7%
Excellent	215 (33%)	None	10.00 of 10.00	
Very Good	23 (3%)	None	7.00 of 10.00	
Good	399 (60%)	None	5.00 of 10.00	
Fair	23 (3%)	None	3.00 of 10.00	
Was proper closing code used?		Auto-Fail	Value	Grade: 87.6%
Yes	578 (88%)	None	15.00 of 15.00	
No	82 (12%)	Section	0.00 of 15.00	

QA Summary by Section

This report displays QA performance on a form's sections over a period of time. You can drill down into the report for additional details.

QA Summary By Section Back Generate Report

Start Date: End Date: Date Type:

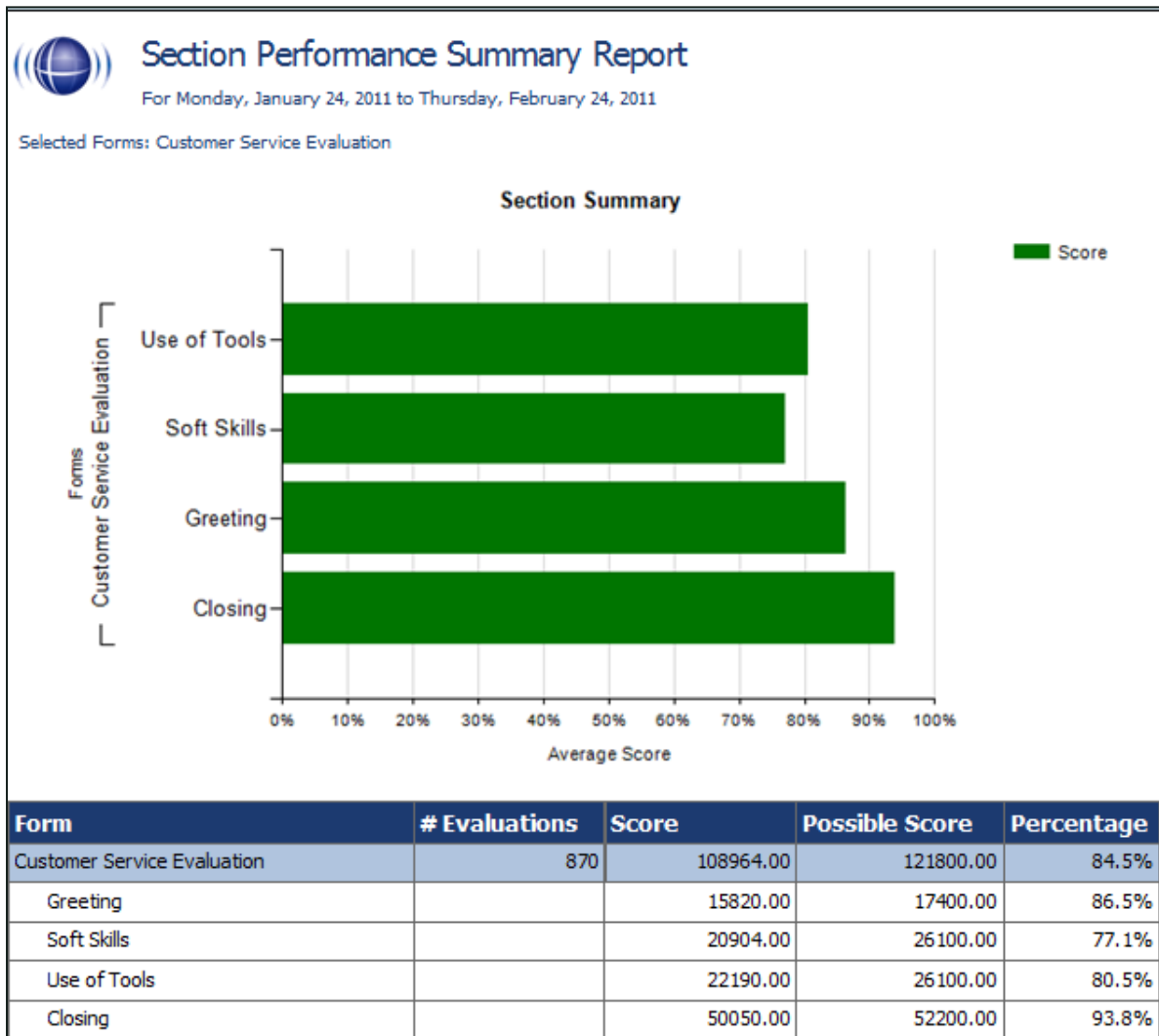
Active: Groups:
Calibration
ClientABC
ClientXYZ

Agents:
VERONICA ALVAREZ
URSULA AVERY
TRACY BLACKBURN

Users:
Administrator
Barry Knack
Bob Smith

Forms:
Customer Service Evaluation
Sales Evaluation

Report Type:



Quality Assurance Detail

This report shows individual responses to each question in a completed QA evaluation, based on the Call ID. The specific call that was graded for the evaluation can be played back by clicking on the Call ID hyperlink. This hyperlink functionality will not work in exported versions of the report.

Quality Assurance Detail Back Generate Report

Start Date: End Date: Date Type:

Agent: Evaluator: Form:

Active: Group: Question:

Response:

Quality Assurance Detail			
Agent: ALVAREZ, VERONICA			
Form Name	Call ID	Evaluated By	Complete Date
Sales Evaluation	1103	Administrator	2/23/2011
Section Name: Greeting			
Question	Evaluation	Score	
Did Agent use branded greeting?	Yes	10.00 of 10.00 (100.0%)	
Did the Agent state his/her name?	Yes	10.00 of 10.00 (100.0%)	
Did the agent verify the promo code?	Yes	20.00 of 20.00 (100.0%)	
Subtotal:		40.00 of 40.00 (100%)	
Section Name: Sales Skills			
Question	Evaluation	Score	
Was sale closed?	Yes	10.00 of 10.00 (100.0%)	
What objections were given?	Price	N/A	
How many rebuttals were used?	2	N/A	
Notes / Tips	Not bad, but we will need to work on your documentation.	N/A	
Subtotal:		10.00 of 10.00 (100%)	
Section Name: Documentation			
Question	Evaluation	Score	
Was proper closing code used?	Yes	15.00 of 15.00 (100.0%)	
Were notes concise and professional?	Good	5.00 of 10.00 (50.0%)	
Subtotal:		20.00 of 25.00 (80%)	
Total:		70.00 of 75.00 (93%)	

Weighted QA Group Periodical Trending Report

This report displays a group by group comparison of quality results at the section level of a selected form over a period of time. This time period begins with the date or period selected and looks backward over the specified number of periods. The reporting period can be daily, weekly, monthly, quarterly or yearly. In the example shown here, the report includes the six months from September, 2010 through February, 2011. The data is broken down section by section.

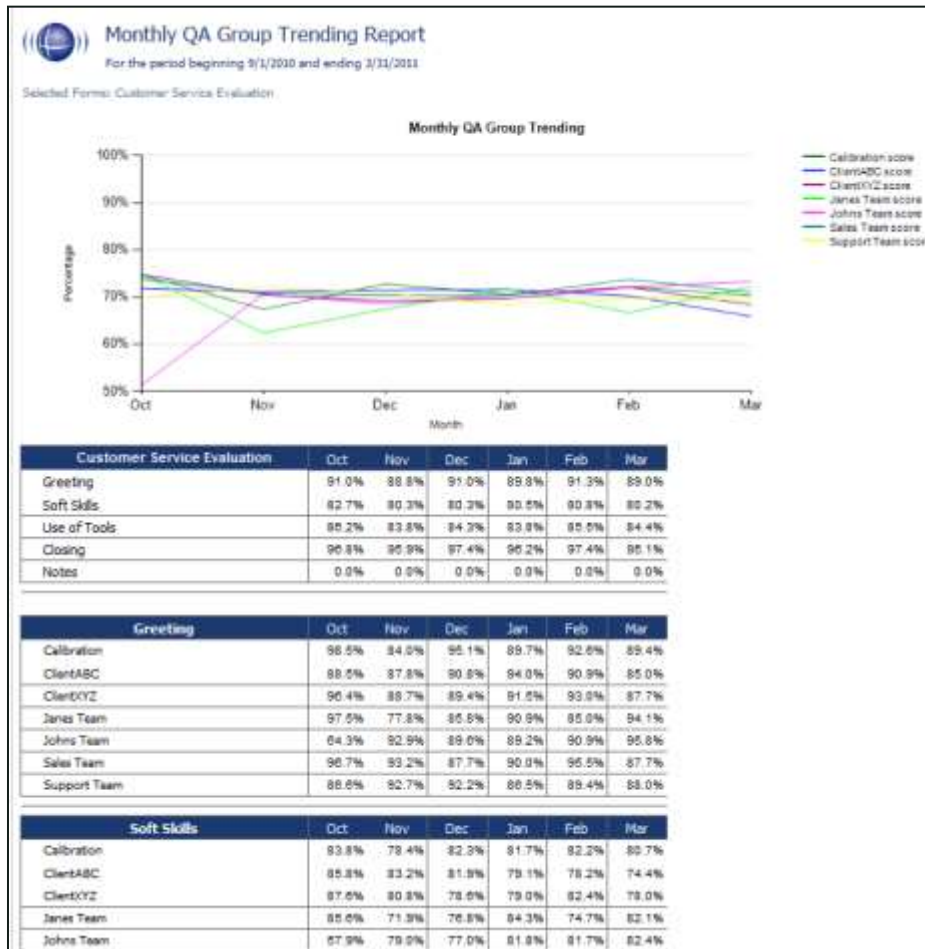
Weighted QA Group Periodical Trending Report Back Generate Report

Report Type: Monthly Year: 2011 Period Name: June

Periods: 6 Active: Active Groups: All Calibration ClientABC ClientXYZ

Forms: All Customer Service Evaluation Sales Evaluation Agents: All LAWANDA ANTHONY JEFFERY AYALA WHITNEY BARRETT Evaluators: All Administrator Bob Smith calcopy

Date Type: Evaluation Date



Ad Hoc Reports

Introduction

Ad hoc reporting enables users to analyze data and create custom, reusable reports. Users control what data is included in a report and how that data appears. Up to ten users can simultaneously use the ad hoc reporting feature in Discover.

Benefits of this feature include:

- Insight into previously unknown trends and relationships between processes, resources, and other data sources via data analysis.
- More useful reports customized to a user's data and information requirements.
- Flexibility to revise reports as data and needs change.

The default web.config setting limits the number of data rows returned by any ad hoc report to 30,000. This can be configured by your Uptivity Installation Team or after installation by Uptivity Support. A warning message is displayed when results exceed this limit. There is also a 30-second time-out in the report builder. These safeguards prevent users from generating reports that would bog down the system when requesting large amounts of data. If the retrieved information is incomplete, redefine the search criteria or try redesigning the report. There is no time-out presently associated with rendering the report.

Permissions

Users must have the "Allow Discover Ad Hoc Reporting" and/or "Allow Clarity Ad Hoc Reporting" permissions to use this functionality. These permissions are detailed in the "Permissions" section of the *Discover by Uptivity Administration Manual*.

For ad hoc reports, group-level permissions are not applied, meaning that results will show all data relevant to the query regardless of the permissions of the logged-in user. With standard predefined printable reports, however, such permissions are applied. This difference is by design as the typical ad hoc user would be a report administrator or a one of a select group of users (i.e., middle management), not a standard supervisor or QA analyst.

Working With Ad Hoc Reports

The **Ad Hoc Report Builder** collates data that can be used to create multiple instances of a report using different report criteria values (e.g., date ranges). It can be used to generate any of the existing Uptivity reports with specific items added or removed. The end results are:

- A collection of RDL/HTML data that defines the report columns, layout, and report criteria parameters.
- Report criteria values data for the report.

The procedure for creating an ad hoc report is the same for each report category. For example, a call recording ad hoc report is created using the same steps as those for creating a QA ad hoc report.

To access **Ad Hoc Reports** in Discover, click the **Reporting** tab. Select **Ad Hoc Reports** from the menus on the left, and then select the category of report.

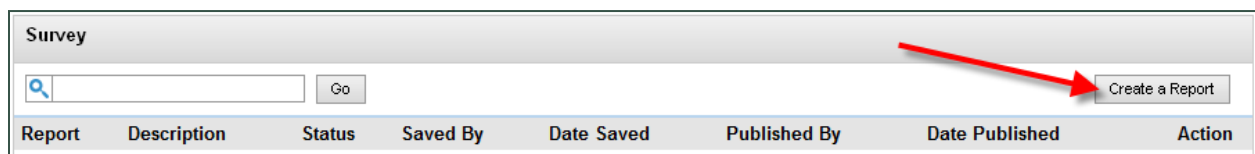
To access **Ad Hoc Reports** in Clarity, click the **Reporting** tab and then the **Ad Hoc** button. Select the category of report from the drop-down menu.

