



## **inContact WFO Reports Reference Guide, 17.1**

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**Hosted**

## inContact WFO Reports Reference Guide, 17.1

- **Version** — 17.1
- **Revision** — February 2017
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## Introduction

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### Audience

This document is designed for users of the inContact Workforce Optimization (WFO) Reporting feature in Hosted deployments. This feature 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 inContact WFO Web Portal.

### Goals

The goal of this document is to provide reference information about the various reports available in inContact WFO. 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 inContact WFO has been installed and integrated with your inContact ACD. It also assumes that your application administrator has configured the application for use based on your business rules and environment. Finally, it assumes that you have access to online help for inContact WFO as a resource for conceptual and task information.

### Need-to-Knows

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

inContact 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 inContact WFO administrator.

Several inContact 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 inContact WFO Web Portal.

inContact 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, inContact 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.

Images in this guide are from the Premises version of inContact WFO and may look slightly different than their Hosted counterparts. The information contained in each report is the same.

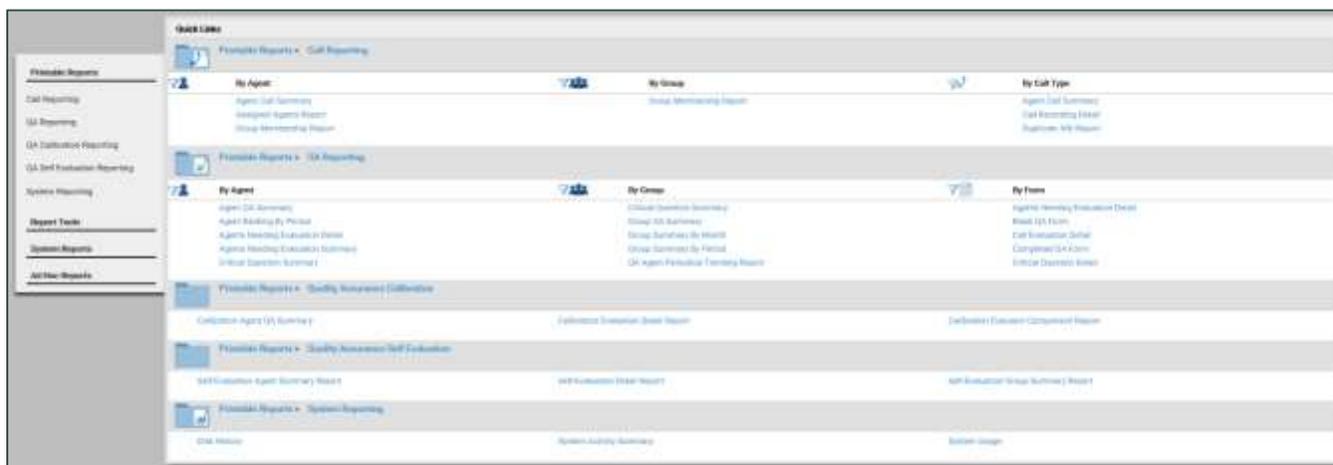
## What's New in This Version

- No changes to reporting have been made for this release. Conceptual and task documentation for the feature has been moved to online help and is now searchable.

## Printable Reports Overview

Printable reports are pre-designed reports included with your inContact WFO system. The Quick Links pane, which shows the most commonly-used printable reports in each category, is available at Reporting/Analytics>WFO.

The System Reporting category of Printable Reports includes reports typically viewed onscreen by the inContact WFO administrator; see [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, search online help for keyword: *printable reports*.

## Call Reporting Reports

inContact 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.

### 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:

1 of 1 Find | Next

### Agent Call Summary

For period beginning 1/1/2013 and ending 1/1/2015

Selected Group: Legends Team  
Selected Call Direction: Incoming

Name	Device ID	# Calls	Average Duration	Total Duration	Max Duration
Bern, Neil	5709	4	00:07:21	00:29:24	00:12:25
Chenier, Roy	8524	1	00:11:41	00:11:41	00:11:41
Cutting, Pietro	5032	2	00:18:16	00:36:33	00:34:19
Fearnley, Henry	7507	1	00:09:45	00:09:45	00:09:45
<b>TOTAL</b>		<b>8</b>	<b>00:10:55</b>	<b>01:27:23</b>	<b>00:34:19</b>

Agent Call Summary - 1/13/2016
Page 1 of 1

### Assigned Agents Report

The **Assigned Agents Report** is not used in Hosted inContact WFO. Instead, use the Active Agents report in Central.

## 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 inContact 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:

Record ID:

Gate:

User 3:

User 7:

User 10:

User 13:

End Date:

Caller's Phone #:

User 1:

User 4:

Skill Group List:

User 8:

User 11:

User 14:

Agents:

Dialed Phone #:

User 2:

User 5:

User 6:

User 9:

User 12:

User 15:

CallCopyGroup:

User 15:

### Call Recording Detail

For Tuesday, January 01, 2013 to Friday, January 15, 2016

<b>Record ID:</b> <a href="#">1776</a>					
<b>Agent:</b> Ayala, Daniel	<b>ANI:</b> 7504	<b>DNIS:</b> 912032998375	<b>Call Direction:</b> Outbound		
<b>Time:</b> 1/22/2013 5:27 PM	<b>Duration:</b> 00:00:47	<b>Gate:</b> 10	<b>Device:</b> 7504	<b>Channel:</b> 3	
<b>inContact WFO Group01 Group:</b>		<b>ACD Group:</b> 40			
<b>Customer Number:</b> u1-8000	<b>User2:</b> u2-8000	<b>User3:</b> u3-6000			
<b>User4:</b> u4-4000	<b>User5:</b> u15-5000	<b>User6:</b>			
<b>User7:</b>	<b>User8:</b>	<b>User9:</b>			
<b>User10:</b>	<b>User11:</b>	<b>User12:</b>			
<b>User13:</b>	<b>User14:</b>	<b>User15:</b>			

## 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

1 of 1 Find | Next

### Duplicate ANI Report

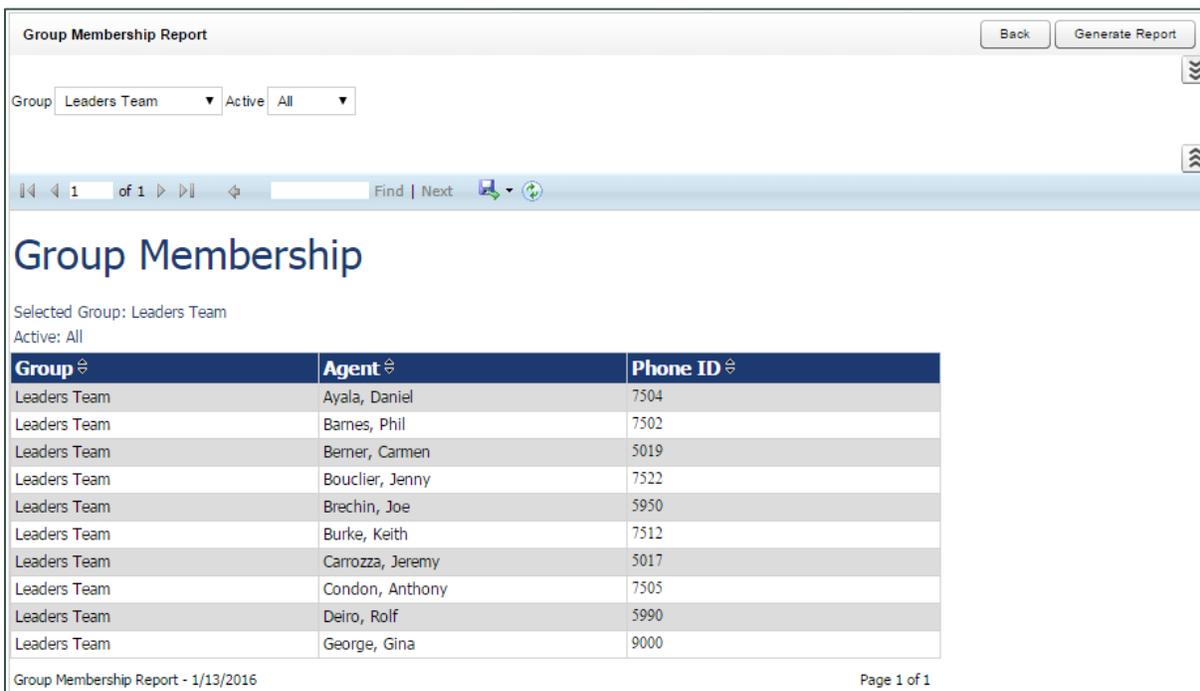
For Tuesday, January 01, 2013 to Wednesday, January 13, 2016

ANI	# Calls Observed
2699860094	2
3149935913	2
4043758169	2
5022	3
5416170715	2
5703	3
5741	2
6026832275	2
6108311236	3
6149463580	2
6784278598	4
7023636363	2
7440	2
7455	3
7466	6
7467	6
7477	18
7536	2
7546	2
7553	2
8888260080	63
9548176817	2

Duplicate ANI Report - 1/13/2016
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

Group: Leaders Team Active: All

Group Membership

Selected Group: Leaders Team  
Active: All

Group	Agent	Phone ID
Leaders Team	Ayala, Daniel	7504
Leaders Team	Barnes, Phil	7502
Leaders Team	Berner, Camen	5019
Leaders Team	Bouclier, Jenny	7522
Leaders Team	Brechin, Joe	5950
Leaders Team	Burke, Keith	7512
Leaders Team	Carrozza, Jeremy	5017
Leaders Team	Condon, Anthony	7505
Leaders Team	Deiro, Rolf	5990
Leaders Team	George, Gina	9000

Group Membership Report - 1/13/2016 Page 1 of 1

## QA Reporting Reports

inContact 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.

