



Uptivity WFO Reporting Manual, v5.7

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Uptivity WFO Reporting Manual, v5.7

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Introduction

Audience

This document is designed for users of the Reporting module in Uptivity WFO. This module enables authorized users to generate and save or print reports as well as find real-time data about the system.

Readers should have a basic level of familiarity with contact center concepts, usage of a PC and its peripherals, the Windows operating system, and the Discover Web Portal.

Goals

The goal of this document is to provide knowledge, reference, and procedural information necessary to use the Reporting module. The document is NOT intended as a specific system or network design document, nor is it designed to educate the reader on contact center concepts or best practices.

Assumptions

This document assumes that Uptivity WFO has been installed and integrated with your PBX if applicable. It also assumes that your application administrator has configured the application for use based on your business rules and environment.

Need-to-Knows

The *Uptivity WFO User Manual* contains general knowledge and procedures related to using the Web Portal, and may prove a helpful reference.

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

Uptivity WFO 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.

Tasks described in this manual may be limited by permissions. If you need to perform a task and are unable to do so, see your supervisor or Uptivity WFO administrator.

Several Uptivity WFO features use menus and other windows that may be considered as “pop-ups” by some browsers. inContact recommends that you configure your browser to allow pop-ups for the Discover Web Portal.

Uptivity WFO supports standard Windows methods for selecting multiple items in a list: press and hold the Shift key while clicking to select consecutive items or press and hold the CTRL key while clicking to select non-consecutive items.

In some cases, Uptivity WFO provides more than one way to accomplish a task or access a feature. The procedures in this manual explain the primary method, but also note the **Alternative** where applicable.

Reporting Basics

Common Report Criteria Overview

Uptivity WFO offers a variety of reports "out of the box" (see [Working with Printable Reports](#)) and also enables users to create their own reports (see [Working with Ad Hoc Reports](#)). Both printable and ad hoc reports can be refined using a variety of criteria. These criteria can include date ranges, user or agent selections, and other data fields depending on the report type. Not all criteria are available for every report type.

This section provides an explanation of the available criteria items and instructions for defining each item. For related information, see [Generate a Printable Report](#) or [Generate an Ad Hoc Report](#).

Start Date

To select the start of the date range from which reporting data will be pulled:

- Click the calendar icon located to the right of the field, or type the date into the field.

End Date

To select the end of the date range from which reporting data will be pulled:

- Click the calendar icon located to the right of the field, or type the date into the field.

Group

To narrow the scope of the report to one or more Uptivity Groups:

- Click the desired group (or **All**) in the list.

Call Direction

To narrow the scope of the report based on the directionality of the call:

- Click the desired call direction (**All**, **Incoming**, **Outgoing**, or **Unknown**) in the the list. **Unknown** means that Uptivity WFO was not able to identify the directionality of the recorded contact.

Period Type

To narrow the scope of the report by selecting a period of time:

- Click desired time period (**Week, Month, Quarter, or Year**) in the list.

Year

To narrow the scope of the report by selecting the year:

- Click the desired year in the drop-down list.

Period

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

To select the period:

- Click the desired period in the drop-down list.

Form

Available options are forms that have been built in your system and that have either active or inactive (disabled) status. To narrow the scope of the report to one or more specific QA evaluation forms:

- Click one form (or **All**) in the list.

Agents

To narrow the report to specific agent(s):

- Click one agent (or **All**) in the list.

Tag Category

This item is only used in conjunction with Uptivity Speech Analytics. To narrow the report to one or more particular tags:

- Click one Tag (or **All**) in the list.

Status/Active

To narrow the scope of the report based on the status of agents:

- Click the desired status (**Active**, **Inactive**, or **All**) in the drop-down list.

Date Type

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. To specify which of these data sets you want to use for QA reporting:

- Click **Call Date** or **Evaluation Date**.

Users

To narrow the scope of the report to one or more specific user(s):

- Click one user (or **All**) in the list.

Report Type

This item is typically available for reports that offer drill-down capability, to access the additional data that supports the cumulative view of the data. To select the type of report to generate:

- Click the desired report type (**Agent**, **Form**, **Section**, and **Question** in the drop-down list.

Section

The Sections criteria item is used in conjunction with the Form criteria item and selections reflect the sections created for a QA evaluation form. To narrow the scope of the report by section:

- Click one section (or **All**) in the list.

Failure Type

Used on the Form and Section Failures Report only. To narrow the scope of the report:

- Click the desired Failure Type (**Form**, **Section**, or **Any**) in the drop-down list.

Month

To select the starting month for your report:

- Click the desired month in the drop-down list.

Periods

The Periods drop-down list is used in conjunction with the Month criteria item. After you have set Month:

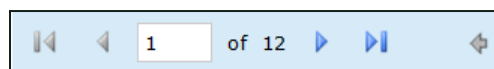
- Click the number of months you want to include in the report (1-12) in the drop-down list.

Common Report Tasks



The following tasks are common to both printable reports and ad hoc reports.

Navigate Report Pages

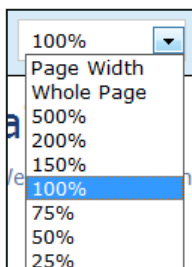
Once you have generated a report, you can use the navigation bar to move back and forth across appropriate report pages. The single arrow to the right takes you forward one page and the single arrow to the left takes you back one page. The arrow/line to the right takes you to the last page of your report and the arrow/line to the left takes you to the first page in your report.



Navigate Report Details

Some reports provide additional details in related reports. When you view a generated report, 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.

Resize the Report Display



You can use the zoom menu to format the size of the report output in your browser window.

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

Search within a Report



To find specific text or values within the report:

- Enter the desired value in the field and then click **Find**. To view subsequent matches, click **Next**.

Refresh the Report Display



To reload the report display after you make any formatting changes:

- Click the **Refresh** icon.

Print a Report



To bring up Windows print controls with standard print options:

- Click the **Print** icon.

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

Sort Records within a Report

Data records on some printable reports, as well as on simple and summary table ad hoc reports, can be sorted. In the example shown here, the records are sorted by the Phone ID as indicated by the icon. To sort in ascending order (A-to-Z):

- Click the top triangle by a column label.

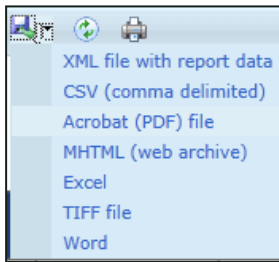
To sort in descending order (Z-to-A):

- Click the bottom triangle by a column label.

To clear any sorting, [Refresh the Report Display](#).

 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

Save and Export a Report



To export and save a report:

1. Click the **Export** icon.
2. Select the desired format from the drop-down list of supported formats.
3. Open and/or save the report as prompted by your web browser.

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

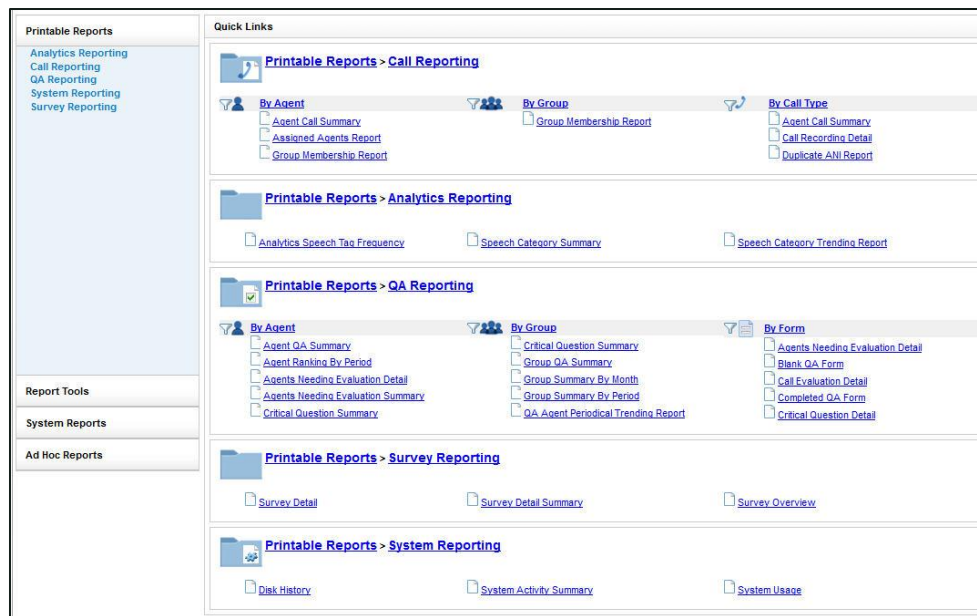
Working with Printable Reports

Printable Reports Overview

Printable reports are pre-designed reports included with your Uptivity WFO system. The **Reporting** tab in the Discover Web Portal gives you access to the Quick Links pane, which shows the most commonly-used printable reports in each category.

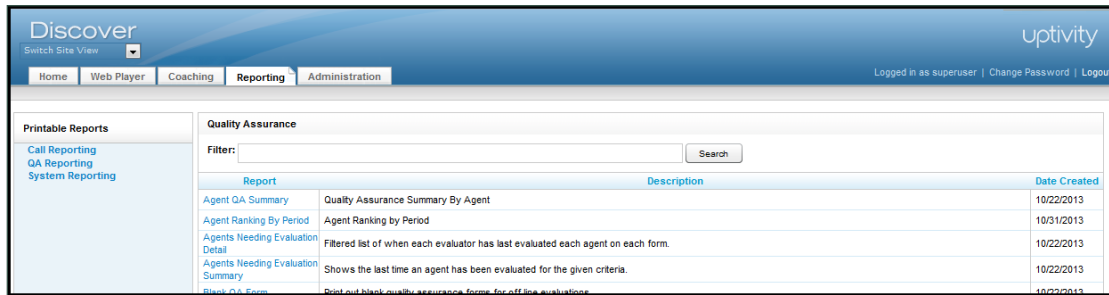
If your installation includes Uptivity Speech Analytics and/or Survey, you will see Printable Reports for those modules; these reports are discussed in their respective administration guides.

The System Reporting category of Printable Reports includes reports typically viewed onscreen by the Uptivity WFO administrator; see [Working with System Reports](#) for more information.



Alternatively, you can view a **Report List** that provides the name, description, and creation date for each report in the chosen category. For more information on accessing printable reports, see [Generate a Printable Report](#).

Filter the Printable Report List



The Filter field allows you to search within the displayed category for a particular report based on the name of the report or on a keyword. For example, "Agent" entered as a keyword filter on the QA Reports list will bring up all QA reports with "agent" in either the report name or description. To filter the list:

- Enter the report name or a keyword in the **Filter** field and then click **Search**.

Generate a Printable Report

To generate a printable report:

4. Click the **Reporting** tab in the Discover Web Portal and expand **Printable Reports** in the left navigation menu.

Alternative: Click the **Reporting** tab in the Discover Web Portal, then click the name of the desired report in the Quick List pane and proceed to step 4.

5. Click the applicable report category.
6. Click the name of the report.
7. Set the report criteria (for details, see [Common Report Criteria Overview](#)) or select a saved criteria set, then click **Generate Report**.

Alternative: To use a saved criteria set, click the inverted chevron icon in the upper right corner and click the desired criteria set to load those settings, then edit if needed. For details, see [Save Printable Report Criteria](#) and [Report Library Overview](#).

Creator	Name	Date Created	Date Modified
superuser	Sales Agents Ranking Repot	8/23/2011	8/23/2011

Search Name: Public:

Form: Sales Evaluation Group: Sales Team Period Type: Month

Year: 2011 Period: June

Save Printable Report Criteria

To save sets of criteria for reports you generate frequently:

1. Click the **Reporting** tab in the Discover Web Portal and expand **Printable Reports** in the left navigation menu.

Alternative: Click the **Reporting** tab in the Discover Web Portal, then click the name of the desired report in the Quick List pane and proceed to step 4.

2. Click the desired report category and then click the name of the desired report.
3. Click the inverted chevron icon in the upper right corner.
4. Enter a name for the report criteria set in the Search Name field.
5. Select the Public check box if you want others to be able to view your saved criteria and then click **Save Search**.

Saved criteria sets can be accessed from the associated report when you generate it. You can also access report criteria from the Report Library (see [Report Library Overview](#)).

Call Reporting Reports Overview

Uptivity WFO 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. This section provides a description and example of each printable report in the Call Reporting category. For more information on running any of these reports, see [Generate a Printable Report](#).


Agent Call Summary

The **Agent Call Summary** displays call totals captured in the call recording system. The report displays the number and duration of calls recorded for one or more agents over a period of time. Recording duration may include on-hold and after call work depending on your specific configuration and the recording scripts used. Report results are limited to groups to which you have access.

Agent Call Summary Back Generate Report

Start Date: End Date: Group:

Call Direction:

 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

The **Assigned Agents Report** displays Active, Inactive, or All agents who are currently in the database, along with their System ID, Username (System Username), and Phone ID. 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.

Ability to view agent information other than your own is limited to permissioned users. Ask your Uptivity WFO administrator if you need to view information for other agents and are unable to do so.

Assigned Agents Report Back Generate Report

Status: Active ▼

Assigned Agents				
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

The **Call Recording Detail** report displays call metadata for your selected agent(s) over a period of time. The report provides the Record ID number along with Uptivity Group, Skill group, ANI, DNIS, recording date and time, call duration, and Device ID. If your organization uses custom field names, those names will be shown instead of the default names listed here. Report results are limited to groups to which you have access.

Call Recording Detail Back Generate Report

Start Date: End Date: Agents:

All
 CallCopy Administrator
 CallCopy Administrator
 CALLCOPY AGENT

Record ID: Caller's Phone #: Dialed Phone #:

Gate: User 1: User 2:

User 3: User 4: User 5:

CallCopyGroup: Skill Group List:

All
 East Agents
 East Supervisors
 West Agents

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

The **Duplicate ANI Report** displays call metadata information for repeat calls into your organization from the same phone number over a period of time. If the same ANI has 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 you 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

The **Group Membership Report** displays Active, Inactive, or All agents in a particular group, along with their Phone ID. Report results are limited to groups to which you have access, even if you select **All**.

Group Membership Report Back Generate Report

Group: All Active Active

 <h2>Group Membership</h2>		
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 Reports Overview

Uptivity WFO QA Reports allow you to trend and track the performance of your agents, analysts, and groups as part of your quality management program. The various QA reports give insight into critical areas such as calibration, trending, and team performance. 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.

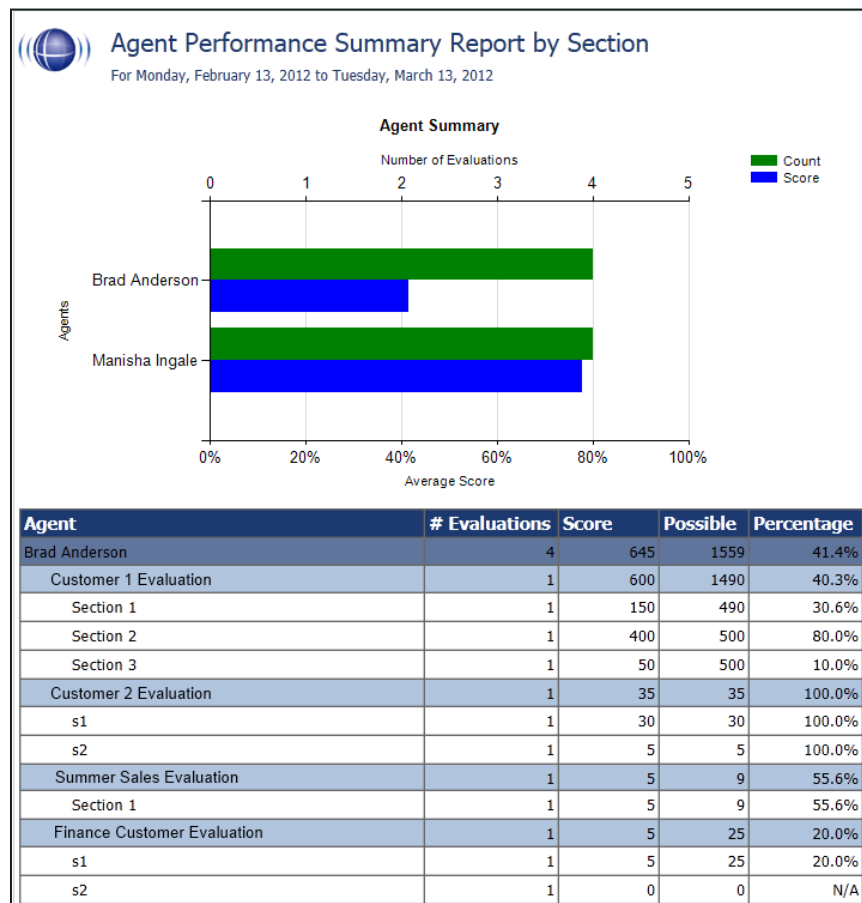
QA Reporting is based on the evaluations that your quality assurance (QA) team has performed. These reports require that one or more QA evaluation forms be created. The way that forms are created affects and impacts the reporting data you are able to see in this category of reports. For more information on creating QA forms, refer to the *Uptivity WFO QM Manual*.

This section provides a description and example of each printable report in the QA Reporting category. For more information on running any of these reports, see [Generate a Printable Report](#).

Agent QA Summary

The **Agent QA Summary** displays the QA performance of selected Group(s) or Agent(s) over a period of time. The Report Type criteria item lets you specify the level of detail: Agent, Form, Section, and Question. When you view the report onscreen, you can drill down to lower levels of detail.

In the example below, **Report Type** was set to **Section**, and you can drill down to **Question**-level results by clicking a section label. Report results are limited to groups to which you have access, even if you select **All**.



Agent Ranking by Period

The **Agent Ranking by Period** 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 agents in your system from 1–X. Positive trending is shown with a green arrow and negative trending with a red arrow. Report results are limited to groups to which you have access, even if you select **All**.

Agent Ranking By Period Back


Period Type: Year: Period:

Form: Group:

Agent Ranking by Month For period beginning 12/1/2010 and ending 12/31/2010				
Agent Name	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

The **Agents Needing Evaluation Detail** report helps you determine agents who may be due for evaluation. The report displays the Agent name, all Uptivity Group(s) to which they belong, any Forms associated with those groups, any possible Users who could serve as Evaluator, and the date the agent was Last Evaluated. You can filter results by any of these displayed items, as well as by whether agents are Active or Inactive and by a Last Evaluated Before date. Report results are limited to groups to which you have access, even if you select **All**.

