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UPTIVITY DISCOVER REPORTING MANUAL, V5.5.1

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About inContact: inContact (NASDAQ: SAAS) is the cloud contact center software leader, helping organizations around the globe create high quality customer experiences with a complete workforce optimization portfolio (WFO). Key portfolio offerings are **inContact Discover WFO** (tightly integrated with the core platform and completely available in the cloud) and **Uptivity Discover WFO** (comprehensive, premise-based WFO that integrates with a wide variety of telephony and contact center solutions). The portfolio also includes the WFO Suite powered by Verint®, ECHO ™ Customer Feedback Survey, inView ™ Performance Dashboard.

inContact is the only provider to combine cloud software with an enterprise-class telecommunications network for a complete customer interaction solution. Winner of Frost & Sullivan 2012 North American Cloud Company of the Year in Cloud Contact Center Solutions, inContact has deployed over 1,300 cloud contact center instances. To learn more, visit www.inContact.com.

Contact: Send suggestions or corrections regarding this guide to documentation@incontact.com.

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Introduction

Audience

This document is designed for users of the Reporting module in Discover. 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 all 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 Discover 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 Discover Web Player Manual* contains general knowledge and procedures related to using the Web Portal, and may prove a helpful reference.

Several Discover features use pop-up 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 site.

Many of the tasks described in this manual are limited by permissions. If you need to perform a task and are unable to do so, see your supervisor or Discover WFO administrator.

Discover 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.

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

Reporting Basics

About Common Report Criteria

Discover offers a variety of reports "out of the box" (see About Printable Reports) and also enables users to create their own reports (see About 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 Discover 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 Discover 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:

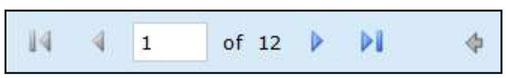
- Click the number of months you want to include in the report (1-12) in the drop-down list.

Working with Reports

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

Navigate Report Pages

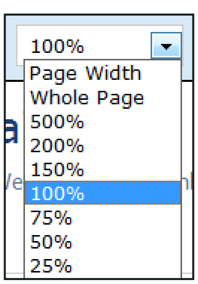
Once your have generated a report, you can use the navigation bar to move back and forth across appropriate report pages. The single arrow to the right takes you forward one page and the single arrow to the left takes you back one page. The arrow/line to the right takes you to the last page of your report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

> **Note:** 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 the Report

To bring up Windows print controls with standard print options:

- Click the **Print** icon.

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

Sort Records within a Report

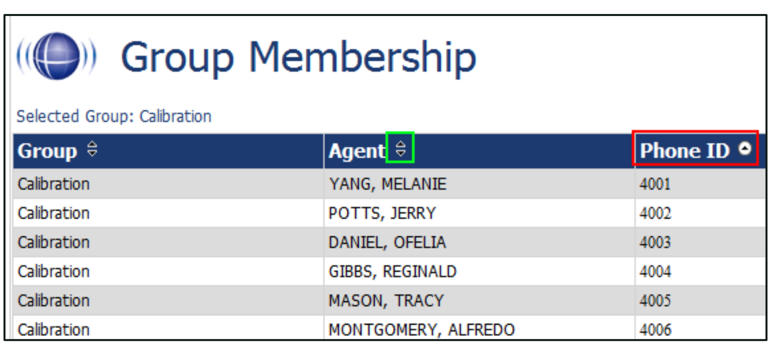
Data records on some printable reports, as well as on simple and summary table ad hoc reports, can be sorted. In the example shown here, the records are sorted by the Phone ID as indicated by the icon. To sort in ascending order (A-to-Z):

- Click the top triangle by a column label.

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

- Click the bottom triangle by a column label.

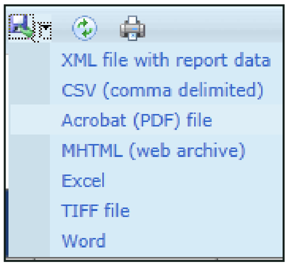
To clear all sorts, Refresh the Report Display.


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:

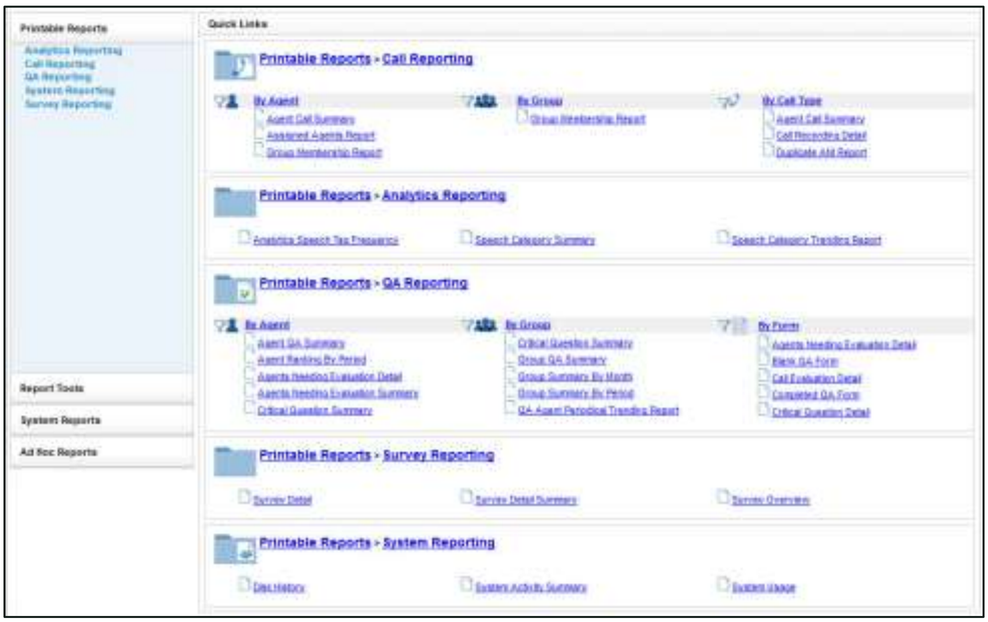
1. Click the **Export** icon.
2. Select the desired format from the drop-down list of supported formats.
3. Open and/or save the report as prompted by your web browser.

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

Printable Reports

About Printable Reports

Printable reports are pre-designed reports included with your Discover 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. You will only see the Analytics Reporting and Survey Reporting categories if your installation includes those optional Uptivity components. The System Reporting category includes reports typically viewed onscreen by the Discover 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 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 a key word. For example, "Agent" entered as a keyword in the Filter field 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

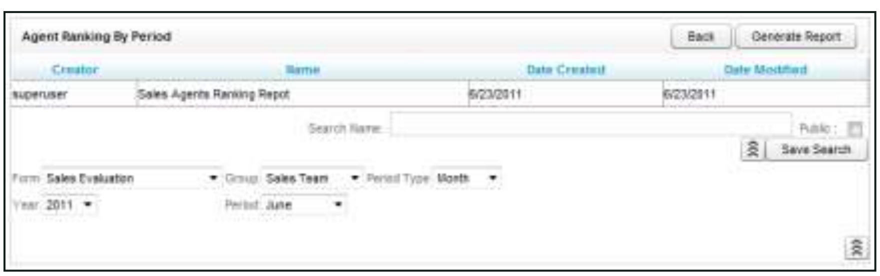
To generate a printable report:

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 desired report category.
6. Click the name of the desired report.
7. Set the desired report criteria (for details, see About Common Report Criteria) 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 About the Report Library.



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**.

Call Reporting Reports

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

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.