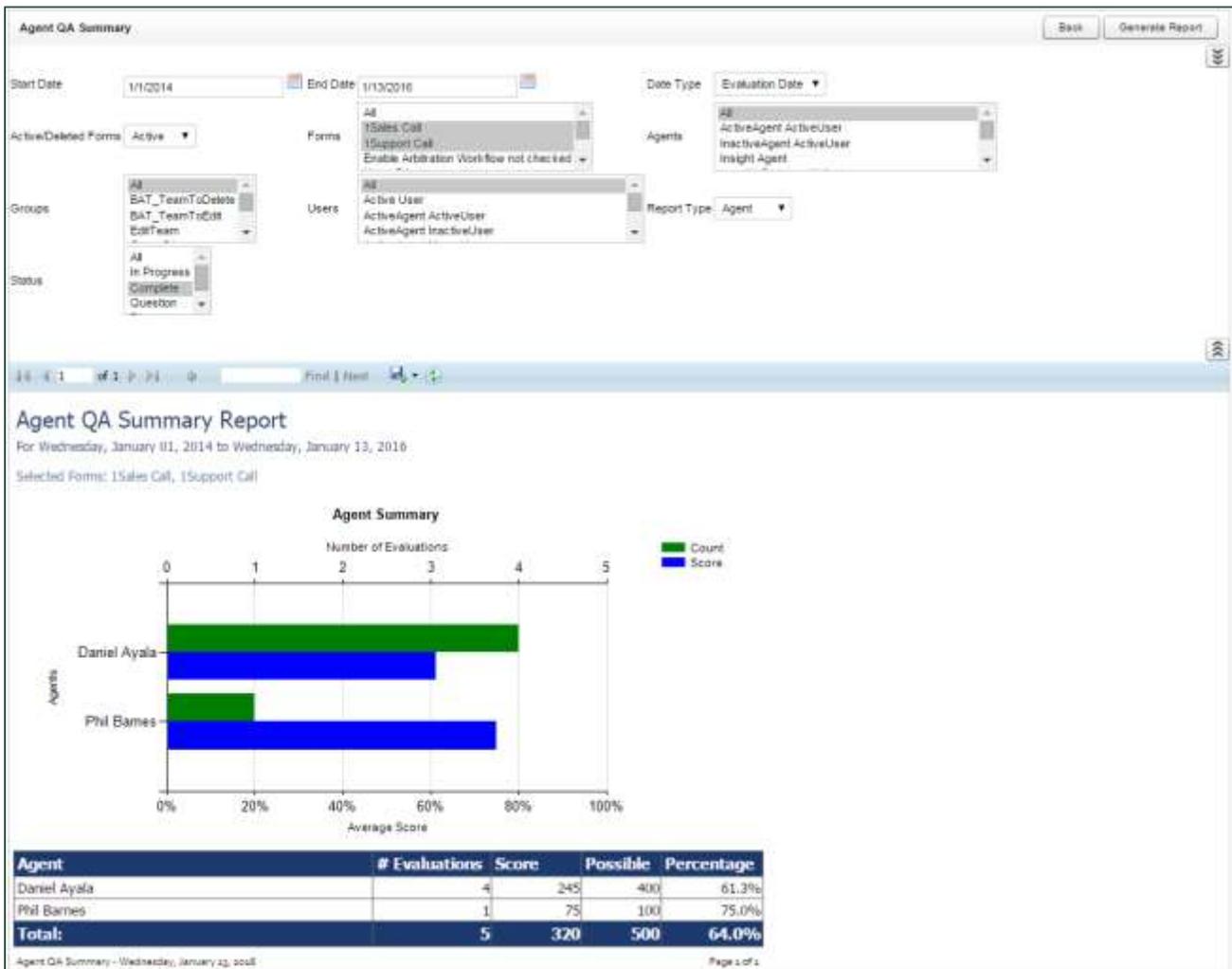
QA Reporting is based on the evaluations that your quality assurance (QA) team have performed. These reports require that one or more QA evaluation forms be created. The way that forms are created affects and impacts the reporting data you are able to see in this category of reports. For more information on creating QA forms, search online help for keyword: *create forms*.

## 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.

You must select a **Status** to run this report.

In the example below, **Report Type** was set to **Agent**, and you can drill down to **Section**-level or **Question**-level results by clicking the agent's name. 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 Generate Report

Form: 1Support Call    Group: All    Period Type: Month

Year: 2013    Period: January

1 of 1    Find | Next

### Agent Ranking by Month

For period beginning 1/1/2013 and ending 1/31/2013

Selected Form: 1Support Call

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 inContact 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**.

Agent	Group	Form	Evaluator	Last Evaluated
Daniel Ayala	Legends Team	1Support Call	Gina George	6/18/2015
Phil Barnes	Leaders Team	1Sales Call	Jessica Hessler	6/18/2015
Neil Bem	Legends Team	1Support Call	Gina George	11/5/2013
Neil Bem	Legends Team	1Sales Call	Gina George	6/18/2015
Anders Bouclier	Legends Team	1Support Call	Gina George	11/5/2013
Rory Cherise	Legends Team	1Support Call	Gina George	11/5/2013
Sheryl Cozica	Legends Team	1Support Call	Gina George	11/5/2013
Pietro Cutting	Legends Team	1Support Call	Gina George	11/5/2013
Kavin Dimatrik	Legends Team	1Support Call	Gina George	11/5/2013
Henry Feamley	Legends Team	1Support Call	Gina George	11/5/2013
Zach Halli	Legends Team	1Support Call	Gina George	11/5/2013

## 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 inContact Groups to which they belong. Report results are limited to groups to which you have access, even if you select **All**.

Agent	Group	Form	Evaluator	Last Evaluated
Ayala, Daniel	Legends Team	1Support Call	Gina George	6/18/2015
Barnes, Phil	Leaders Team	1Sales Call	Jessica Hessler	6/18/2015
Bem, Neil	Legends Team	1Sales Evaluation v2	Gina George	6/18/2015
Bouclier, Jenny	None	None		Never
Brechin, Joe	None	None		Never

## Blank QA Form

The **Blank QA Form** report displays a blank version of a specific QA evaluation form.

Blank QA Form
Back Generate Report

Form: 1Support Call

1 of 1 Find | Next

### 1Support Call

**Opening**

**Proper introduction?**

Yes

No

**Ask for caller's name?**

Yes

No

**Restate problem to ensure understanding?**

Yes

No

**Comments:**

**Communication Skills**

**Technical language at caller's level of understanding?**

Yes

No

**Pace and enunciation clear and understandable?**

Yes

No

**Patient and empathetic tone?**

Yes

No

**Comments:**

**Technical Skills**

**Application UI knowledge and proficiency**

Excellent

Acceptable

Unacceptable

**Underlying system knowledge and proficiency (DB, OS, scripts, etc.)**

Excellent

Acceptable

Unacceptable

**Overall technical speed and proficiency (moving through screens, using tools, etc.)**

Excellent

Acceptable

Unacceptable

**Comments:**

**Closing**

**Clarify and communicate next steps?**

Yes

No

**Thank caller?**

Yes

No

Blank QA Form - 1/13/2016
Page 1 of 1

## 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**.

You must select a **Status** to run this report.

Call Evaluation Detail
Back Generate Report

Start Date: 10/1/2015

Agent: Daniel Ayala

Active/Deleted Evaluations: Active

Response: Any

Gate:

User 3:

QA Record ID:

User 7:

User 10:

User 13:

End Date: 1/15/2016

Evaluator: All

Group: All

Caller's Phone #:

User 1:

User 4:

status: All

User 5:

User 11:

User 14:

Date Type: Evaluation Date

Form: All

Question: Any

Dated Phone #:

User 2:

User 5:

User 8:

User 9:

User 12:

User 15:

Call Evaluation Detail

For Thursday, October 01, 2013 to Friday, January 15, 2016

Selected Agent: Daniel Ayala

Agent: Ayala, Daniel			
Form Name	Call ID	Evaluated By	Complete Date
2Sales Call		1722 Gina George	1/13/2016
Group: Leaders Team	ANI: 7504	DNIS: 912032998378	Call Direction: Outbound
Time: 1/22/2013 5:17 PM	Duration: 00:00:45	Gate: 10	Device: 7504 Channel: 2
Customer Number: u1-9000	User2: u2-2000	User3: u3-4000	
User4: u4-7000	User5: u15-8000	User6:	
User7:	User8:	User9:	
User10:	User11:	User12:	
User13:	User14:	User15:	
Section Name: Opening			
Question	Evaluation	Score	
Proper introduction?	Yes	10.00 of 10.00 (100.0%)	
Ask for caller's name?	No	0.00 of 10.00 (0.0%)	
Restate problem to ensure understanding?	Yes	10.00 of 10.00 (100.0%)	
Ask for permission to place customer on hold?	Not Applicable	N/A	
Comments:		N/A	
	<b>Subtotal:</b>	<b>20.00 of 30.00 (67%)</b>	
Section Name: Communication Skills			
Question	Evaluation	Score	
Technical language at caller's level of understanding?	Yes	10.00 of 10.00 (100.0%)	
Face and enunciation clear and understandable?	Yes	10.00 of 10.00 (100.0%)	
Patient and empathetic tone?	Yes	10.00 of 10.00 (100.0%)	
Comments:		N/A	
	<b>Subtotal:</b>	<b>30.00 of 30.00 (100%)</b>	