 **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

The **Agents Needing Evaluation Summary** displays the same information as the [Agents Needing Evaluation Detail](#) report, but only shows one entry per agent regardless of the number of Uptivity Groups to which they belong. Report results are limited to groups to which you have access, even if you select **All**.

Agents Needing Evaluation Summary
Back
Generate Report

Last Evaluated Before

Status

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

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

The **Blank QA Form** report displays a blank version of a specific QA evaluation form. Report results are limited to groups to which you have access, even if you select **All**.

Blank QA Form Back Generate Report

Form



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

The **Call Evaluation Detail** report shows detailed results on a completed QA evaluation based on your selection criteria. Metadata information is shown at the top, followed by a section- and question-level breakdown of the form with individual responses. Report results are limited to groups to which you have access, even if you select **All**.

Back Generate Report

Start Date: End Date: Date Type:

Agent: Evaluator: Form:

Active: Group: Question:

Response: Caller's Phone #: Dialed Phone #:

Gate: User 1: User 2:

User 3: User 4: User 5:

QA Record ID:


Agent: ABBOTT, JOAIII			
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

The **Completed QA Form** report displays scoring data for a specific QA evaluation, and is automatically generated when you print a QA Record via Search QA Evaluations on the Coaching tab. Enter the **QA Record ID** to generate the report. Report results are limited to groups to which you have access. 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	<input checked="" type="checkbox"/> 10pts
No	<input type="checkbox"/>
Did Agent state his/her name?	
Yes	<input checked="" type="checkbox"/> 10pts
No	<input type="checkbox"/>
Soft Skills	Score: 20 of 30 (66.67%)
Did Agent use courtesy statements as appropriate?	
Excellent	<input type="checkbox"/>
Very Good	<input type="checkbox"/>
Good	<input checked="" type="checkbox"/> 5pts
Fair	<input type="checkbox"/>
Poor	<input type="checkbox"/>
Did Agent demonstrate Active Listening?	
Excellent	<input type="checkbox"/>
Very Good	<input type="checkbox"/>
Good	<input checked="" type="checkbox"/> 5pts
Fair	<input type="checkbox"/>
Poor	<input type="checkbox"/>
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	<input checked="" type="checkbox"/> 10pts
No	<input type="checkbox"/>
Notes	
We will coach you on your soft skills	

Critical Question Detail

The **Critical Question Detail** report provides detailed insight as to how each agent has scored on the Critical question on all evaluated calls. Report results are limited to groups to which you have access, even if you select **All**.

Critical Question Detail
Back Generate Report

Start Date

End Date

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

Date Type

Active

Critical Question Detail <small>For Monday, February 28, 2011 to Tuesday, March 29, 2011</small>					
<small>Selected Forms: Critical Question Form</small>					
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 Summary

The **Critical Question Summary** shows a summary of the Critical question as a whole. Report results are limited to groups to which you have access, even if you select **All**.

Critical Question Summary Back Generate Report

Start Date End Date Group List
Calibration
ClientABC
ClientXYZ

Form List Agent List User List
Customer Service Evaluation
Sales Evaluation
VERONICA ALVAREZ
URSULA AVERY
TRACY BLACKBURN
Administrator
Barry Knack
Bob Smith

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

The **Evaluation List Report** generates a list of QA evaluations performed within the specified time period. The report provides a means of tracking the evaluation process and the scoring of evaluations. Report results are limited to groups to which you have access, even if you select **All**.

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

The **Evaluator QA Summary** displays results of one or more 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 for more granular detail. Report results are limited to groups to which you have access, even if you select **All**.

Evaluator QA Summary Back Generate Report

Start Date: 3/2/2014 End Date: 4/2/2014 Date Type: Call Date

Active/Deleted Forms: Active Forms: Today'sQAform, WithArb, WithArb-NoEvaCompleted, WithoutArb

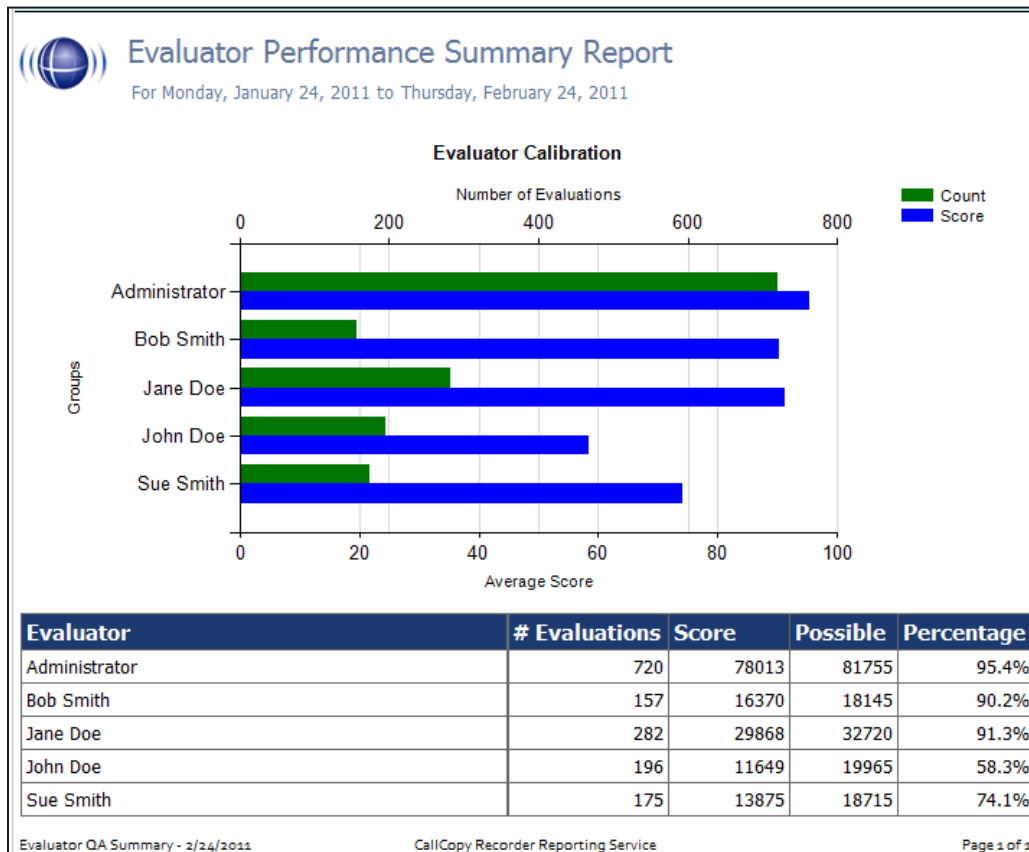
Agents: Anthony Condon, Jean-Pierre Conlee, Sheryl Coscia, George Costanza

Groups: All, Group01, Group02, Group03

Users: William Clark, William Clinton, Wolfgang DiGirolamo, Zach Haltli

Status: All, In Progress, Complete, Question

Report Type: Evaluator



Group QA Summary

The **Group QA Summary** displays performance of one or more team(s) on one or more form(s) over a period of time. You can drill down for more granular data on Report Type (Group, Form, Section, and Question). Report results are limited to groups to which you have access, even if you select **All**.

Group QA Summary Back Generate Report

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

Active: Active

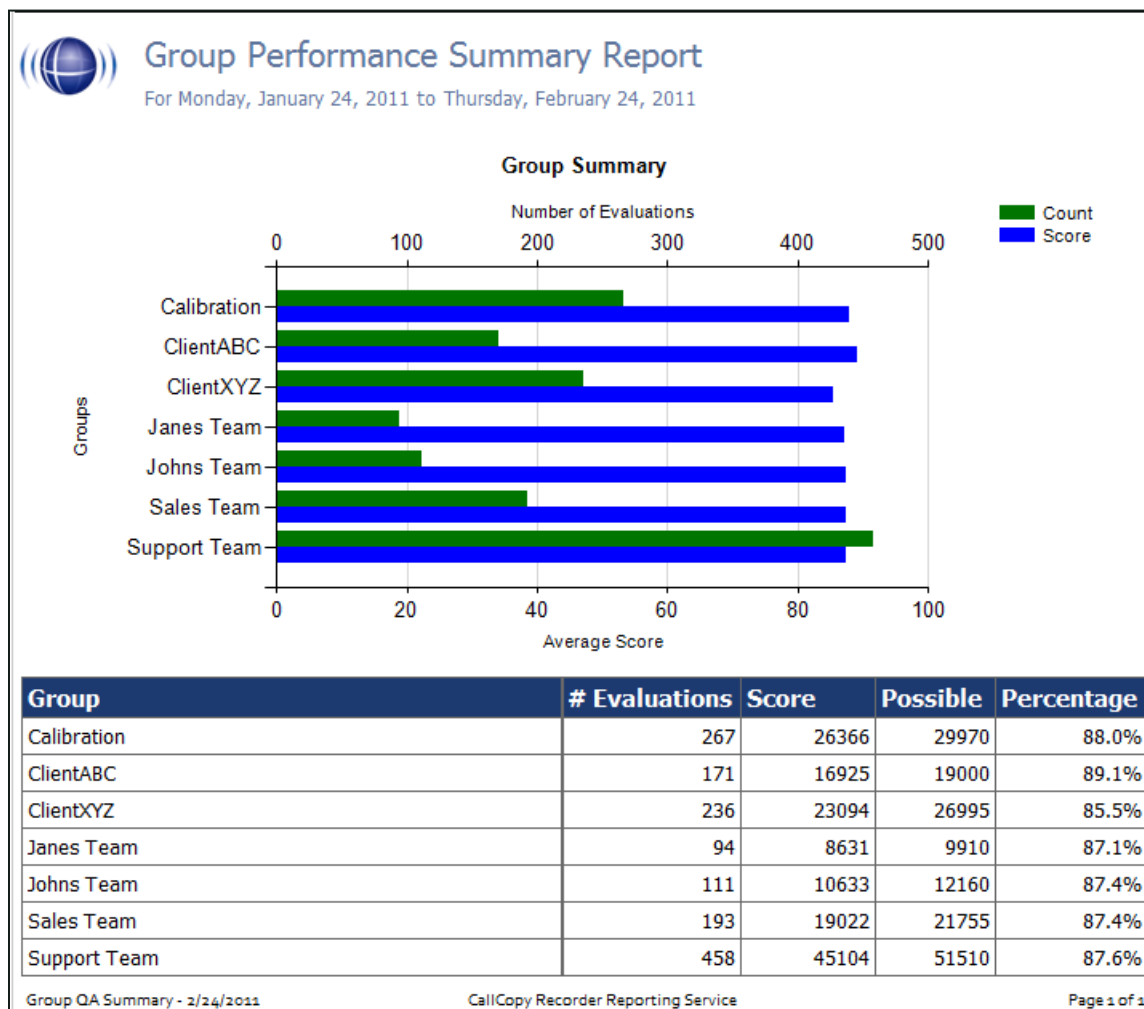
Forms: All, Customer Service Evaluation, Sales Evaluation

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

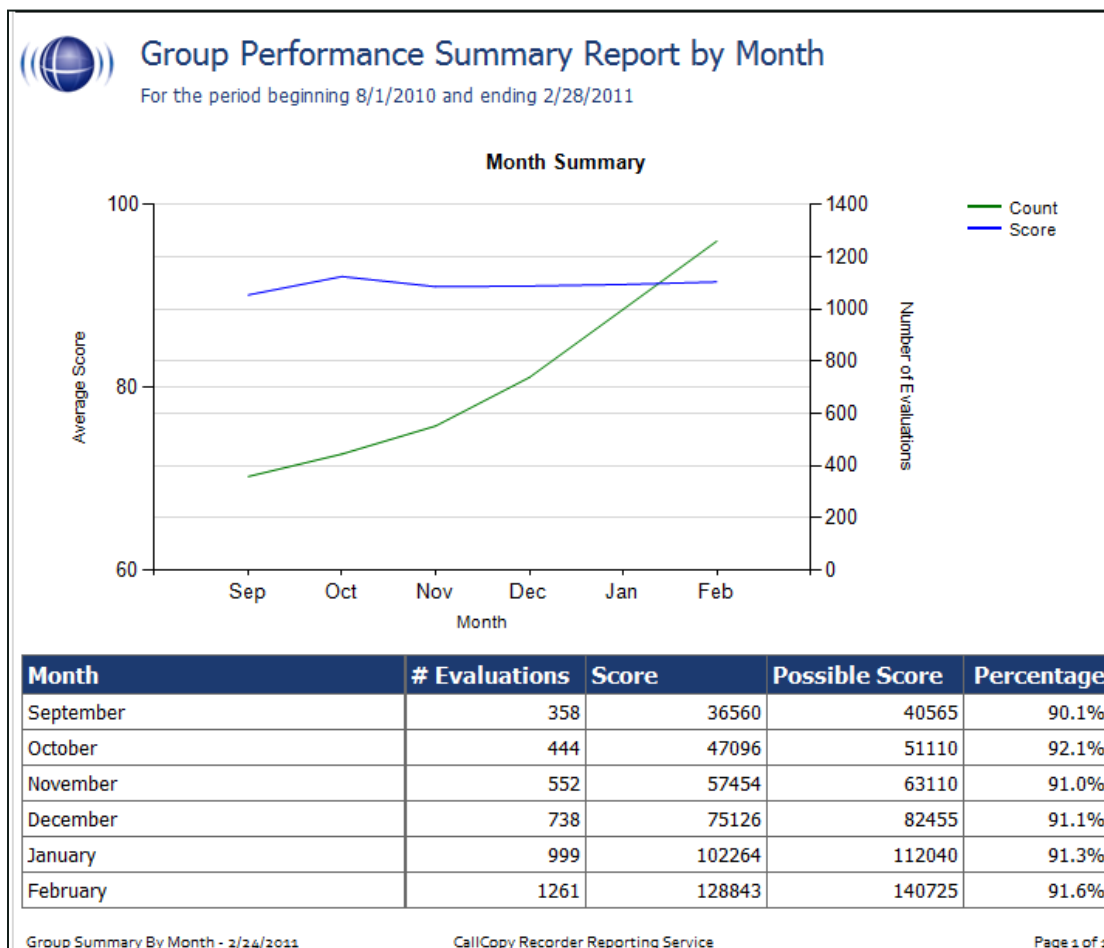
The **Group Summary by Month** report displays performance of one or more team(s) on one or more form(s), charted over a certain number of months based on the end Month you select. Choosing a Report Type of **Month** shows total data for each month. Choosing a Report Type of **Group** shows evaluation data by Uptivity Group for each month. Report results are limited to groups to which you have access, even if you select **All**.

Group Summary By Month Back Generate Report

Month: Year: Periods:

Active: Forms: Agents:

Groups: Users: Report Type:



Group Summary by Period

The **Group Summary by Period** report displays performance of one or more team(s) on one or more form(s), charted over a certain number of periods (week, month, quarter, or year). This time period begins with the date or period selected in the **Period Name** field and looks backward over the specified number of periods. Report results are limited to groups to which you have access, even if you select **All**.

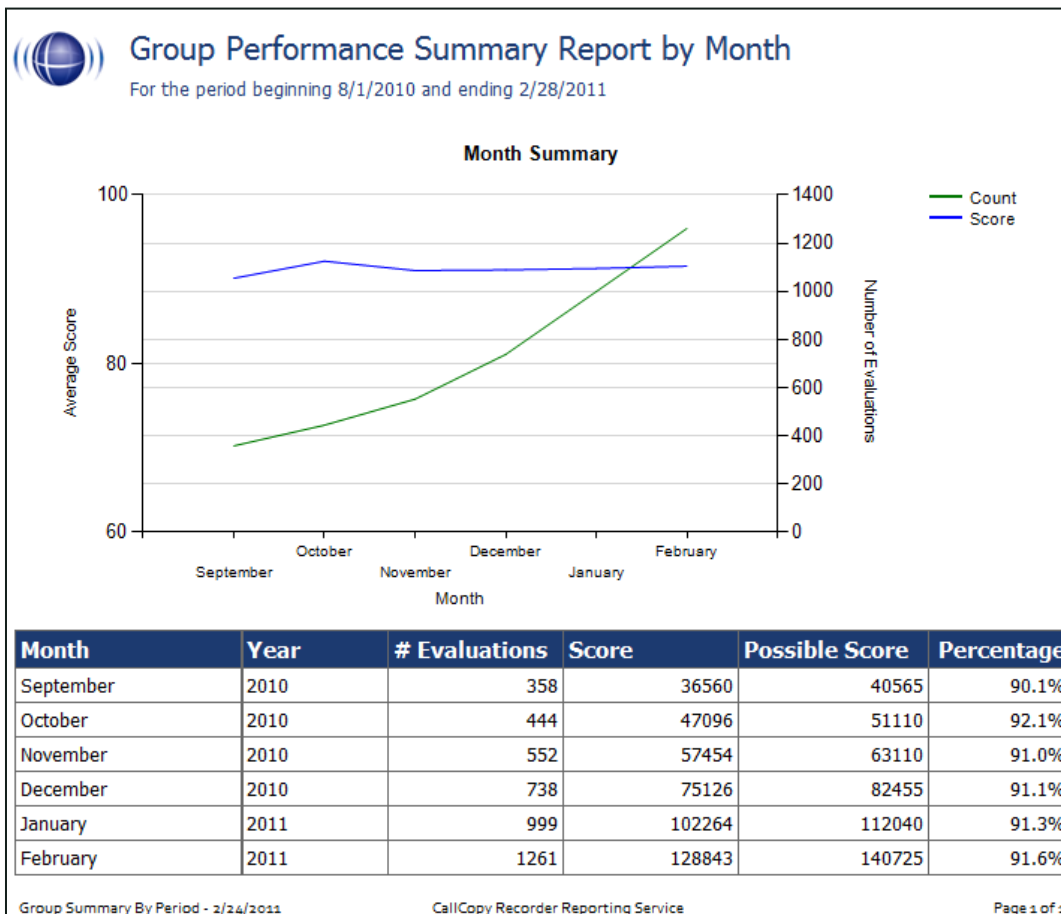
Group Summary By Period Back Generate Report

Period Type: Year: Period Name:

Periods: Active: Forms:

Agents: VERONICA ALVAREZ Groups: Calibration Users: Administrator

Report Type:



Multiple Evaluations Summary

The **Multiple Evaluations Summary** displays the last 12 evaluations conducted on a selected agent and form, based on a selected end date. Agent ID, Supervisor ID, and Form ID are required fields. **Overall Average %** is the average score of all evaluations done using the selected form regardless of agent or evaluator. **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. Individual percentages in the **Overall Percentage** column are Section totals. 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 Back Generate Report

End Date: Agent ID: Form ID:

Supervisor ID: Status:

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

The **QA Agent Periodical Trending Report** summarizes an agent's performance over a selected period of time. This time period begins with the date or period selected in the **Period Name** field and looks backward over the specified number of periods. The reporting period can be daily, weekly, monthly, quarterly or yearly. This sample report shows September, 2010 through February, 2011.