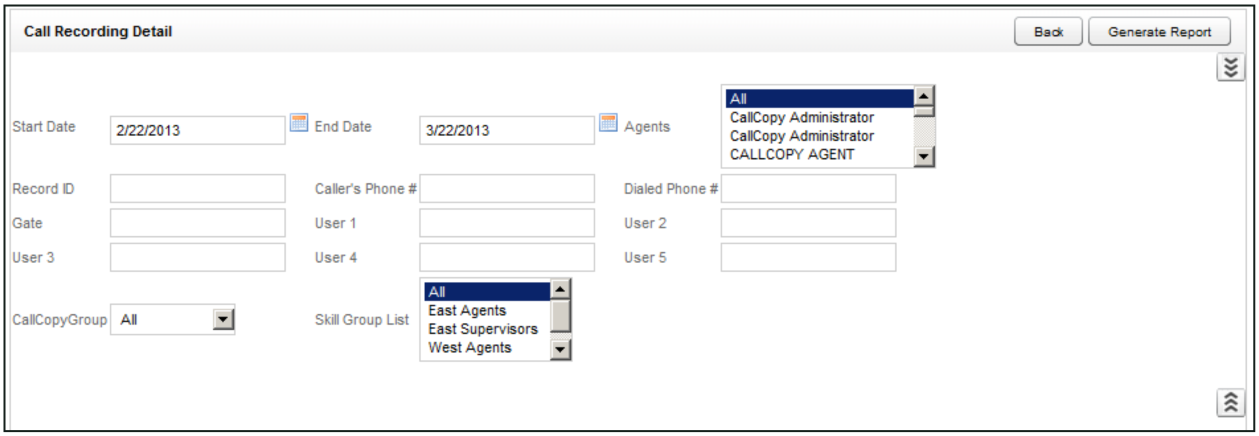
Ability to view agent information other than your own is limited to permissioned users. Ask your Discover administrator if you need to view information for other agents and are unable to do so.

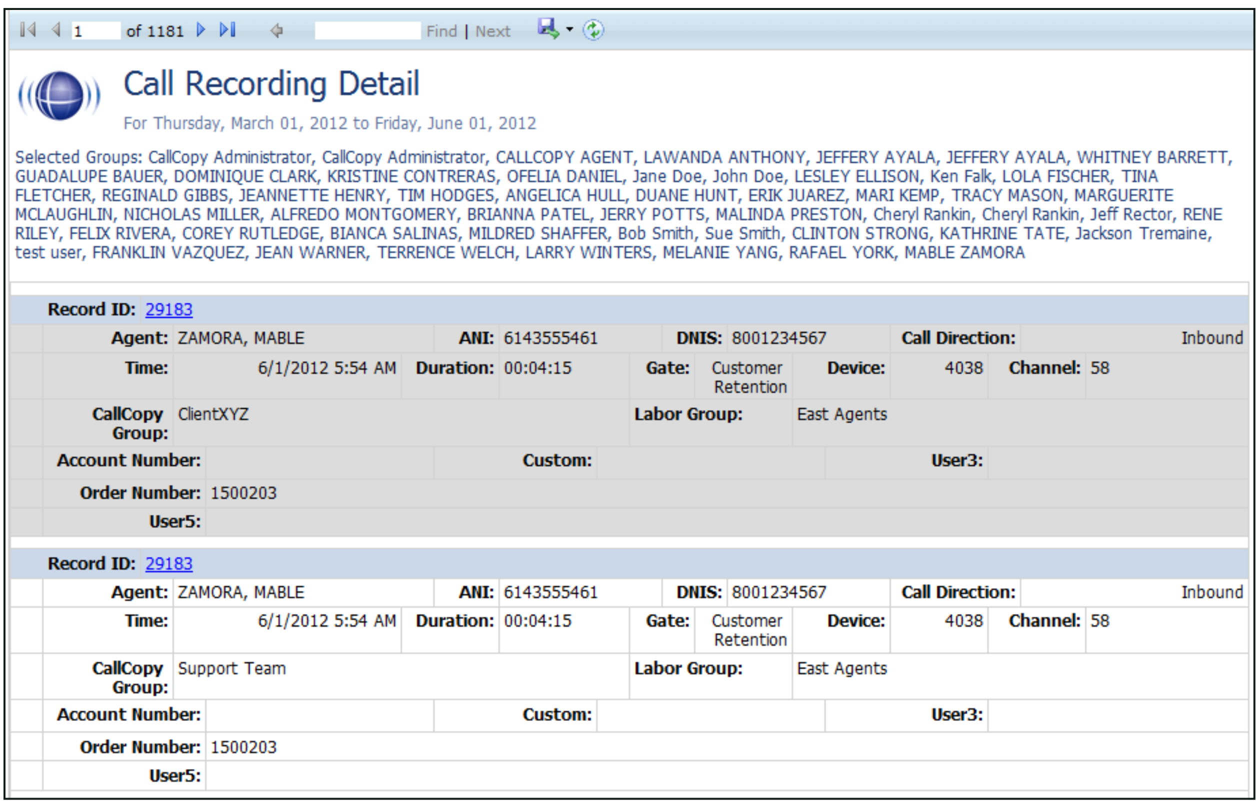

Assigned Agents

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

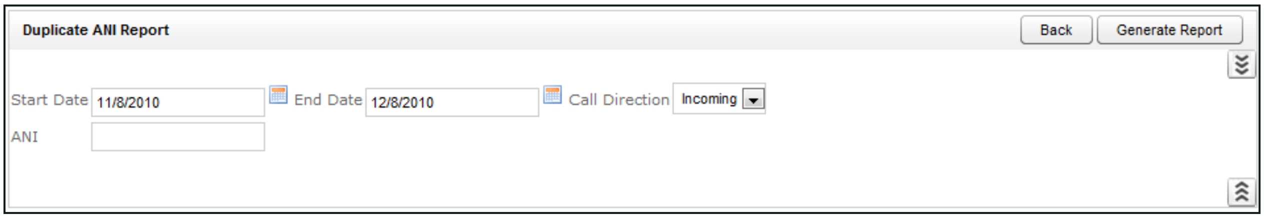
The **Call Recording Detail** report displays call metadata for your selected agent(s) over a period of time. The report provides the Record ID number along with Discover Group, Skill group, ANI, DNIS, recording date and time, call duration, and Device ID. If your organization uses custom field names,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





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.



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

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

Discover 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, refer to the *Uptivity Discover Quality Management 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.

Quality Assurance

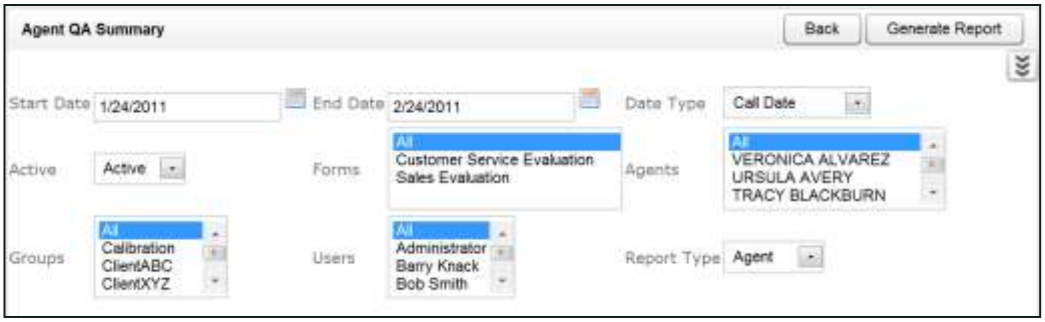
Filter: Search

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

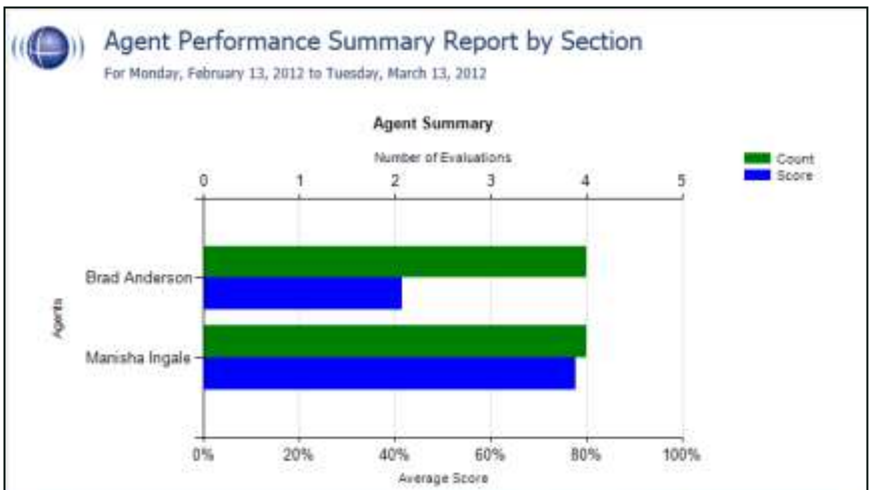
Pages : 1 2 > >> Go To Page : 1 of 2 Go

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.