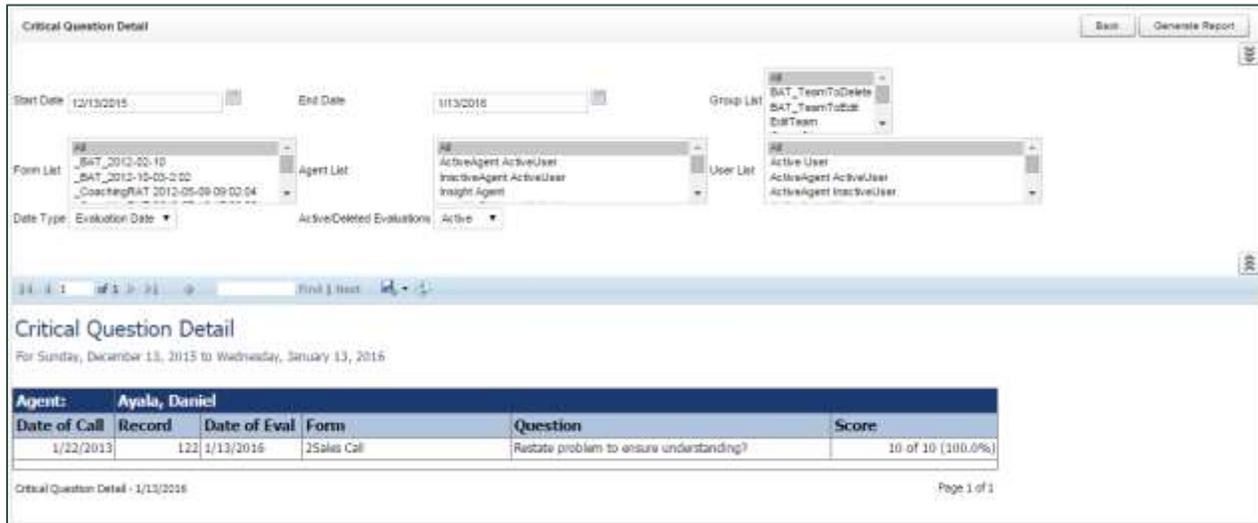
## Completed QA Form

The **Completed QA Form** report displays scoring data for a specific QA evaluation. The report shows both earned and possible points for each question so that agents and evaluators can more clearly see areas for improvement. The report is automatically generated when you print a QA Record via Search QA Evaluations on the Coaching tab. Type 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			
Agent:	Barnes, Phil	Evaluation ID:	96
Evaluator:	George, Gina	Call ID:	No Recording
Date of Evaluation:	7/29/2014	Date of Recording:	
Duration:	0:0:0	Arbitrator:	No Dispute
Evaluation Form:	Sales Evaluation v2	Station ID:	
Agent Number:		Number Called	
CallerID ANI:		DNIS:	
Group:		Channel:	
Call Direction:		ACD Gate:	
User1:		Screen Capture:	
User3:		User2:	
User5:		User4:	
<b>Intro</b>			<b>20 of 30 (66.67%)</b>
Did the agent introduce him/herself by name?			
Yes	<input checked="" type="checkbox"/>	10pts	
No	<input type="checkbox"/>	0pts	
Did the agent ask for the caller's name?			
Yes	<input type="checkbox"/>	10pts	
No	<input checked="" type="checkbox"/>	0pts	
Did the agent use the current promotional greeting?			
Yes	<input checked="" type="checkbox"/>	10pts	
No	<input type="checkbox"/>	0pts	
<b>Soft Skills</b>			<b>15 of 30 (50.00%)</b>
Did the agent personalize the conversation by using the caller's name on at least two occasions?			
Yes	<input type="checkbox"/>	10pts	
No	<input checked="" type="checkbox"/>	0pts	
Did the agent suggest appropriate add-on products based on the caller's initial order?			
Yes	<input checked="" type="checkbox"/>	10pts	
No	<input type="checkbox"/>	0pts	
Was the agent warm and friendly while remaining professional?			
Exceeds Expectations	<input type="checkbox"/>	10pts	
Meets Expectations	<input checked="" type="checkbox"/>	5pts	
Did Not Meet Expectations	<input type="checkbox"/>	0pts	
<b>Technical Skills</b>			<b>15 of 20 (75.00%)</b>
Was the agent able to navigate through product screens efficiently?			
Exceeds Expectations	<input type="checkbox"/>	10pts	
Meets Expectations	<input checked="" type="checkbox"/>	5pts	
Did Not Meet Expectations	<input type="checkbox"/>	0pts	
Did the agent correctly handle credit card processing?			
Yes	<input checked="" type="checkbox"/>	10pts	
No	<input type="checkbox"/>	0pts	
<b>Form Total:</b>			<b>50 of 80 (62.50%)</b>
<b>Comments</b>			
Completed QA Form - 8/7/2015			
			Page 1 of 1

## 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**  
For Sunday, December 13, 2015 to Wednesday, January 13, 2016

Agent: Ayala, Daniel					
Date of Call	Record	Date of Eval	Form	Question	Score
1/22/2013	122	1/13/2016	2Sales Call	Restate problem to ensure understanding?	10 of 10 (100.0%)

Critical Question Detail - 1/13/2016 Page 1 of 1

## Critical Question Summary

The **Critical Question Summary** is similar to the Detail version, but shows a summary of per form. For example, suppose an agent was evaluated five times using one form with a Critical question and four times using another form with a different Critical question. The Detail report would show a line for each of the nine evaluations. The Summary report would show one line for the form used five times and one line for the form used four times. Report results are limited to groups to which you have access, even if you select **All**.

## Evaluation List Report

The **Evaluation List Report** generates a list of standard QA evaluations performed within the specified time period. Self-evaluations and calibration evaluations are not included. 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:  Status:  Agent:

Active/Deleted Evaluations:  Form:  Evaluator:

1 of 133 Find | Next

### Quality Assurance Evaluation List

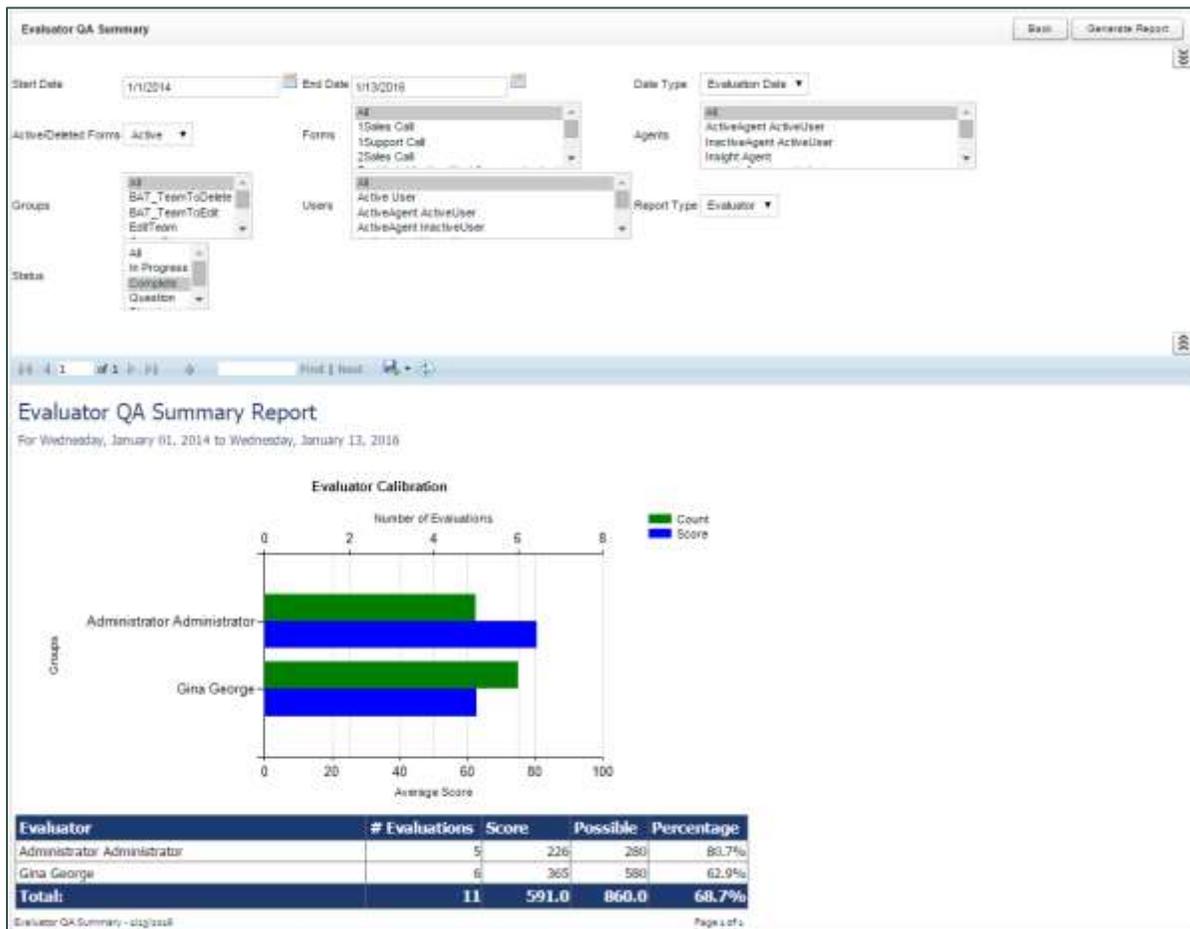
Form	Agent	Record ID	Recording Date	Evaluated By	Evaluation Date	Score
Customer Service Evaluation	Administrator, Uptivity	22388	09/09/15	Vicki Hardwick	09/09/2015	140.0 of 140.0 (100.0%)
Customer Service Evaluation	Administrator, Uptivity	13256	09/12/15	Abe Capote	09/12/2015	120.0 of 140.0 (85.7%)
Customer Service Evaluation	Administrator, Uptivity	13170	09/20/15	Vicki Hardwick	09/20/2015	140.0 of 140.0 (100.0%)
Customer Service Evaluation	Administrator, Uptivity	15658	10/06/15	Your Uptivity Administrator	10/06/2015	134.0 of 140.0 (95.7%)
Customer Service Evaluation	Administrator, Uptivity	25477	10/14/15	Your Uptivity Administrator	10/14/2015	134.0 of 140.0 (95.7%)
Customer Service Evaluation	Administrator, Uptivity	25478	10/14/15	Abe Capote	10/14/2015	134.0 of 140.0 (95.7%)
Customer Service Evaluation	Administrator, Uptivity	15567	10/19/15	Your Uptivity Administrator	10/19/2015	134.0 of 140.0 (95.7%)
Customer Service Evaluation	Administrator, Uptivity	15568	10/19/15	Your Uptivity Administrator	10/19/2015	140.0 of 140.0 (100.0%)
Customer Service Evaluation	Administrator, Uptivity	4597	10/26/15	Your Uptivity Administrator	10/26/2015	140.0 of 140.0 (100.0%)

## 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**.

You must select a **Status** to run this report.

Report results are limited to groups to which you have access, even if you select **All**.



## Form and Section Failures Report

The **Form and Section Failures Report** displays critical failure points in one or more forms over a selected period of time. The top section shows a summary of the total number of form and/or section failures per agent; the lower section supplies the detail of the failure(s). Report results are limited to groups to which you have access, even if you select **All**.