Performance can be shown on a per-form basis as well as for selected agents, groups or users. Report results are limited to groups to which you have access, even if you select **All**.

QA Agent Periodical Trending Report Back Generate Report

Report Type: Year: Period Name:

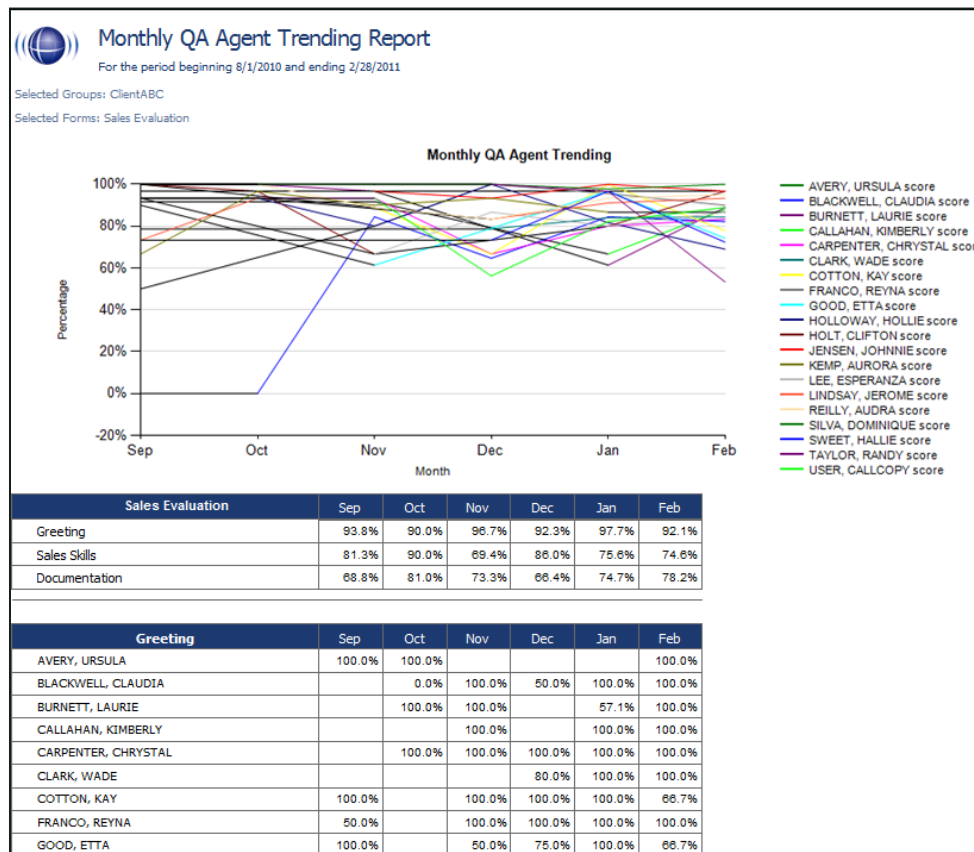
Periods: Active: group list:

form list:

 agent list:

 user list:

Date Type:



QA Agent Trending Report

The **QA Agent Trending Report** summarizes an agent's performance on a particular form over a period of time. Performance can be broken down on a section-by-section, and question-by-question basis, depending on how the QA evaluation form was created. Report results are limited to groups to which you have access, even if you select **All**.

QA Agent Trending Report Back

Start Date: End Date: Date Type:

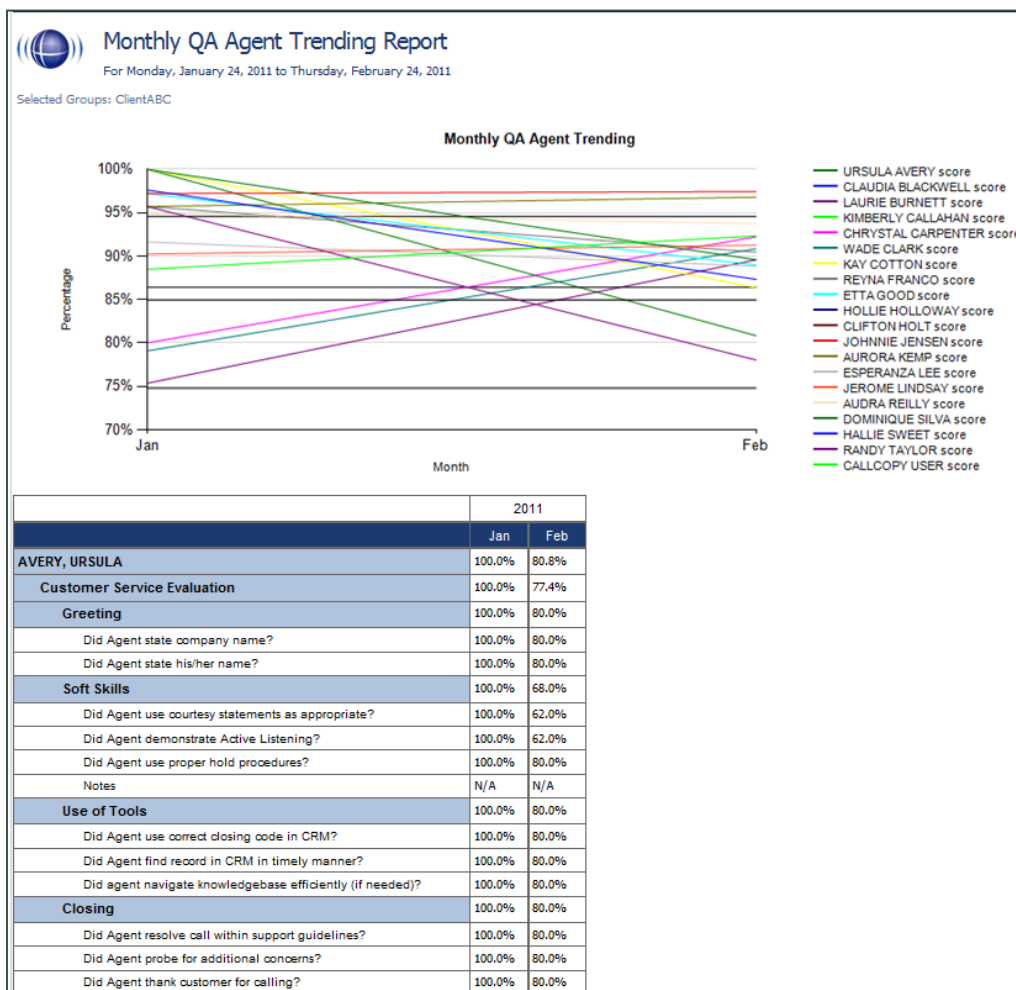
Active: Groups:
 Calibration
 ClientABC
 ClientXYZ

Forms:
 Customer Service Evaluation
 Sales Evaluation

Agents:
 VERONICA ALVAREZ
 URSULA AVERY
 TRACY BLACKBURN

Users:
 Administrator
 Barry Knack
 Bob Smith

Reporting Period:



QA Form Trending Report

The **QA Form Trending Report** displays total quality performance on a particular QA evaluation form over a period of time.

QA Form Trending Report Back Generate Report

Start Date: End Date: Reporting Period:

Active: Group List:
ClientABC
ClientXYZ

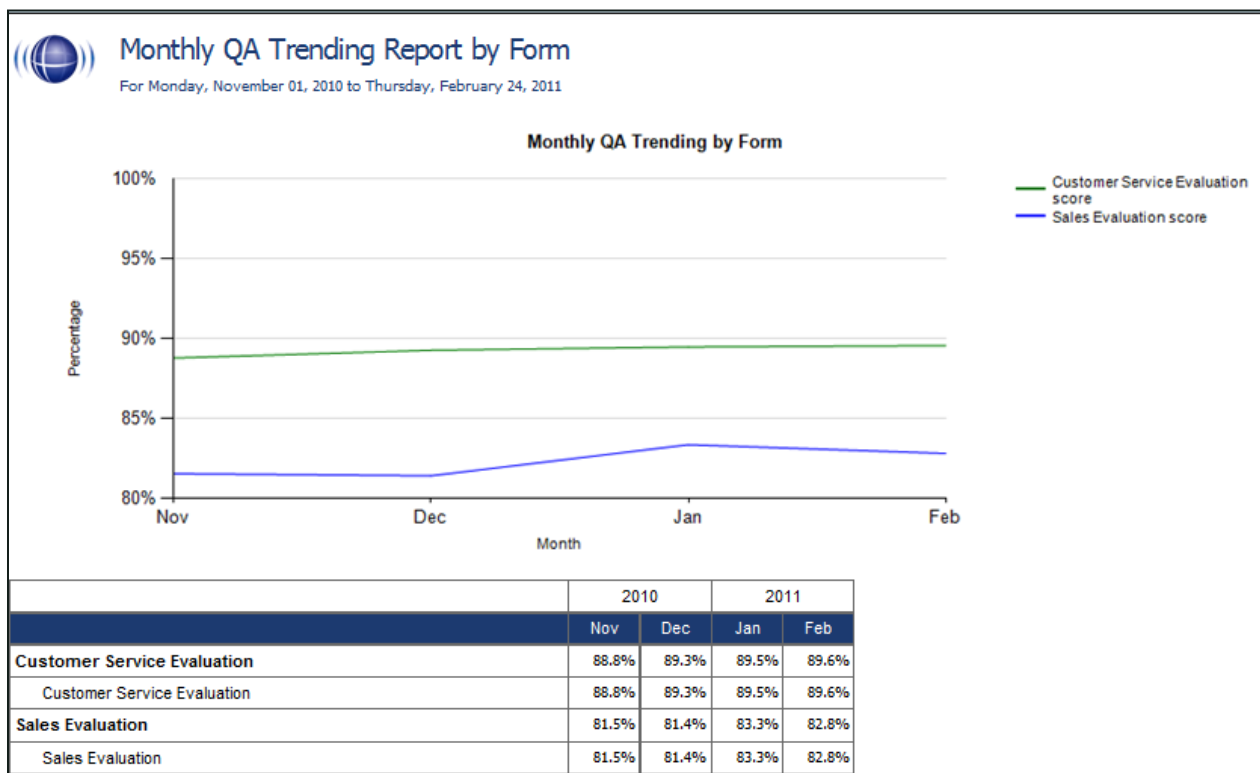
Form List:
Customer Service Evaluation
Sales Evaluation

Agent List:
VERONICA ALVAREZ
URSULA AVERY
TRACY BLACKBURN

User List:
Administrator
Barry Knack
Bob Smith

Report Type:

Report Detail:



QA Group Periodical Trending Report

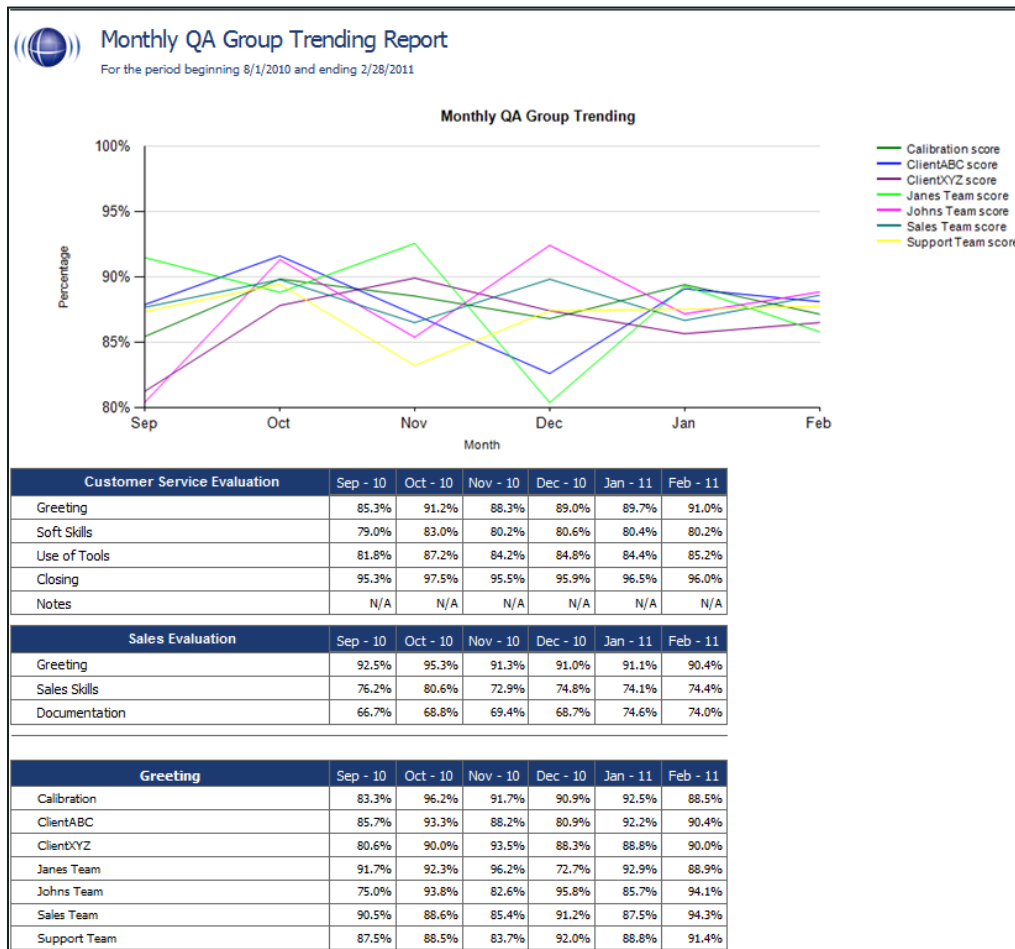
The **QA Group Periodical Trending Report** displays performance of one or more group(s) on one or more form(s) over a period of time. This time period begins with the date or period selected in the **Period Name** field and looks backward over the specified number of periods. The reporting period can be daily, weekly, monthly, quarterly or yearly. This sample report shows September, 2010 through February, 2011. 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

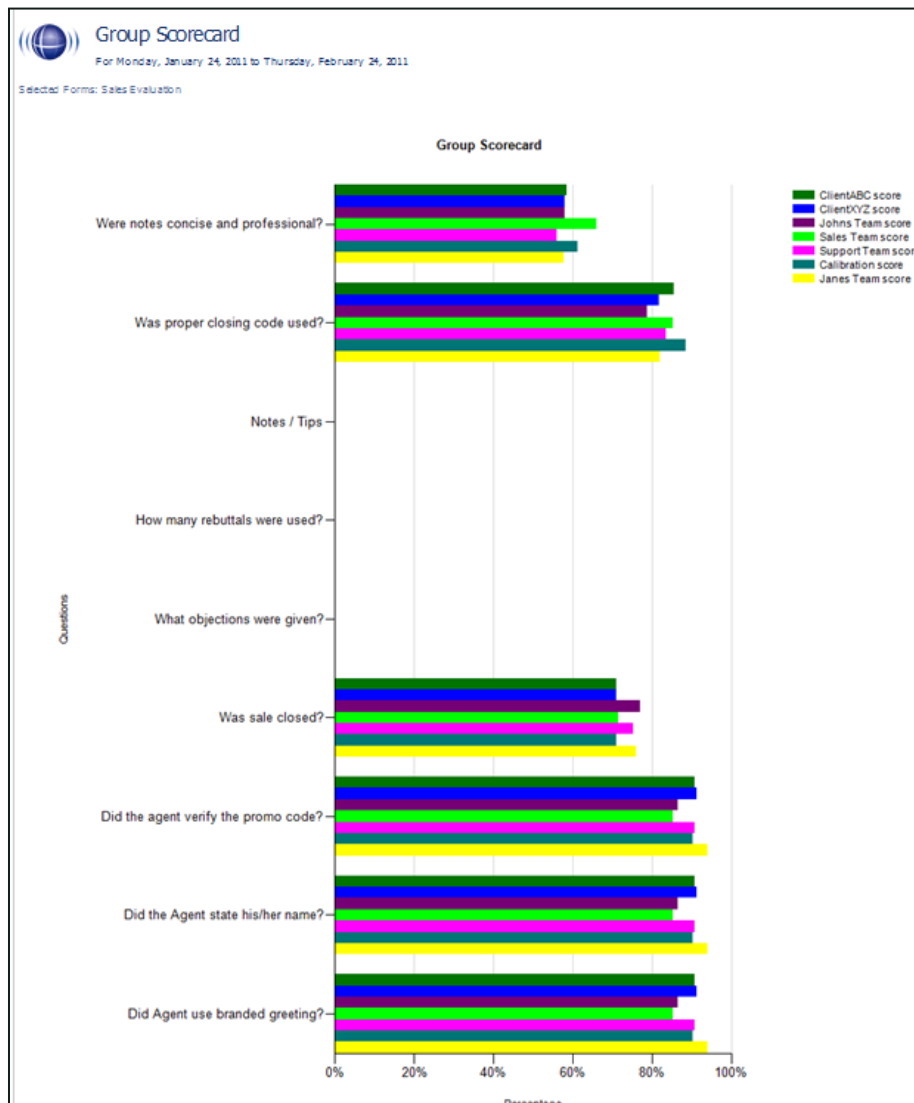
The **QA Group Scorecard** displays a group-by-group comparison of results for a QA evaluation form, at a question level, based on a period of time.