Only report types to which the user has permissions will be displayed. To create a new report, see [Create a New Ad Hoc Report](#). To edit an existing report, see [Edit Existing Ad Hoc Reports](#).

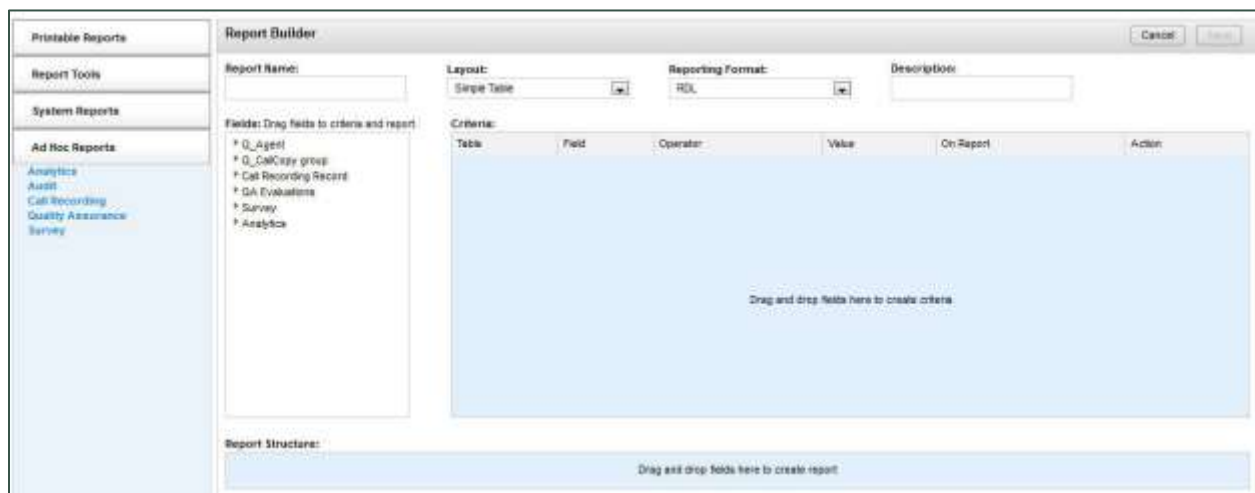
Create a New Ad Hoc Report

To create a new report:

1. Access the desired category of reports in Discover or Clarity as described above, then click on **Create a Report** in the upper right corner.



2. The **Report Builder** opens. This is the core of ad hoc reporting, and allows you to specify a report's custom criteria, display elements, format elements, and layout. These items may differ depending on the report category and layout selected.



3. Enter a name for the report as you want it to be displayed in the listing of available reports. Enter a description (optional) of up to 100 characters.

4. Choose a Layout: **Simple Table**, **Summary Table** or **Matrix Table**.

Simple Table: allows for creation of basic, list-style reports. A single row of fields are displayed in the Structure area. Columns can be rearranged by dragging the fields left and right. There are no charts supported with this layout.

Report Structure:

Agent Name CallCopy Group Total Form Possibl... Total Actual Score

Agent Name	CallCopy Group	Total Form Possible Score	Total Actual Score
Ayala, Daniel	Legends Team	125.00	85.00
Ayala, Daniel	Legends Team	100.00	85.00
Bern, Neil	Legends Team	100.00	75.00
Brookar, Anders	Legends Team	100.00	85.00
Chenier, Roy	Legends Team	100.00	30.00
Coccia, Sheryl	Legends Team	100.00	80.00
Cutting, Pietro	Legends Team	100.00	55.00
Dimetri, Kevin	Legends Team	100.00	95.00
Fearnley, Henry	Legends Team	100.00	85.00
Hall, Zach	Legends Team	100.00	90.00

Summary Table: allows for creation of more advanced reports with nested, collapsible subcategories/groupings. A grid of fields is displayed in the Structure area. Column fields can be dragged left and right to rearrange. Rows can be dragged up and down to regroup data. Lower fields are nested within higher fields. Bar and pie charts are supported with this layout.

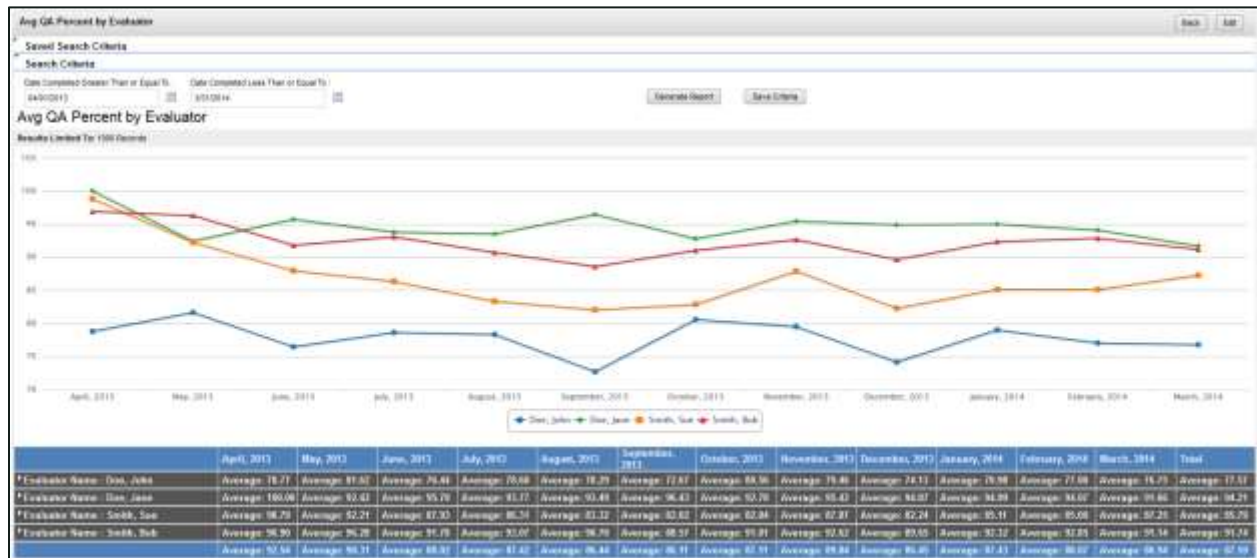
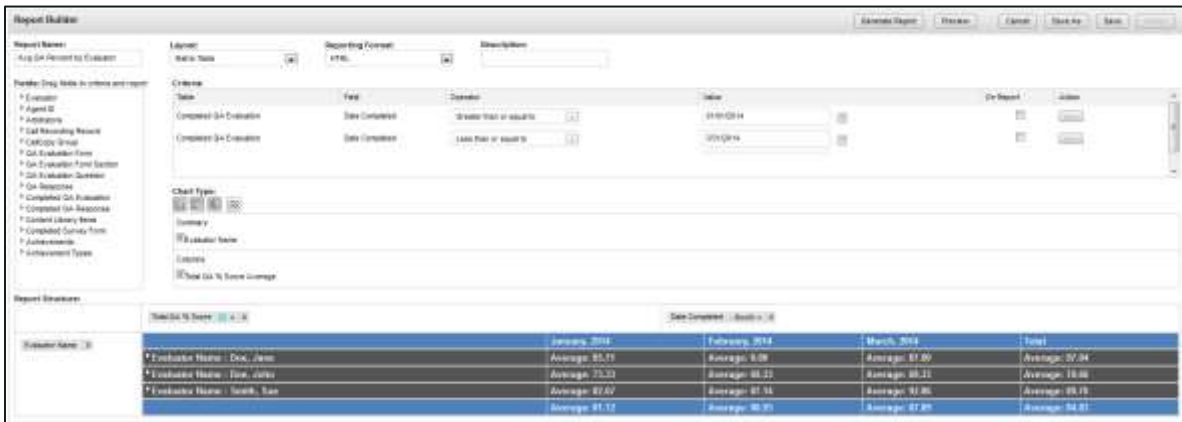
Report Structure:

Agent Name Agent Status

CallCopy Group

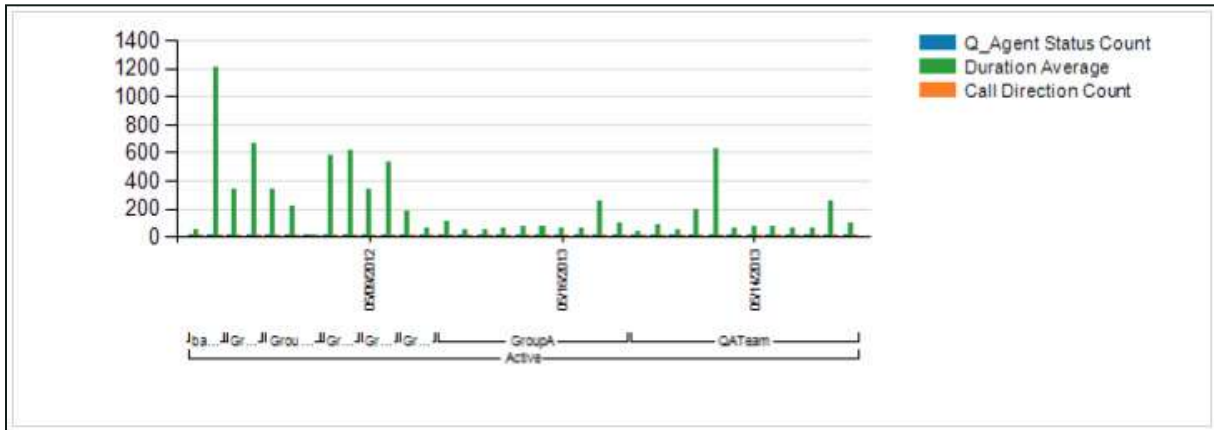
Agent Name	Agent Status
CallCopy Group : Legends Team	
Coccia, Sheryl	Active
Cutting, Pietro	Active
Brookar, Anders	Active
Dimetri, Kevin	Active
Bern, Neil	Active
Hall, Zach	Active
Ayala, Daniel	Active
Fearnley, Henry	Active
Chenier, Roy	Active

Matrix Table: allows for creation of sophisticated reports that measure one or more pieces of information across a period of time. In the Structure area, fields controlling the information to be measured and the time range are displayed in the Columns area, and are limited to one field in each area per report. Fields that control grouping of that information are displayed in the Rows area. Multiple fields can be dragged, dropped and rearranged here to provide for different logical groupings of the information. Bar, pie and line charts are supported with this layout. Keep in mind that line charts illustrating large data sets may become difficult to read and use.

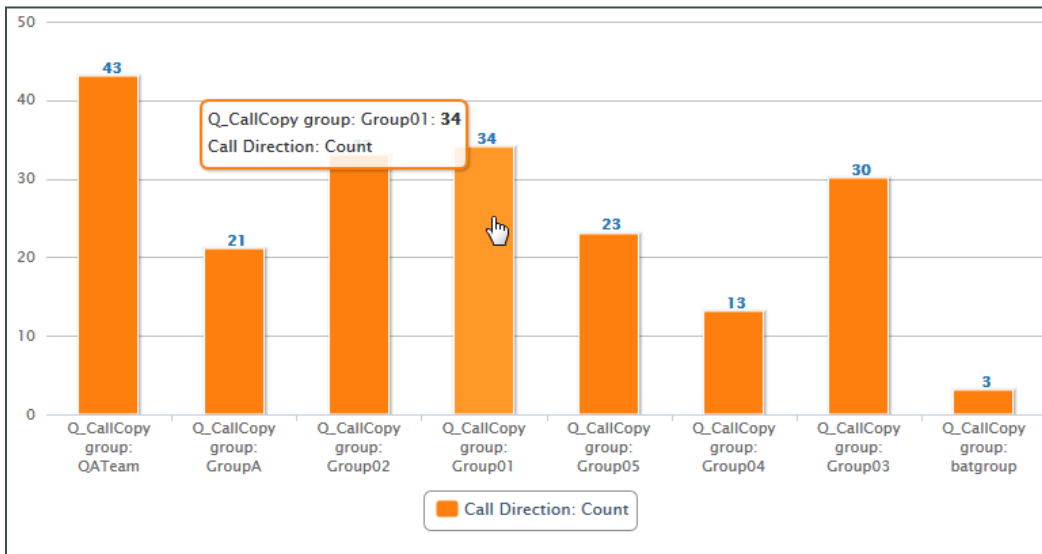


- Choose a Reporting Format: **RDL** or **HTML**. The format affects display and interactivity of charts.