Form and Section Failures Report
Back Generate Report

Start Date:

Active/Deleted Evaluations:

Agents:   
 Uptivity Administrator  
 Germaine Ahner  
 Barry Aman

Report Type:

End Date:

Form:

Groups:   
 Billing - Location A  
 Billing - Location B  
 Corporate Account Records

Failure Type:

Date Type:

Section:

Users:   
 Abe Capote  
 Aleshia Zahm  
 Alesia Cravey

1 of 48 Find | Next

### Form and Section Failure Report by Agent

For Thursday, January 01, 2015 to Thursday, January 14, 2016

Customer Service Evaluation	Greeting
Agent	Failure Count
Administrator, Uptivity	Form Failures: 0, Section Failures: 1
Ahner, Germaine	Form Failures: 0, Section Failures: 2
Aman, Barry	Form Failures: 0, Section Failures: 4
Armstead, Bobbye	Form Failures: 0, Section Failures: 4
Arriaga, Shanita	Form Failures: 0, Section Failures: 1
Balcom, Jerry	Form Failures: 0, Section Failures: 3
Baughman, Lilly	Form Failures: 0, Section Failures: 3
Belle, Joey	Form Failures: 0, Section Failures: 1
Berard, Elmo	Form Failures: 0, Section Failures: 2
Bullen, Daniella	Form Failures: 0, Section Failures: 3
Burling, Leona	Form Failures: 0, Section Failures: 2

## 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: 1/1/2014

Active/Deleted Forms: Active

Groups: Group03, Group04, Group05, **Leaders Team**

End Date: 1/14/2016

Forms: All, 1Sales Call, 1Support Call, 2Sales Call

Users: All, Active User, ActiveAgent ActiveUser, ActiveAgent InactiveUser

Date Type: Evaluation Date

Agents: All, ActiveAgent ActiveUser, InactiveAgent ActiveUser, Insight Agent

Report Type: Group

1 of 1

Group QA Summary Report

For Wednesday, January 01, 2014 to Thursday, January 14, 2016

Selected Groups: Leaders Team, Legends Team

**Group Summary**

Number of Evaluations

Average Score

Group	# Evaluations	Score	Possible	Percentage
Leaders Team	4	270	385	70.1%
Legends Team	9	556	835	66.6%
Total:	13	826.00	1220.00	67.7%

Group QA Summary - 1/14/2016
Page 1 of 1

## 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 inContact 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: January

Active/Deleted Forms: Active

Groups: All, Billing - Location A, Billing - Location B, Corporate Account Records

Year: 2016

Forms: All, Admissions, Case Audit, Customer Service Evaluation

Users: All, Abe Capote, Aleshia Zahm, Alesia Cravey

Periods: 6

Agents: All, Uptivity Administrator, Germaine Ahner, Barry Aman

Report Type: Month

1 of 1 Find | Next

### Group Performance Summary Report by Month

For the period beginning 7/1/2015 and ending 1/31/2016

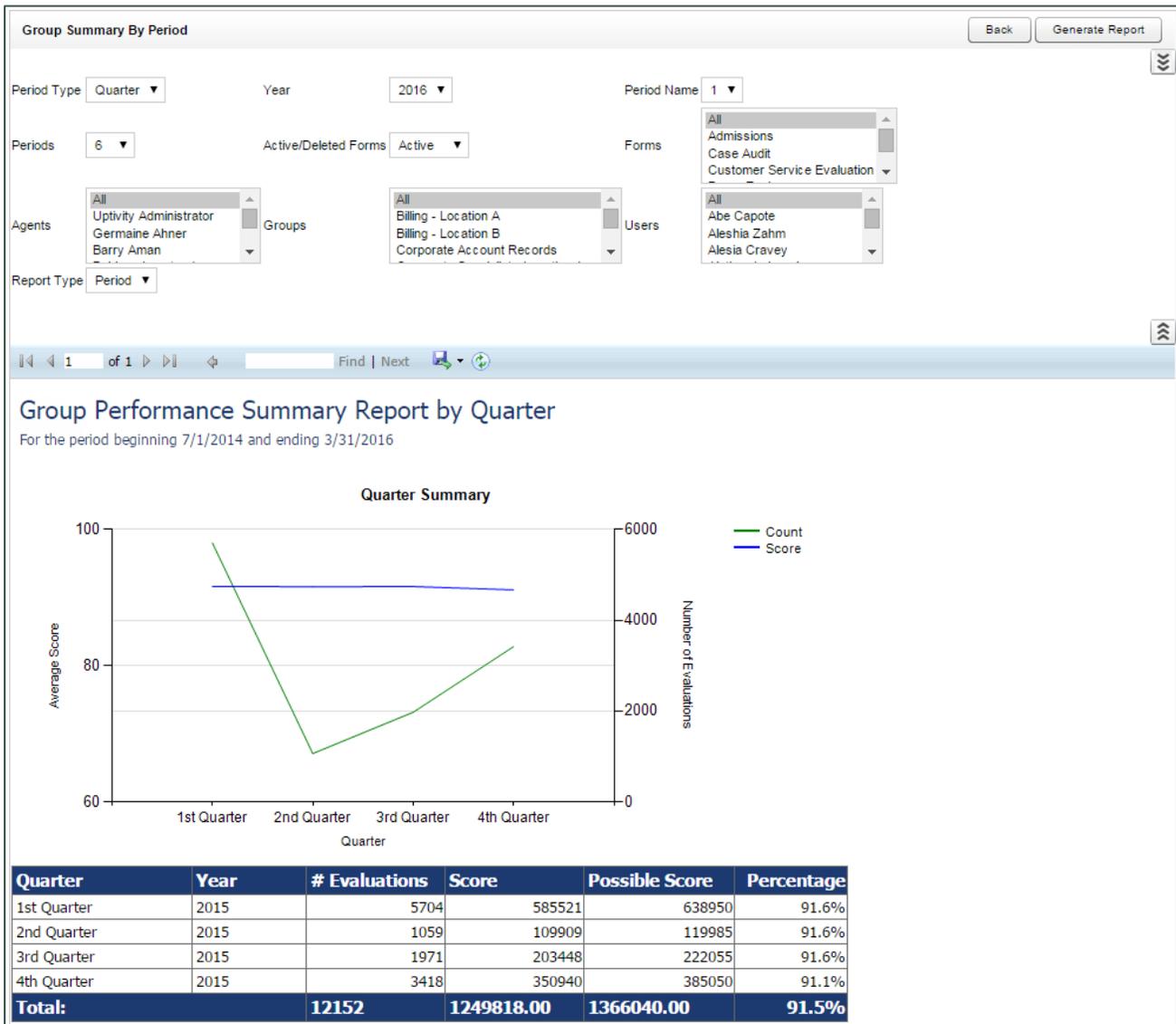
#### Month Summary

Month	# Evaluations	Score	Possible Score	Percentage
August	656	66470	73055	91.0%
September	749	77477	84385	91.8%
October	947	95879	105865	90.6%
November	1196	123774	135915	91.1%
December	1275	131287	143270	91.6%
January	1600	164565	179215	91.8%
<b>Total:</b>	<b>6423</b>	<b>659452.00</b>	<b>721705.00</b>	<b>91.4%</b>

Group Summary By Month - 1/14/2016
Call/Copy Recorder Reporting Service
Page 1 of 1

## 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**.



## 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. **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.

You must select an **Agent ID, Form ID, Supervisor ID** and **Status** to run this report.

Multiple Evaluations Summary
Back Generate Report

End Date: 1/14/2016 Agent ID: Germaine Ahner Form ID: Customer Service Evaluation

Supervisor ID: Your Uptivity Administrator Status: All  
In Progress  
Complete  
Question

14 1 of 1 Find Next

### Multiple Evaluations Summary Report

Contact Date Range: July 22, 2015 - January 12, 2016  
 Agent Name: Germaine Ahner  
 Supervisor Name: Your Uptivity Administrator Overall Average: 92.4%

---

Form: Customer Service Evaluation  
 Average Score for this Form: 97.1%

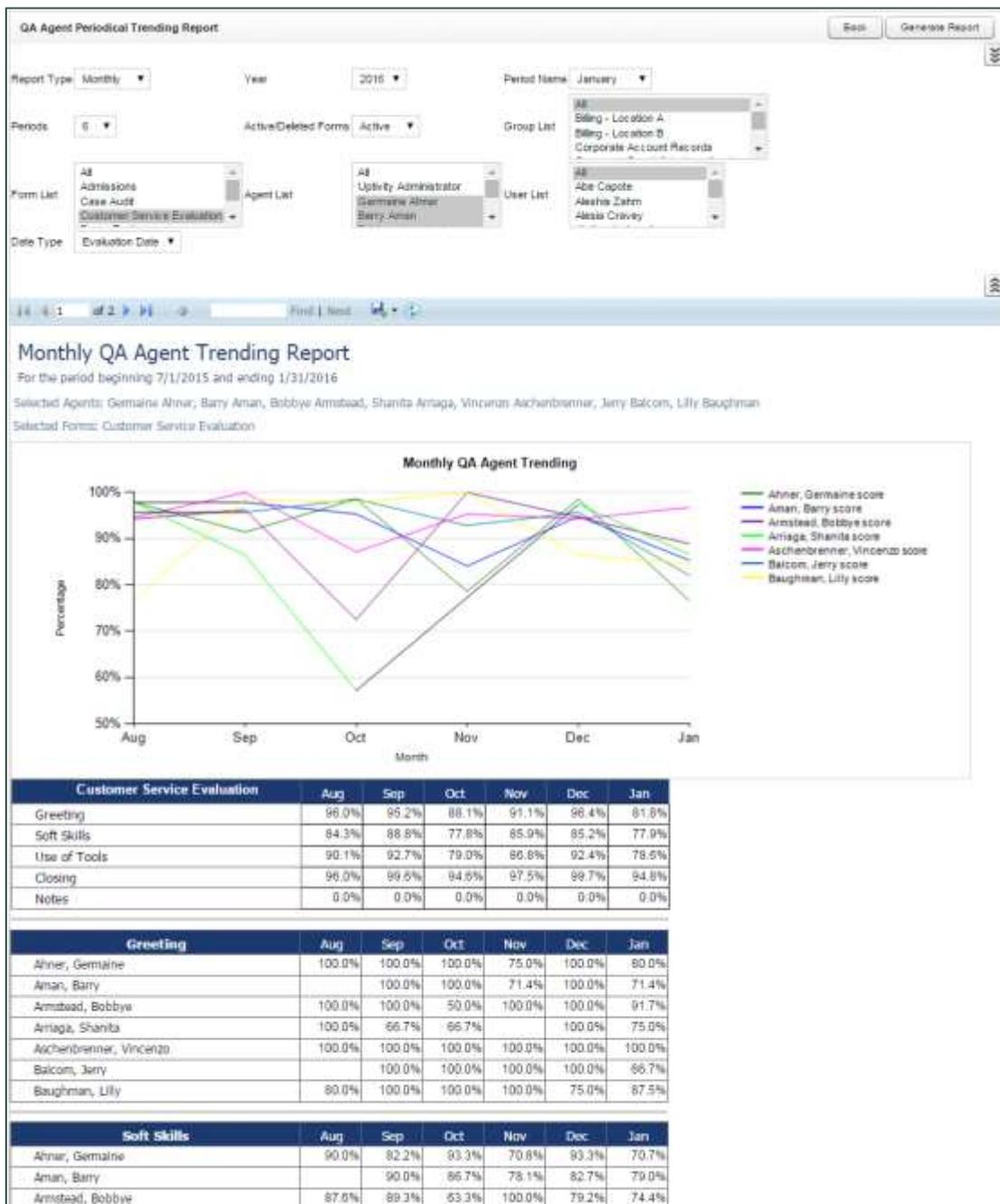
Section/Questions	Total Possible	1	2	3	4	5	6	7	8	9	10	11	12	Total	Overall Percentage
<b>Greeting</b>	240													240	100.0%
Did Agent state company name?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did Agent state his/her name?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
<b>Soft Skills</b>	360													332	92.2%
Did Agent demonstrate Active Listening?	120	10	7	10	7	10	10	10	7	10	10	7	10	108	90.0%
Did Agent use courtesy statements as appropriate?	120	10	7	10	5	10	10	10	7	10	10	5	10	104	86.7%
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%
<b>Use of Tools</b>	360													340	94.4%
Did Agent find record in CRM in timely manner?	120	10	10	10	0	10	10	10	10	10	10	0	10	100	83.3%
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%
<b>Closing</b>	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%
<b>Notes</b>	0													0	0.0%
Reviewer Notes	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%