QA Group Scorecard Back Generate Report

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

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

Agent List: All VERONICA ALVAREZ URSULA AVERY TRACY BLACKBURN Evaluator: All Administrator Barry Knack Bob Smith



QA Group Trending Report

The **QA Group Trending Report** displays a group-by-group comparison of results for a QA form, at a per-question level. Data is compared daily, weekly, monthly, or yearly based on your selections for a specific period of time.

QA Group Trending Report Back Generate Report

Start Date: End Date: Date Type:

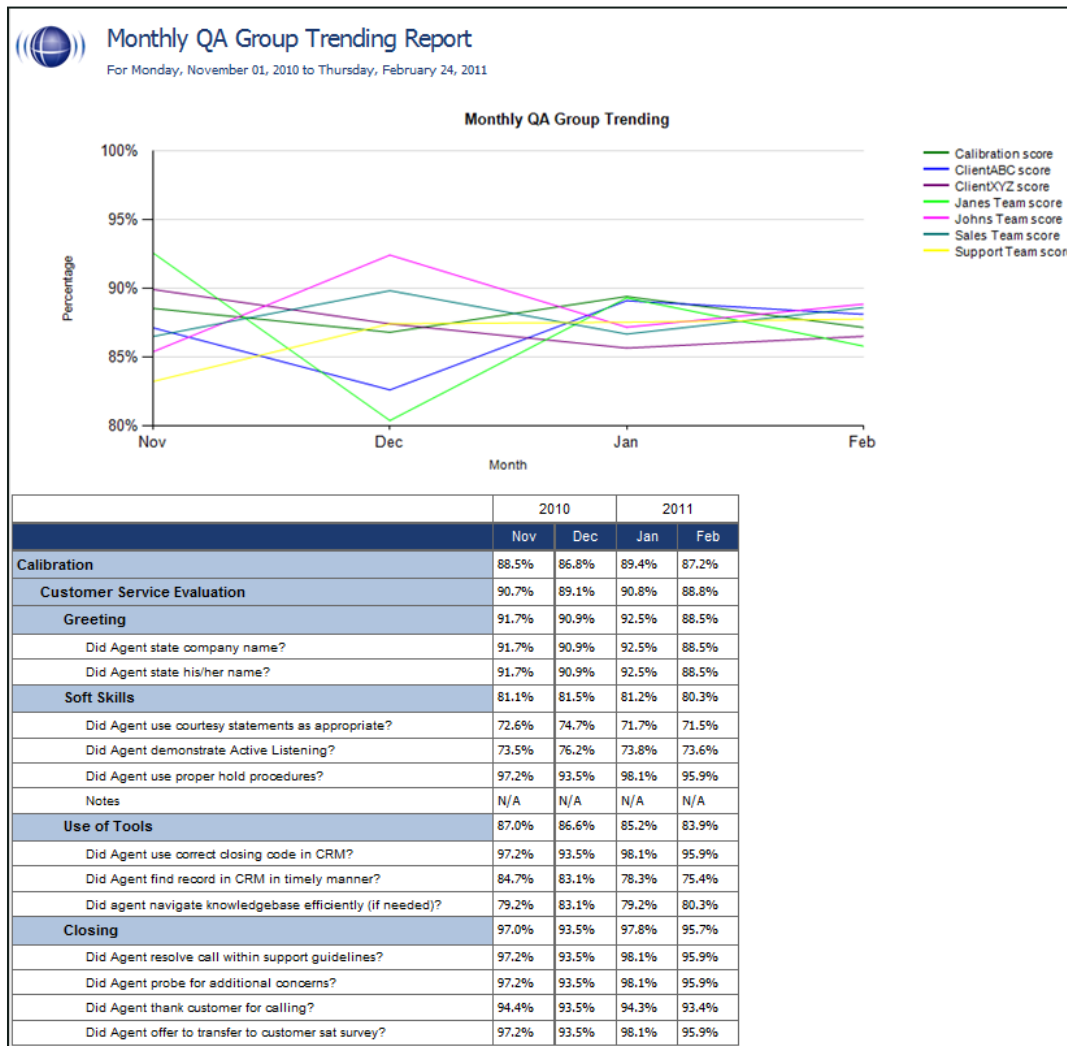
Active: Groups:
Calibration
ClientABC
ClientXYZ

Forms:
Customer Service Evaluation
Sales Evaluation

Agents:
VERONICA ALVAREZ
URSULA AVERY
TRACY BLACKBURN

Users:
Administrator
Barry Knack
Bob Smith

Reporting Period:



QA Pending Acknowledgment

The **QA Pending Acknowledgment** report displays a list of unacknowledged QA evaluations on an agent-by-agent and form-by-form basis. This report is only needed if you use the Acknowledgment-only or Acknowledgment and Arbitration workflows. For more information, see the *Uptivity WFO Quality Management Manual*.

QA Pending Acknowledgment Back Generate Report

Older Than Groups

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

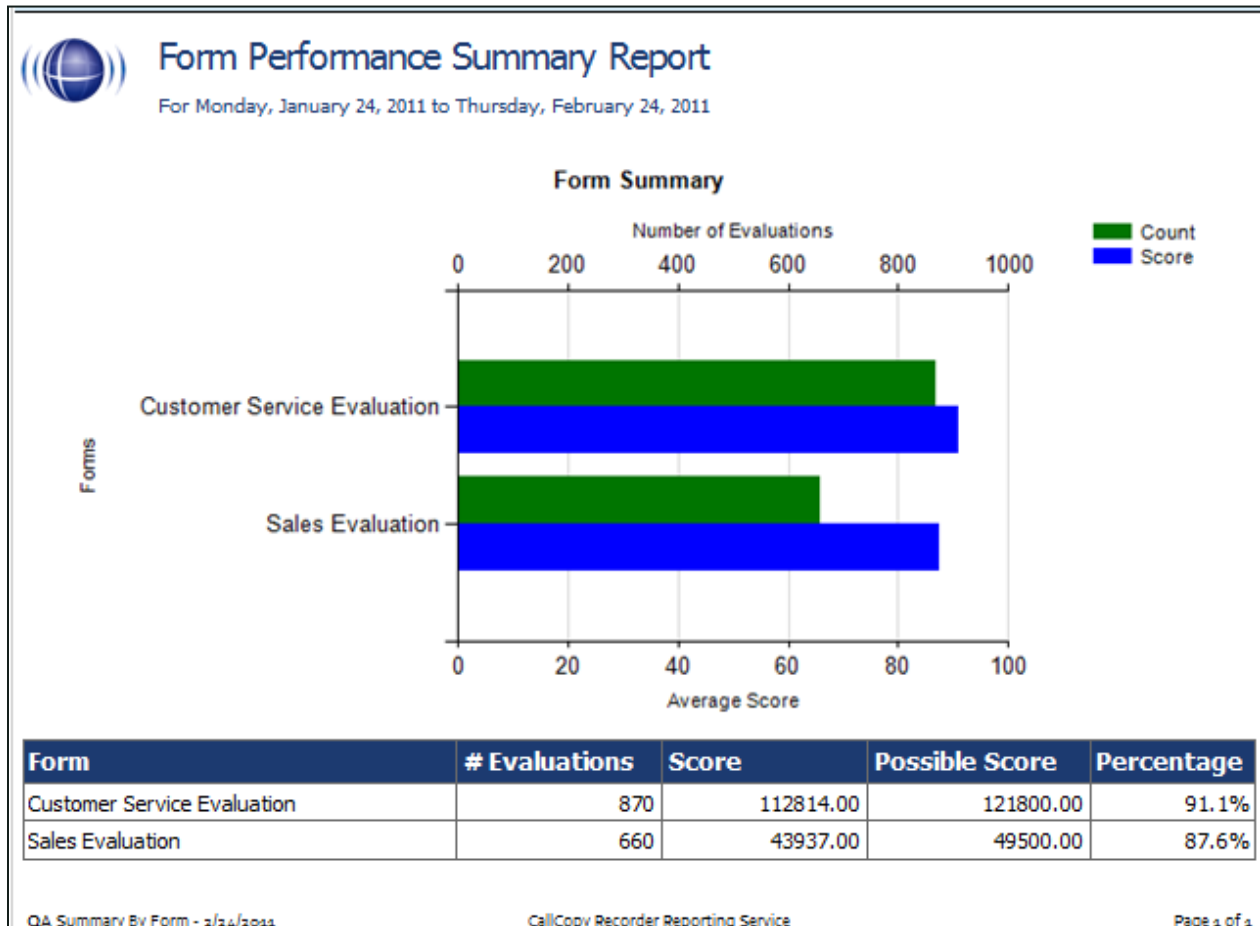
The **QA Summary by Form** report displays performance on one or more QA evaluation forms over a period of time. You can drill down into the report for additional details.

QA Summary By Form Back Generate Report

Start Date: End Date: Date Type:

Active: Forms: Agents:

Groups: Users: Report Type:



QA Summary by Question

The **QA Summary by Question** report displays performance on a QA evaluation 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:

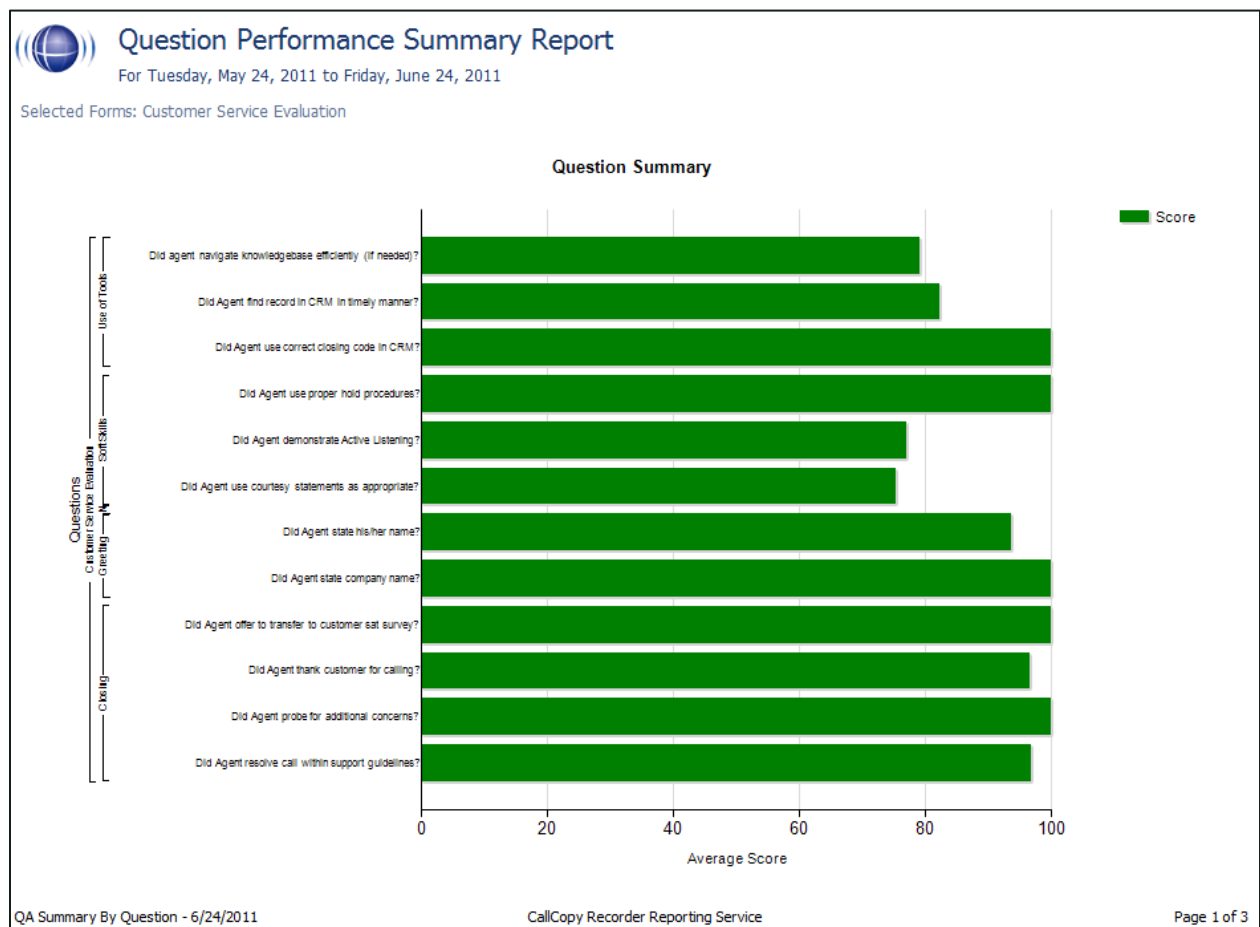
Active: Groups:
Calibration
ClientABC
ClientXYZ


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

The **QA Summary by Section** report displays performance on a QA evaluation form's sections over a period of time. You can drill down into the report for additional details.

QA Summary By Section Back

Start Date: End Date: Date Type:

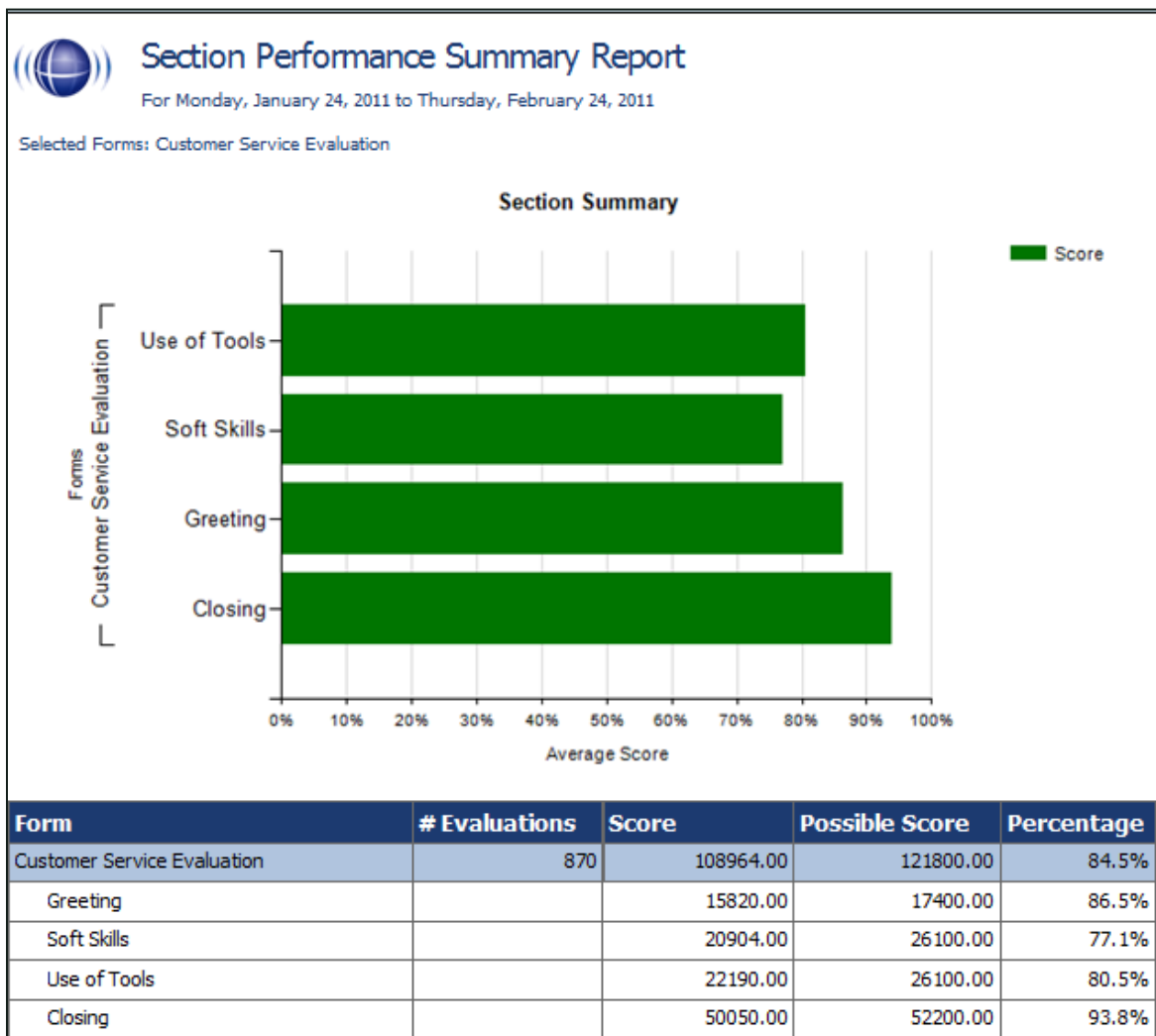
Active: Groups:
Calibration
ClientABC
ClientXYZ

Agents:
VERONICA ALVAREZ
URSULA AVERY
TRACY BLACKBURN

Users:
Administrator
Barry Knack
Bob Smith

Forms:
Customer Service Evaluation
Sales Evaluation

Report Type:



Quality Assurance Detail

The **Quality Assurance Detail** report shows individual responses to each question in a completed QA evaluation, based on the Call ID. The specific call graded in 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

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

The **Weighted QA Group Periodical Trending Report** displays group-by-group comparisons of quality results at the section level of a form over a period of time. This time period begins with the date or period selected in the **Period Name** field 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. Data is broken down section by section.