RDL works with Microsoft SQL Reporting Services and offers export formats of PDF, Microsoft Word, or Microsoft Excel files. Charts are simply laid out, displaying all the information in a non-interactive way. Large reports with pagination can be created. Categories and groupings in RDL reports are expanded by default.



HTML charts are interactive, allowing information to be displayed on mouse-over. Clicking on bars within the chart allows you to drill down into subcategories and see more detailed results. However, this format cannot be exported, does not support pagination, and is limited to displaying only 1000 results. HTML works best as a basic data preview, or for reports that will only be viewed online. Categories and groupings in HTML reports are collapsed by default.



6. The **Fields** area contains all relevant data types for the given report category, and includes any custom field names from the Discover **Terminology** page. For details, see [Discover Report Types](#).

Notes

- Changes to **Terminology** page settings will not appear in the ad hoc reporting pages immediately. The Discover web application pool in IIS must be recycled in order for the changes to appear.
- User status and agent status indicate the same thing – whether the user is active or inactive/deleted. Agent Status presently does not indicate whether an agent is, was, or has ever been an agent.
- For reporting and display purposes, Discover combines an agent's first and last names into a single field with the default name **Agent**. Older versions of Discover displayed **Agent First Name** and **Agent Last Name** separately. Reports built in these older versions will still display in this way, and these field labels can still be viewed in the **Report Structure** area on these reports. However, only the combined **Agent** field can be used in new reports. In addition, if the **Agent First Name** or **Agent Last Name** label is deleted from the **Report Structure** area, there is no way to get it back.

Ad Hoc Reports

Drag the desired fields into the **Report Structure** area. This area will look different depending on the report layout selected. Columns represent what will be X-axis labels and rows represent Y-axis labels on charts that accompany the resulting report. Fields cannot be duplicated within the row or column areas. However, the same field may be used to create both a row and a column if appropriate.

The screenshot shows the 'Report Builder' window with the following sections:

- Report Name:** A text input field.
- Layout:** A dropdown menu set to 'Summary Table'.
- Reporting Format:** A dropdown menu set to 'RDL'.
- Description:** A text input field.
- Fields:** A list of fields to be dragged into criteria and report, including:
 - Evaluator
 - Evaluator Name
 - Evaluator Status
 - Q_Agent
 - Arbitrators
 - Call Recording Record
 - Recording ID
 - Q_ANI
 - Q_DNIS
 - Q_Voice Port
 - Q_Device Alias
 - Q_CallCopy group
 - QA Evaluation Form
 - QA Evaluation Form Section
 - QA Evaluation Question
- Criteria:** A table with columns: Table, Field, Operator, Value, On Report, Action. The main area contains the text 'Drag and drop fields here to create criteria'.
- Chart Type:** A section with icons for different chart types and a 'Summary' label.
- Report Structure:** A table with two main areas: 'Drag and drop fields here to create columns' and 'Drag and drop fields here to create rows'.

- The data for selected fields appears in the **Report Preview** area. To remove a field, click the X on the field label. Click on the downward arrow on a **Column** field for additional options relevant to the data type, including **Column Average**, **Column Count**, and **Column Sum**.

The results are totaled per summary group, and per total of all groups at the bottom. This data is also used to generate charts.

The close-up shows the 'Report Structure' dropdown menu for the 'Duration' field. The options are:

- Duration (with a close button 'X')
- Column Average
- Column Count
- Column Sum
- None

Report Structure:

Agent Name	Agent Status	Duration
* Agent Status : Active		
Eddy, Cheryl7547	Active	00:00:32
Eddy, Cheryl7547	Active	00:00:45
Eddy, Cheryl7547	Active	00:01:08
Eddy, Cheryl7547	Active	00:00:45
Eddy, Cheryl7547	Active	00:00:27
Eddy, Cheryl7547	Active	00:00:40
Eddy, Cheryl7547	Active	00:00:22
Byrd, Stan	Active	00:00:44
Count: 8		Average: 00:00:39
* Agent Status : Inactive		
agent5_last50, agent2_first50	Inactive	00:00:11
agent5_last, agent5_first	Inactive	00:01:03
Count: 2		Average: 00:00:37
Count: 10		Average: 00:00:39

8. Fields can be rearranged by dragging them to a different location within the same area. Fields cannot be moved between column and row areas in summary or matrix table reports – they must be removed and re-added. The **Report Preview** area will update based on changes in the **Structure** area.
9. To filter the information displayed in the report, drag the desired fields to the **Criteria** area. A drop-down menu of relevant operators and a text entry field for the operator value or date selector will appear for each data field. Operators vary depending on the field selected, but may include:
 - Less than
 - Greater than
 - Equal to
 - Not equal to
 - Less than or equal to
 - Greater than or equal to
 - Starts with
 - Ends with
 - Contains
 - Does not contain
 - In
 - Not in

Select an operator and enter a value. Acceptable values depend on the type of data in the selected field (agent name, date, record ID, etc.). Due to the limited number of possible values, certain data types like Discover Groups or Call Direction will have a drop-down list of acceptable values rather than an open-entry text box.

Report Name:

Layout: Reporting Format: Description:

Fields: Drag fields to criteria and report.

- Agent
 - Agent Name
 - Agent Status
- CallCopy Group
- Call Recording Record
 - Recording ID
 - CallerID
 - Dialed Number
 - Device ID
 - Agent ID
 - Recording Time
 - Call Direction
 - Duration

Criteria:

Table	Field	Operator	Value	On Report	Action
Call Recording Record	Call Direction	Equal to	Inbound	<input type="checkbox"/>	Save Delete

Chart Type:

Summary

Agent Status

Columns

Duration Average Agent Status Count

Report Structure:

Agent Name x Agent Status x Duration x

Agent Name	Agent Status	Duration
Agent Status : Inactive		
agent3_last58, agent3_first58	Inactive	00:03:36
agent9_last58, agent9_first58	Inactive	00:13:19
agent7_last58, agent7_first58	Inactive	00:00:41

- The **On Report** check box allows you to choose whether a criterion is shown in the **Report Criteria** section of the rendered/printed report. Select this as needed.
- For each criterion, click **Save** to apply changes or update the report preview. Click **Delete** to remove a criterion.
- If you use summary or matrix table layouts, options for **Chart Type** are shown under the Criteria area. Both layouts support vertical/horizontal bar and pie charts; matrix table layouts also support line graphs. Only icons for charts supported by the chosen report type will be displayed. Available icons appear in gray; an icon changes to color when selected.

Beneath the icons are fields that can be chosen for display on the chart, depending on the report type and data. For summary and matrix table reports, fields in the rows area appear under **Summary**, while choosing **Column Average**, **Count**, or **Sum** for columns displays those values under **Columns**. For vertical and horizontal bar graphs, multiple data types on both columns and rows can be selected for display. For pie charts and line graphs, only one entity in each of the **Summary** and **Column** areas may be selected.

Report Builder [Preview] [Cancel] [Save]

Report Name:

Layout: Summary Table Reporting Format: RDL Description:

Fields: Drag fields to criteria and report.

- Agent
 - Agent Name
 - Agent Status
- CallCopy Group
- Call Recording Record
 - Recording ID
 - CallerID
 - Dialed Number
 - Device ID
 - Agent ID
 - Recording Time
 - Call Direction
 - Duration

Criteria:

Table	Field	Operator	Value	On Report	Action
Call Recording Record	Call Direction	Equal to	Inbound	<input type="checkbox"/>	<input type="button" value="Add"/> <input type="button" value="Delete"/>

Chart Type:

Summary

Agent Status

Columns

Duration Average Agent Status Count

Report Structure:

Agent Name X Agent Status X Duration X

Agent Name	Agent Status	Duration
* Agent Status : Inactive		
	Count: 6	Average: 00:05:58
* Agent Status : Active		
	Count: 4	Average: 00:03:36
	Count: 10	Average: 00:05:01

13. Click **Preview** to see in a popup how the report will appear when rendered.

Ad Hoc Reports

- If a chart was created with the report, it will appear in the **Preview** as well. HTML reports will allow interactive drill-down exploration of data by clicking on bars in the chart. If there are multiple detail levels, clicking through will loop back to the top level.



- Click **Cancel** to return to editing the report in the **Report Builder**.
- When finished creating the report, click **Save**. A dialog box opens, allowing you to change the name and/or description of the report. You can also choose whether to save, as public or private, the criteria used to build the report. The criteria are automatically saved with the report, but this option allows you to save criteria that might be used to generate other reports in the future. Click **Save**. When the dialog box closes, additional actions will be available at the top of the **Report Builder** screen. These actions are discussed in more detail in the [Edit Existing Ad Hoc Reports](#) section.
- If you wish to discard changes to the report, click **Cancel** instead. The system will return to the main ad hoc reporting page.

Edit Existing Ad Hoc Reports

Editing a saved ad hoc report can be used to:

- Change a report that is being developed and reviewed.
- Change a report that has been approved and used but requires changes to meet new or different information needs.
- Create a new report from an existing report.
- Publish a saved report, which stores a copy of the report on the Report Server and allows the report to be rendered on that server if desired. This can sometimes be beneficial in environments where the Report Server and the Uptivity applications are on different physical or virtual machines.

To edit an ad hoc report:

1. Access the desired category of reports in Discover or Clarity as described earlier. You will see a list of reports for that category, sorted alphabetically by report name. Visible content has been either created by the logged-in user and set as Public or Private, or created by other users and shared as Public. The **Saved By** column displays the name of the last user to save changes to the report.
2. Specific reports can be located by entering a search word or phrase and clicking **Go**, or by manually scrolling/paging through the list. Saved reports can be used as drafts for creating new reports or as workspace for analyzing data.

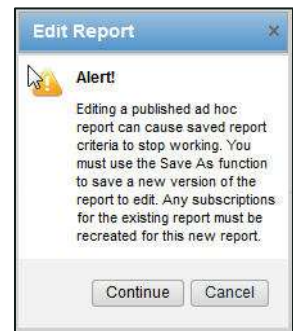
Report	Description	Status	Saved By	Date Saved	Published By	Date Published	Action
Agent List by Group		Saved	George, Gina	11/4/2013	NA	NA	View Delete
Hold Time Report		Saved	Ward, Rae	11/5/2013	NA	NA	View Delete
Outbound Calls by Agent		Saved	George, Gina	11/5/2013	NA	NA	View Delete
QA vs Survey Score Report		Saved	George, Gina	11/5/2013	NA	NA	View Delete
Survey Scores by Agent		Saved	Ward, Rae	11/5/2013	NA	NA	View Delete

3. Locate the report you wish to edit. Double-click on the report or click the **View** button at the right end of the report's row in the list. Saved reports can also be removed from the system here by clicking the report's **Delete** button. Deleting a report removes the saved report and all saved search criteria for the report.
4. Click **Edit**. A pop-up window will appear, warning you that editing an existing report can cause saved report criteria to stop working. Consider using the **Save As** function to save a new version of the report for editing. Click **Continue** to proceed or **Cancel** to return to the listing of available reports.

5. The Report Builder will open, with buttons representing six possible actions at the top of the screen. Make any desired changes to the report, then select the appropriate action:
- **Generate Report** returns you to the main view for that report. Click **Generate Report** again to see the report as it will appear when rendered.
 - **Preview** launches a pop-up window showing the report as it will appear when rendered.
 - **Cancel** allows you to leave this area and return to the main ad hoc reporting screen.
 - **Save As** opens the Save Report dialog box, allowing you to retain the original report and save a new report in a separate file. The report name must be unique. The dialog box presents options for saving report criteria as public or private. Click **Save** to commit changes and return to the **Report Builder** window.
 - **Save** updates the existing report with any changes you've made. If the name is changed, clicking Save updates the existing report with the new name. The option to save criteria for the report is not presented. After saving, click **Cancel** to return to the main ad hoc reporting screen.
 - **Publish** opens the Publish Report dialog box. If you want to change the name of the published report, you may do so here. If there is already a published report with your chosen name, you will be prompted to choose a unique report name. Click **OK** when ready to accept the name, or **Cancel** to return to the Report Builder. After publishing, click **Cancel** to return to the main ad hoc reporting screen.

Note

Once a report has been published, it can no longer be edited. However, it can be used as the basis for a new report. Clicking the Edit button on a published report launches a pop-up warning as shown here.



Generate an Ad Hoc Report

Once an ad hoc report has been saved, it can be generated in multiple iterations using different search parameters (e.g., date ranges, user names).

To generate an ad hoc report:

1. From the **Report Builder**, click **Generate Report**. Opening an existing report from the listing of available reports will automatically take you to the **Generate Report** page.