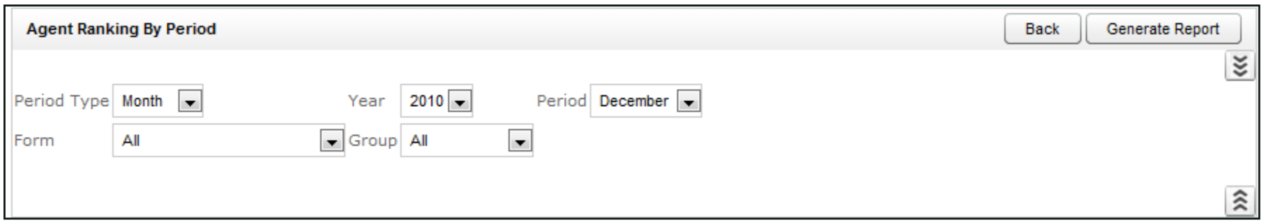
In the example below, **Report Type** was set to **Section**, and you can drill down to **Question**-level results by clicking a section label. Report results are limited to groups to which you have access, even if you select **All**.



Agent	# Evaluations	Score	Possible	Percentage
Brad Anderson	4	645	1559	41.4%
Customer 1 Evaluation	1	600	1490	40.3%
Section 1	1	150	490	30.6%
Section 2	1	400	500	80.0%
Section 3	1	50	500	10.0%
Customer 2 Evaluation	1	35	35	100.0%
s1	1	30	30	100.0%
s2	1	5	5	100.0%
Summer Sales Evaluation	1	5	9	55.6%
Section 1	1	5	9	55.6%
Finance Customer Evaluation	1	5	25	20.0%
s1	1	5	25	20.0%
s2	1	0	0	N/A

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**.



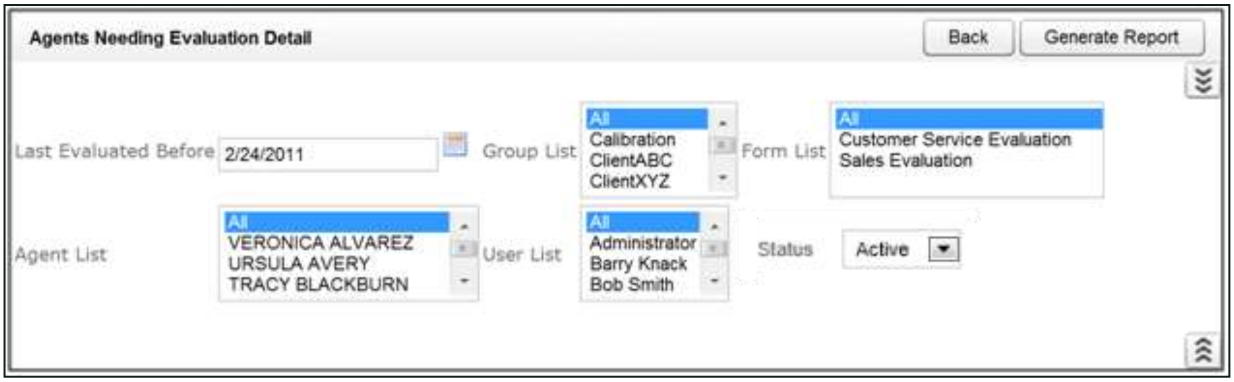
Agent Ranking by Month

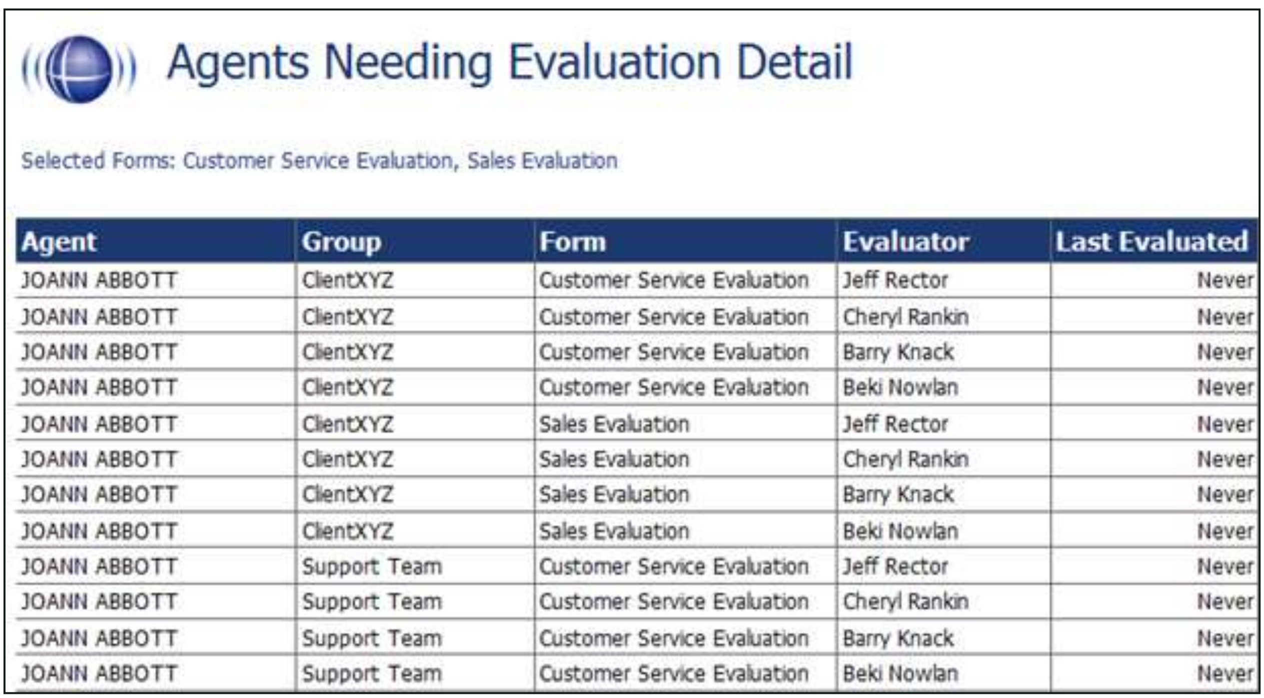
For period beginning 12/1/2010 and ending 12/31/2010

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 Discover 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**.