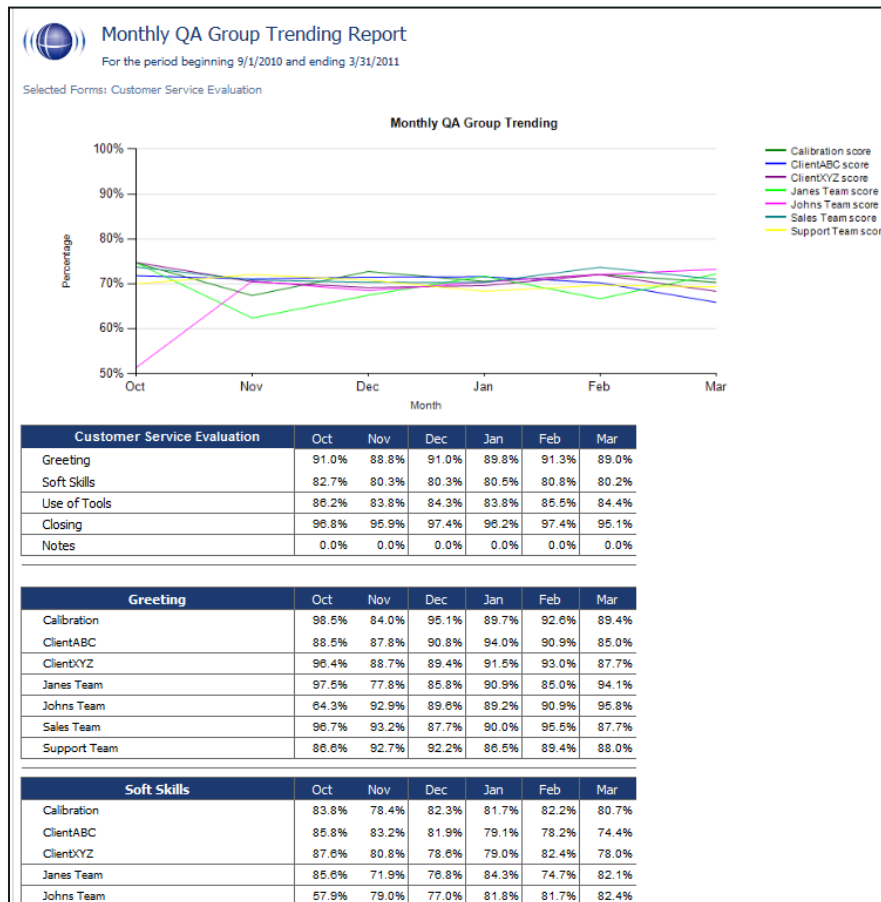
Weighted QA Group Periodical Trending Report Back Generate Report

Report Type: Monthly Year: 2011 Period Name: June

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

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

Date Type: Evaluation Date



QA Calibration Reporting Reports Overview

Calibration is a process that helps ensure all evaluators in your organization score calls consistently and fairly, following any established standards, rules, and best practices. When agents receive feedback and direction based on consistent scoring, the results include higher-quality customer service, reduced agent confusion and frustration, and improved employee morale. Uptivity WFO supports the calibration process by means of calibration evaluations. For more information on calibration, see the *Uptivity WFO Quality Management Manual*.

QA Calibration Reporting is based on the calibration evaluations that your quality assurance (QA) team members have performed. Scores associated with calibration evaluations are not included in regular QA Reporting reports, and vice versa. The following reports are available in calibration-specific versions:

- [Agent QA Summary](#)
- [Evaluator QA Summary](#)
- [Group QA Summary](#)

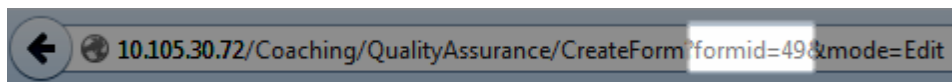
The **Calibration Report** lets you view the details of one or more completed calibration evaluations. It is the calibration-specific equivalent of the [Call Evaluation Detail](#) report.

There are also two reports that are only available in QA Calibration Reporting. This section provides a description and example of these printable reports. For more information on running any of these reports, see [Generate a Printable Report](#).

Obtain a QA Form ID

To generate the [Calibration Evaluator Comparison Report](#), you must provide the Form ID for the QA form used by the evaluators. This is a numeric value used to identify the form in the Uptivity WFO database. To obtain the Form ID:

1. Click the **Coaching** tab in the Discover Web Portal and expand Quality Assurance in the left navigation menu.
2. Click **Manage Forms** and then click **Filter** to see a list of all QA forms.
3. Click **Edit** for the form used in the calibration evaluations.



The QA Form ID (in this case, 49) is shown in the URL for the Edit page.

Calibration Evaluator Comparison Report

The **Calibration Evaluator Comparison Report** allows you to see, on a section-by-section and question-by-question basis, how each participating evaluator scored the designated call. Depending on the number of questions on the form, and the number of evaluators, this report may run to several pages in length for a single calibration evaluation.

In the sample report shown here, a group of four evaluators has completed a calibration evaluation for the same call (Call ID 1825).

QA Calibration Evaluator Comparison Report				
Agent:	Bern, Neil	Call ID:	1825	
Agent Id:	28	Call Date:	1/23/2013	
Evaluation Date Range:	Monday, April 06, 2015 to Monday, April 06, 2015			
Evaluator	Evaluation ID	Points	Possible Points	%
Eddy, Cheryl	107	85.00	100.00	85.00%
George, Gina	105	75.00	100.00	75.00%
Hessler, Jessica	108	85.00	100.00	85.00%
Ward, Rae	106	75.00	100.00	75.00%
1 Support Call				
Opening				
Proper introduction?		Possible Points: #		10.00
Evaluation ID	Evaluator	Response		
107	Eddy, Cheryl	Yes		10.00
105	George, Gina	Yes		10.00
108	Hessler, Jessica	Yes		10.00
106	Ward, Rae	Yes		10.00
Ask for caller's name?		Possible Points: #		10.00
Evaluation ID	Evaluator	Response		
107	Eddy, Cheryl	Yes		10.00
105	George, Gina	Yes		10.00
108	Hessler, Jessica	Yes		10.00
106	Ward, Rae	Yes		10.00
Restate problem to ensure understanding?		Possible Points: #		10.00
Evaluation ID	Evaluator	Response		
107	Eddy, Cheryl	Yes		10.00
105	George, Gina	No		0.00
108	Hessler, Jessica	No		0.00
106	Ward, Rae	Yes		10.00
Comments:		Possible Points: #		0.00
Evaluation ID	Evaluator	Response		
107	Eddy, Cheryl			0.00
105	George, Gina	Restated but missed part of issue.		0.00
108	Hessler, Jessica			0.00
106	Ward, Rae			0.00

QA Calibration Trending Report

The **QA Calibration Trending Report** details performance of one or more evaluators on one or more QA evaluation forms over a period of time. The report is organized by evaluator and then by form. Performance can be further broken down on a section-by-section, and question-by-question basis, depending on how the QA form was created.

This report can be used to monitor how the evaluator scores calls before and after calibration-related coaching. Because the report can include all evaluations, it is not meant to monitor trends only in calibration evaluations.

The screenshot shows the configuration interface for the QA Calibration Trending Report. It includes the following fields and options:

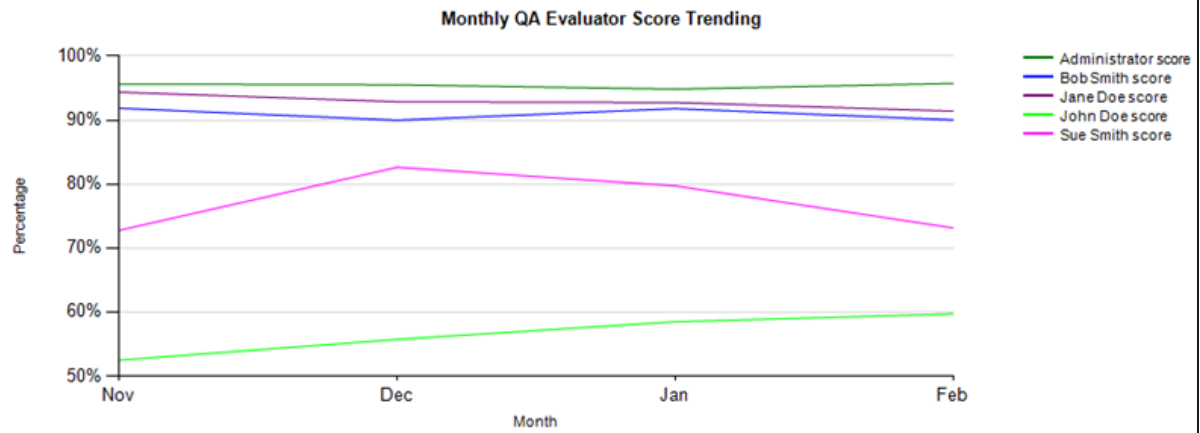
- Start Date:** 3/21/2015
- End Date:** 4/21/2015
- Date Type:** Call Date
- Active/Deleted Forms:** Active
- Groups:** Leaders Team, Legends Team, MultipleEvalTeam, QATeam
- Forms:** All, 1Sales Call, 1Support Call, AutoBat_QA_Form_Edit_ONLY
- Agents:** Brad Anderson, Dr. Avsenik, Daniel Ayala, Phil Barnes
- Users:** Boris Chavis, Brad Anderson, Bratko Evan, Brian Hamilton
- Reporting Period:** Monthly
- Status:** All, In Progress, Complete, Question

Buttons for "Back" and "Generate Report" are located in the top right corner.



Monthly QA Calibration Trending Report

For Monday, November 01, 2010 to Thursday, February 24, 2011



	2010		2011	
	Nov	Dec	Jan	Feb
Administrator	95.6%	95.5%	94.8%	95.7%
Customer Service Evaluation	96.2%	95.9%	95.4%	96.5%
Greeting	100.0%	98.9%	98.1%	99.4%
Did Agent state company name?	100.0%	98.9%	98.1%	99.4%
Did Agent state his/her name?	100.0%	98.9%	98.1%	99.4%
Soft Skills	86.6%	86.6%	86.9%	87.9%
Did Agent use courtesy statements as appropriate?	79.3%	79.8%	80.0%	81.4%
Did Agent demonstrate Active Listening?	80.6%	80.6%	81.4%	82.2%
Did Agent use proper hold procedures?	100.0%	99.5%	99.3%	100.0%
Notes	N/A	N/A	N/A	N/A
Use of Tools	95.8%	95.9%	94.2%	96.4%
Did Agent use correct closing code in CRM?	100.0%	99.5%	99.3%	100.0%
Did Agent find record in CRM in timely manner?	93.8%	94.7%	91.1%	94.8%
Did agent navigate knowledgebase efficiently (if needed)?	93.8%	93.6%	92.2%	94.5%
Closing	100.0%	99.5%	99.3%	100.0%
Did Agent resolve call within support guidelines?	100.0%	99.5%	99.3%	100.0%
Did Agent probe for additional concerns?	100.0%	99.5%	99.3%	100.0%
Did Agent thank customer for calling?	100.0%	99.5%	99.3%	99.7%
Did Agent offer to transfer to customer sat survey?	100.0%	99.5%	99.3%	100.0%

Working with System Reports

System Reports Overview

Your Uptivity WFO system offers system reporting options in two areas. The **System Reporting** section under **Printable Reports** provides historical data that relates to usage of the Uptivity WFO 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

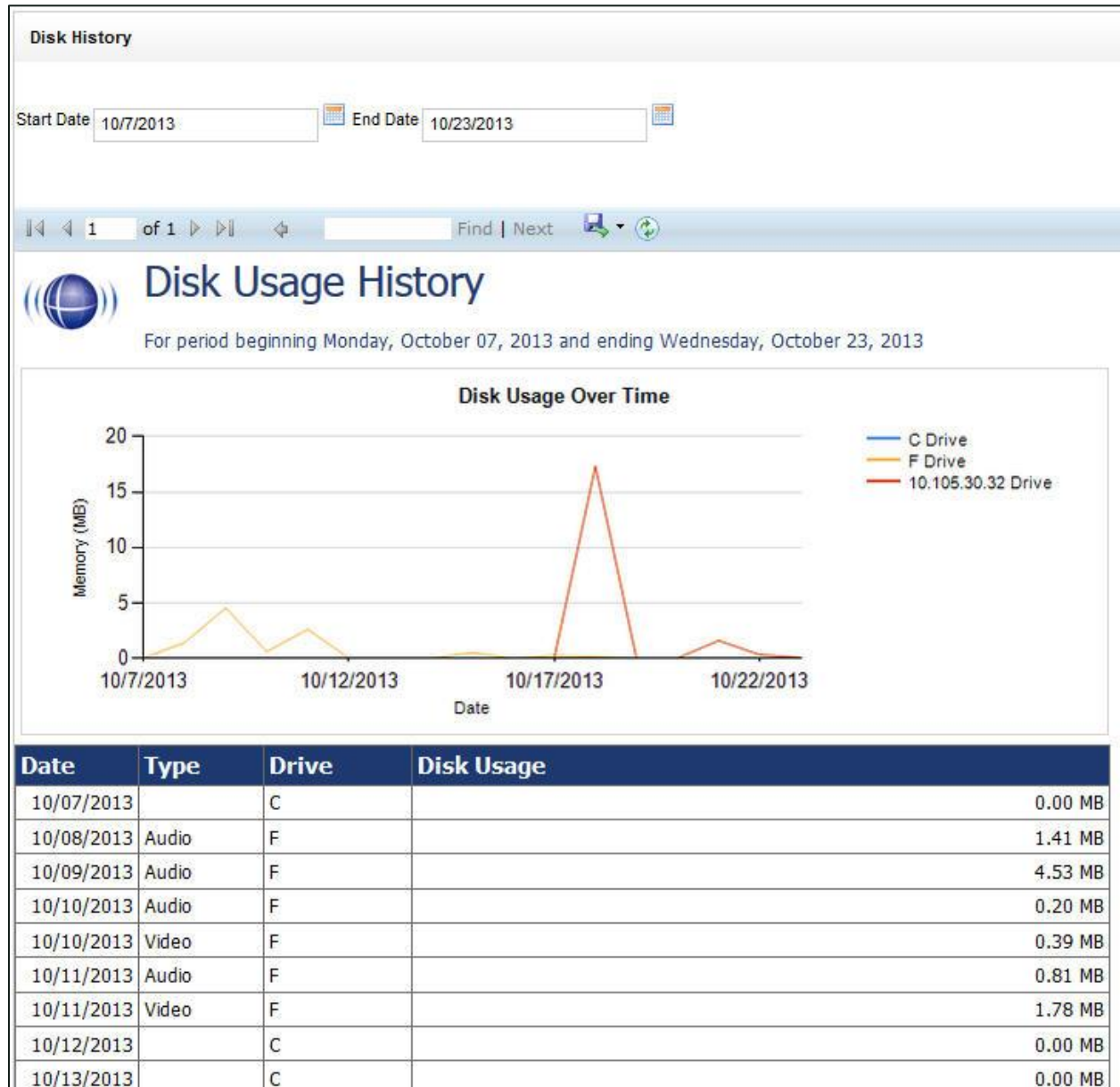
System Reports provides a number of non-printable reports, which have data that is not suitable for printing or exporting. These reports are usually interactive, and often provide real-time updates to the user.

Printable Reports	IP Phone Status <input type="button" value="Export"/>																																																								
Report Tools	<i>This page automatically refreshes every 5 seconds. Last Refresh Time: 10/23/2013 9:24:01 AM</i>																																																								
System Reports	<table border="1"> <thead> <tr> <th colspan="7">IP Phone Information</th> </tr> <tr> <th>Q_Voice Port</th> <th>Q_Device Alias</th> <th>IP Address</th> <th>Board</th> <th>Confidence</th> <th colspan="2">Last Update</th> </tr> </thead> <tbody> <tr> <td>1000</td> <td></td> <td>10.100.10.515</td> <td>-1</td> <td>(5)Static Entry</td> <td colspan="2">10/22/2013 12:14:10 PM</td> </tr> <tr> <td>1001</td> <td></td> <td>10.100.10.516</td> <td>-1</td> <td>(5)Static Entry</td> <td colspan="2">10/22/2013 12:14:10 PM</td> </tr> <tr> <td>1002</td> <td></td> <td>10.100.10.517</td> <td>-1</td> <td>(5)Static Entry</td> <td colspan="2">10/22/2013 12:14:10 PM</td> </tr> <tr> <td>3601</td> <td></td> <td>10.100.5.89</td> <td>1</td> <td>(3)Parsed</td> <td colspan="2">10/18/2013 5:54:49 PM</td> </tr> <tr> <td>3602</td> <td></td> <td>10.100.5.59</td> <td>1</td> <td>(3)Parsed</td> <td colspan="2">10/11/2013 8:26:58 AM</td> </tr> <tr> <td>3604</td> <td></td> <td>10.100.6.34</td> <td>1</td> <td>(3)Parsed</td> <td colspan="2">10/9/2013 12:58:02 PM</td> </tr> </tbody> </table>	IP Phone Information							Q_Voice Port	Q_Device Alias	IP Address	Board	Confidence	Last Update		1000		10.100.10.515	-1	(5)Static Entry	10/22/2013 12:14:10 PM		1001		10.100.10.516	-1	(5)Static Entry	10/22/2013 12:14:10 PM		1002		10.100.10.517	-1	(5)Static Entry	10/22/2013 12:14:10 PM		3601		10.100.5.89	1	(3)Parsed	10/18/2013 5:54:49 PM		3602		10.100.5.59	1	(3)Parsed	10/11/2013 8:26:58 AM		3604		10.100.6.34	1	(3)Parsed	10/9/2013 12:58:02 PM	
IP Phone Information																																																									
Q_Voice Port	Q_Device Alias	IP Address	Board	Confidence	Last Update																																																				
1000		10.100.10.515	-1	(5)Static Entry	10/22/2013 12:14:10 PM																																																				
1001		10.100.10.516	-1	(5)Static Entry	10/22/2013 12:14:10 PM																																																				
1002		10.100.10.517	-1	(5)Static Entry	10/22/2013 12:14:10 PM																																																				
3601		10.100.5.89	1	(3)Parsed	10/18/2013 5:54:49 PM																																																				
3602		10.100.5.59	1	(3)Parsed	10/11/2013 8:26:58 AM																																																				
3604		10.100.6.34	1	(3)Parsed	10/9/2013 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 historical disk usage in MB for recording data over a range of days. 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 performed in Uptivity WFO by one or more specified users during a given date range. The report is separated into different sections for each date in the range that has activity. Actions such as login/logout, call playback, call deletions, and QA functions are all tracked with this report.

System Activity Summary Back Generate Report

Internal All

User ID All

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 total time a user was logged into the system based on the specified time range.