2. In the **Search Criteria** section, you can modify the filtering criteria that have been saved with the report. To add new criteria or change specific operators, the report must be manually edited and resaved. For details, see [Edit Existing Ad Hoc Reports](#).
3. To make your criteria selections available for future use, click **Save Criteria**. A dialog box will appear, allowing you to name the criteria and set it for public or private use. Make your choices and click **Save**. Your criteria options will now be available to you in the **Saved Search Criteria** section, along with any criteria you may have saved previously and any criteria saved as public by other users. Double-click on saved search criteria to apply those selections to this report. Both the **Search Criteria** and **Saved Search Criteria** sections can be expanded or collapsed as needed.
4. Click **Generate Report** to display the results on the screen with the report navigation and feature bar. For details, see [Printable-Report Functions](#). Columns in simple and summary layout reports can be sorted by toggling the ascending/descending arrows in the column headers.

Note As with **Printable Reports**, some ad hoc reports may display clickable links to call recording files or other information. These links will not work in exported versions of the report.

Discover Report Types

Analytics Reports

The following entities and fields are available for use in **Analytics** ad hoc reports. For more information, refer to the *Uptivity Speech Analytics Administration Guide*. If your system uses custom field names in the Web Portal, those names will be shown instead of default names listed here. For more information, see the *Discover by Uptivity Administration Manual's* "Terminology" section.

Note If you want to create a single report that includes both Audio Information and Analytic Tag data, use the attributes in the Derived Audio Tags group.

Analytic Tag Group

- **Tag Group ID:** This attribute was deprecated in Discover v5.4.
- **Tag Group Name:** Enter search criteria in the open-entry text box.

Analytic Tag

- **Tag Name:** Enter search criteria in the open-entry text box.
- **Effective Start Date:** Click on calendar icon to enter search criteria using date selector.
- **Effective End Date:** Click on calendar icon to enter search criteria using date selector.
- **Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list: All, Active, Inactive.
- **Criteria Name:** Enter search criteria in the open-entry text box.

Analytic Speech Tag

- **Phrases:** Enter search criteria in the open-entry text box.
- **Target Confidence:** Enter search criteria in the open-entry text box; numeric values up to two decimal places (e.g. 75.36).

Analytic Recording Tags

- **Tag Text:** Enter search criteria in the open-entry text box.
- **Seconds from Start:** Indicates when a text tag starts. Enter search criteria in the open-entry text box; numeric values only.
- **Seconds from End:** Indicates when a text tag ends. Enter search criteria in the open-entry text box; numeric values only.
- **Audio Channel:** Some call recording integrations provide audio in separate channel streams, and we can distinguish whether the speaker is the agent or caller. Generally speaking, Avaya/Nortel, Cisco, and most VoIP systems provide separate streams, but Avaya DMCC and ShoreTel do not. Ask your system administrator if your system supports this functionality. If it does, the agent is represented by channel 0 and the caller is indicated by channel 1. Enter search criteria in the open-entry text box; numeric values only.

Note The "caller" stream includes all speakers other than the agent (e.g., in a conference call scenario).

- **Confidence:** Enter search criteria in the open-entry text box; numeric values up to two decimal places (e.g. 75.36).
- **Date Recorded:** Click on calendar icon to enter search criteria using date selector.
- **Date Tagged:** Click on calendar icon to enter search criteria using date selector.

Call Recording

- **Call Recording ID:** Enter search criteria in the open-entry text box; numeric values only.
- **Caller ID:** This is an inbound caller's number (ANI). Enter search criteria in the open-entry text box.
- **Called Number:** This is the outbound called number (DNIS). Enter search criteria in the open-entry text box.
- **Device/Port ID:** This is the physical device. Enter search criteria in the open-entry text box.
- **Agent Number (Device Alias):** This number is always associated with the agent, no matter what physical device he/she uses. Enter search criteria in the open-entry text box.
- **Recording Time:** This is the date/time the recording occurred. Click on calendar icon to enter search criteria using date selector. Can be used as a Date field in Matrix Table reports.
- **Call Direction:** Reports display as Inbound or Outbound. Select search criteria from the drop-down list: Inbound, Outbound, Inbound or Outbound, Unknown.
- **Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Group:** This is the ACD/Switch Group. Enter search criteria in the open-entry text box.
- **ACD Gate:** This is populated from the ACD with information known by various names (Gate, VDN, Queue, Call Type, etc.). Enter search criteria in the open-entry text box.

Agent

- **Agent Name:** Reports display as Last Name, First Name. Enter search criteria in the open-entry text box.
- **Phone ID:** This is the physical device. Enter search criteria in the open-entry text box.
- **Agent Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list: All, Active, Inactive.
- **Group:** This is the Discover Group name. Select search criteria from the drop-down list of Discover Groups.
- **Group Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list: All, Active, Inactive.

Audio Information

- **Audio Info Type:** Reports display as Silence, Crosstalk. Select search criteria from the drop-down list: All, Crosstalk, Silence.
- **Audio Info Start:** Indicates when an audio information type starts. Enter search criteria in the open-entry text box as number of seconds; whole number values only.
- **Audio Info Stop:** Indicates when an audio information type stops. Enter search criteria in the open-entry text box as number of seconds; whole number values only.

Derived Audio Tags

- **Tag Type:** Displays either the audio information type (e.g. crosstalk, silence, etc.) or the name of an analytic tag. Enter search criteria in the open-entry text box.
- **Tag:** Displays the text of an analytic tag. Enter search criteria in the open-entry text box.
- **Start Seconds:** Indicates the number of seconds from the start of the recording at which the tag begins. Enter search criteria in the open-entry text box as number of seconds; whole number values only.
- **End Seconds:** Indicates the number of seconds from the start of the recording at which the tag ends. Enter search criteria in the open-entry text box as number of seconds; whole number values only.

Audit Reports

The following entities and fields are available for use in **Audit** ad hoc reports. If your system uses custom field names in the Web Portal, those names will be shown instead of default names listed here. For more information, see the *Discover by Uptivity Administration Manual's* "Terminology" section.

Notes

- If a **Role** is not assigned to any **Users**, it will not appear in a report showing user/role assignments.
- Auditing is controlled by the system; users cannot change what is audited.
- Audit records are written to the database and do not expire. They remain available for reporting for the life of your system (barring any database issues that result in data loss).

User

- **Last, First Name:** Enter search criteria in the open-entry text box (e.g. Pond, Amelia).
- **Username:** Enter search criteria in the open-entry text box in the format used in your system (e.g. apond).
- **Superuser:** Reports display as Yes or No. Select search criteria from the drop-down list: All, Yes, No.
- **Agent:** Indicates whether individual is or has ever been an agent (i.e. recorded). Reports display as Never, Current or Former. Select search criteria from the drop-down list: All, Never, Current, Former.
- **User Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list: All, Active, Inactive.
- **Login Attempts:** Enter search criteria in the open-entry text box; numeric values only.
- **Locked:** Reports display as Yes/No. Select search criteria from the drop-down list: All, Yes, No.
- **User – Created By:** Enter search criteria in the open-entry text box.
- **User - Created On:** Click on calendar icon to enter search criteria using date selector.
- **User - Modified On:** Click on calendar icon to enter search criteria using date selector.
- **User - Modified By:** Enter search criteria in the open-entry text box.

Role

- **Role Name:** Enter search criteria in the open-entry text box.
- **Role - Created On:** Click on calendar icon to enter search criteria using date selector.
- **Role - Created By:** Enter search criteria in the open-entry text box.
- **Role - Modified On:** Click on calendar icon to enter search criteria using date selector.
- **Role - Modified By:** Enter search criteria in the open-entry text box.

Permission

To see a complete list of possible values for either of the fields in this section, drag the **Permission** and/or Type fields to the Report Structure area and click Preview. Some of available values are self-explanatory; others are less so.

In the example below, the values listed under **Permission** refer to the user-defined fields that can be configured in the Terminology section of Web Portal Administration.

The values listed under Type refer to the action that can be taken with those fields. For a more detailed explanation of permissions, refer to the Roles and Permissions sections in the *Discover by Uptivity Administration Manual*.

Permission	Type	Q_CallCopy group
USER2	EDITFIELDS	Group01
USER4	EDITFIELDS	Group01
USER6	EDITFIELDS	Group01
USER8	EDITFIELDS	Group01

- **Permission:** Reports display the permission name as it appears in the database (e.g. AllowQA). Enter search criteria in the open-entry text box.
- **Type:** This provides further information on the permission as it relates to product (e.g. Discover), group, or general function (e.g. EDITFIELDS). Enter search criteria in the open-entry text box.

Group

- **Group:** This is the Discover Group name. Select search criteria from the drop-down list of Discover Groups.
- **Group Status:** Report displays as Active or Inactive. Select search criteria from the drop-down list: All, Active, Inactive.

Audit Trail

- **Audit Event ID:** Enter search criteria in the open-entry text box.
- **Audit Module:** Enter search criteria in the open-entry text box. The module name must be entered as it appears in the database. Drag the **Audit Module** field to the **Report Structure** area and click **Preview** to see a list of possible values.
- **Audit Component:** This is the component or page involved in an event. In the open-entry text box, enter search criteria as either the name of the component (e.g. AuditLog), or as an HTML page (e.g. /Administration/Scheduling/CreateCustomSchedule.aspx)
- **Audit User:** Enter search criteria in the open-entry text box as Last Name, First Name.
- **Audit Time:** Click on calendar icon to enter search criteria using date selector.
- **IP Address:** Enter search criteria in the open-entry text box; values must be in valid IP address format.
- **Numeric Message:** This field stores numbers that let the system identify database records like user or call record IDs, or analytic tags. Enter search criteria in the open entry text box.
- **Message 1:** Enter search criteria in the open-entry text box; see note.
- **Message 2:** Enter search criteria in the open-entry text box; see note.
- **Message 3:** Enter search criteria in the open-entry text box; see note.

Note

Audit messages consist of one to three parts. Each part contains different text. After a list of events is retrieved, review the messages to find which events are useful. Pick the appropriate key words and enter them in the Message Text fields. Determining which words appear in which field involves some trial and error, and it may be helpful to use the Starts with, Ends with, Contains and Does not contain operators when setting up criteria.

Call Recording Reports

The following entities and fields are available for use in **Call Recording** ad hoc reports. If your system uses custom field names in the Web Portal, those names will be shown instead of default names listed here. For more information, see the *Discover by Uptivity Administration Manual's* "Terminology" section.

Note

Users who have permission to view their own calls in the call list will be able to see the QA and Survey scores for those calls, even if they do not have QA or Survey permissions.

Agent ID

- **Agent Name:** Reports display as Last Name, First Name. Enter search criteria in the open-entry text box.
- **Agent Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list: All, Active, Inactive.

Group

- **Group:** This is the Discover Group name. Select search criteria from the drop-down list of Discover Groups.

Call Recording Record

- **Recording ID:** Enter search criteria in the open-entry text box; numeric values only.
- **Caller ID (ANI):** This is an inbound caller's number. Enter search criteria in the open-entry text box.
- **Called Number (DNIS):** This is the outbound called number. Enter search criteria in the open-entry text box.
- **Device/Port ID:** This is the physical device. Enter search criteria in the open-entry text box
- **Agent Number (Device Alias):** This number is always associated with the agent, no matter what physical device he/she uses. Enter search criteria in the open-entry text box
- **Recording Time:** This is the date/time the recording occurred. Click on calendar icon to enter search criteria using date selector.
- **Call Direction:** Reports display as Inbound or Outbound. Select search criteria from the drop-down list: Inbound, Outbound, Inbound or Outbound, Unknown.
- **Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Group:** This is the ACD/Switch Group. Enter search criteria in the open-entry text box.
- **ACD Gate:** This is populated from the ACD with information known by various names (Gate, VDN, Queue, Call Type, etc.). Enter search criteria in the open-entry text box.
- **Total Hold Time:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **User1-15:** These fields may or may not be used in your installation. Names and values of these fields are defined in the Web Portal's **Terminology** page.

Ad Hoc Reports

QA Evaluations

- **Evaluations Completed:** Enter search criteria in the open-entry text box; whole numbers only.
- **QA Score:** Enter search criteria in the open-entry text box; whole numbers only.
- **QA Possible Score:** Enter search criteria in the open-entry text box; whole numbers only.
- **QA % Score:** Reports display scores as percentages, calculated from QA Score/QA Possible Score. Enter search criteria in the open-entry text box; numeric values up to two decimal places (e.g. 75.36).

Survey

- **Survey Score:** Enter search criteria in the open-entry text box; whole numbers only.
- **Survey Possible Score:** Enter search criteria in the open-entry text box; whole numbers only.
- **Survey % Score:** Reports display scores calculated from Survey Score/Survey Possible Score. Enter search criteria in the open-entry text box; numeric values up to two decimal places (e.g. 75.36).