Multiple Evaluations Summary - 1/14/2016 CallCopy Recorder Reporting Service Page 1 of 2

## 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.

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 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 Generate Report

Start Date:  End Date:  Date Type: Evaluation Date

Active Agents/Users: Active

Agents:

Groups:

Users:

Forms:

Reporting Period: Monthly

---

### Monthly QA Agent Trending Report

For Thursday, October 01, 2015 to Thursday, December 31, 2015

Selected Agents: Germaine Ahner, Barry Aman, Bobbye Amstad, Shanita Arriaga, Vincenzo Aschentrebner, Jerry Balcom, Lilly Baughman

	2015		
	Oct	Nov	Dec
<b>Ahner, Germaine</b>	85.6%	77.7%	98.6%
<b>Customer Service Evaluation</b>	98.6%	78.6%	98.6%
<b>Greeting</b>	100.0%	75.0%	100.0%
Did Agent state company name?	100.0%	75.0%	100.0%
Did Agent state his/her name?	100.0%	75.0%	100.0%
<b>Soft Skills</b>	93.3%	70.8%	93.3%
	N/A	N/A	N/A
Did Agent use courtesy statements as appropriate?	90.0%	61.3%	90.0%
Did Agent demonstrate Active Listening?	90.0%	63.8%	90.0%
Did Agent use proper hold procedures?	100.0%	87.5%	100.0%
<b>Use of Tools</b>	100.0%	70.8%	100.0%
Did Agent find record in CRM in timely manner?	100.0%	62.5%	100.0%
Did agent navigate knowledgebase efficiently (if needed)?	100.0%	62.5%	100.0%
Did Agent use correct closing code in CRM?	100.0%	87.5%	100.0%
<b>Closing</b>	100.0%	87.5%	100.0%
Did Agent resolve call within support guidelines?	100.0%	87.5%	100.0%
Did Agent probe for additional concerns?	100.0%	87.5%	100.0%
Did Agent thank customer for calling?	100.0%	87.5%	100.0%

## 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:

Internal All:  Active/Deleted Forms:  Group List:   
 Billing - Location A  
 Billing - Location B  
 Corporate Account Records

Form List:   
 Admissions  
 Case Audit  
 Customer Service Evaluation

Agent List:   
 Uptivity Administrator  
 Germaine Ahner  
 Barry Aman

User List:   
 Abe Capote  
 Aleshia Zahm  
 Alesia Cravey

Report Type:  Report Detail:

---

1 of 1 Find | Next

### Monthly QA Trending Report by Form

For Thursday, October 01, 2015 to Thursday, December 31, 2015

**Monthly QA Trending by Form**

— Customer Service Evaluation score  
— Sales Evaluation score

	2015		
	Oct	Nov	Dec
<b>Customer Service Evaluation</b>	88.3%	89.1%	90.0%
Customer Service Evaluation	88.3%	89.1%	90.0%
<b>Sales Evaluation</b>	81.9%	82.4%	83.2%
Sales Evaluation	81.9%	82.4%	83.2%

## 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. The first table shows the average monthly score for all selected groups on each section of the evaluation. The second table shows the average monthly score for each group individually on each section of the evaluation.

QA Group Periodical Trending Report
Back Generate Report

Report Type: Monthly Year: 2016 Period Name: January

Periods: 5 Active/Deleted Forms: Active Group List: Billing - Location A, Billing - Location B, Corporate Account Records

Form List: All Admissions, Case Audit, Customer Service Evaluation Agent List: All Uptivity Administrator, Germaine Aheer, Barry Aman User List: All Abe Capote, Alesha Zahn, Alesia Cravey

---

### Monthly QA Group Trending Report

For the period beginning 7/1/2015 and ending 1/31/2016

Selected Forms: Customer Service Evaluation

Customer Service Evaluation	Aug - 15	Sep - 15	Oct - 15	Nov - 15	Dec - 15	Jan - 16
Greeting	92.5%	95.0%	91.5%	92.5%	93.9%	93.6%
Soft Skills	80.2%	82.2%	80.0%	80.8%	81.1%	81.5%
Use of Tools	83.7%	86.1%	82.1%	83.8%	85.4%	85.7%
Closing	95.1%	97.9%	96.1%	96.0%	96.5%	96.4%
Notes	N/A	N/A	N/A	N/A	N/A	N/A

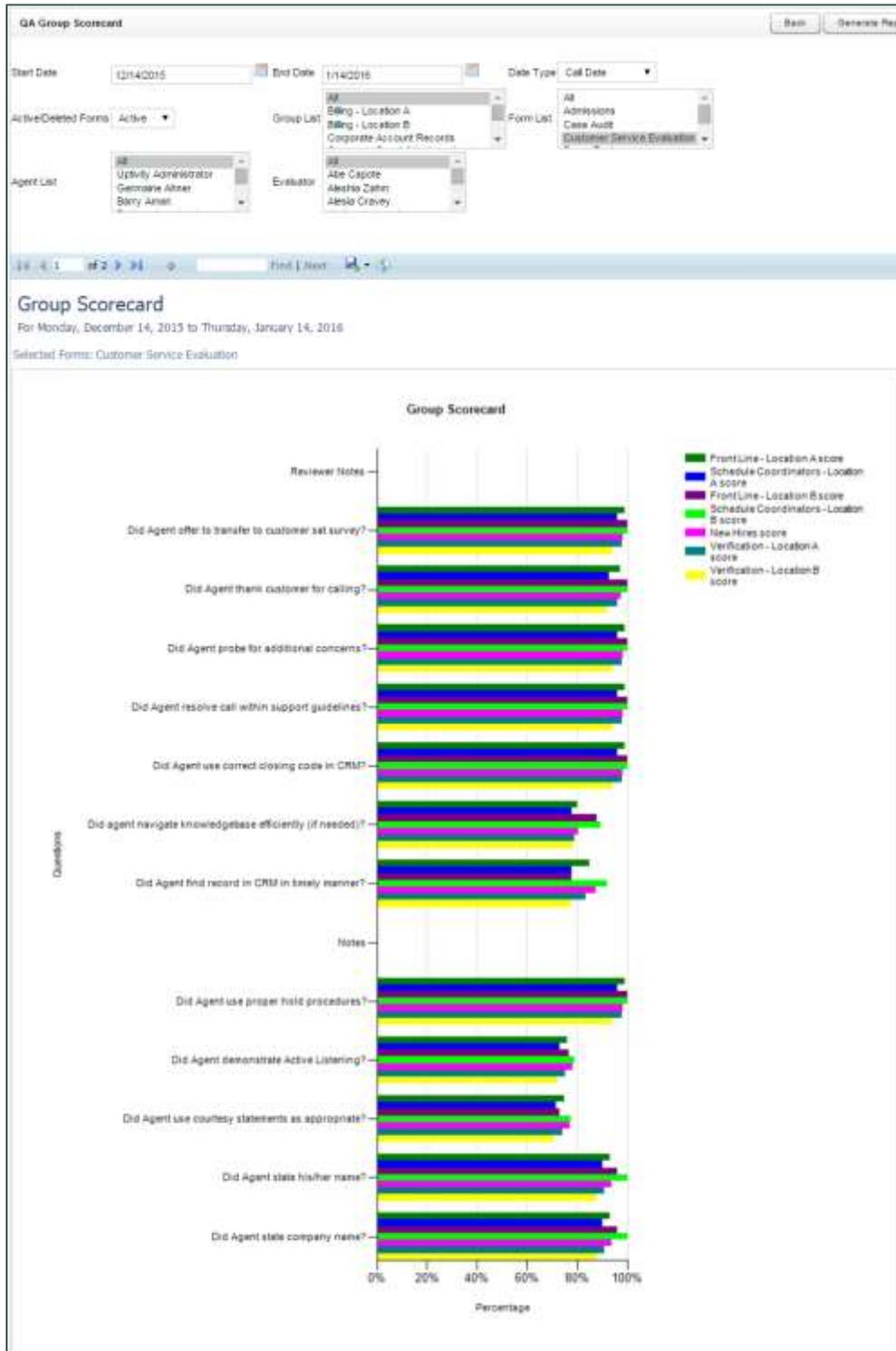
Customer Service Evaluation	Aug - 15	Sep - 15	Oct - 15	Nov - 15	Dec - 15	Jan - 16
<b>Greeting</b>						
Front Line - Location A	89.5%	99.0%	88.1%	93.4%	93.6%	96.5%
Front Line - Location B	94.1%	96.4%	89.4%	91.7%	96.3%	96.9%
New Hires	90.5%	93.0%	94.3%	87.8%	95.1%	91.7%
Schedule Coordinators - Location A	94.4%	96.0%	96.7%	94.0%	95.9%	93.0%
Schedule Coordinators - Location B	94.0%	97.7%	86.9%	91.7%	96.7%	98.7%
Verification - Location A	92.1%	95.0%	92.7%	94.0%	93.8%	92.8%
Verification - Location B	93.2%	92.4%	88.5%	91.8%	90.4%	92.6%