System Usage Back Generate Report

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
Page 1 of 1
CallCopy Recorder Reporting Service

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 shows the device extension number, the device IP address, 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 corner of the report. Confidence indicates Uptivity WFO's certainty that the voice port is actually assigned to the IP address. Confidence can be:

- **(1) No Confidence**
- **(2) Best Guess**
- **(3) Parsed:** Somewhat confident. An Uptivity WFO script has detected the port value based on agent's entry of digits when logging into the phone.
- **(4) Phone Registered:** Very confident. The telephony system has provided the port/address combination to Uptivity WFO.
- **(5) Static Entry:** The port/address has been entered in the **IP Phones** list section of the **Recorder Settings** menu on the Discover Web Portal'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 Information

License Information Reload

System License Available : **Yes**

License ID :

Licensed To :

Expires On : 1/31/2015

Licensed Audio Ports : 99

Licensed Insight Seats : 99

Licensed to Brand Insight : Yes

Licensed Analytics Seats : 99

Licensed Survey Channels : 99

Licensed Screen Capture Ports : 99

Licensed Desktop Only Ports : 99

Maximum Concurrent Recordings : 99

Licensed to Reload Voice Boards : Yes

The **License Information** report shows in real time whether the system is currently licensed for recording and other features. It displays the License ID number, the expiration date (if applicable), and the number of channels for which the system is licensed for each feature.

i The "Licensed Insight Seats" and "Licensed to Brand Insight" items refer to an Uptivity WFO module known as Insight and later as Discover Toolbar. This module is no longer offered but may be present in some legacy deployments.

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.

System Status

- Tools - System Status					
Logged In Users					
Username	Login Time				
superuser	1/28/2013 3:43:56 PM				
1					
Channel Summary					
Idle	Recording	Total Channels			
0	0	155			
Channel Status					
Channel	State	Last State Change	Agent Name	Recording Device	Record
103	OutOfService	11/21/2012 2:53:05 PM			
2	Ready	10/10/2012 6:52:10 PM			
4	Ready	10/10/2012 6:52:10 PM			
5	Ready	10/10/2012 6:52:10 PM			
6	Ready	10/10/2012 6:52:10 PM			
7	Ready	10/10/2012 6:52:10 PM			
8	Ready	10/10/2012 6:52:10 PM			
9	Ready	10/10/2012 6:52:10 PM			
10	Ready	10/10/2012 6:52:10 PM			
11	Ready	10/10/2012 6:52:10 PM			
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 >					
Screen Capture Client Status					
Agent Name	Username	IP Address	Computer	Version	Application
UNKNOWN	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 Dwyer	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
Carmen Berner	agent13	10.100.11.113	agent13-pc	5.0.0.1020	some title
Franco Handler	agent15	10.100.11.115	agent15-pc	5.0.0.1020	some title

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

i In some cases, a user may log 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

Transcoder Status						
<i>This page automatically refreshes every 5 seconds. Last Refresh Time: 10/23/2013 11:06:13 AM</i>						
Completed Records						
Identity	Source	Destination	Queued Time	Last Update Time		
5279	F:\CallCopy\Recordings\20131009\3602\3602-08-59-39.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 4:19:18 PM	1378830018	3	Unknown (4)
5218	F:\CallCopy\Recordings\20130910\7477\7477-13-20-32.cca	F:\CallCopy\Recordings\20130910\7477\7477-13-20-32.wav	9/10/2013 4:19:08 PM	1378830008	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	1378829959	3	Unknown (4)
5001	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	1375873211	3	Unknown (4)
4683	F:\Recordings\VoIP\20130703\7546\7546-16-53-38.cca	F:\Recordings\VoIP\20130703\7546\7546-16-53-38.wav	7/3/2013 5:20:01 PM	1372872061	3	Unknown (4)
4682	F:\Recordings\VoIP\20130703\7546\7546-15-56-15.cca	F:\Recordings\VoIP\20130703\7546\7546-15-56-15.wav	7/3/2013 4:58:12 PM	1372870752	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	1372863264	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	1372855682	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	1372855298	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	1372855069	3	Unknown (4)

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.

Audit Report

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".	OnAuthorize
03/12/2012 13:56:02	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged in.	/Login?ReturnUrl=%2fAdministration%2fPermissions%2fUserEdit%2f84
03/12/2012 13:56:02	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged in.	/Login?ReturnUrl=%2fAdministration%2fPermissions%2fUserEdit%2f84
03/12/2012 13:56:02	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged out.	/Login?ReturnUrl=%2fAdministration%2fPermissions%2fUserEdit%2f84
03/12/2012 13:57:23	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) changed user "84" ().	/Administration/Permissions/UserEdit/84
03/12/2012 13:57:23	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) created superuser "84" ().	/Administration/Permissions/UserEdit/84
03/12/2012 13:57:27	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged out.	/Logout
03/12/2012 13:57:27	10.100.5.131	Unknown Unknown	User "Unknown Unknown" (-1) tried to access URL "/Home/Default.aspx".	OnAuthorize
03/12/2012 13:57:26	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged in.	/Login?ReturnUrl=%2fAdministration%

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; you 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:** In the open-entry text box, enter either an Uptivity WFO component name or HTML page. See examples in the **Component** column of the image in this section.
- **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 Uptivity WFO systems as objects with ID numbers. Some event types (for example, Call Playback) can therefore include this number as a criterion, and you can enter it in the open-entry text box. Other event types (for example, Login or Changed Password) will not have any related objects.
- **Message Text 1/2/3:** Enter search criteria in the open-entry text box. 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 keywords 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.
- **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).

Working with Ad Hoc Reports

Ad Hoc Reports Overview

Ad hoc reporting enables you 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 Uptivity WFO.

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.

By default, the number of data rows returned by any ad hoc report is limited to 30,000. This can be changed by your Uptivity WFO deployment team or after deployment by Uptivity WFO 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 you from generating reports that would bog down the system when requesting large amounts of data. If the retrieved information is incomplete, try redefining search criteria or redesigning the report. There is no time-out associated with report rendering.

Ad hoc reports creation and management is limited to permissioned users. In addition, you will only see report types to which you have permissions. If you need to work with ad hoc reports and are unable to do so, contact your Uptivity WFO administrator.

For ad hoc reports, group-level permissions are not applied. This means that results will show all data relevant to the query regardless of the groups to which you have access. With standard, printable Uptivity WFO reports, such permissions are applied. This difference is by design. The typical ad hoc user would be a report administrator or a one of a select group of users (for example, middle management), not a standard supervisor or QA analyst.

Procedures for creating ad hoc reports in Clarity WFM are different from those in Uptivity WFO. For information on Clarity ad hoc reporting, refer to the *Clarity WFM User Manual*.

Ad Hoc Report Builder

This image shows an Ad Hoc Report Builder screen in which a Call Recording report is being built using the Summary Table layout and the RDL format.

Ad hoc reports are created and edited in the **Ad Hoc Report Builder**, which displays once you have selected the desired report category. 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 you select.

The Report Builder collates data that can be used to create multiple instances of a report using different report criteria values (for example, date ranges). It can be used to generate any of the printable 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.

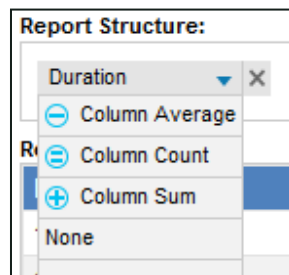
The procedure for building an ad hoc report is the same for each report category. For example, a call recording ad hoc report is built using the same steps as those for creating a QA ad hoc report.

To build a new report, see [Create a New Ad Hoc Report](#). To edit an existing report, see [Edit Existing Ad Hoc Reports](#).

Ad Hoc Report Structure

All ad hoc reports use the same basic structure, and offer the same options for layout and formatting. Layout and format choices are made using drop-down lists at the top of the Ad Hoc Report Builder window. There are three layout options: **Simple Table**, **Summary Table** and **Matrix Table**. There are two reporting format options: **RDL** and **HTML**. These layout and format options are discussed later in this section.

Reports are built by dragging fields from the **Fields** area to the **Report Structure** and/or **Criteria** areas. If your organization uses custom field names, these names will be shown in the Report Builder. However, changes to these names on the **Terminology** page will not appear in the ad hoc reporting pages immediately. The Uptivity WFO web application pool in IIS must be recycled in order for the changes to appear.



When you see a downward arrow next to a field label in the Report Structure area, there may be additional reporting options for that field. These options vary depending on the data type, but include **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 (for related information, see [Chart Types in Ad Hoc Reports](#)).

In the Report Structure area, you can't duplicate fields within the row or column areas. However, you can use the same field to create both a row and a column if appropriate.

You can rearrange fields by dragging them to a different location within the same area. Fields can't be moved between column and row areas in summary or matrix table reports – you must remove and re-add them. The report data preview will update based on changes you make in the Report Builder.

Report Structure:

Call Volume Date/T... Split Offered Calls Answered Calls

Call Volume Date/Time	Split	Offered Calls	Answered Calls
4/6/2014 9:30:00 AM	15	0	0
4/6/2014 10:00:00 AM	15	0	0
4/6/2014 10:30:00 AM	15	0	0
4/6/2014 11:00:00 AM	15	1	1
4/6/2014 11:30:00 AM	15	0	0
4/6/2014 12:00:00 PM	15	0	0
4/6/2014 12:30:00 PM	15	0	0
4/6/2014 1:00:00 PM	15	0	0
4/6/2014 1:30:00 PM	15	0	0
4/6/2014 2:00:00 PM	15	0	0

Simple Tables are basic, list-style reports displaying a single row of fields in the Structure area. Columns can be rearranged by dragging fields left and right. Charts are not supported.

Report Structure:

Agent Answered Calls Service Level Calls

Agent	Answered Calls	Service Level Calls
Labor Unit : Corax - HSI		
205	28	16
205	28	16
205	28	16
205	28	16
205	28	16
205	28	16
205	28	16
205	28	16
205	28	16
205	28	16

Summary Tables feature nested, collapsible subcategories/groupings of a grid of fields 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.

Report Builder

Report Name: Avg QA Percent by Evaluator

Layout: Matrix Table Reporting Format: HTML

Fields: Drag fields to criteria and report.

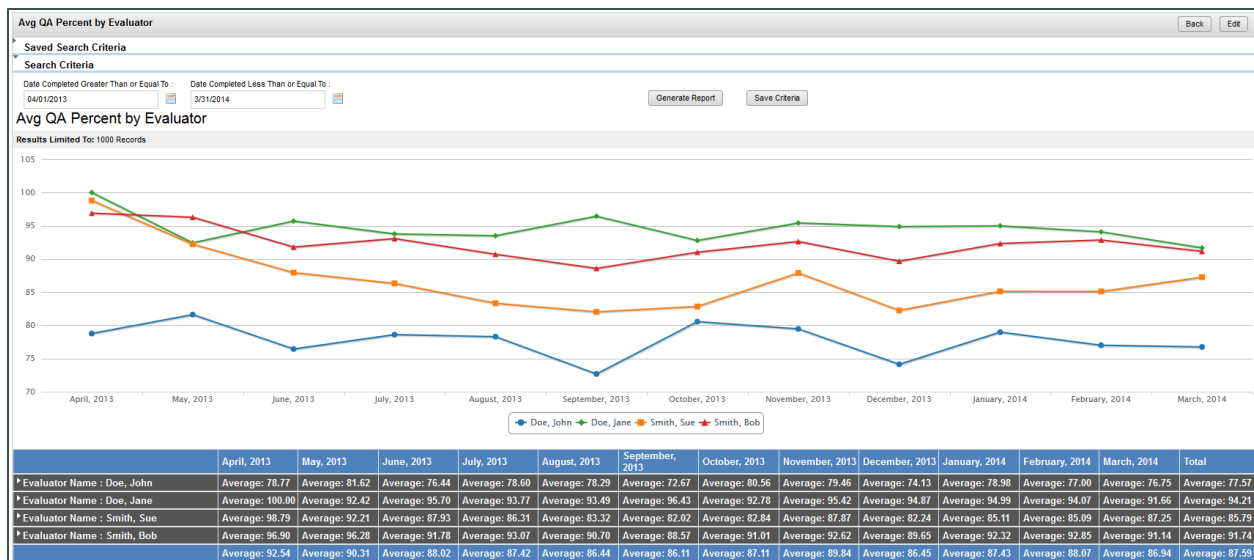
Criteria:

Table	Field	Operator	Value	On Report	Action
Completed QA Evaluation	Date Completed	Greater than or equal to	01/01/2014	<input type="checkbox"/>	Remove
Completed QA Evaluation	Date Completed	Less than or equal to	3/31/2014	<input type="checkbox"/>	Remove

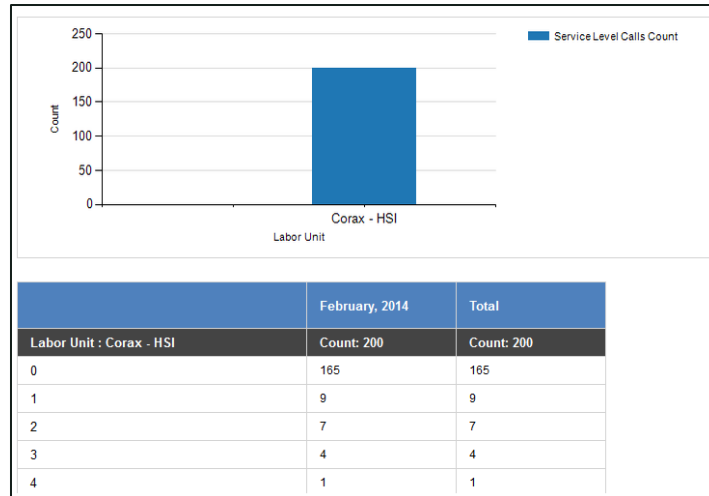
Chart Type: Summary

Report Structure:

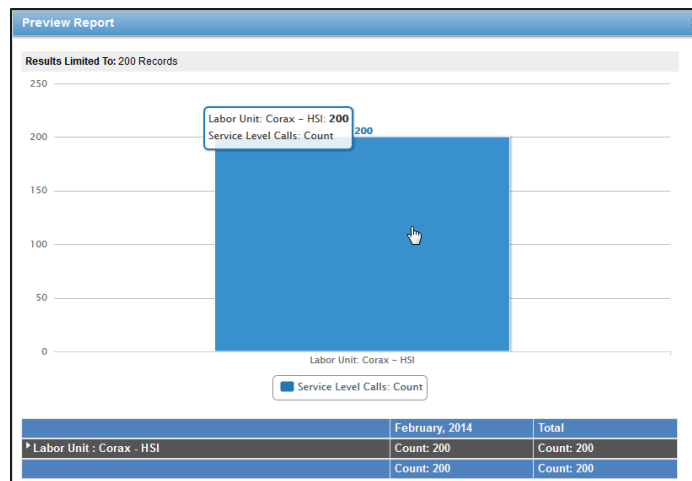
Evaluator Name	January, 2014	February, 2014	March, 2014	Total
* Evaluator Name : Doe, Jane	Average: 85.71	Average: 87.90	Average: 87.04	Average: 87.04
* Evaluator Name : Doe, John	Average: 73.33	Average: 69.33	Average: 70.66	Average: 70.66
* Evaluator Name : Smith, Sue	Average: 82.67	Average: 87.44	Average: 92.86	Average: 89.70
	Average: 61.72	Average: 80.93	Average: 87.89	Average: 84.03



Matrix Tables measure one or more pieces of information across a period of time. 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 to provide for different logical groupings of the information. Bar, pie and line charts are supported. Line charts illustrating large data sets may become difficult to read and use. This example shows average monthly QA percentage score by evaluator over a one-year period.

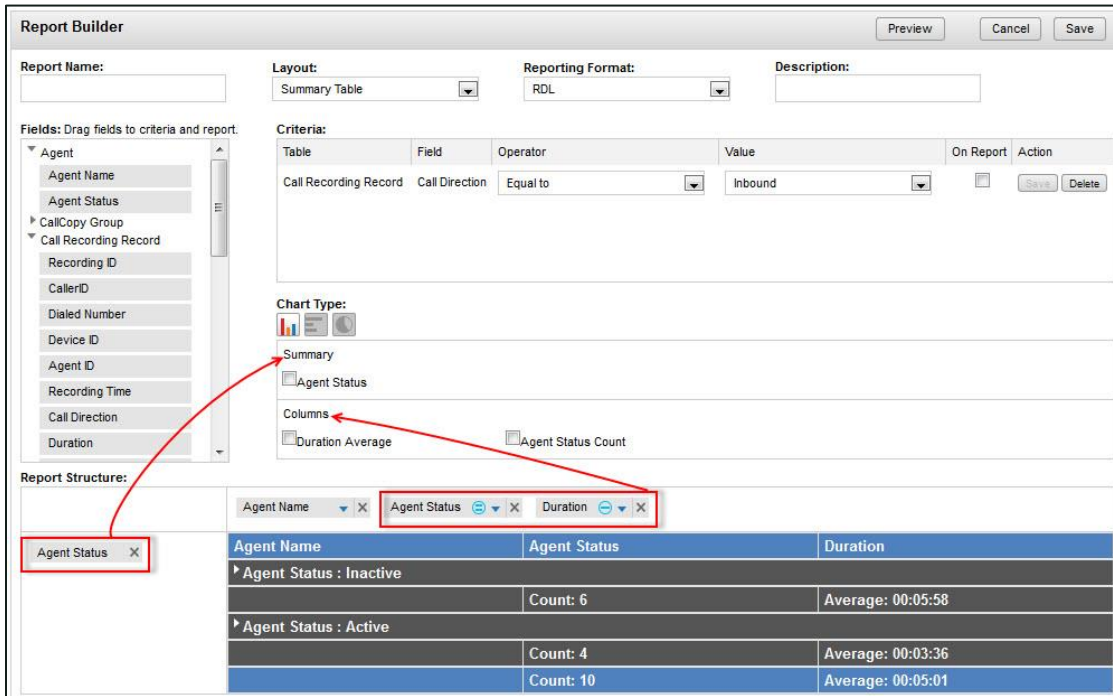


The **RDL** report format works with Microsoft SQL Reporting Services and provides export formats of PDF, Microsoft Word, or Microsoft Excel files. Charts are simply laid out, displaying all the information in a non-interactive way. Large reports with pagination can be created. Categories and groupings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



HTML reports and charts are interactive, allowing information to be displayed on mouse-over. Clicking on bars within a chart allows you to drill down into subcategories and see more detailed results. If there are multiple detail levels, clicking through will loop back to the top level. 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.

Chart Types in Ad Hoc Reports



The **Chart Type** area allows you to select a chart to graphically display the data in your report. Available charts depend on the report layouts you select. You will only see icons for charts supported by the chosen layout. Available icons appear in gray; an icon changes to color when selected.