Analytics

- **Analytic Tag:** Enter search criteria in the open-entry text box.

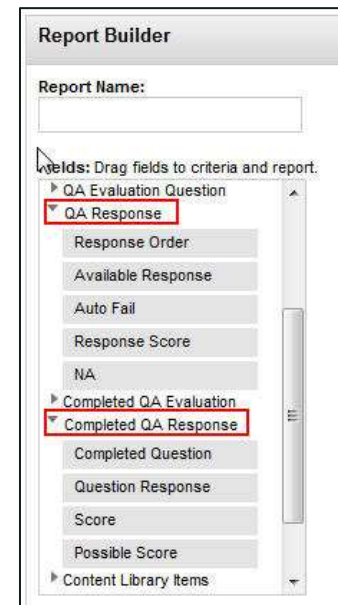
Quality Assurance Reports

Quality Assurance (QA) data available for ad hoc reporting includes both QA Form data and Completed QA data. It is important **NOT** to mix these data types. Mixing them can yield inaccurate, inconsistent or unexpected results. In general, QA reporting can serve two purposes:

- Reporting on available QA Forms (QA Form, Sections, Questions and available responses).
- Reporting on Completed QA Forms, which is what the vast majority of our existing reports provide.

Using a single interface to create reports for both purposes is challenging because this data has different meanings and is linked together depending on context. To help ensure accurate reporting, keep the following in mind when building reports:

- Categories beginning with "QA" are meant to be used when reporting on available QA forms (e.g. a listing of forms that include a specific question).
- Categories beginning with "Completed QA" are meant to be used when reporting on QA evaluations (e.g. a listing of evaluations that received a specific response to a specific question).



The following entities and fields are available for use in **Quality Assurance** ad hoc reports. If your system uses custom field names in the Web Portal, those names will be shown instead of default names listed here. For more information, see the *Discover by Uptivity Administration Manual's* "Terminology" section.

Evaluator

- **Evaluator Name:** Reports display as Last Name, First Name. Enter search criteria in the open-entry text box.
- **Evaluator Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list: All, Active, Inactive.

Agent

- **Agent Name:** Reports display as Last Name, First Name. Enter search criteria in the open-entry text box.
- **Agent Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list: All, Active, Inactive.

Arbitrator

- **Arbitrator Name:** Reports display as Last Name, First Name. Enter search criteria in the open-entry text box.
- **Arbitrator Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list: All, Active, Inactive.

Call Recording Record

- **Recording ID:** Enter search criteria in the open-entry text box; numeric values only.
- **Caller ID (ANI):** Inbound caller number. Enter search criteria in the open-entry text box.
- **Number Called (DNIS):** Outbound called number. Enter search criteria in the open-entry text box.
- **Extension:** Enter search criteria in the open-entry text box.
- **Agent ID:** Enter search criteria in the open-entry text box.

Group

- **Group:** This is the Discover Group name. Select search criteria from the drop-down list of Discover Groups.

QA Evaluation Form

- **Form Name:** Enter search criteria in the open-entry text box.
- **Acknowledgment Required:** Reports display as Yes, No. Select search criteria from the drop-down list: All, Yes, No.
- **Create Date:** Click on calendar icon to enter search criteria using date selector.
- **Status:** Reports display as Active or Inactive. Search criteria values are All, Active, Inactive.
- **Disable Date:** Click on calendar icon to enter search criteria using date selector.

QA Evaluation Form Section

- **Section Order:** Enter search criteria in the open-entry text box; whole numbers only.
- **Section Name:** Enter search criteria in the open-entry text box.

QA Evaluation Question

- **Form Question:** Enter search criteria in the open-entry text box.
- **Question Order:** Enter search criteria in the open-entry text box; whole numbers only.
- **Priority:** Reports display as Normal, Critical. Select search criteria from the drop-down list: All, Normal, Critical.
- **Possible Score:** Enter search criteria in the open-entry text box; numeric values only.

QA Response

- **Response Order:** Enter search criteria in the open-entry text box; whole numbers only.
- **Available Response:** Enter search criteria in the open-entry text box.
- **Auto Fail:** Enter search criteria in the open-entry text box as follows: "0" for no auto-fail, "s" for section auto-fail, or "f" for form auto-fail.
- **Response Score:** Enter search criteria in the open-entry text box; numeric values only.
- **NA:** Reports display as NA. Select search criteria from the drop-down list: All, Yes, No.

Completed QA Evaluation

- **Evaluation ID:** Enter search criteria in the open-entry text box; numeric values only.
- **Date Completed:** Click on calendar icon to enter search criteria using date selector.
- **Total Form Possible Score:** Enter search criteria in the open-entry text box; numeric values only.
- **Total Actual Score:** Enter search criteria in the open-entry text box; numeric values only.
- **Total QA % Score:** Reports display scores calculated from QA Score/QA Possible Score. Enter search criteria in the open-entry text box; numeric values up to two decimal places (e.g. 75.36).
- **Acknowledgment Status:** Reports display as Unacknowledged or Acknowledged. Select search criteria from the drop-down list: All, Acknowledged, Unacknowledged.
- **Notes:** Enter search criteria in the open-entry text box.
- **Score Changes:** This is the number of times an evaluation score has been changed. Enter search criteria in the open-entry text box; whole numbers only.
- **QA Status:** Reports display as Completed, In Progress, Question or Dispute. Select search criteria from the drop-down list t: All, Completed, In Progress, Question, Dispute.
- **Start Date:** This is the date a completed or in-progress evaluation was started. Click on calendar icon to enter search criteria using date selector.
- **QA Active/Deleted:** Reports display as Active or Deleted. Select search criteria from the drop-down list: All, Active, Deleted.
- **Disputed Count:** This is the number of times an agent disputed an evaluation comment or score. Enter search criteria in the open-entry text box; numeric values only.
- **Questioned Count:** This is the number of times an agent questioned an evaluation comment or score. Enter search criteria in the open-entry text box; numeric values only.

Completed QA Response

- **Completed Question:** Enter search criteria in the open-entry text box.
- **Question Response:** Enter search criteria in the open-entry text box.
- **Score:** Enter search criteria in the open-entry text box; numeric values only.
- **Possible Score:** Enter search criteria in the open-entry text box; numeric values only.

Content Library Items

- **Library Item:** Reports can display as related to agents or groups. Enter search criteria in the open-entry text box.
- **Acknowledged Date:** Reports can display this per agent. Click on the calendar icon to enter search criteria using date selector.

Completed Survey Form

Note Survey Form data may be related to a Call Recording ID.

- **Survey Name:** Enter search criteria in the open-entry text box.
- **Status:** Reports display as Not Started, Complete, Incomplete or Taken. Select search criteria from the drop-down list: All, Not Started, Complete, Incomplete, Taken.
- **Completed Survey ID:** Enter search criteria in the open-entry text box; numeric values only.
- **Survey Possible Value:** Enter search criteria in the open-entry text box; numeric values only.
- **Survey Value:** Enter search criteria in the open-entry text box; numeric values only.
- **Survey % Score:** Reports display scores calculated from Survey Score/Survey Possible Score. Enter search criteria in the open-entry text box; numeric values up to two decimal places (e.g. 75.36).

Achievements

- **Achievement ID:** Enter search criteria in the open-entry text box; whole numbers only.
- **Achievement Points:** Enter search criteria in the open-entry text box; whole numbers only from 0-999.
- **Awarded Date:** Click on calendar icon to enter search criteria using date selector.
- **Expiration Date:** Click on calendar icon to enter search criteria using date selector.
- **Achievement Status:** Reports display as Active or Expired. Select search criteria from the drop-down list: All, Active, Expired.

Achievement Types

- **Achievement Name:** Enter search criteria in the open-entry text box.

Survey Reports

The following entities and fields are available for use in **Survey** ad hoc reports. Survey-call record linking must be configured for the agent and call recording data to appear in the database. If your system uses custom field names in the Web Portal, those names will be shown instead of default names listed here. For more information, see the *Discover by Uptivity Administration Manual's* "Terminology" section.

Form

- **Form:** Enter search criteria in the open-entry text box.
- **Form Status:** Reports display Active, Disabled or In Progress. Select search criteria from the drop-down list: All, Active, Disabled, In Progress.
- **Negative Threshold:** Enter search criteria in the open-entry text box; numeric values only.
- **Positive Threshold:** Enter search criteria in the open-entry text box; numeric values only.
- **Section:** Enter search criteria in the open-entry text box.

Question

- **Question:** Enter search criteria in the open-entry text box.
- **Question Type:** Reports display Present Question and Wait for Result, Collect Customer Information, Collect Digits, End Survey, Transfer, or Skip. Select search criteria from the drop-down list: All, Present Question and Wait for Result, Collect Customer Information, Collect Digits, End Survey, Transfer, Skip.
- **Hide No-Data Response:** Reports display as Yes or No. Select search criteria from the drop-down list: All, Yes, No.
- **Possible Score:** Enter search criteria in the open-entry text box; numeric values only.

Response

- **Response:** Enter search criteria in the open-entry text box.
- **Response Possible Value:** Enter search criteria in the open-entry text box; numeric values only.
- **Response Recording Name:** Some survey questions may elicit a verbal response, which is recorded as a .wav file. Reports display the filename (e.g. 0-101154.wav). Enter search criteria in the open-entry text box.

Completed Survey

- **Completed Survey ID:** Enter search criteria in the open-entry text box; numeric values only.
- **Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Survey Date:** Click on calendar icon to enter search criteria using date selector.
- **Number Called (DNIS):** Outbound called number. Enter search criteria in the open-entry text box.
- **Caller ID (ANI):** Inbound caller number. Enter search criteria in the open-entry text box.
- **Survey Possible Value:** Enter search criteria in the open-entry text box; numeric values only.
- **Survey Value:** Enter search criteria in the open-entry text box; numeric values only.
- **Survey % Score:** Reports display scores calculated from Survey Score/Survey Possible Score. Enter search criteria in the open-entry text box; numeric values up to two decimal places (e.g. 75.36).
- **Survey Complete:** Report displays as Yes, No. Select search criteria from the drop-down list: Yes, No, All. Can be used as a Measure field in Matrix Table reports.

Call Recording

- **Call Recording ID:** Enter search criteria in the open-entry text box; numeric values only.

Agent

- **Agent Name:** Reports display as Last Name, First Name. Enter search criteria in the open-entry text box.
- **Phone ID:** Enter search criteria in the open-entry text box.
- **Agent Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list: All, Active, Inactive.
- **Group:** This is the Discover Group name. Select search criteria from the drop-down list of Discover Groups.
- **Group Status:** Report Reports display as Active or Inactive. Select search criteria from the drop-down list: All, Active, Inactive.

Clarity Report Types

Note: The Clarity database stores dates and times in UTC (Coordinated Universal Time), the primary time standard by which the world regulates clocks and time. The Clarity Web Portal often adjusts these fields to the user's time, but ad hoc reports show the date/time fields in UTC. For this reason, you may notice differences between ad hoc reports and what you see in Clarity's user interface.

ACD Call and Agent Data Reports

These entities and fields are used for Clarity **ACD Call** and **Agent Data** Ad Hoc Reports.

ACD Split Call Data

- **Call Volume Date/Time:** Click on calendar icon to enter search criteria using date selector.
- **Split:** Enter search criteria in the open-entry text box.
- **Device:** Enter search criteria in the open-entry text box.
- **Interval Seconds:** This is the time interval for which data should be pulled. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Offered Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Answered Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Service Level Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Abandoned Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Abandon Seconds:** This is the total time in seconds that abandoned calls were on hold before caller hung up. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).

ACD Agent/Split Call Data

Note ACD Agent/Split and ACD Agent data can be used to calculate Average Handle Time (AHT), Occupancy/Utilization, and other metrics.

- **Split:** Enter search criteria in the open-entry text box.
- **Call Volume Date/Time:** Click on calendar icon to enter search criteria using date selector.
- **Interval Seconds:** This is the time interval for which data should be pulled. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Answered Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Hold Calls:** This is the number of calls that were placed on hold one or more times. Enter search criteria in the open-entry text box; whole number values only.
- **Ring Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Customer Seconds:** This is the talk time in seconds. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Hold Seconds:** Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **ACW Seconds:** This is time spent on after-call work. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).

ACD Agent Data

- **Call Volume Date/Time:** Click on calendar icon to enter search criteria using date selector.
- **Interval Seconds:** This is the time interval for which data should be pulled. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Logged in Seconds:** This is the total number of seconds logged into the ACD. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Available Seconds:** This is the total number of seconds available to take calls (e.g. waiting for a call). Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Inactive Seconds:** This is the total number of seconds in inactive modes (e.g. lunch, break, training). Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).