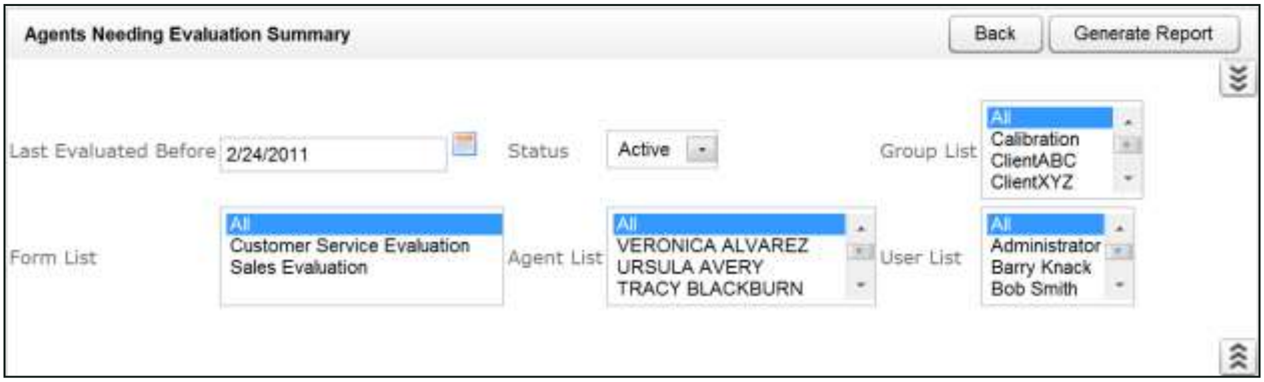
Agents Needing Evaluation Detail

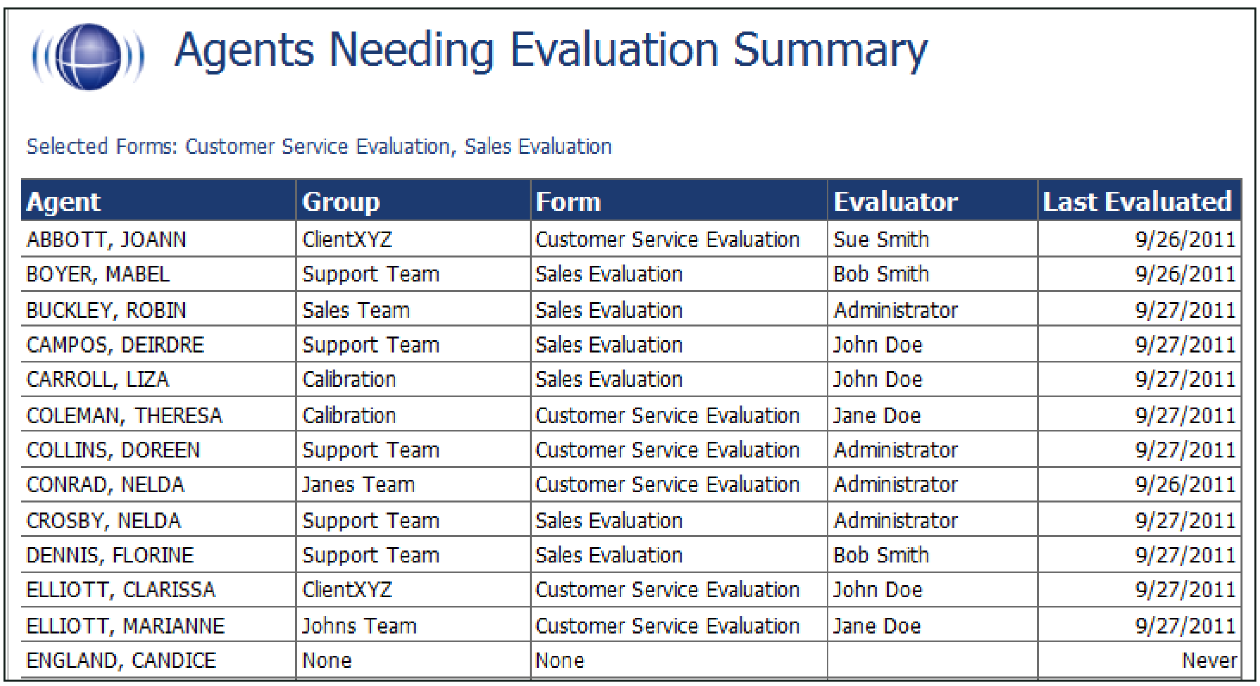
Selected Forms: Customer Service Evaluation, Sales Evaluation

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, but only shows one entry per agent regardless of the number of Discover Groups to which they belong. Report results are limited to groups to which you have access, even if you select **All**.





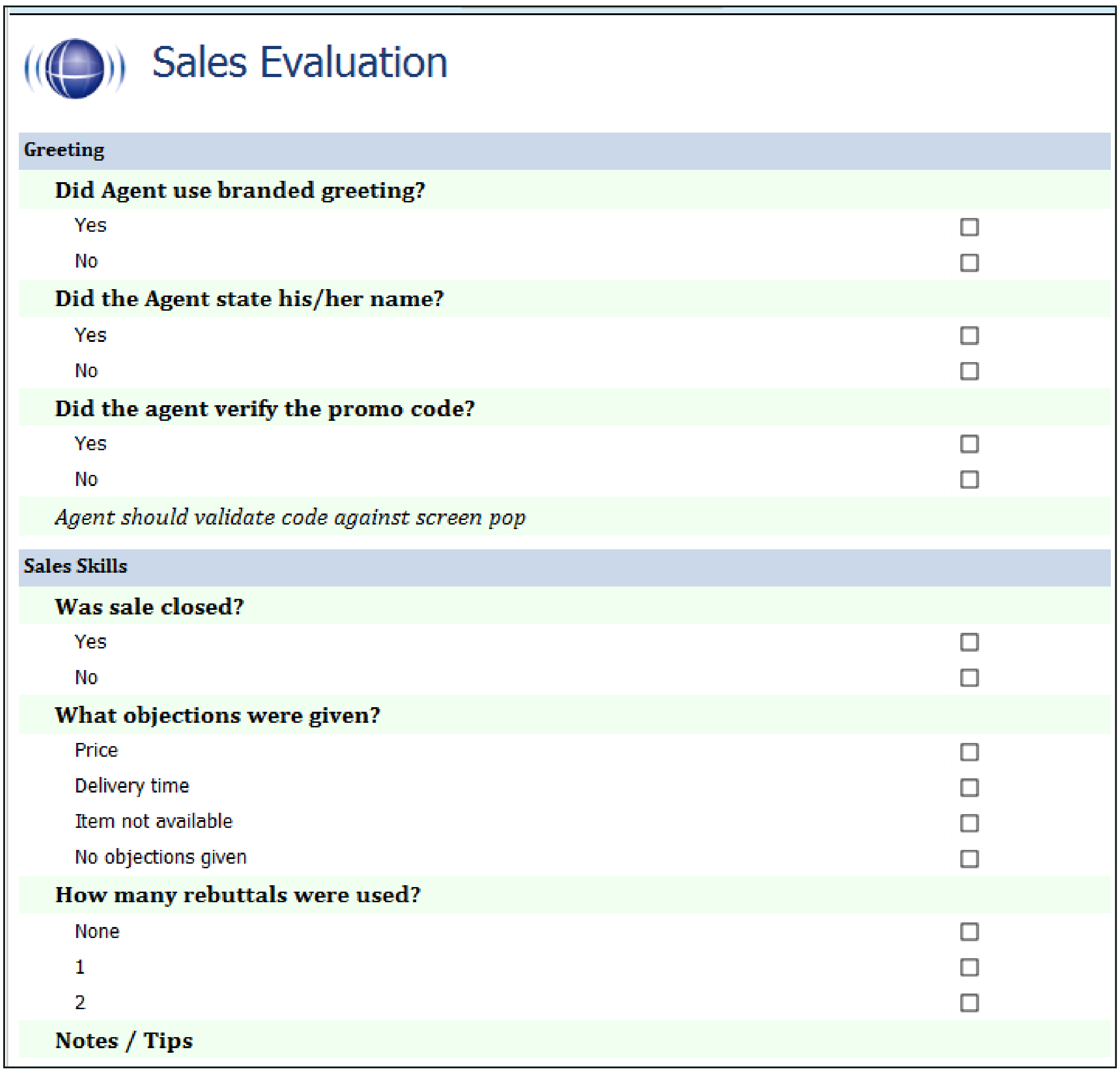
Agents Needing Evaluation Summary

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**.



Sales Evaluation

Greeting

Did Agent use branded greeting?

- Yes ☐
- No ☐

Did the Agent state his/her name?

- Yes ☐
- No ☐

Did the agent verify the promo code?

- Yes ☐
- No ☐

Agent should validate code against screen pop

Sales Skills

Was sale closed?

- Yes ☐
- No ☐

What objections were given?

- Price ☐
- Delivery time ☐
- Item not available ☐
- No objections given ☐

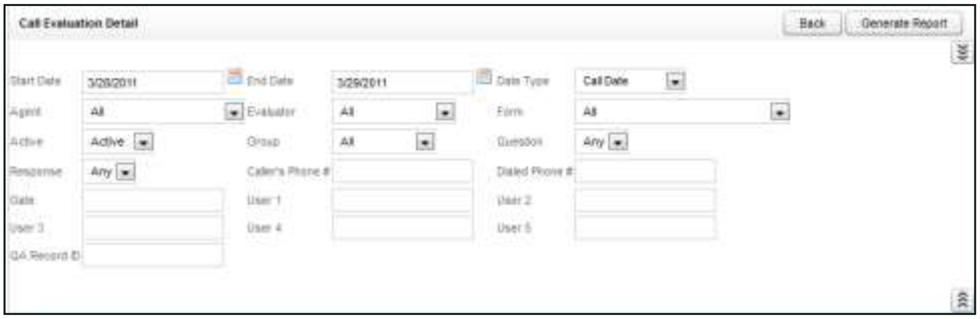
How many rebuttals were used?