Beneath the icons are fields you can choose to display on the chart, depending on the report layout 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, you can select multiple data types for both columns and rows. For pie charts and line graphs, you can only select one entity in each of the **Summary** and **Column** areas.

For charts that use X- and Y-axes, columns represent what will be X-axis chart labels and rows represent Y-axis chart labels.

Ad Hoc Report List

Once created, your reports can be accessed from the **Ad Hoc Report List**. The list displays all reports associated with the type of report you select from the drop-down list. In this example, the list shows reports for Call Recording.

Call Recording								
<input type="text"/>							Go	Create a Report
Report	Description	Status	Saved By	Date Saved	Published By	Date Published	Action	
Agent List by Group		Saved	George, Gina	11/4/2013	NA	NA	<input type="button" value="View"/>	
Hold Time Report		Saved	Ward, Rae	11/5/2013	NA	NA	<input type="button" value="View"/> <input type="button" value="Delete"/>	
Outbound Calls by Agent		Saved	George, Gina	11/5/2013	NA	NA	<input type="button" value="View"/> <input type="button" value="Delete"/>	
QA vs Survey Score Report		Saved	George, Gina	11/5/2013	NA	NA	<input type="button" value="View"/> <input type="button" value="Delete"/>	
Survey Scores by Agent		Saved	Ward, Rae	11/5/2013	NA	NA	<input type="button" value="View"/> <input type="button" value="Delete"/>	


Pages 1 Items Per Page Go to page: 1 of 1

The list is sorted alphabetically by report name. You will be able to see any reports that you've created, whether saved as Public or Private, and any reports 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.

Saved reports can be removed from the system by clicking **Delete** for that report. Deleting a report removes the saved report and all of its saved search criteria.

Create a New Ad Hoc Report

Survey								
<input type="text"/>							Go	Create a Report
Report	Description	Status	Saved By	Date Saved	Published By	Date Published	Action	



To create a new report (see related information in [Ad Hoc Report Structure](#) and [Chart Types in Ad Hoc Reports](#)):

1. Click the **Reporting** tab in the Discover Web Portal and expand **Ad Hoc Reports** in the left navigation menu.
2. Click the desired report category and then click **Create a Report** in the upper right corner.
3. Enter a **Name** for the report as you want it to be displayed in the listing of available reports.
4. Enter a **Description** if desired (up to 100 characters).
5. Choose a **Layout** from the drop-down list.
6. Choose a **Reporting Format** from the drop-down list.

7. Drag the desired **Fields** into the **Report Structure** area. To remove a field, click the X on the field label.
8. Set any additional reporting options for individual fields.
9. Drag fields to the **Criteria** section, select an operator and enter a value.
10. Set **Chart Type** options if desired.
11. Click **Save** when your report is complete. If you want to see how the report (and charts, if applicable) will appear when rendered, click **Preview**.

Save Ad Hoc Report Criteria

When you save a finished ad hoc report, you can also choose whether to separately save the criteria used to build the report. This option allows you to manipulate the criteria separately from the report, and more easily generate the same report for multiple sets of criteria.

For example, you might have a report that is regularly run for one team, but might need to be run for other teams in the future. By saving the criteria, you can easily create multiple versions of the report for the different teams without having to rebuild the entire report. Saving the criteria as public will make the set available to others who build ad hoc reports.

To save the report criteria:

1. Follow the procedure to [Create a New Ad Hoc Report](#).
2. Select the **Save report criteria** check box in the **Save Report** dialog box.
3. Enter a **Report Criteria Name**.
4. Select either **Private** or **Public** from the drop-down **Access** menu.
5. Click **Save**.

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 makes it available for use with Report Subscriptions.

Editing an existing report can cause saved report criteria to stop working. You should use the **Save As** function to save a new version of the report for editing. Choosing **Save As** also lets you save criteria associated with the new version.

If you choose to **Save** the existing report, Uptivity WFO applies your changes to the existing report and updates that report with the new name. You cannot save new criteria at this point. To add new criteria or change the operators for existing criteria, you must use **Save As** to create a new version of the report.

To edit an ad hoc report:

1. Click the **Reporting** tab in the Discover Web Portal and expand **Ad Hoc Reports** in the left navigation menu.
2. Select the desired category of reports.
3. Double-click on the desired report or click the **View** button at the right end of the report's row in the list.
4. Click **Edit**.
5. Make your changes to the report. For related information, see [Ad Hoc Report Builder](#).
6. Click **Save** to update the existing report or **Save As** to save a new version of the report.

Generate an Ad Hoc Report

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

To generate an ad hoc report:

1. Click the **Reporting** tab in the Discover Web Portal and expand **Ad Hoc Reports** in the left navigation menu.
2. Select the desired category of reports.
3. Double-click the desired report or click the **View** button at the right end of the report's row in the list.
4. From the Report Builder bar, click **Generate Report**.
5. Enter your criteria or select an existing set of **Saved Search Criteria** by double-clicking (expand or collapse the **Search Criteria** and **Saved Search Criteria** sections as needed).
6. Click **Generate Report**.

As with Printable Reports, any clickable links to call recording files or other information will not work in exported versions of the report. For more information on working with generated ad hoc reports, see [Common Report Tasks](#).

Publish an Ad Hoc Report

Only published reports can be used in Report Subscriptions, but 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 to this effect.

To publish an ad hoc report:

1. Click the **Reporting** tab and expand **Ad Hoc Reporting** in the left navigation menu.
2. Select the desired category of reports.
3. Double-click the desired report or click the **View** button at the right end of the report's row in the list.
4. From the Report Builder bar, click **Publish**.
5. Enter a new **Name** for the report if desired and then click **OK**.

Uptivity WFO Ad Hoc Reports Reference

Analytics Report Types

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 organization uses custom field names in the Web Portal, those names will be shown instead of default names listed here.

Analytic Tag Group

- **Tag Group Name:** Type search criteria in the open-entry text box.

Analytic Tag

- **Tag Name:** Type 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:** Type search criteria in the open-entry text box.

Analytic Speech Tag

- **Phrases:** Type search criteria in the open-entry text box.

- **Target Confidence:** Type search criteria in the open-entry text box; numeric values up to two decimal places (for example, 75.36).

Analytic Recording Tags

- **Tag Text:** Type search criteria in the open-entry text box.
- **Seconds from Start:** Indicates when a text tag starts. Type search criteria in the open-entry text box; numeric values only.
- **Seconds from End:** Indicates when a text tag ends. Type search criteria in the open-entry text box; numeric values only.
- **Audio Channel:** Allows for speaker separation when audio is provided in separate channel streams. Only available in certain integrations.
- **Confidence:** Type search criteria in the open-entry text box; numeric values up to two decimal places (for example, 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:** Type numeric values as search criteria in the open-entry text box.
- **Caller ID:** This is an inbound caller's number (ANI). Type search criteria in the open-entry text box.
- **Called Number:** This is the outbound called number (DNIS). Type search criteria in the open-entry text box.
- **Device/Port ID:** This is the physical device. Type 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. Type 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 of these choices and 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. Type 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, and so forth). Type search criteria in the open-entry text box.

Agent

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

Audio Information

Uptivity WFO applies audio information tags to a recording based on the audio information in the call. The available tags are Silence and Crosstalk. These tags can be accessed through Audio Information or Derived Audio Tags (see the following section). If you want to create a single report that includes both Audio Information and Analytic Tag data, use the Derived Audio Tags group.

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

Derived Audio Tags

- **Tag Type:** Displays the type of tag (Analytic Recording Tag or Audio Info Tag). Type search criteria in the open-entry text box. You must type either the entire phrase (for example, "analytic recording tag") or use the **Contains** operator to search based on a partial tag type (for example, "audio").
- **Tag:** For audio info tags, displays either [silence] or [crosstalk]. For analytic recording tags, displays the text of the tag. Type search criteria in the open-entry text box. As shown here, the tag values include brackets. Use the **Contains** operator to search the value either with or without these brackets (for example, "silence" or "[silence]").
- **Start Seconds:** Indicates the number of seconds from the start of the recording at which the tag begins. Type 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. Type search criteria in the open-entry text box as number of seconds; whole number values only.

Audit Report Types

The following entities and fields are available for use in **Audit** ad hoc reports. If your organization uses custom field names in the Web Portal, those names will be shown instead of default names listed here. These considerations apply to Audit ad hoc reports:

- 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:** Type search criteria in the open-entry text box (for example, Pond, Amelia).
- **Username:** Type search criteria in the open-entry text box in the format used in your system (for example, apond).
- **Superuser:** Reports display as Yes or No. Select search criteria from the drop-down list of these choices and All.
- **Agent:** Indicates whether individual is or has ever been an agent (that is, has been recorded). Reports display as Never, Current or Former. Select search criteria from the drop-down list of these choices and All.
- **User Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list of these choices and All.
- **Login Attempts:** Type 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 of these choices and All.
- **User – Created By:** Type 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:** Type search criteria in the open-entry text box.

Role

- **Role Name:** Type 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:** Type search criteria in the open-entry text box.

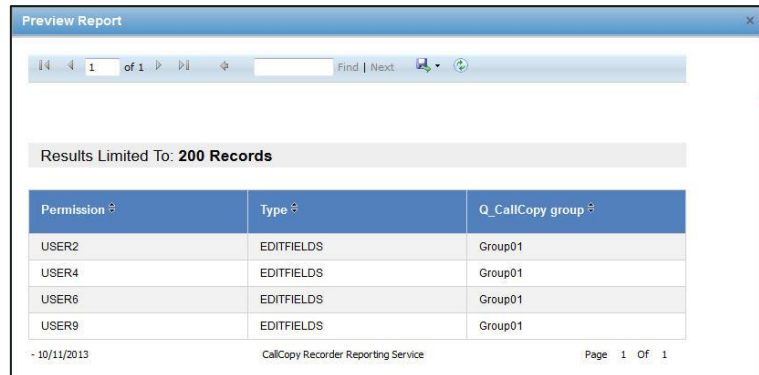
- **Role - Modified On:** Click on calendar icon to enter search criteria using date selector.
- **Role - Modified By:** Type search criteria in the open-entry text box.

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 the available values are self-explanatory; others are less so.

In the image, the values listed under

Permission refer to user-defined fields which may or may not be used by your organization. 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 *Uptivity WFO Administration Manual*.



Permission	Type	Q_CallCopy group
USER2	EDITFIELDS	Group01
USER4	EDITFIELDS	Group01
USER6	EDITFIELDS	Group01
USER9	EDITFIELDS	Group01

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

Group

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

Audit Trail

- **Audit Event ID:** Type search criteria in the open-entry text box.
- **Audit Module:** Type 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, type search criteria as either the name of the component (for example, AuditLog), or as an HTML page (for example, /Administration/Scheduling/CreateCustomSchedule.aspx)
- **Audit User:** Type 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:** Type 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. Type search criteria in the open entry text box.
- **Message 1:** Type search criteria in the open-entry text box; see below.
- **Message 2:** Type search criteria in the open-entry text box; see below.
- **Message 3:** Type search criteria in the open-entry text box; see below.

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 keywords 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 Report Types

The following entities and fields are available for use in **Call Recording** ad hoc reports. If your organization uses custom field names in the Web Portal, those names will be shown instead of default names listed here.

i 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. Type search criteria in the open-entry text box.
- **Agent Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list of these choices and All.

Group

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

Call Recording Record

- **Recording ID:** Type search criteria in the open-entry text box; numeric values only.
- **Caller ID (ANI):** This is an inbound caller's number. Type search criteria in the open-entry text box.
- **Called Number (DNIS):** This is the outbound called number. Type search criteria in the open-entry text box.
- **Device/Port ID:** "Hardware" identifier in your ACD/PBX (for example, Position ID, Phone Port, DN, or Extension). Type search criteria in the open-entry text box.
- **Agent Number (Device Alias):** Agent-associated identifier in your ACD/PBX (for example, extension or agentID). Type 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 of these choices and Unknown.
- **Duration:** Reports display as HH:MM:SS. Type search criteria in the three provided boxes as hours, minutes, seconds.
- **Group:** Group setting in your ACD/PBX (for example: Hunt Group, Skill Group, or Labor Group). Type search criteria in the open-entry text box.
- **ACD Gate:** Call gate or queue setting in your ACD/PBX (for example, Application, Split, Gate, and so forth). Type search criteria in the open-entry text box.

- **Total Hold Time:** Reports display as HH:MM:SS. Type search criteria in the three provided boxes as hours, minutes, seconds.
- **User1-15:** Names and values of these fields are defined in the Web Portal's **Terminology** page. For more information, see the *Uptivity WFO Administration Manual*.

QA Evaluations

- **Evaluations Completed:** Type search criteria in the open-entry text box; whole numbers only.
- **QA Score:** Type search criteria in the open-entry text box; whole numbers only.
- **QA Possible Score:** Type 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. Type search criteria in the open-entry text box; numeric values up to two decimal places (for example, 75.36).

Survey

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

Analytics

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

Derived Audio Tags

- **Tag Type:** Displays the type of tag (Analytic Recording Tag or Audio Info Tag). Type search criteria in the open-entry text box. You must type either the entire phrase (for example, "analytic recording tag") or use the **Contains** operator to search based on a partial tag type (for example, "audio").
- **Tag:** For audio info tags, displays either [silence] or [crosstalk]. For analytic recording tags, displays the text of the tag. Type search criteria in the open-entry text box. As shown here, the tag values include brackets. Use the **Contains** operator to search the value either with or without these brackets (for example, "silence" or "[silence]").

- **Start Seconds:** Indicates the number of seconds from the start of the recording at which the tag begins. Type 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. Type search criteria in the open-entry text box as number of seconds; whole number values only.

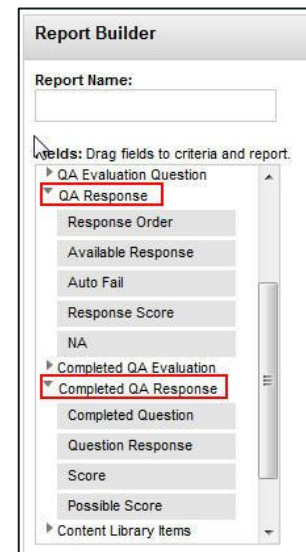
Quality Assurance Report Types

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 Evaluations, 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 (for example, a listing of forms that include a specific question).
- Categories beginning with "Completed QA" are meant to be used when reporting on QA evaluations (for example, 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 organization uses custom field names in the Web Portal, those names will be shown instead of default names listed here.

Evaluator

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

Agent

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

Arbitrator

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

Call Recording Record

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

Group

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

QA Evaluation Form

- **Form Name:** Type search criteria in the open-entry text box.
- **Acknowledgment Required:** Reports display as Yes, No. Select search criteria from the drop-down list of these choices and All.
- **Create 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 of these choices and All.
- **Disable Date:** Click on calendar icon to enter search criteria using date selector.

QA Evaluation Form Section

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

QA Evaluation Question

- **Form Question:** Type search criteria in the open-entry text box.
- **Question Order:** Type 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 of these choices and All.
- **Possible Score:** Type search criteria in the open-entry text box; numeric values only.

QA Response

- **Response Order:** Type search criteria in the open-entry text box; whole numbers only.
- **Available Response:** Type search criteria in the open-entry text box.
- **Auto Fail:** Type 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:** Type 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:** Type 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:** Type search criteria in the open-entry text box; numeric values only.
- **Total Actual Score:** Type search criteria in the open-entry text box; numeric values only.
- **Total QA % Score:** Reports display scores calculated from QA Score/QA Possible Score. Type search criteria in the open-entry text box; numeric values up to two decimal places (for example, 75.36).
- **Acknowledgment Status:** Reports display as Unacknowledged or Acknowledged. Select search criteria from the drop-down list of these choices and All.
- **Notes:** Type search criteria in the open-entry text box.
- **Score Changes:** This is the number of times an evaluation score has been changed. Type search criteria in the open-entry text box; whole numbers only.
- **QA Status:** Reports display as Calibration, Calibration In Progress, Completed, In Progress, Question or Dispute. Select search criteria from the drop-down list of these choices and All.

- **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 of these choices and All.
- **Disputed Count:** This is the number of times an agent disputed an evaluation comment or score. Type 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. Type search criteria in the open-entry text box; numeric values only.


Completed QA Response

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

 Survey Form data may be related to a Call Recording ID, thus providing a more complete view of the customer experience.

- **Survey Name:** Type 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 of these choices and All.
- **Completed Survey ID:** Type search criteria in the open-entry text box; numeric values only.
- **Survey Possible Value:** Type search criteria in the open-entry text box; numeric values only.
- **Survey Value:** Type search criteria in the open-entry text box; numeric values only.
- **Survey % Score:** Reports display scores calculated from Survey Score/Survey Possible Score. Type search criteria in the open-entry text box; numeric values up to two decimal places (for example, 75.36).

Achievements

- **Achievement ID:** Type search criteria in the open-entry text box; whole numbers only.
- **Achievement Points:** Type 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 of these choices and All.

Achievement Types

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

Survey Report Types

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 organization uses custom field names in the Web Portal, those names will be shown instead of default names listed here.

Form

- **Form:** Type 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 of these choices and All.
- **Negative Threshold:** Type search criteria in the open-entry text box; numeric values only.
- **Positive Threshold:** Type search criteria in the open-entry text box; numeric values only.
- **Section:** Type search criteria in the open-entry text box.

Question

- **Question:** Type 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 of these choices and All.
- **Hide No-Data Response:** Reports display as Yes or No. Select search criteria from the drop-down list of these choices and All.
- **Possible Score:** Type search criteria in the open-entry text box; numeric values only.

Response

- **Response:** Type search criteria in the open-entry text box.
- **Response Possible Value:** Type 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 (for example, 0-101154.wav). Type search criteria in the open-entry text box.

Completed Survey

- **Completed Survey ID:** Type 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. Type search criteria in the open-entry text box.
- **Caller ID (ANI):** Inbound caller number. Type search criteria in the open-entry text box.
- **Survey Possible Value:** Type search criteria in the open-entry text box; numeric values only.
- **Survey Value:** Type search criteria in the open-entry text box; numeric values only.
- **Survey % Score:** Reports display scores calculated from Survey Score/Survey Possible Score. Type search criteria in the open-entry text box; numeric values up to two decimal places (for example, 75.36).
- **Survey Complete:** Report displays as Yes, No. Select search criteria from the drop-down list of these choices and All. Can be used as a Measure field in Matrix Table reports.