Skill

- **Skill:** Enter search criteria in the open-entry text box.

Labor Unit

- **Labor Unit:** Enter search criteria in the open-entry text box.

User

- **Agent Name:** Enter search criteria in the open-entry text box.

Team

- **Team:** Enter search criteria in the open-entry text box.
- **Team Supervisor:** Enter search criteria in the open-entry text box.

Service Level

- **SL Waiting Time:** This is the Service Level goal for "Waiting Time" as set by your Clarity administrator. Enter search criteria in the open-entry text box; numeric values only.
- **SL Percent Calls Answered:** This is the Service Level goal for "Percent Answered" as set by your Clarity administrator. Enter search criteria in the open-entry text box; numeric values only.

Agent Leave/PTO Reports

These entities and fields are used for Clarity **Agent Leave/PTO** ad hoc reports.

Leave Requests

- **Leave Type:** Enter search criteria in the open-entry text box.
- **Date Created:** Click on calendar icon to enter search criteria using date selector.
- **Start Date:** Click on calendar icon to enter search criteria using date selector.
- **End Date:** Click on calendar icon to enter search criteria using date selector.
- **Leave Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Comment:** Enter search criteria in the open-entry text box.
- **Status:** Enter search criteria in the open-entry text box.
- **Approved By:** Enter search criteria in the open-entry text box.

Agent

- **Agent:** Enter search criteria in the open-entry text box.
- **Location:** Enter search criteria in the open-entry text box.

Team

- **Team:** Enter search criteria in the open-entry text box.
- **Team Supervisor:** Enter search criteria in the open-entry text box.

Labor Unit

- **Labor Unit:** Enter search criteria in the open-entry text box.

Skill

- **Skill:** Enter search criteria in the open-entry text box.

Shift Reports

These entities and fields are used for Clarity **Shift** ad hoc reports.

Shift

- **Agent Name:** Enter search criteria in the open-entry text box.
- **Shift Start:** Click on calendar icon to enter search criteria using date selector.
- **Shift End:** Click on calendar icon to enter search criteria using date selector.
- **Shift Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Activity:** This is the type of activity (e.g. lunch, meeting, training, break, etc.) Enter search criteria in the open-entry text box.
- **Activity Start:** Click on calendar icon to enter search criteria using date selector.
- **Activity End:** Click on calendar icon to enter search criteria using date selector.
- **Activity Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Is Paid:** Reports display as Yes or No. Select search criteria from the drop-down list: All, Yes, No.
- **Late Threshold:** Enter search criteria in the open-entry text box; numeric values only.

Labor Unit

- **Labor Unit:** Enter search criteria in the open-entry text box.

Skill

- **Skill:** Enter search criteria in the open-entry text box.

Team

- **Team:** Enter search criteria in the open-entry text box.
- **Team Supervisor:** Enter search criteria in the open-entry text box.

Sample Reports

This section explains how to generate a variety of reports using the Ad Hoc Report Builder. These are meant to give you an idea of the flexibility and types of ad hoc reports you can create, but is by no means an all-inclusive list.

Audit Report > Superuser

This report lists the users who have superuser permission.

Columns	Rows	Criteria	Operator	Criteria Value
User > Username User > Last Name User > First Name User > Superuser	User > User Status	User > Superuser	Equal To	Yes

Audit Report > Modified Users

This report lists which users have been modified in the last 24 hours.

Columns	Rows	Criteria	Operator	Criteria Value
User > Username User > Last Name User > First Name	N/A	User > Modified On	Greater Than	[Yesterday's Date]

Audit > Group Membership

Predefined reports show the agents within a group. This example will allow viewing by groups assigned to an agent instead.

Columns	Rows	Criteria	Operator	Criteria Value
Group > Group	User > Username	User > Username	Equal To	[Username]

Audit > User Role Assignments

Shows the roles assigned to active users whose accounts are not locked.

Columns	Rows	Criteria	Operator	Criteria Value	
Users > Username	N/A	Users > User Status	Equal To	Active	
Users > Last Name		Users > Locked	Equal To	No	
Users > First Name					
Users > Role Name					

Audit > Role: Permissions

There is currently no predefined report in Discover that provides this information. It displays what permissions are assigned to which roles.

Columns	Rows	Criteria	Operator	Criteria Value
Permission > Permission	Role Name	N/A	N/A	N/A

Call Recordings > User Fields

If custom user fields are utilized, this report would relate that data to specific call records. For example, if order numbers or account numbers are linked to recording IDs, the following settings would display that data. Filters can be added to limit results. This type of report may be useful in environments using On-Demand and Fusion.

Columns	Rows	Criteria	Operator	Criteria Value
Call Recording Record > Recording ID	N/A	N/A	N/A	N/A
Call Recording Record > [custom user field]				

Call Recordings > Total Hold Time

For integrations that track hold time, this report would display hold time per calls, and could total or average the hold time across a range of filtered call records.

Columns	Rows	Criteria	Operator	Criteria Value
Agent ID > Last Name	N/A	N/A	N/A	N/A
Agent ID > First Name				
Call Recording Record > Recording ID				
Call Recording Record > Duration				
Call Recording Record > Total Hold Time				
Call Recording Record > Caller ID (ANI)				

Call Recordings > Calls from Particular Area Codes

This could help locate areas with high incoming call volumes for strategic purposes.

Columns	Rows	Criteria	Operator	Criteria Value
Agent ID > Last Name	N/A	Call Recording Record > Caller ID (ANI)	Starts With	[Area Code]
Agent ID > First Name				
Call Recording Record > Recording ID				
Call Recording Record > Duration				
Call Recording Record > Caller ID (ANI)				

Quality Assurance > Agent QA Summary

A predefined report like this exists, but now additional fields can be added, such as the name of the evaluator. This allows comparison of evaluation scores on the same form if both were done on the same recording.

Columns	Rows	Criteria	Operator	Criteria Value
Completed QA Evaluation > Evaluation ID Evaluator > Evaluator Last Name Evaluator > Evaluator First Name Agent ID > Agent Last Name Agent ID > Agent First Name QA Evaluation Form > Form Name Completed QA Evaluation > Total Form Possible Score Completed QA Evaluation > Total Actual Score	Recording ID	N/A	N/A	N/A

Quality Assurance > QA Score and Survey Score Comparison

Allows you to compare QA scores to survey scores for a given Recording ID.

Columns	Rows	Criteria	Operator	Criteria Value
Completed QA Evaluation > Evaluation ID Agent ID > Agent Last Name Agent ID > Agent First Name Completed QA Evaluation > Total Form Possible Score Completed QA Evaluation > Total Actual Score Completed Survey Form > Survey Possible Value Complete Survey Form > Survey Value	Recording ID	N/A	N/A	N/A

Quality Assurance > QA Form Score Relation to Library Items/Training

This can be useful in determining how effective training and resource materials are for improving agents' QA scores.

Columns	Rows	Criteria	Operator	Criteria Value
Completed QA Evaluation > Evaluation ID	Recording ID	Content Library Items > Library Item	Equal To	[File Name]
Completed QA Evaluation > Date Completed				
Agent ID > Agent Last Name				
Agent ID > Agent First Name				
QA Evaluation Form > Form Name				
Completed QA Evaluation > Total Form Possible Score				
Completed QA Evaluation > Total Actual Score				
Content Library Items > Library Item				
Content Library Items > Acknowledged Date				

Survey > Call Recording/Agent/Survey Score

There are currently no predefined reports that show the linking of call recordings to surveys. Building the following report shows that.

Columns	Rows	Criteria	Operator	Criteria Value
Call Recording > Call Recording ID Agent ID > Agent Last Name Agent ID > Agent First Name Completed Survey > Completed Survey ID Completed Survey > Survey Date Completed Survey > Survey Possible Value Completed Survey > Survey Value	N/A	N/A	N/A	N/A

System Reports

Overview of System Reports

Your Discover system offers system reporting options in two areas. The **System Reporting** section under the **Printable Reports** menu provides historical data that relates to the usage of the Discover software and the status of the system and software.

System Reporting		
Filter: <input type="text"/>		<input type="button" value="Search"/>
Report	Description	Date Created
Disk History	Charts the daily consumption of memory resources by saved audio and video files.	3/1/2011
System Activity Summary	Total incidents of logged user activities over time.	3/1/2011
System Usage	Time spent logged into the CallCopy system per user.	3/1/2011

Pages : Go To Page : of 1

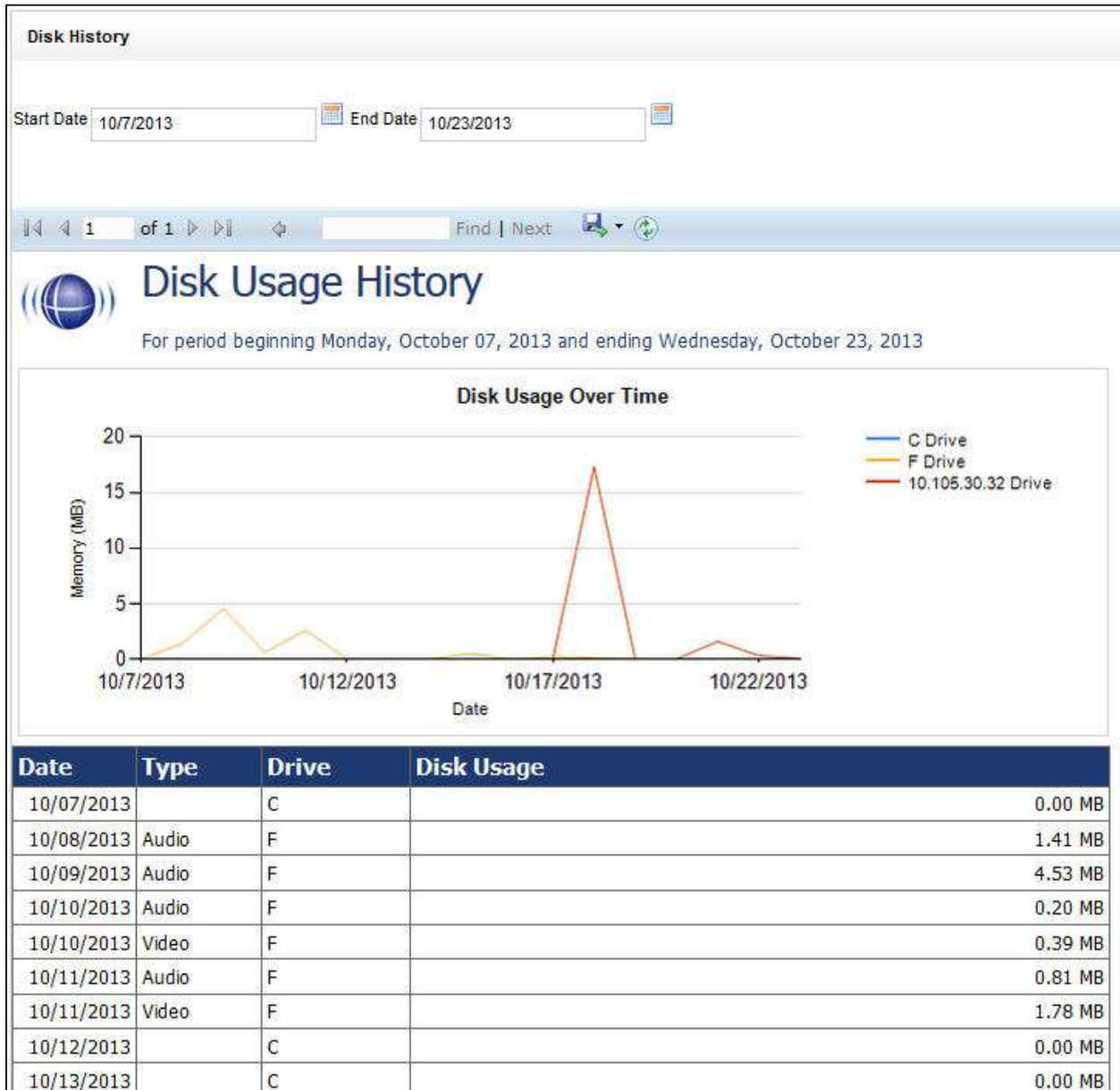
The **System Reports** menu provides a number of non-printable reports, which have data that is not suited for printing or exporting. These reports are usually interactive, and often provide real-time updates to the user.