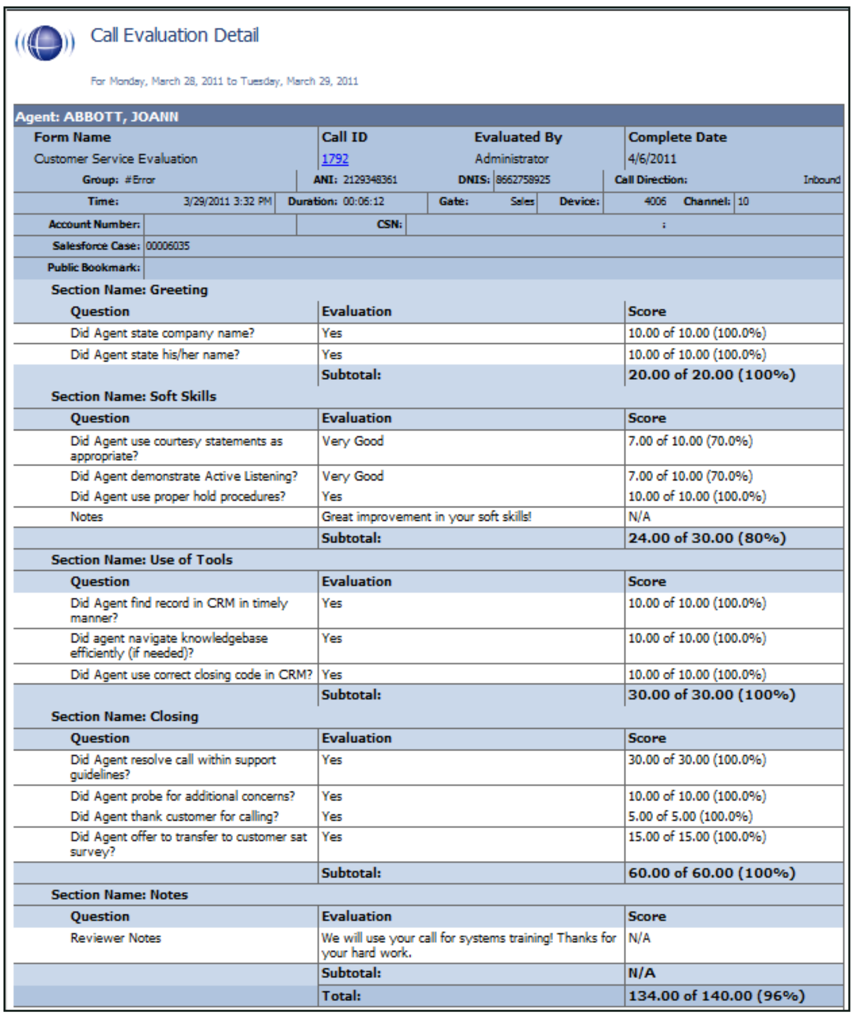
- None ☐
- 1 ☐
- 2 ☐

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**.





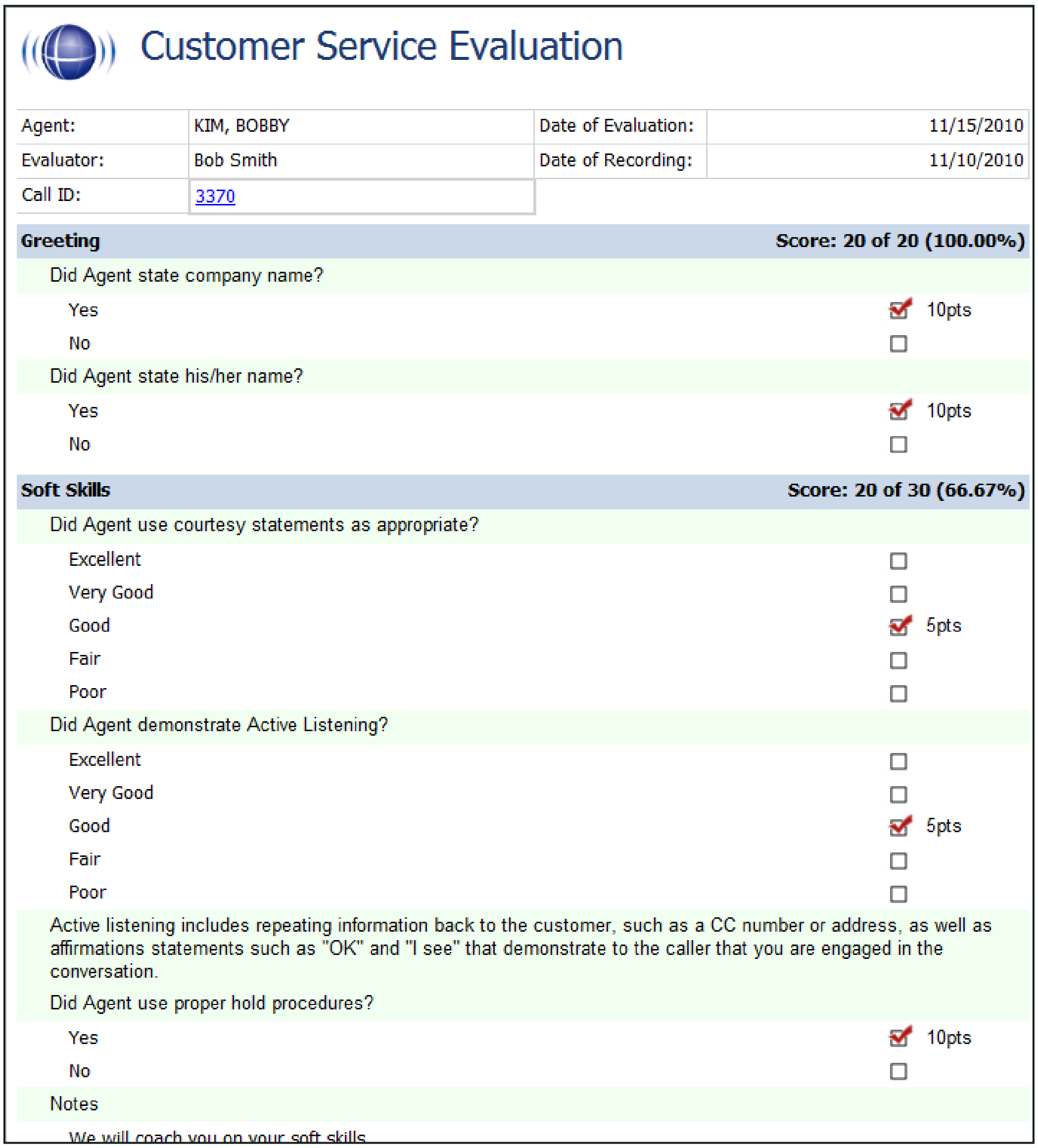
Call Evaluation Detail

For Monday, March 28, 2011 to Tuesday, March 29, 2011

Agent: ABBOTT, JOANN			
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.