Call Recording

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

Agent

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

- **Group:** This is the Uptivity Group name. Select search criteria from the drop-down list of Uptivity Groups.
- **Group Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list of these choices and All.

Clarity Ad Hoc Reports Reference


ACD Call and Agent Data Report Types

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:** Type search criteria in the open-entry text box.
- **Device:** Type search criteria in the open-entry text box.
- **Interval Seconds:** This is the time interval for which data should be pulled. Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).
- **Offered Calls:** Type search criteria in the open-entry text box; whole number values only.
- **Answered Calls:** Type search criteria in the open-entry text box; whole number values only.
- **Service Level Calls:** Type search criteria in the open-entry text box; whole number values only.
- **Abandoned Calls:** Type 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. Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).

ACD Agent/Split Call Data

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

- **Split:** Type 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. Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).
- **Answered Calls:** Type 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. Type search criteria in the open-entry text box; whole number values only.
- **Ring Calls:** Type search criteria in the open-entry text box; whole number values only.
- **Customer Seconds:** This is the talk time in seconds. Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).
- **Hold Seconds:** Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).
- **ACW Seconds:** This is time spent on after-call work. Type search criteria in the open-entry text box as seconds (for example, 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. Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).
- **Logged in Seconds:** This is the total number of seconds logged into the ACD. Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).
- **Available Seconds:** This is the total number of seconds available to take calls (for example, waiting for a call). Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).
- **Inactive Seconds:** This is the total number of seconds in inactive modes (for example, lunch, break, training). Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).

Skill

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

Labor Unit

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

User

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

Team

- **Team:** Type search criteria in the open-entry text box.
- **Team Supervisor:** Type 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. Type 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. Type search criteria in the open-entry text box; numeric values only.

Forecast Call Data

- **Forecast Volume Set Name:** Type search criteria in the open-entry text box.
- **Offered Calls:** Type search criteria in the open-entry text box; numeric values only.
- **Forecast vs. Actual %:** Type search criteria in the open-entry text box; numeric values only.

🔗 When considering forecast accuracy, your goal is to come as close to 100% as possible. Therefore, percentages that are significantly higher or significantly lower than 100 are not desirable (for example, 150% is not a good result).

- **Split:** Type search criteria (split or skill number) in the open-entry text box.
- **Forecasted Calls:** Type search criteria in the open-entry text box; numeric values only.
- **Forecast Interval Seconds:** Type search criteria in the open-entry text box; numeric values only.
- **Forecast Skill Name:** Type search criteria in the open-entry text box; numeric values only.
- **Forecast Call Volume Date/Time:** Click on calendar icon to enter search criteria using date selector.

Agent Leave/PTO Report Types

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

Leave Requests

- **Leave Type:** Type 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. Type search criteria in the three provided boxes as hours, minutes, seconds.
- **Comment:** Type search criteria in the open-entry text box.
- **Status:** Reports display as Pending, Approved, Declined, Awaiting User Approval, Declined by User, Under Review, or Canceled. Select search criteria from the drop-down list of these choices and All.
- **Approved By:** Type search criteria in the open-entry text box.

Agent

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

Team

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

Labor Unit

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

Skill

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

Shift Report Types

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

Shift

- **Agent Name:** Type 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. Type search criteria in the three provided boxes as hours, minutes, seconds.
- **Activity:** This is the type of activity (for example, lunch, meeting, training, break, and so forth). Type 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. Type 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 of these choices and All.
- **Late Threshold:** Type search criteria in the open-entry text box; numeric values only.

Labor Unit

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

Skill

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

Team

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

Sample Ad Hoc Reports

This section provides parameters for a variety of ad hoc reports, to give you an idea of the types of reports you can create. This is by no means an all-inclusive list.

Audit Report > Superuser

This report lists the users who have superuser permission. Use the Summary Table Report Layout.

- **Column Fields:** Username; Last, First Name; Superuser
- **Row Fields:** User Status
- **Criteria Field:** Superuser
- **Criteria Operator:** Equal To
- **Criteria Value:** Yes

Audit Report > Modified Users

This report lists which users have been modified in the last 24 hours. Use the Simple Table Report Layout.

- **Column Fields:** Username; Last, First Name
- **Criteria Field:** User – Modified On
- **Criteria Operator:** Greater Than
- **Criteria Value:** [Yesterday's Date]

Audit > Group Membership

Existing printable reports show the agents within a group. This example will allow you to see groups assigned to an agent instead. Use the Summary Table Report Layout.

- **Column Fields:** Group
- **Row Fields:** Username
- **Criteria Field:** Username
- **Criteria Operator:** Equal To
- **Criteria Value:** [Username]

Audit > User Role Assignments

This report shows the roles assigned to active users whose accounts are not locked. Use the Simple Table Report Layout.

- **Column Fields:** Username; Last, First Name; Role Name
- **First Criteria Field, Operator, Value:** User Status, Equal To, Active
- **Second Criteria Field, Operator, Value:** Locked, Equal To, No

Audit > Role: Permissions

This report displays what permissions are assigned to which roles. Use the Summary Table Report Layout.

- **Column Fields:** Permission
- **Row Fields:** Role Name

Call Recordings > User Fields

If your organization uses custom user fields, this report will 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 Uptivity Fusion Desktop Analytics. Use the Simple Table Report Layout.

- **Column Fields:** Recording ID; [custom user field]

Call Recordings > Total Hold Time

For integrations that track hold time, this report displays hold time per calls, and can total or average hold time across a range of filtered call records. Use the Simple Table Report Layout.

- **Column Fields:** Agent Name; Recording ID; Duration; Total Hold Time; Caller ID (ANI)

Call Recordings > Calls from Particular Area Codes

This report could help locate areas with high incoming call volumes for strategic purposes. Use the Simple Table Report Layout.

- **Column Fields:** Agent Name; Recording ID; Duration; Caller ID (ANI)
- **Criteria Field:** Caller ID (ANI)
- **Criteria Operator:** Starts With
- **Criteria Value:** [Area Code]

Quality Assurance > Agent QA Summary

A predefined report like this exists, but creating a similar ad hoc report allows you to include additional fields. For example, adding the name of the evaluator would allow comparison of evaluation scores on the same QA evaluation form if both were done on the same recording. Use the Summary Table Report Layout.

- **Column Fields:** Evaluation ID; Evaluator Name; Agent Name; Form Name; Total Form Possible Score; Total Actual Score
- **Row Fields:** Recording ID

Quality Assurance > QA Score and Survey Score Comparison

This report allows you to compare QA scores to survey scores for a given Recording ID. Use the Summary Table Report Layout.

- **Column Fields:** Evaluation ID; Agent Name; Total Form Possible Score; Total Actual Score; Survey Possible Value; Survey Value
- **Row Fields:** Recording ID

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

This report can be useful in determining how effective training and resource materials are for improving agent QA scores. Use the Summary Table Report Layout.

- **Column Fields:** Evaluation ID; Date Completed; Agent Name; Form Name; Total Form Possible Score; Total Actual Score; Library Item; Acknowledged Date
- **Row Fields:** Recording ID
- **Criteria Field:** Library Item
- **Criteria Operator:** Equal To
- **Criteria Value:** [File Name]

Survey > Call Recording/Agent/Survey Score

This report shows the linking of call recordings to surveys. Use the Simple Table Report Layout.

- **Column Fields:** Call Recording ID; Agent Name; Completed Survey ID; Survey Date; Survey Possible Value; Survey Value

Working with Report Tools

Report Subscriptions Overview

Report Subscriptions allow you to pre-schedule specific reports and provide the results to multiple users. They are managed from the Report Subscriptions page in your Discover or Clarity Web Portal.

Creation and management of report subscriptions are limited to permissioned users. In addition, you can only create subscriptions for reports to which you have permissions. If you need to work with report subscriptions and are unable to do so, contact your Uptivity WFO administrator.

Report subscriptions use SQL Server Reporting Services (SSRS) and may be limited or unavailable if SQL Express is used in your installation.

Report Subscriptions							New	
Your installation uses SQL Server Standard Edition								
Report	Description	Execution Status	Modified By	Date Modified	Last Run	Action		
Blank QA Form		New Subscription	Administrator Administrator	6/11/2014 11:42:09 AM	1/1/0001 12:00:00 AM	Edit	Delete	
System Activity Summary		Mail sent to mingale@uptivity.com	Administrator Administrator	6/13/2014 3:08:12 PM	6/23/2014 2:00:10 AM	Edit	Delete	
Group Membership Report		Mail sent to mingale@uptivity.com	Administrator Administrator	6/13/2014 3:14:48 PM	6/23/2014 2:00:10 AM	Edit	Delete	
Agent Call Summary		Mail sent to mingale@uptivity.com	Administrator Administrator	6/18/2014 4:43:29 PM	6/23/2014 3:00:08 AM	Edit	Delete	
Call Evaluation Detail		Mail sent to mingale@uptivity.com	Administrator Administrator	6/19/2014 2:47:56 PM	6/23/2014 2:00:10 AM	Edit	Delete	
Agent QA Summary		Mail sent to test@uptivity.com	Administrator Administrator	6/20/2014 9:10:04 AM	6/20/2014 2:00:20 AM	Edit	Delete	

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The Report Subscriptions page header identifies your version of SQL.

You cannot use HTML reports with subscriptions.

Report Subscriptions can be scheduled individually, or you can use a shared schedule for multiple subscriptions.

Report Subscriptions are private; only the subscription creator can view and edit the subscription's settings.

Subscription Delivery Methods

Reports can be delivered in one of two ways:

- **Email:** in this method, the application sends the report directly to one or more recipients. The email subject is automatically completed with the report name and the time it was run, but you can customize this if desired. You can also choose the priority at which the email is sent, and include comments for the body of the email.

You can send the report as an email attachment or you can include a link from which the recipient can launch the report. The latter method can conserve network bandwidth but it also requires that every recipient be assigned a user account on the SQL Report Server since that is where the report file is located. Uptivity recommends that you discuss this with your system administrator and your Uptivity installation engineer before deciding to provide reports as links.

To deliver report subscriptions via email, the application must have an email account configured for its use on the SQL Report Server. This is typically done during the installation process.

- **File Share Delivery:** in this method, the application creates the report and saves it to a network file share where users can access it. You can choose a filename for the report and whether to append a file extension to that filename. You can also choose to overwrite existing files with newer versions, to not overwrite files if previous versions exist, or to increment file names as newer versions are added.

To deliver reports via file share delivery, you will need to provide the application with a full UNC path to the network share, as well as credentials to write to that location. If Uptivity WFO (or Clarity) cannot save the report, you will see "File share write failure" as that report's Execution Status.

Load the Report Subscriptions Page

To load the **Report Subscriptions** page in the Discover Web Portal:

1. Click the **Reporting** tab and expand **Report Tools** in the left navigation menu.
2. Click **Report Subscriptions**.

To load the **Report Subscriptions** page in the Clarity Web Portal:

1. Click the **Reports** tab and then click the **Tools** button.
2. Select **Report Subscriptions** from the drop-down list.

Create a Report Subscription

New subscriptions are created on the New Report Subscription page. You can create a subscription for any printable report or published ad hoc report to which you have appropriate access and permissions. Reports in subscriptions can be rendered in any of the available report formats. For related information, see [Save and Export a Report](#).

To create a Report Subscription:

1. Load the Report Subscriptions page in either the Discover or Clarity Web Portal.
2. Click **New** at the top-right corner of the page.
3. Choose a report from the **Select a Report** drop-down list.
4. Type a custom title for your subscription in the **Description** field (required).
5. Select a delivery method from the **Delivered by** drop-down list.
6. Follow the procedure to [Set Email Delivery Options](#) or [Set Windows File Share Delivery Options](#), as preferred.
7. Select the option to run the subscription **On a Shared Schedule** or **When the scheduled report run is complete**. If you choose the shared schedule option, you must also select the desired schedule from the drop-down list.
8. Follow the procedure to [Set Schedule Options](#).
9. Set the report parameter values if needed and then click **Save**. Refer to the specific report description for more information on parameters associated with that report.

i Certain reports have default values associated with some or all of their parameters. As a time-saver, these parameters appear with a "Use default" check box next to them. When you initially create the report, you can leave this box selected to use the default value or you can clear it to enter specific values. Once you've created the subscription, the check box has no effect and should be disregarded.

Set Email Delivery Options

Options for delivering reports via email are configured as a sub-task of the procedure for creating a report subscription. After following these steps, you will need to complete the [Create a Report Subscription](#) procedure.

To set up email delivery options:

1. In the **To:** box, type email address(es) for primary recipient(s). Use a semi-colon to separate addresses.
2. In the **Cc:** and **Bcc:** boxes, type email address(es) for secondary recipient(s). Use a semi-colon to separate addresses.
3. In the **Reply-To:** box, type the email address to which recipients should respond if they have questions. This field is required.
4. In the **Subject** box, type a new subject line if desired; otherwise, use the default subject created by the application.
5. Select the check box for **Include Report** to send the report as an email attachment.
6. Select the desired **Render Format** from the drop-down list.
7. Select the desired **Priority** for email report deliveries from the drop-down list.
8. In the **Comment** box, type any text you want to be included in the email body.

Set Windows File Share Delivery Options

Options for delivering reports via Windows file share are configured as a sub-task of the procedure for creating a report subscription. After following these steps, you will need to complete the [Create a Report Subscription](#) procedure.

To set up file share delivery options:

1. In the **File Name** box, enter the name of the saved report file. This does not have to be the same as the name of the report.
2. Select the check box for Add a file extension when the file is created if desired.
3. In the **Path** box, enter the complete UNC path for the location where the report will be saved.
4. In the **Username** and **Password** boxes, enter the credentials the application will use to access the file share.
5. Select your desired **Overwrite** option.

Set Schedule Options

Schedule options for report subscriptions are configured as a sub-task of the procedure for creating a report subscription. The options are the same for shared schedules and individual report schedules. Schedule details will vary based on the frequency at which you choose to run the schedule. After following these steps, you will need to complete the [Create a Report Subscription](#) procedure.

To configure schedule options:

1. Select the frequency at which you want the schedule to run: Hour, Day, Week, Month, or Once.
2. Configure the schedule details in the corresponding box (for example, Hourly Schedule, One-time Schedule, and so forth).
3. Click the calendar icon and use the date selector to set the date to **Begin running this schedule**.
4. Select the check box to **Stop this schedule** if desired, and then click the calendar icon and use the date selector to set the date for the schedule to stop.

Manage Report Subscriptions

Several routine management tasks can be done from the Report Subscriptions page.

Sort the Report Subscriptions List

To sort the Report Subscriptions list by the contents of a column:

- Click the triangle in the upper right corner of the column heading to sort in ascending order, or the inverted triangle to sort in descending order.

Edit Report Subscriptions Settings

To edit the settings of a subscription:

1. Click **Edit** in the **Action** column for the desired subscription.
2. Edit the settings and then click **Save**.

Delete Report Subscriptions

You can delete report subscriptions that are no longer needed. However, recipients of that subscribed report will not be automatically informed that the subscription has been deleted.

To delete an existing subscription:

- Click **Delete** in the Action column for the desired subscription and then click **OK**.

Shared Schedules Overview

Shared Schedules can be used to execute multiple reports simultaneously. Creation and management of shared schedules are limited to permissioned users. If you need to work with shared schedules and are unable to do so, contact your Uptivity WFO administrator.

Load the Shared Schedules Page

To load the **Shared Schedules** page in the Discover Web Portal:

1. Click the **Reporting** tab and expand **Report Tools** in the left navigation menu.
2. Click **Shared Schedules**.

To load the **Shared Schedules** page in the Clarity Web Portal:

1. Click the **Reports** tab and then click **Tools**.
2. Select **Shared Schedules** from the drop-down list.

Create a New Shared Schedule

To create a new **Shared Schedule**:

1. Load the **Shared Schedules** page in the Discover or Clarity Web Portal.
2. Click **New** at the top-right corner of the page.
3. Enter a **Schedule Name** (up to 100 characters) as you want it to appear in the listing of shared schedules.
4. Set the individual schedule details. For related information, see [Set Schedule Options](#).
5. Click **Save**.

Manage Shared Schedules

Several routine management tasks can be done from the **Shared Schedules** page.

Sort the Shared Schedules List

To sort the **Shared Schedules** list by the contents of a column:

- Click the triangle in the upper right corner of the column heading to sort in ascending order, or the inverted triangle to sort in descending order.

Edit a Shared Schedule's Settings

To edit the settings of a **Shared Schedule**:

1. Click **Edit** in the **Action** column for the desired schedule.
2. Edit the desired settings and then click **Save**.

Delete Shared Schedules

You can delete **Shared Schedules** that are no longer needed. Deleting a **Shared Schedule** will cause those schedule settings to be individually reassigned to report subscriptions that use the schedule.

To delete an existing **Shared Schedule**:

- Click **Delete** in the **Action** column for the desired schedule and then click **OK**.

Pause/Resume a Shared Schedule

To stop running (pause) a **Shared Schedule** that has not expired:

- Click **Pause** in the **Action** column for the desired schedule.





To resume running a **Shared Schedule** that has been paused, and has not expired:

- Click **Resume** in the **Action** column for the desired schedule.

Report Library Overview

The **Report Library** is available only in Uptivity WFO. You must have at least one of the reporting-related permissions in order to access the **Report Library**.

In essence, a report is a combination of a report layout and the criteria used to generate the report. When users create a report, they are given the option to save associated criteria as either public or private. In the **Report Library**, you will find any public criteria as well as any private criteria that you personally have saved (see [Save Printable Report Criteria](#)).

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	

Load the Report Library

To load the **Report Library** page:

1. Click the **Reporting** tab and expand **Report Tools** in the left navigation menu.
2. Click **Report Library**.

Manage the Report Library

Several routine management tasks can be done from the **Report Library** page.

Execute a Report from the Report Library

To execute a report from the Report Library:

- Load the **Report Library** and click the desired report in the list.

Delete Saved Criteria from the Report Library

To delete saved criteria from the **Report Library**:

- Load the Report Library. Click the **Delete** icon for the desired report and then click **OK**.

Document Revision History

Revision	Change Description	Effective Date
0	Initial version for this release	2015-09-01