Printable Reports		IP Phone Status <input type="button" value="Export"/>					
Report Tools		This page automatically refreshes every 2 seconds. Last Refresh Time: 10/22/2013 9:24:01 AM					
System Reports		IP Phone Information					
IP Phone Status License Info System Status Transcoder Status Audit Report		II_Voice Port	II_Device Alias	IP Address	Brand	Confidence	Last Update
		1000		10.100.10.845	-F	(S)Static Entry	10/22/2013 12:14:10 PM
		1001		10.100.10.850	-F	(S)Static Entry	10/22/2013 12:14:10 PM
		1002		10.100.10.857	-F	(S)Static Entry	10/22/2013 12:14:10 PM
		3001		10.100.5.88	F	(C)Parsed	10/16/2013 3:54:49 PM
		3002		10.100.5.88	F	(C)Parsed	10/16/2013 3:26:55 AM
		3006		10.100.0.34	F	(C)Parsed	10/16/2013 12:58:02 PM

Both categories of reports are explained in this section, with the printable reports first.

Disk History

The Disk History Report displays the historical disk usage in MB for recording data over a range of days defined by the user. The results are displayed in both line chart and list format. Multiple drives are distinguished by differently-colored lines.




System Activity Summary

The System Activity Summary displays the actions a specified user(s) performed in the Discover system during a given date range. The report is separated with a different section for each date in the range selected that has activity. Actions such as login/logout, call playback, call deletes, and QA functions are all tracked with this report.

System Activity Summary Back Generate Report

Internal All Start Date End Date

User ID


 System Activity Summary For period beginning Monday, February 13, 2012 and ending Tuesday, March 13, 2012			
02/13/2012	No activity on this date.		
02/14/2012	No activity on this date.		
Date	User	Count	Event
02/15/2012		3	Invalid Page Access Attempt
02/15/2012		1	System Start
02/15/2012	Administrator Administrator	5	Live Monitor Observed
02/15/2012	Administrator Administrator	8	Login
02/15/2012	Administrator Administrator	4	Logout
02/15/2012	Administrator Administrator	1	Schedule Created
Date	User	Count	Event
02/16/2012		1	System Start
Date	User	Count	Event
02/17/2012		2	Invalid Page Access Attempt
02/17/2012		1	System Start
02/17/2012	Administrator Administrator	2	Login
02/17/2012	Administrator Administrator	2	Logout
02/18/2012	No activity on this date.		
02/19/2012	No activity on this date.		
Date	User	Count	Event
02/20/2012		1	Failed Login Attempt
02/20/2012		43	Invalid Page Access Attempt
02/20/2012		4	System Start
02/20/2012	Administrator Administrator	2	Edit QA Score
02/20/2012	Administrator Administrator	1	Group Created
02/20/2012	Administrator Administrator	18	Login

System Usage

The System Usage report displays the total time a user was logged into the system based on the specified time range.

System Usage Back

Start Date End Date User ID

 System Usage		
For period beginning Monday, February 28, 2011 and ending Tuesday, March 29, 2011		
Date	User	Time In System
03/01/2011	Administrator	23:55:59
03/02/2011	Administrator	24:00:00
03/03/2011	Administrator	24:00:00
03/04/2011	Administrator	24:00:00
03/05/2011	Administrator	24:00:00
03/06/2011	Administrator	24:00:00
03/07/2011	Administrator	24:00:00
03/08/2011	Administrator	24:00:00
03/09/2011	Administrator	24:00:00
03/10/2011	Administrator	11:26:13
03/10/2011	Barry Knack	00:01:34
03/10/2011	Beki Nowlan	00:01:34
	Total:	11:27:21
03/28/2011	Administrator	01:16:43
03/28/2011	Barry Knack	01:28:18
03/28/2011	Beki Nowlan	02:57:43
03/28/2011	CALLCOPY USER	00:02:33
	Total:	05:42:17

System Usage - 3/29/2011 CallCopy Recorder Reporting Service Page 1 of 1

IP Phone Status

The IP Phone Status report shows the status of all IP phones detected on the network for passive VoIP integrations. The report list shows the device extension number, the IP address of the device, the voice board number the device was detected by, the confidence level of the detection, and the date/time the device was detected on the network. This report is useful when verifying that all phones are ready to be recorded on the network. The report automatically updates the list every 5 seconds. It can also be exported into a CSV file by clicking the **Export** button at the top-right of the report. **Confidence** indicates Discover's certainty that the voice port is actually assigned to the IP address. Confidence can be:

- (1) No Confidence
- (2) Best Guess
- (3) Parsed (e.g. somewhat confident. A Discover script has detected the port value based on agent's entry of digits when logging into the phone.)
- (4) Phone Registered (e.g. very confident. The telephony system has provided the port/address combination to Discover.)
- (5) Static Entry – The port/address has been entered in the **IP Phones** list section of the **Recorder Settings** menu on Discover's **Administration** tab.

IP Phone Status Export					
<i>This page automatically refreshes every 5 seconds. Last Refresh Time: 6/11/2010 11:23:46 AM</i>					
IP Phone Information					
Voice Port	Device Alias	IP Address	Board	Confidence	Last Update
7506		10.100.6.25	1	(3)Parsed	4/27/2010 1:28 PM
7507		10.100.6.36	1	(3)Parsed	4/30/2010 8:29 PM
7505		10.100.6.41	1	(3)Parsed	5/3/2010 2:47 PM
7503		10.110.18.2	1	(3)Parsed	6/1/2010 7:36 PM
7504		10.110.19.2	1	(3)Parsed	4/26/2010 10:16 PM

License Info

The License Information report shows in real time if the system is currently licensed for recording. It displays the License ID number, the date the license was issued, the expiration date, and the number of channels for which the system is licensed.

This report shows licenses for the server that hosts the Web Portal. If you have other recording cores on different servers, those licenses will not be checked or included in this report.

License Information
System License Available : Yes
License ID :1
Created On :08/10/2009
Licensed To :Devel01
CallCopy
License Type :Production
Expires On :Never
Licensed Audio Ports :500
Licensed Screen Capture Ports :500
Licensed Desktop Only Ports :500
Maximum Concurrent Recordings :-1

System Status

This report shows the current call channel and agent activity on the system. This information is useful when investigating why users are logged in but not recording.

Tools - System Status																																																																								
Logged In Users <table border="1"> <thead> <tr> <th>Username</th> <th>Login Time</th> </tr> </thead> <tbody> <tr> <td>superuser</td> <td>10/28/2013 3:43:58 PM</td> </tr> </tbody> </table>							Username	Login Time	superuser	10/28/2013 3:43:58 PM																																																														
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Channel Summary <table border="1"> <thead> <tr> <th>Idle</th> <th>Recording</th> <th>Total Channels</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>155</td> </tr> </tbody> </table>							Idle	Recording	Total Channels	0	0	155																																																												
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Channel Status <table border="1"> <thead> <tr> <th>Channel</th> <th>State</th> <th>Last State Change</th> <th>Agent Name</th> <th>Recording Device</th> <th>Record</th> </tr> </thead> <tbody> <tr><td>103</td><td>OutOfService</td><td>11/21/2012 2:53:05 PM</td><td></td><td></td><td></td></tr> <tr><td>2</td><td>Ready</td><td>10/18/2012 8:52:10 PM</td><td></td><td></td><td></td></tr> <tr><td>4</td><td>Ready</td><td>10/18/2012 8:52:10 PM</td><td></td><td></td><td></td></tr> <tr><td>5</td><td>Ready</td><td>10/18/2012 8:52:10 PM</td><td></td><td></td><td></td></tr> <tr><td>6</td><td>Ready</td><td>10/18/2012 8:52:10 PM</td><td></td><td></td><td></td></tr> <tr><td>7</td><td>Ready</td><td>10/18/2012 8:52:10 PM</td><td></td><td></td><td></td></tr> <tr><td>8</td><td>Ready</td><td>10/18/2012 8:52:10 PM</td><td></td><td></td><td></td></tr> <tr><td>9</td><td>Ready</td><td>10/18/2012 8:52:10 PM</td><td></td><td></td><td></td></tr> <tr><td>10</td><td>Ready</td><td>10/18/2012 8:52:10 PM</td><td></td><td></td><td></td></tr> <tr><td>11</td><td>Ready</td><td>10/18/2012 8:52:10 PM</td><td></td><td></td><td></td></tr> </tbody> </table>							Channel	State	Last State Change	Agent Name	Recording Device	Record	103	OutOfService	11/21/2012 2:53:05 PM				2	Ready	10/18/2012 8:52:10 PM				4	Ready	10/18/2012 8:52:10 PM				5	Ready	10/18/2012 8:52:10 PM				6	Ready	10/18/2012 8:52:10 PM				7	Ready	10/18/2012 8:52:10 PM				8	Ready	10/18/2012 8:52:10 PM				9	Ready	10/18/2012 8:52:10 PM				10	Ready	10/18/2012 8:52:10 PM				11	Ready	10/18/2012 8:52:10 PM			
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Screen Capture Client Status <table border="1"> <thead> <tr> <th>Agent Name</th> <th>Username</th> <th>IP Address</th> <th>Computer</th> <th>Version</th> <th>Application</th> </tr> </thead> <tbody> <tr><td>UNKQIVVI</td><td>agent1</td><td>10.100.11.101</td><td>agent1-pc</td><td>5.0.0.1020</td><td>some title</td></tr> <tr><td>Richard Cunningham</td><td>agent11</td><td>10.100.11.111</td><td>agent11-pc</td><td>5.0.0.1020</td><td>some title</td></tr> <tr><td>Stuart Divyer</td><td>agent11</td><td>10.100.11.114</td><td>agent14-pc</td><td>5.0.0.1020</td><td>some title</td></tr> <tr><td>Jeremy Carrozza</td><td>agent12</td><td>10.100.11.112</td><td>agent12-pc</td><td>5.0.0.1020</td><td>some title</td></tr> <tr><td>Carleen Bemer</td><td>agent13</td><td>10.100.11.113</td><td>agent13-pc</td><td>5.0.0.1020</td><td>some title</td></tr> <tr><td>Franks Handler</td><td>agent15</td><td>10.100.11.115</td><td>agent15-pc</td><td>5.0.0.1020</td><td>some title</td></tr> </tbody> </table>							Agent Name	Username	IP Address	Computer	Version	Application	UNKQIVVI	agent1	10.100.11.101	agent1-pc	5.0.0.1020	some title	Richard Cunningham	agent11	10.100.11.111	agent11-pc	5.0.0.1020	some title	Stuart Divyer	agent11	10.100.11.114	agent14-pc	5.0.0.1020	some title	Jeremy Carrozza	agent12	10.100.11.112	agent12-pc	5.0.0.1020	some title	Carleen Bemer	agent13	10.100.11.113	agent13-pc	5.0.0.1020	some title	Franks Handler	agent15	10.100.11.115	agent15-pc	5.0.0.1020	some title																								
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Stuart Divyer	agent11	10.100.11.114	agent14-pc	5.0.0.1020	some title																																																																			
Jeremy Carrozza	agent12	10.100.11.112	agent12-pc	5.0.0.1020	some title																																																																			
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Franks Handler	agent15	10.100.11.115	agent15-pc	5.0.0.1020	some title																																																																			

Note In some cases, a user may be logged in on multiple computers or browsers, and then log out of one session while still working in the other. The Logged In Users table may not correctly reflect each of these logins/logouts.

Transcoder Status

The Transcoder Status report gives a near real-time display of what audio files are being processed by the Transcoder module. This is useful in verifying the proper operation of the Transcoder. The list displays the last 10 Completed Records, In-Progress Records and Failed Records in separate sections. The list automatically refreshes every five seconds

For both completed and failed records, the Source column displays the names of the raw audio files, and the Destination column lists names of the files that have been successfully transcoded. For Failed Records, the report also shows the date/time of the last transcoding attempt, when the next attempt will take place, the number of attempts that have been made, and the current status of the process.