Soft Skills	Aug - 15	Sep - 15	Oct - 15	Nov - 15	Dec - 15	Jan - 16
Front Line - Location A	78.6%	85.4%	80.0%	80.2%	81.2%	83.8%

## 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 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: 12/14/2015 End Date: 1/14/2016 Date Type: Call Date

Active/Deleted Forms: Active Groups: Billing - Location A, Billing - Location B, Corporate Account Records Forms: All, Admissions, Case Audit, Customer Service Evaluation

Agents: Uptivity Administrator, Germaine Ahner, Barry Aman Users: All, Abe Capote, Alesha Zahm, Alesia Cravey Reporting Period: Monthly

---

### Monthly QA Group Trending Report

For Monday, December 14, 2015 to Thursday, January 14, 2016

Selected Forms: Customer Service Evaluation

	2015	2016
	Dec	Jan
<b>Front Line - Location A</b>	93.7%	93.3%
<b>Customer Service Evaluation</b>	93.7%	93.3%
<b>Greeting</b>	98.9%	95.4%
Did Agent state company name?	100.0%	100.0%
Did Agent state his/her name?	97.8%	90.7%
<b>Soft Skills</b>	84.6%	83.8%
Did Agent use courtesy statements as appropriate?	76.1%	75.4%
Did Agent demonstrate Active Listening?	77.8%	76.1%
Did Agent use proper hold procedures?	100.0%	100.0%
Notes	N/A	N/A
<b>Use of Tools</b>	89.1%	88.3%
Did Agent find record in CRM in timely manner?	87.0%	85.2%
Did agent navigate knowledgebase efficiently (if needed)?	80.4%	79.6%
Did Agent use correct closing code in CRM?	100.0%	100.0%
<b>Closing</b>	98.7%	99.8%
Did Agent resolve call within support guidelines?	97.8%	100.0%
Did Agent probe for additional concerns?	100.0%	100.0%
Did Agent thank customer for calling?	97.8%	98.1%

## 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 *inContact WFO QM Manual* or the online help for inContact WFO.

You must select a **Group** to run this report.

QA Pending Acknowledgment
Back Generate Report

Older Than

Groups

- Corporate Specialist - Location A
- Corporate Specialist - Location B
- Foundation
- Front Line - Location A

1 of 1 Find | Next

### QA Pending Acknowledgment

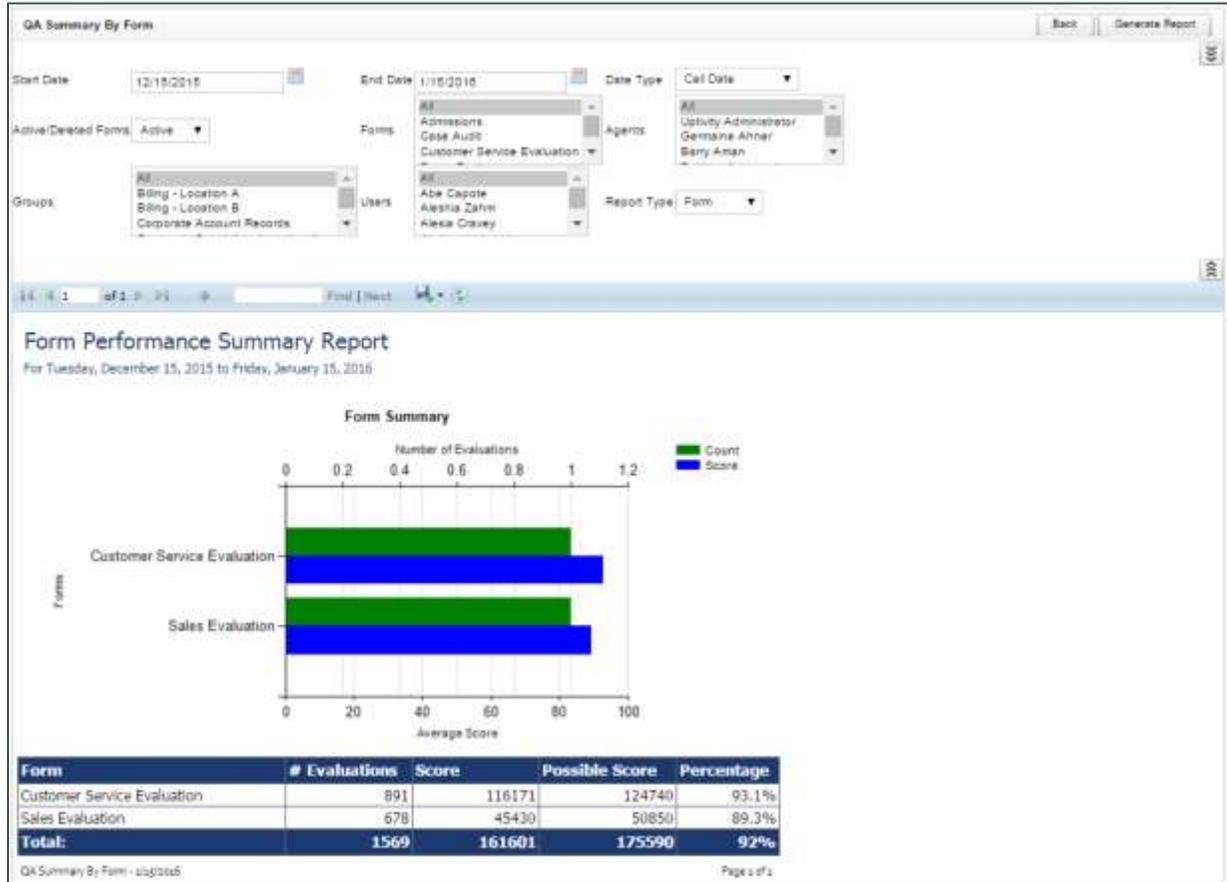
Selected Groups: Front Line - Location A

Form	Agent	Call ID	Evaluator	Completed Date	Status
Customer Service Evaluation	Garner, Dwayne	38212	Meda Swindall	8/8/2015	Unacknowledged
Sales Evaluation	Costales, Brice	36702	Kendra Breed	9/1/2015	Unacknowledged

QA Pending Acknowledgment - 1/15/2016 Page 1 of 1

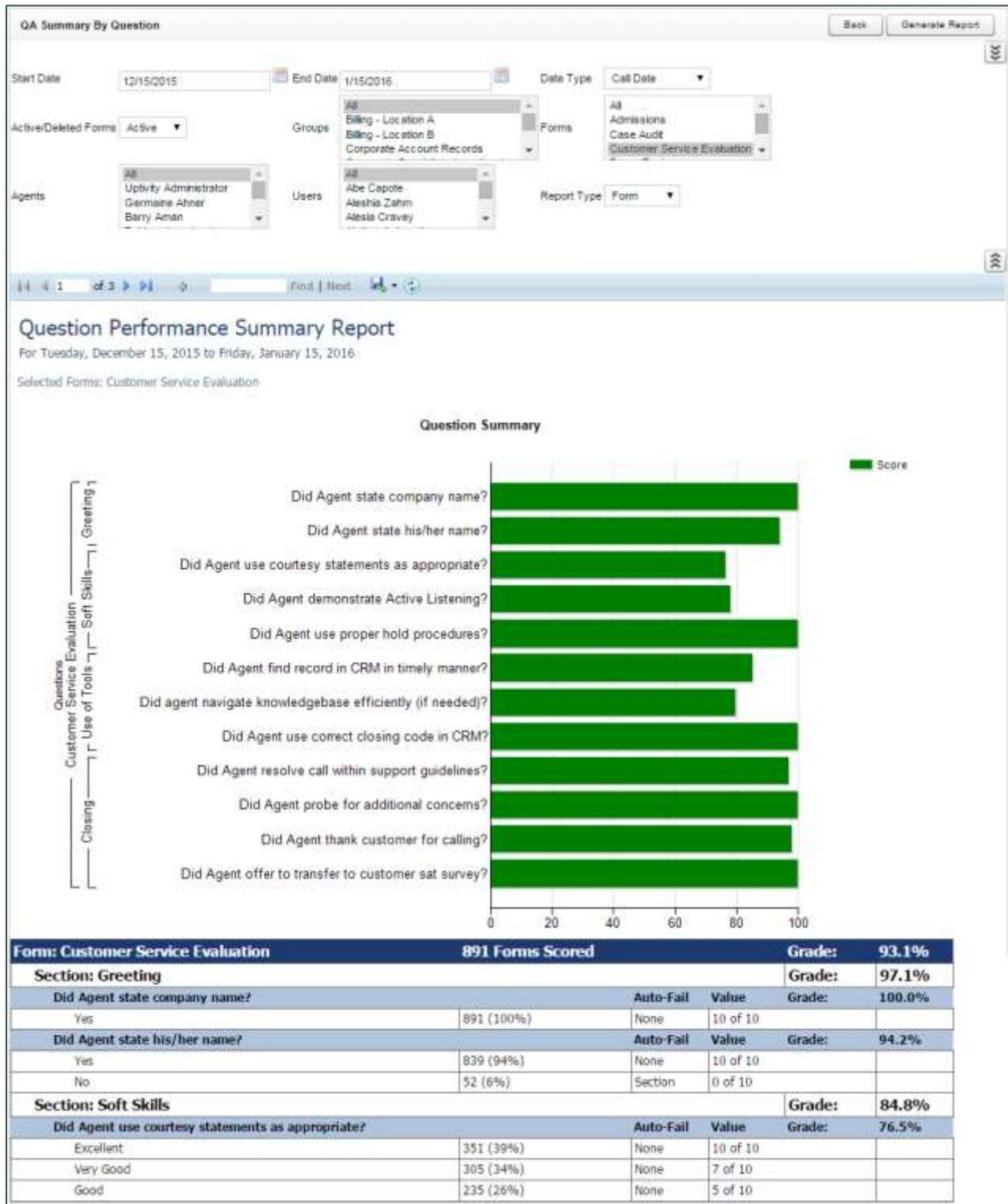
## QA Summary by Form

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 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 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 Generate Report

Start Date:  End Date:  Date Type:

Active/Deleted Forms:  Groups:  Forms:

Agents:  Users:  Report Type:

---

### Section Performance Summary Report

For Tuesday, December 15, 2015 to Friday, January 15, 2016

Selected Forms: Customer Service Evaluation

#### Section Summary

Section	Average Score
Use of Tools	86.3%
Soft Skills	81.9%
Greeting	91.2%
Closing	96.9%

Form	# Evaluations	Score	Possible Score	Percentage
Customer Service Evaluation	891	113051	124740	90.6%
Greeting		16260	17820	91.2%
Soft Skills		21896	26730	81.9%
Use of Tools		23080	26730	86.3%
Closing		51815	53460	96.9%

QA Summary By Section - 1/15/2016
Page 1 of 1

## Quality Assurance Detail

The **Quality Assurance Detail** report shows completed QA evaluations that meet the criteria you provide. 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.