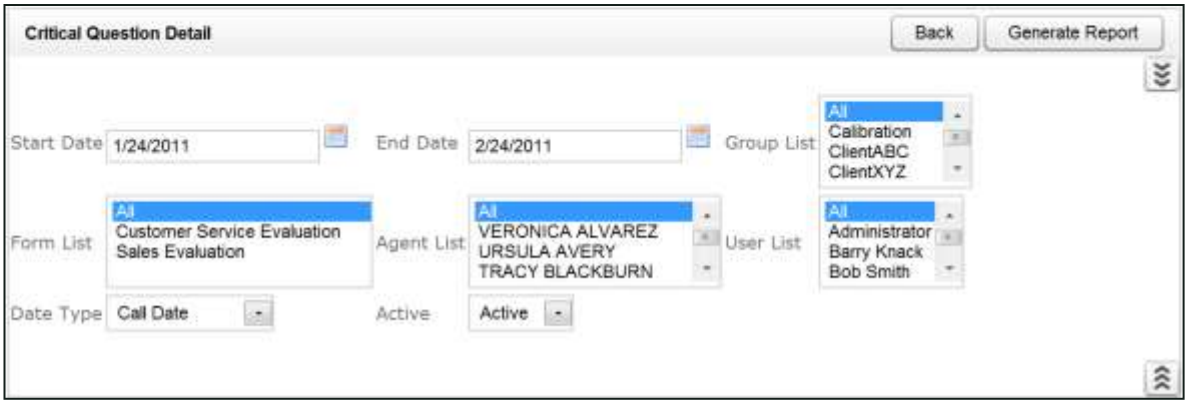
Customer Service Evaluation

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

Greeting		**Score: 20 of 20 (100.00%)**
Did Agent state company name?		
Yes	☑	10pts
No	☐	
Did Agent state his/her name?		
Yes	☑	10pts
No	☐	
Soft Skills		**Score: 20 of 30 (66.67%)**
Did Agent use courtesy statements as appropriate?		
Excellent	☐	
Very Good	☐	
Good	☑	5pts
Fair	☐	
Poor	☐	
Did Agent demonstrate Active Listening?		
Excellent	☐	
Very Good	☐	
Good	☑	5pts
Fair	☐	
Poor	☐	
Active listening includes repeating information back to the customer, such as a CC number or address, as well as affirmations statements such as "OK" and "I see" that demonstrate to the caller that you are engaged in the conversation.		
Did Agent use proper hold procedures?		
Yes	☑	10pts
No	☐	
Notes		
We will coach you on your soft skills		

Critical Question Detail

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 Monday, February 28, 2011 to Tuesday, March 29, 2011

Selected Forms: Critical Question Form

Agent:	**CAMPOS, DEIRDRE**				
Date of Call	**Record**	**Date of Eval**	**Form**	**Question**	**Score**
3/29/2011	1000004	3/29/2011	Critical Question Form	Is this a critical question example?	10 of 10 (100.0%)

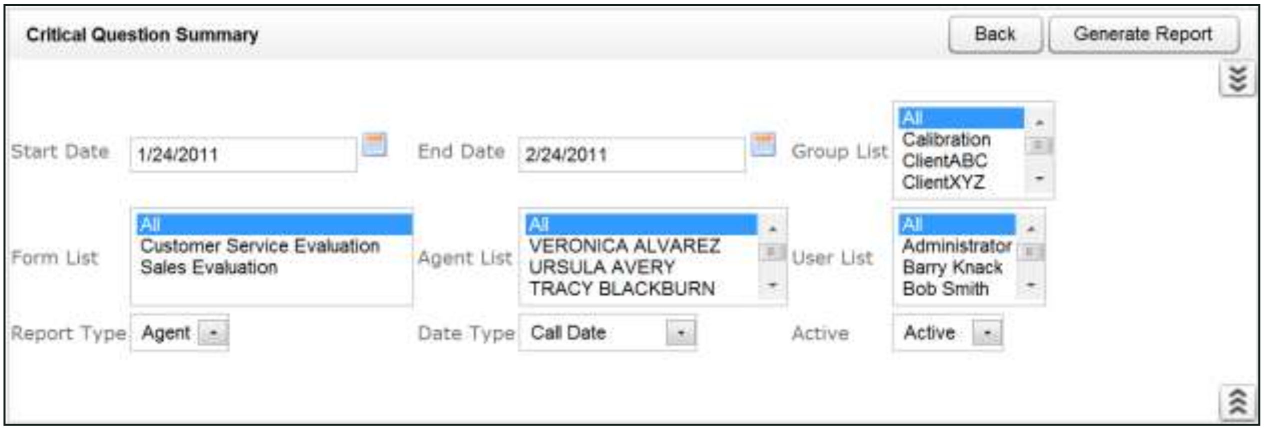
Agent:	**GILBERT, ADELINE**				
Date of Call	**Record**	**Date of Eval**	**Form**	**Question**	**Score**
3/29/2011	1000003	3/29/2011	Critical Question Form	Is this a critical question example?	10 of 10 (100.0%)

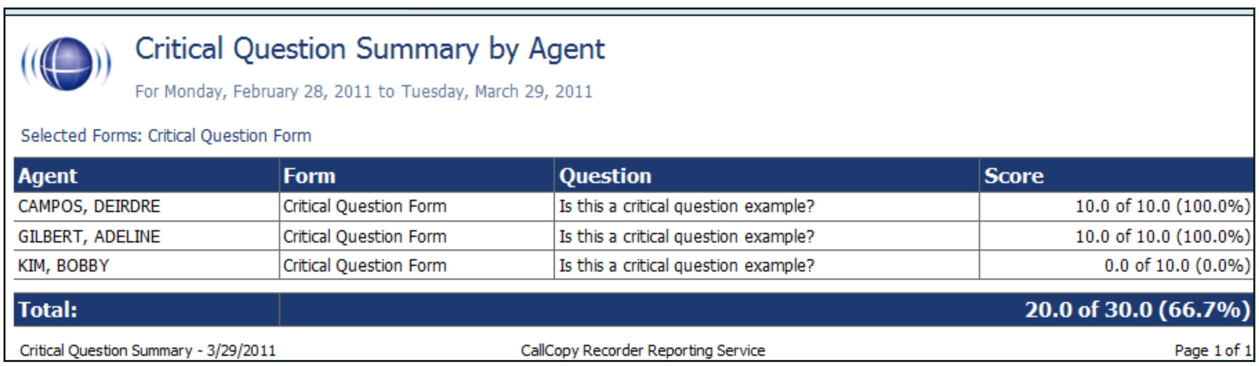
Agent:	**KIM, BOBBY**				
Date of Call	**Record**	**Date of Eval**	**Form**	**Question**	**Score**
3/29/2011	1000005	3/29/2011	Critical Question Form	Is this a critical question example?	0 of 10 (0.0%)

Critical Question Detail - 3/29/2011 CallCopy Recorder Reporting Service Page 1 of 1

Critical Question Summary

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 by Agent

For Monday, February 28, 2011 to Tuesday, March 29, 2011

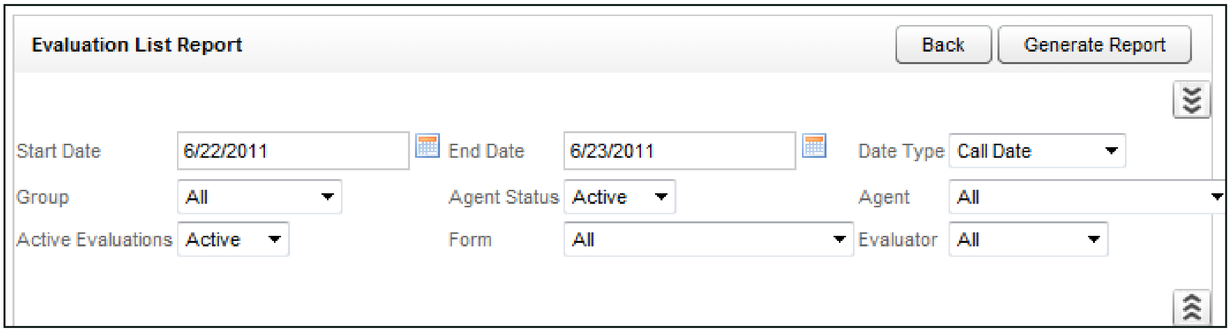
Selected Forms: Critical Question Form

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**.