Transcoder Status							
This page automatically refreshes every 5 seconds. Last Refresh Time: 10/22/2013 11:06:12 AM							
Completed Records							
Identity	Source	Destination	Queued Time	Last Update Time			
5279	F:\CallCopy\Recordings\20131009\3602\3602-08-89-39.cca	F:\CallCopy\Recordings\20131009\3602\3602-08-59-39.wav	10/9/2013 9:19:39 AM	10/9/2013 9:19:59 AM			
No In Progress Records							
Failed Records							
Identity	Source	Destination	Last Update Time	Next Retry Time	Attempts	Status	
5219	F:\CallCopy\Recordings\20130910\7477\7477-13-32-16.cca	F:\CallCopy\Recordings\20130910\7477\7477-13-32-16.wav	9/10/2013 4:19:16 PM	1378630016	3	Unknown (4)	
5218	F:\CallCopy\Recordings\20130910\7477\7477-13-26-32.cca	F:\CallCopy\Recordings\20130910\7477\7477-13-26-32.wav	9/10/2013 4:19:08 PM	1378630056	3	Unknown (4)	
5212	F:\CallCopy\Recordings\20130906\7546\7546-13-00-47.cca	F:\CallCopy\Recordings\20130906\7546\7546-13-00-47.wav	9/10/2013 4:18:19 PM	1378629959	3	Unknown (4)	
5061	F:\Recordings\VoIP\20130807\7449\7449-10-56-21.cca	F:\Recordings\VoIP\20130807\7449\7449-10-56-21.wav	8/7/2013 10:59:11 AM	1375673211	3	Unknown (4)	
4683	F:\Recordings\VoIP\20130703\7546\7546-15-53-36.cca	F:\Recordings\VoIP\20130703\7546\7546-15-53-36.wav	7/3/2013 5:20:91 PM	1372672061	3	Unknown (4)	
4682	F:\Recordings\VoIP\20130703\7546\7546-15-56-16.cca	F:\Recordings\VoIP\20130703\7546\7546-15-56-16.wav	7/3/2013 4:58:12 PM	1372670752	3	Unknown (4)	
4674	F:\Recordings\VoIP\20130703\7546\7546-13-26-17.cca	F:\Recordings\VoIP\20130703\7546\7546-13-26-17.wav	7/3/2013 2:53:24 PM	1372663264	3	Unknown (4)	
4672	F:\Recordings\VoIP\20130703\7546\7546-12-44-06.cca	F:\Recordings\VoIP\20130703\7546\7546-12-44-06.wav	7/3/2013 12:47:02 PM	1372659662	3	Unknown (4)	
4671	F:\Recordings\VoIP\20130703\7546\7546-12-34-58.cca	F:\Recordings\VoIP\20130703\7546\7546-12-34-58.wav	7/3/2013 12:40:38 PM	1372655299	3	Unknown (4)	
4670	F:\Recordings\VoIP\20130703\7546\7546-12-05-18.cca	F:\Recordings\VoIP\20130703\7546\7546-12-05-18.wav	7/3/2013 12:36:49 PM	1372655069	3	Unknown (4)	

Audit Report

The Audit Report displays the log of specific actions taken by each user in the system during a specified date range. Auditing is controlled by the system; users cannot change what is audited. Use the Log Type list to search for specific events or actions performed by a user, such as Login, Logout, or Change Password.

Search fields available for customizing the Audit Report include:

- **User:** Select the desired user from the drop-down list, or choose "All".
- **Log Type:** Select the desired log types from the drop-down list of events that are logged, or choose "All".
- **Component or Page:** This is the component or page involved in an event. In the open-entry text box, enter search criteria as either a component name (e.g. AuditLog) or as an HTML page (e.g. /Administration/Scheduling/CreateCustomSchedule.aspx).
- **IP Address:** In the open-entry text box, enter the address of the user whose action caused the event.
- **ID of Related Object:** Call records and audio recordings are stored in the Discover systems as objects with ID numbers. Some event types (e.g. Call Playback) can therefore include this number as a criterion, and you would enter it in the open-entry text box. Other event types (e.g. Login or Changed Password) will not have any related objects.
- **Message Text 1/2/3:** Enter search criteria in the open-entry text box; see note.
- **Start Time/End Time:** Use the date selectors to enter the start and end of the time range for the report. Audit records are written to the database and do not expire. They remain available for reporting for the life of your system (barring any database issues that result in data loss).

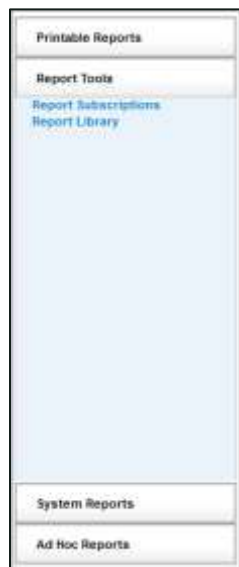
Note

Audit messages consist of one to three parts. Each part contains different text. After a list of events is retrieved, review the messages to find which events are useful. Pick the appropriate key words and enter them in the Message Text fields. Determining which words appear in which field involves some trial and error, and it may be helpful to use the Starts with, Ends with, Contains and Does not contain operators when setting up criteria.

Time Logged	IP Address	Associated Username	Message	Component
03/12/2012 13:55:54	10.100.5.131	Unknown Unknown	User "Unknown Unknown" (-1) tried to access URL "/Home/Default.aspx".	CrAuthorize
03/12/2012 13:56:02	10.100.5.131	Marisha Ingale	User "Marisha Ingale" (04) logged in.	ILogin?ReturnUrl=%2FAdministration%2FPermissions%2FUseEdit%2F04
03/12/2012 13:56:03	10.100.5.131	Marisha Ingale	User "Marisha Ingale" (04) logged in.	ILogin?ReturnUrl=%2FAdministration%2FPermissions%2FUseEdit%2F04
03/12/2012 13:56:02	10.100.5.131	Marisha Ingale	User "Marisha Ingale" (04) logged out.	ILogin?ReturnUrl=%2FAdministration%2FPermissions%2FUseEdit%2F04
03/12/2012 13:57:23	10.100.5.131	Marisha Ingale	User "Marisha Ingale" (04) changed user "SA" ().	AdministrationPermissions/UseEdit04
03/12/2012 13:57:23	10.100.5.131	Marisha Ingale	User "Marisha Ingale" (04) created supervisor "SA" ().	AdministrationPermissions/UseEdit04
03/12/2012 13:57:27	10.100.5.131	Marisha Ingale	User "Marisha Ingale" (04) logged out.	ILogout
03/12/2012 13:57:27	10.100.5.131	Unknown Unknown	User "Unknown Unknown" (-1) tried to access URL "/Home/Default.aspx".	CrAuthorize
03/12/2012 13:57:27	10.100.5.131	Marisha Ingale	User "Marisha Ingale" (04) logged in.	ILogin?ReturnUrl=%2FAdministration%2FPermissions%2FUseEdit%2F04

Report Tools

Overview of Report Tools



Report Tools allow you to automate, and/or make available to other users, certain reporting functions. They are designed to make reporting more effective and efficient. The **Report Tools** menu has these links:

Report Subscriptions: In most organizations, there is a need for certain reports to be generated and distributed on a regular basis. Report subscriptions allow you to automate this process. You must have the "Allow Report Subscriptions" permission to use this functionality.

Report Library: In essence, a report is a combination of the report layout and the criteria used to generate the report. When reports are created, users are given the option to save the associated criteria as either public or private. The **Report Library** is where you will find any public criteria, as well as private criteria that you personally have saved. For details, see [Report Library](#).

Report Subscriptions

Report subscriptions allow you to pre-schedule specific reports and provide the results to multiple users.

To access **Report Subscriptions** in Discover, click the **Reporting** tab in the Web Portal, and click on the **Report Tools** menu. The link to **Report Subscriptions** will be listed on the menu.

Manage Subscriptions

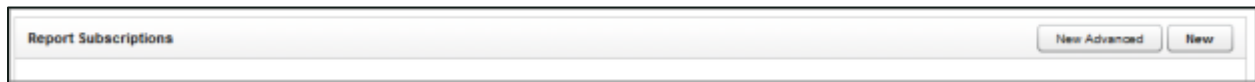
When you load the **Report Subscriptions** page, you will be presented with a list of available subscriptions. Click the heading of any column to sort by the contents of that column.

Report Subscriptions						New Advanced	New
Subscription	Report	Status	Owner	Last Run	Date Created		
agents	Agent Ranking By Period	New Subscription	Administrator	01/01/0001	06/09/2010		
agents	Assigned Agents Report	New Subscription	Administrator	01/01/0001	06/09/2010		
agents	Assigned Agents Report	New Subscription	Administrator	01/01/0001	06/09/2010		
calls	Call Recording Detail	New Subscription	Administrator	01/01/0001	06/09/2010		

Clicking on any of the subscriptions listed will display the subscription settings for editing. To delete an existing subscription, you can click the **Delete** icon from this list. Users who have subscribed to a report will *not* be automatically informed that the subscription has been deleted.

Create New Subscriptions

The procedure for creating new subscriptions depends on whether an environment uses the Enterprise edition of Microsoft SQL Server or another edition. SQL Enterprise-edition users create new subscriptions using the **New Advanced** button. Other versions of SQL use the **New** button. Only one button, **New OR New Advanced**, can be used, not both. If you use the wrong button, Discover will show an error message that the subscription was not saved. In this case, use the other button to create the subscription.



1. Click the **New** button at the top-right of the page. The **Report Subscription Details** page will load.
2. Choose a report from the **Select a Report** drop-down list. Only those reports listed in the **Printable Reports** menu are available for subscription.
3. The **Description** field is a custom title for your subscription. Enter a description in the field.
4. Reports are delivered via e-mail, allowing the report to be sent directly to one or more recipients. The following fields appear for completion:
 - **To:, and B**enter the e-mail addresses of the recipient(s) in these fields as appropriate. Use semi-colons to separate multiple addresses in the same field.
 - **Reply-To:** enter the e-mail address to which any replies should be sent. This is a required field.
 - **Subject:** the subscription builder automatically fills the Subject with the name of the report and the time at which it was run. You can customize the contents of this field if desired.
 - **Include Report:** checking this box causes the report file to be attached to the email.
 - **Include Link:** checking this box generates a custom link which the recipient can click to launch the report file. This option is useful when distributing the complete report to a large number of users would negatively impact network traffic. The report file is located on the SQL Report Server; thus, all report recipients must be assigned user accounts on the server. Do not select this option without first discussing it with your system administrator and the Uptivity Installation engineer.
 - **Render Format:** from the drop-down list, select the format for the delivered report. The following file types are supported: Comma Delimited (CSV); Acrobat (PDF); Web Archive (MHTML); Excel (XLS); Image (TIFF); Word (DOC); and Data (XML).
 - **Priority:** from the drop-down list, select the priority to flag the e-mail appropriately for its recipient(s)
 - **Comment:** enter any additional description or text that should appear in the body of the e-mail.

5. Reports can be run once or repeatedly on an hourly, daily, weekly, or monthly schedule. Each of the schedule options allows for additional fine-tuning. For example, in the monthly schedule you can set the report to run only in specific months, limit the week in which it runs, and more. Regardless of any other options selected, you must choose a start time for the report to run. Best practice is to schedule report subscriptions to run outside peak times so that their impact on other system activities is minimized. Set the individual report schedule details from the following:

Choose whether to run the report on an hourly, daily, weekly, monthly, or one time basis.

Daily
 Weekly
 Monthly

Monthly Schedule

Months: Jan Feb Mar Apr
 May Jun Jul Aug
 Sep Oct Nov Dec

On week of month: 1st ▼

On day of week: Sun Mon Tue Wed Thu Fri Sat

On calendar day(s): (Comma separated list)

Start time: : A.M. P.M.

6. Report Parameters are the data options that will be used to run the selected report. The options in this section will vary depending on the **Report Type** selected in the Subscription Overview section of the page. These options will be the same as the options for the report when viewed through the **Printable Reports** menu.

Report Parameter Values

Specify the report parameter values to use with this subscription.

Start Date:
 ▼ Use Default

End Date:
 ▼ Use Default

Group:
 ▼ Use Default

Call Direction:
 ▼ Use Default





7. Click the **Save** button at the top of the page to save your Report Subscription. You will be taken back to the Report Subscription list, where the newly created report will be displayed as the first item.

Report Library

The **Report Library** is available under the **Report Tools** menu on the **Reporting** tab. This page will list any report criteria that you personally have saved for printable or ad hoc reports, as well as any criteria saved as public by other users.

Select a saved report criteria from the list to run the report.

Delete the saved criteria by clicking the **Delete** icon.

Report Library			
Private Listing			
Report	Date Created	Owner	
Sales Agent Incoming Call Summary Report	6/23/2011 12:13:19 PM	superuser	
Sales Agent Outgoing Call Summary Report	6/23/2011 12:14:03 PM	superuser	
Sales Agents Ranking Report	6/23/2011 3:17:45 PM	superuser	
Public Listing			
Report	Date Created	Owner	
Calibration Group QA Summary	6/24/2011 1:56:51 PM	superuser	

About Uptivity

What boosts the bottom line for any company with a contact center? How about getting the best that every agent can deliver from their first day on the job and constantly optimizing contact center management and performance? Only Uptivity gives you the tools you need to continuously improve every aspect of each step of every agent's life cycle and enhance customer satisfaction. You get exactly what you need thanks to a modern, integrated, and easy-to-use suite of tools that offers a unified system for performance management, workforce management, speech analytics, and call recording. Unparalleled customer service and support from our in-house staff combine with a better bundle for a better value, and a lower total cost of ownership.

Headquartered in Columbus, Ohio, and on the Web at www.uptivity.com.