Back Generate Report

Start Date:  End Date:  Date Type:

Agent:  Evaluator:  Form:

Active/Deleted Evaluations:  Group:  Question:

Response:

1 of 330

### Quality Assurance Detail

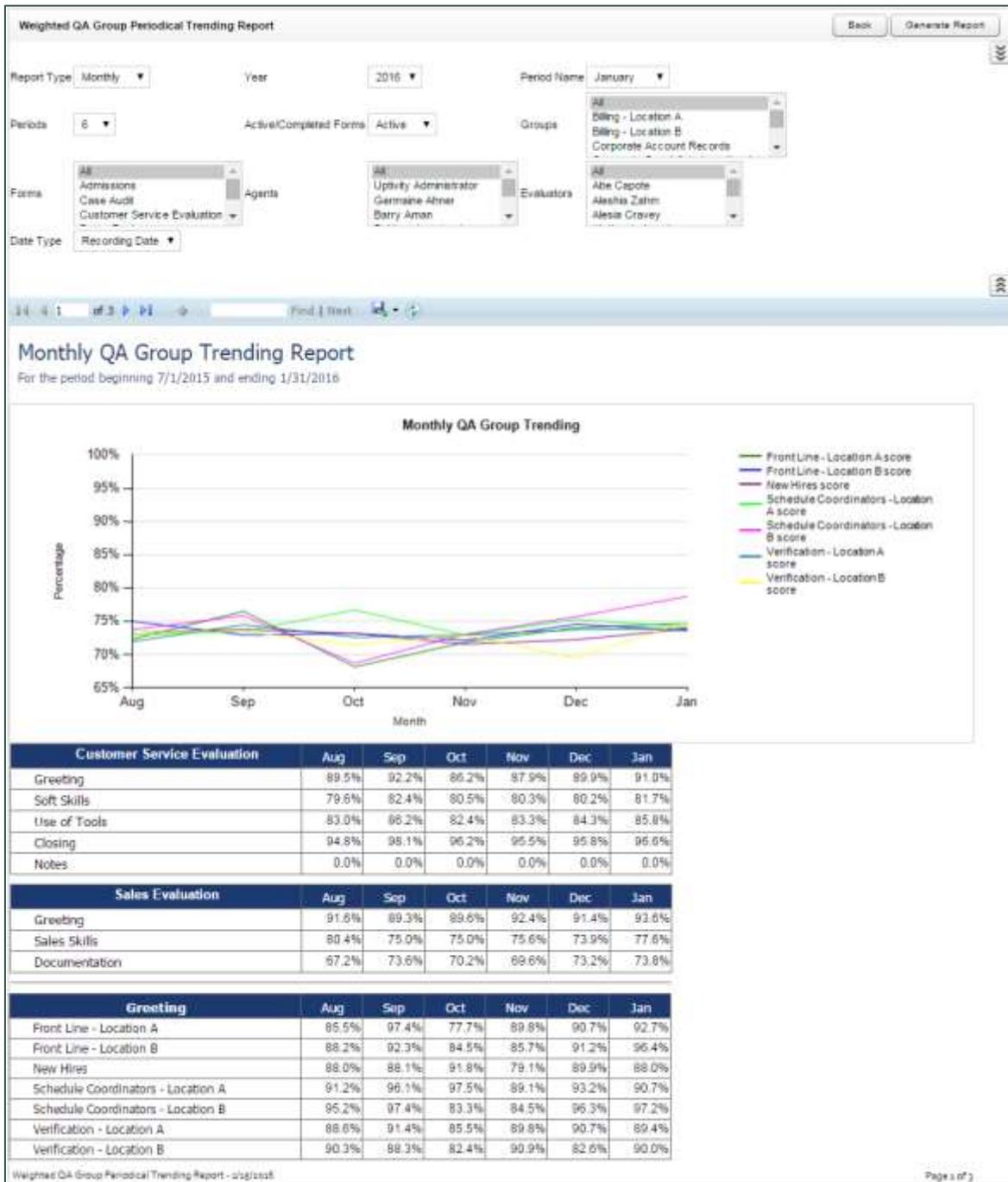
Selected Form: Customer Service Evaluation

Agent: Administrator, Uptivity			
Form Name	Call ID	Evaluated By	Complete Date
Customer Service Evaluation	<a href="#">4720</a>	Your Uptivity Administrator	1/10/2016
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%)	
<b>Subtotal:</b>		<b>20.00 of 20.00 (100%)</b>	
Section Name: Soft Skills			
Question	Evaluation	Score	
Did Agent use courtesy statements as appropriate?	Excellent	10.00 of 10.00 (100.0%)	
Did Agent demonstrate Active Listening?	Excellent	10.00 of 10.00 (100.0%)	
Did Agent use proper hold procedures?	Yes	10.00 of 10.00 (100.0%)	
Notes	Great tone of voice!	N/A	
<b>Subtotal:</b>		<b>30.00 of 30.00 (100%)</b>	
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%)	
<b>Subtotal:</b>		<b>30.00 of 30.00 (100%)</b>	
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%)	
<b>Subtotal:</b>		<b>60.00 of 60.00 (100%)</b>	
Section Name: Notes			
Question	Evaluation	Score	
Reviewer Notes	You are a superstar!	N/A	
<b>Subtotal:</b>		<b>0.00 of 0.00 (0%)</b>	
<b>Total:</b>		<b>140.00 of 140.00 (100%)</b>	

Quality Assurance Detail - 1/15/2016
Page 1 of 330

## 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. Data is broken down section by section.



## QA Calibration Reporting Reports

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. inContact WFO supports the calibration process by means of calibration evaluations. For more information, search online help for keyword: *calibration*.

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 QA Calibration Reporting section includes:

- [Agent QA Summary](#) — calibration-specific version
- [Evaluator QA Summary](#) — calibration-specific version
- [Group QA Summary](#) — calibration-specific version
- 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.
- [Calibration Evaluator Comparison Report](#) — allows you to see how each participating evaluator scored the designated call
- [QA Calibration Trending Report](#) — details performance of one or more evaluators on one or more QA evaluation forms over a period of time

### 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.

You must complete all fields to run this report.

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

Calibration Evaluator Comparison Report
Back Generate Report

Call Record Id:  Form Id:  Evaluation Start Date:

Evaluation End Date:

1 of 3 Find | Next

### Calibration Evaluator Comparison Report

Agent:	Bern, Neil	Call ID:	1825
Agent Id:	28	Call Date:	1/23/2013
Evaluation Date Range:	Wednesday, April 01, 2015 to Thursday, April 30, 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

**Communication Skills**

Technical language at caller's level of understanding?			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

Pace and enunciation clear and understandable?			Possible Points: #	10.00
Evaluation ID	Evaluator	Response		
107	Eddy, Cheryl	Yes		10.00

Calibration Evaluator Comparison Report - 1/15/2016
Page 1 of 3

## 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.



## QA Self-Evaluation Reports

Self-evaluation is a process that helps managers and supervisors see how agents view their own performance. Agents can easily compare their self-evaluations to those performed by evaluators. This leads to more productive coaching sessions and a sense of agent empowerment, which in turn contribute to higher-quality customer service, reduced agent confusion and frustration, and improved employee morale. For more information, search online help for keyword: *self-evaluation*.

QA Self-Evaluation Reporting is based on the self-evaluations that your agents have performed. Scores associated with self-evaluations are not included in regular QA Reporting reports, and vice versa. The QA Self-Evaluation Reporting section includes:

- [Agent QA Summary](#) — calibration-specific version
- [Group QA Summary](#) — calibration-specific version
- Self-Evaluation Detail — details of one or more completed self-evaluations. It is the equivalent of the [Call Evaluation Detail](#) report.
- [Self-Evaluator Comparison Report](#) — allows managers to compare self-evaluations and standard evaluations for the same recorded interaction.
- [Self-Evaluation Trending Report](#) — details how agents have scored themselves on one or more self-evaluation forms over a period of time.

## Self-Evaluator Comparison Report

The **Self-Evaluator Comparison Report** allows you to compare self-evaluations to standard evaluations for the same recorded interaction. Depending on the number of questions on the forms, and the number of evaluations, this report may run to several pages in length.

You must complete all fields to run this report.

In the sample report shown here, a standard evaluation and a self-evaluation have been completed for the same call using different forms (Call Record ID 1747).