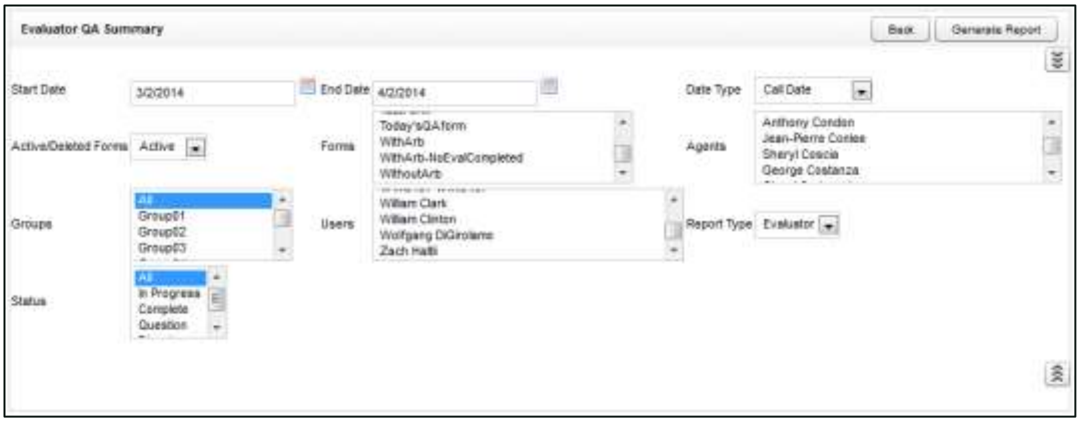


Quality Assurance Evaluation List

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%)

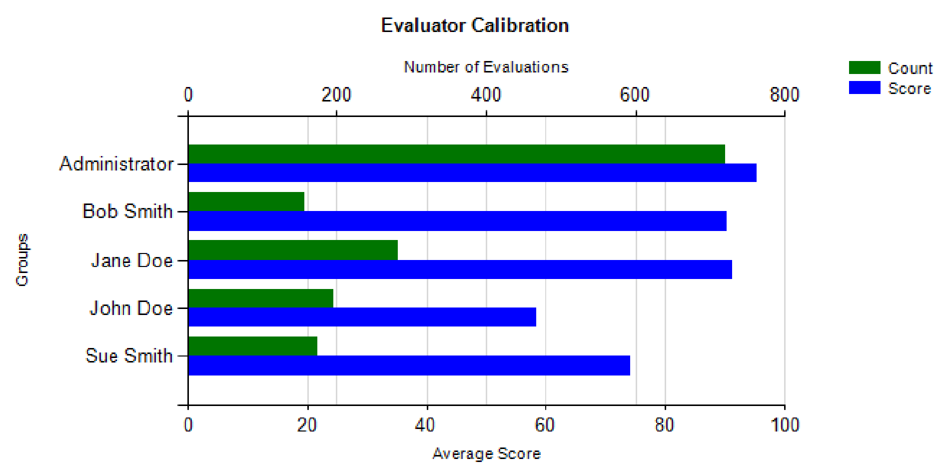
Evaluator QA Summary

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 Performance Summary Report

For Monday, January 24, 2011 to Thursday, February 24, 2011

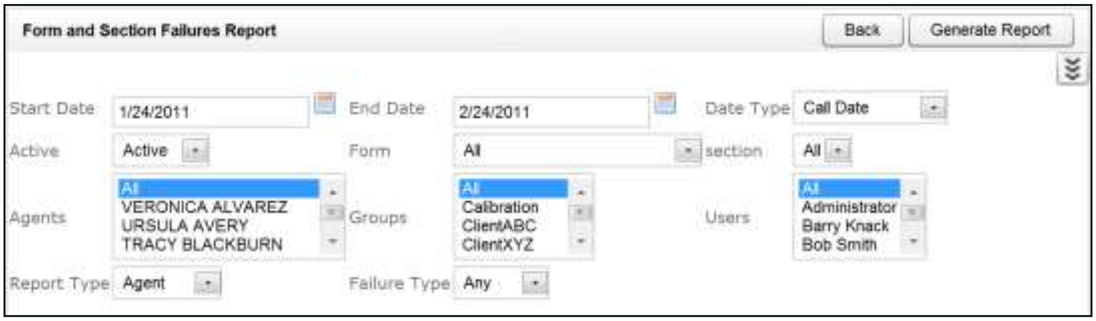


Evaluator	# Evaluations	Score	Possible	Percentage
Administrator	720	78013	81755	95.4%
Bob Smith	157	16370	18145	90.2%
Jane Doe	282	29868	32720	91.3%
John Doe	196	11649	19965	58.3%
Sue Smith	175	13875	18715	74.1%

Evaluator QA Summary - 2/24/2011 CallCopy Recorder Reporting Service Page 1 of 1

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 Failure Report by Agent

For Monday, January 24, 2011 to Thursday, February 24, 2011

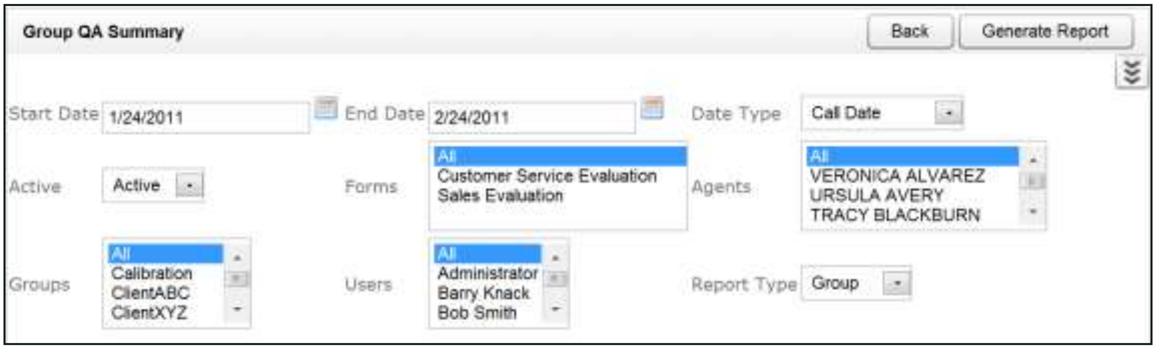
Selected Groups: ClientXYZ

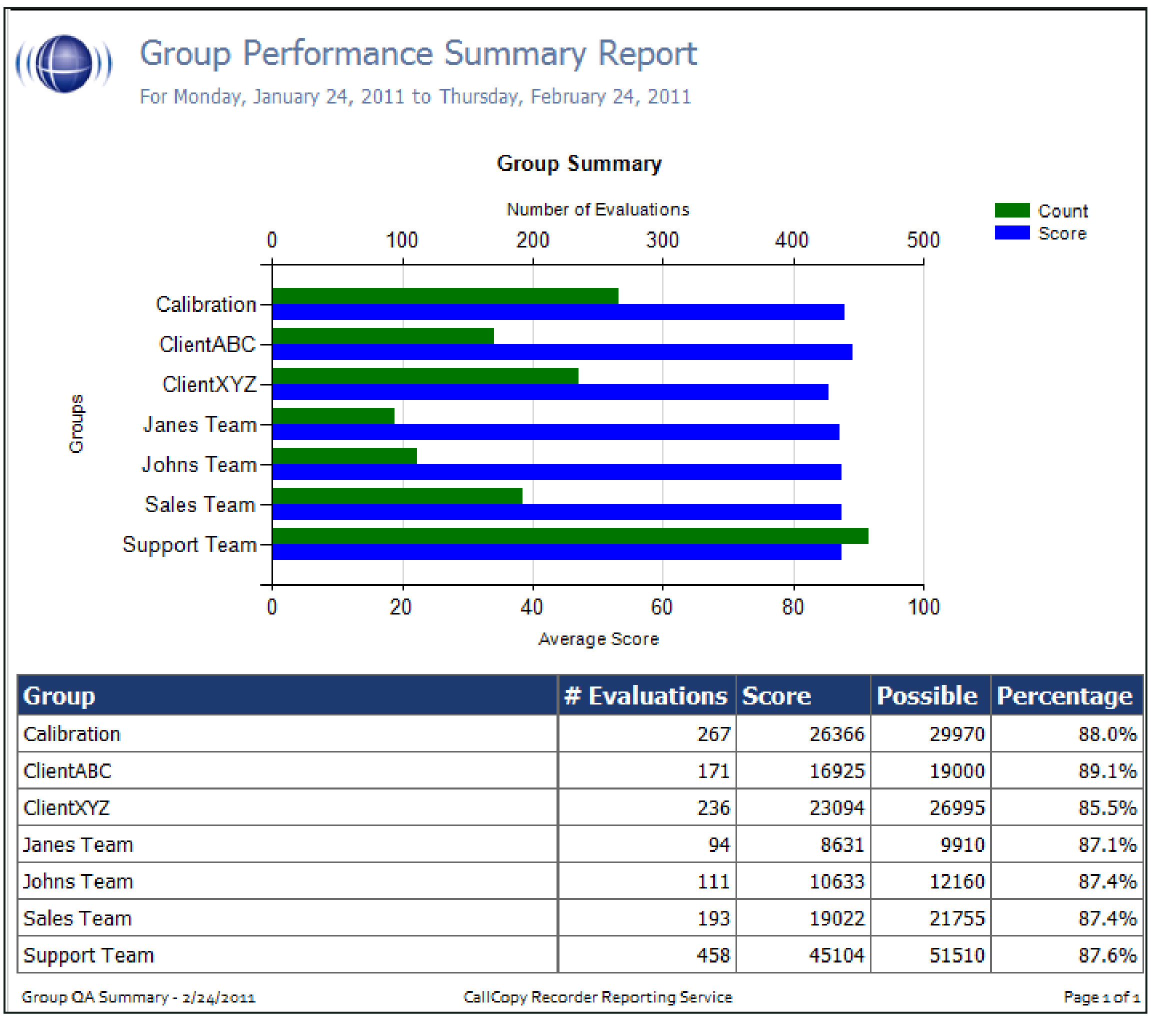
Customer Service Evaluation		**Greeting**
Agent		**Failure Count**
HICKMAN, RONALD		Form Failures: 0, Section Failures: 1
PATTERSON, GRETA		Form Failures: 0, Section Failures: 1
REEVES, CECILIA		Form Failures: 0, Section Failures: 1
SELLERS, ELLA		Form Failures: 0, Section Failures: 1
SHEPHERD, LETHA		Form Failures: 0, Section Failures: 1
TUCKER, SUSAN		Form Failures: 0, Section Failures: 1
	Total:	**Form Failures: 0, Section Failures: 6**