Back Generate Report

Form:  Call Record ID:  Evaluation Start Date:   
 Evaluation End Date:

**Self-Evaluator Comparison Report**

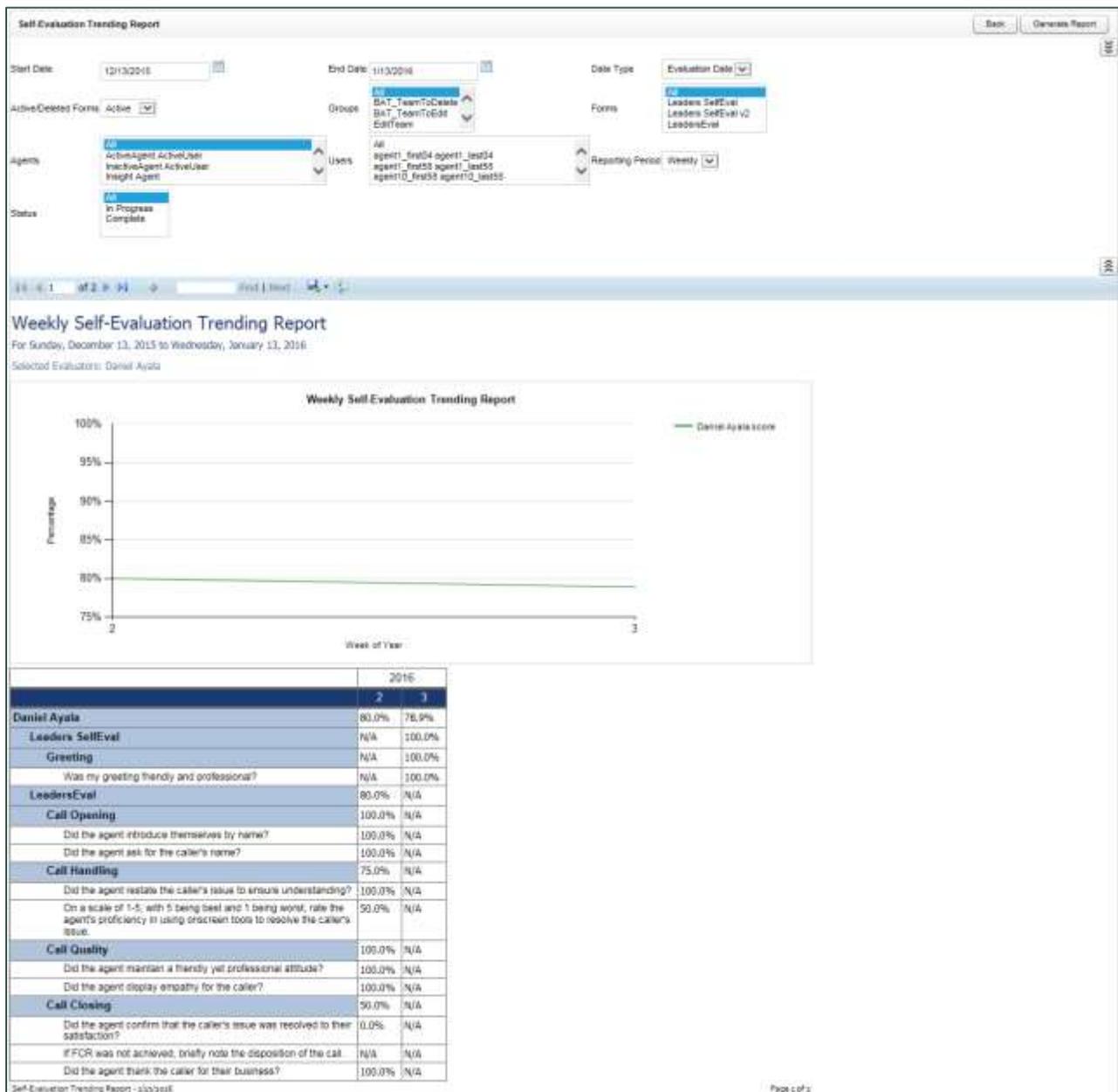
Agent:	Ayala, Daniel	Call ID:	1747
Agent ID:	34	Call Date:	1/22/2013
Evaluation Date Range:	Friday, January 01, 2016 to Thursday, February 04, 2016		

Evaluator	Evaluation ID	Points	Possible Points	%
<b>Opening</b>				
<b>Proper introduction?</b>			Possible Points: #	10.00
Evaluation ID	Evaluator	Response		
123	Administrator, Administrator	Yes		10.00
<b>Ask for caller's name?</b>			Possible Points: #	10.00
Evaluation ID	Evaluator	Response		
123	Administrator, Administrator	No		0.00
<b>Restate problem to ensure understanding?</b>			Possible Points: #	10.00
Evaluation ID	Evaluator	Response		
123	Administrator, Administrator	No		0.00
<b>Comments:</b>			Possible Points: #	0.00
Evaluation ID	Evaluator	Response		
123	Administrator, Administrator	Saying, "I understand the problem" is not the same as restating the problem.		0.00
<b>Communication Skills</b>				
<b>Technical language at caller's level of understanding?</b>			Possible Points: #	10.00
Evaluation ID	Evaluator	Response		
123	Administrator, Administrator	Yes		10.00
<b>Pace and enunciation clear and understandable?</b>			Possible Points: #	10.00
Evaluation ID	Evaluator	Response		
123	Administrator, Administrator	Yes		10.00
<b>Patient and empathetic tone?</b>			Possible Points: #	10.00
Evaluation ID	Evaluator	Response		
123	Administrator, Administrator	No		0.00
<b>Comments:</b>			Possible Points: #	0.00

## Self-Evaluation Trending Report

The **Self-Evaluation Trending Report** details how agents have scored themselves on one or more self-evaluation forms over a period of time. The report is organized by agent 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 agents score themselves on calls over time, and can be especially valuable to review trends before and after coaching sessions. Because the report can include all evaluations, it can also be used to compare self-evaluation scores to regular QA scores for the same agent.



## System Reports

Your inContact 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 inContact 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
<a href="#">Disk History</a>	Charts the daily consumption of memory resources by saved audio and video files.	3/1/2011
<a href="#">System Activity Summary</a>	Total incidents of logged user activities over time.	3/1/2011
<a href="#">System Usage</a>	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.

IP Phone Status						
This page automatically refreshes every 2 seconds. Last Refresh Time: 10/23/2013 9:24:01 AM						
IP Phone Information						
ID_Voice Port	ID_Device Alias	IP Address	Status	Confidence	Last Update	
1000		10.100.10.815	-E	(S)Static Entry	10/22/2013 12:14:18 PM	
1001		10.100.10.816	-E	(S)Static Entry	10/22/2013 12:14:18 PM	
1002		10.100.10.817	-E	(S)Static Entry	10/22/2013 12:14:18 PM	
3001		10.100.5.88	1	(C)Parsed	10/16/2013 9:54:49 PM	
3002		10.100.5.88	1	(C)Parsed	10/11/2013 8:26:50 AM	
3003		10.100.8.34	1	(C)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. This report is not typically used by Hosted or Hybrid inContact WFO users, but can be helpful to inContact WFO Support.

## System Activity Summary

The **System Activity Summary** displays the actions performed in inContact 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

Start Date 
End Date 
User

1 of 4
Find | Next

### System Activity Summary

For period beginning Tuesday, December 15, 2015 and ending Friday, January 15, 2016

Date	User	Count	Event
12/15/2015		4	Logout
12/15/2015		4	System Start
12/15/2015	Administrator Administrator	9	Login
12/15/2015	Administrator Administrator	6	Logout
12/15/2015	Administrator Administrator	3	Playbacks Call
Date	User	Count	Event
12/16/2015		3	Failed Login Attempt
12/16/2015		2	Logout
12/16/2015		3	System Start
12/16/2015	Administrator Administrator	17	Login
12/16/2015	Administrator Administrator	11	Logout
12/16/2015	Administrator Administrator	11	Playbacks Call
12/16/2015	Administrator Administrator	1	User Created
12/16/2015	callcopy admin	1	Login
12/16/2015	callcopy admin	8	Playbacks Call

## System Usage

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

System Usage
Back Generate Report

Start Date 
End Date 
User

1 of 3
Find | Next

### System Usage

For period beginning Tuesday, December 15, 2015 and ending Friday, January 15, 2016

Date	User	Time In System
12/15/2015	Administrator Administrator	06:29:03
12/16/2015	Administrator Administrator	23:23:23
12/16/2015	callcopy admin	03:19:23
<b>Total:</b>		<b>26:42:46</b>
12/17/2015	Administrator Administrator	24:00:00
12/17/2015	callcopy admin	24:00:00
<b>Total:</b>		<b>48:00:00</b>
12/18/2015	Administrator Administrator	24:00:00
12/18/2015	callcopy admin	24:00:00
<b>Total:</b>		<b>48:00:00</b>
12/19/2015	Administrator Administrator	24:00:00
12/19/2015	callcopy admin	24:00:00
<b>Total:</b>		<b>48:00:00</b>
12/20/2015	Administrator Administrator	24:00:00
12/20/2015	callcopy admin	24:00:00
<b>Total:</b>		<b>48:00:00</b>

## IP Phone Status

This report is not used with Hosted or Hybrid inContact WFO.

## 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 inContact WFO module known as Insight and later as Discover Toolbar. This module is not used with inContact WFO.

## System Status

This report is not typically used by Hosted inContact WFO users, where the recording integration is in the cloud. It shows the current call channel and agent activity on the system, which can be useful to Hybrid users and to inContact WFO Support when investigating why users are logged in but not recording.

## Transcoder Status

The **Transcoder Status** report gives a near real-time display of what audio files are being processed by the Transcoder module. This report is not typically used by Hosted or Hybrid inContact WFO users, but can be helpful to inContact WFO Support.

## 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 textbox, type either an inContact WFO component name or HTML page. See examples in the **Component** column of the image in this section.
- **IP Address:** In the open-entry textbox, type the address of the user whose action caused the event.
- **ID of Related Object:** Call records and audio recordings are stored in inContact WFO systems as objects with ID numbers. Some event types (such as Call Playback) can therefore include this number as a criterion, and you can type it in the open-entry textbox. Other event types (for example, Login or Changed Password) will not have any related objects.

- **Message Text 1/2/3:** Type search criteria in the open-entry textbox. 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 type 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).

## Ad Hoc Reports

---

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. For more information on creating, generating, and publishing ad hoc reports, search online help for keyword: *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 places information in custom user fields (for example, order numbers or account numbers), this report relates that data to specific call records. Filters can be added to limit results. This type of report may be useful in environments using inContact 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 could total or average the 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

## Document Revision History

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Revision	Change Description	Effective Date
0	Initial version for this release.	2017-02-21