Form	Section	Agent	Failure	Call ID	Date
Customer Service Evaluation	Greeting	HICKMAN, RONALD	Section	2237	2/4/2011
HICKMAN, RONALD	**Total:**	**Form Failures: 0, Section Failures: 1**			
Customer Service Evaluation	Greeting	PATTERSON, GRETA	Section	5749	1/27/2011
PATTERSON, GRETA	**Total:**	**Form Failures: 0, Section Failures: 1**			
Customer Service Evaluation	Greeting	REEVES, CECILIA	Section	9716	2/23/2011
REEVES, CECILIA	**Total:**	**Form Failures: 0, Section Failures: 1**			
Customer Service Evaluation	Greeting	SELLERS, ELLA	Section	3181	2/16/2011
SELLERS, ELLA	**Total:**	**Form Failures: 0, Section Failures: 1**			
Customer Service Evaluation	Greeting	SHEPHERD, LETHA	Section	8832	2/18/2011
SHEPHERD, LETHA	**Total:**	**Form Failures: 0, Section Failures: 1**			
Customer Service Evaluation	Greeting	TUCKER, SUSAN	Section	508	2/22/2011
TUCKER, SUSAN	**Total:**	**Form Failures: 0, Section Failures: 1**			
Greeting	**Total:**	**Form Failures: 0, Section Failures: 6**			

Group QA Summary

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 Performance Summary Report

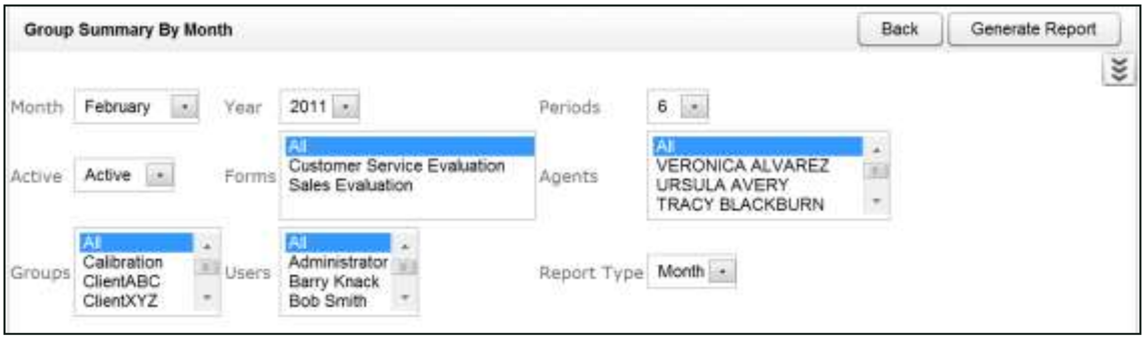
For Monday, January 24, 2011 to Thursday, February 24, 2011

Group	# Evaluations	Score	Possible	Percentage
Calibration	267	26366	29970	88.0%
ClientABC	171	16925	19000	89.1%
ClientXYZ	236	23094	26995	85.5%
Janes Team	94	8631	9910	87.1%
Johns Team	111	10633	12160	87.4%
Sales Team	193	19022	21755	87.4%
Support Team	458	45104	51510	87.6%

Group QA Summary - 2/24/2011 CallCopy Recorder Reporting Service Page 1 of 1

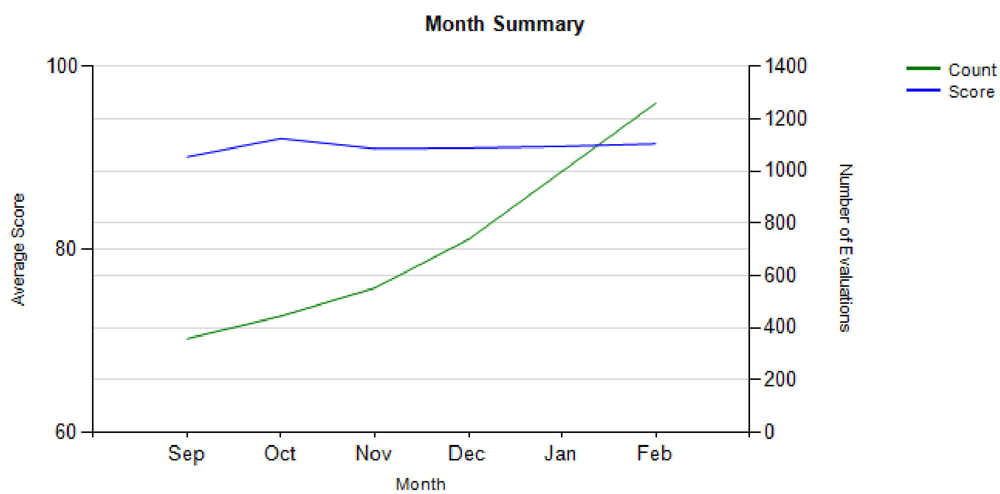
Group Summary by Month

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 Discover Group for each month. Report results are limited to groups to which you have access, even if you select **All**.



Group Performance Summary Report by Month

For the period beginning 8/1/2010 and ending 2/28/2011

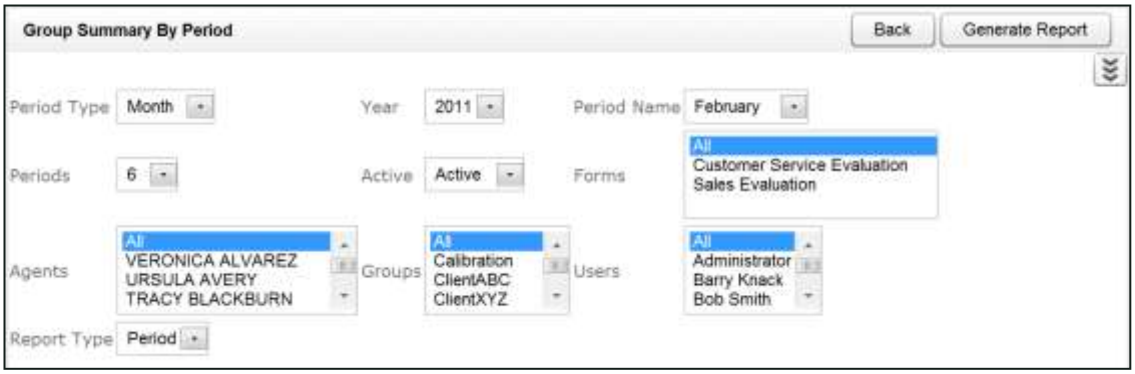


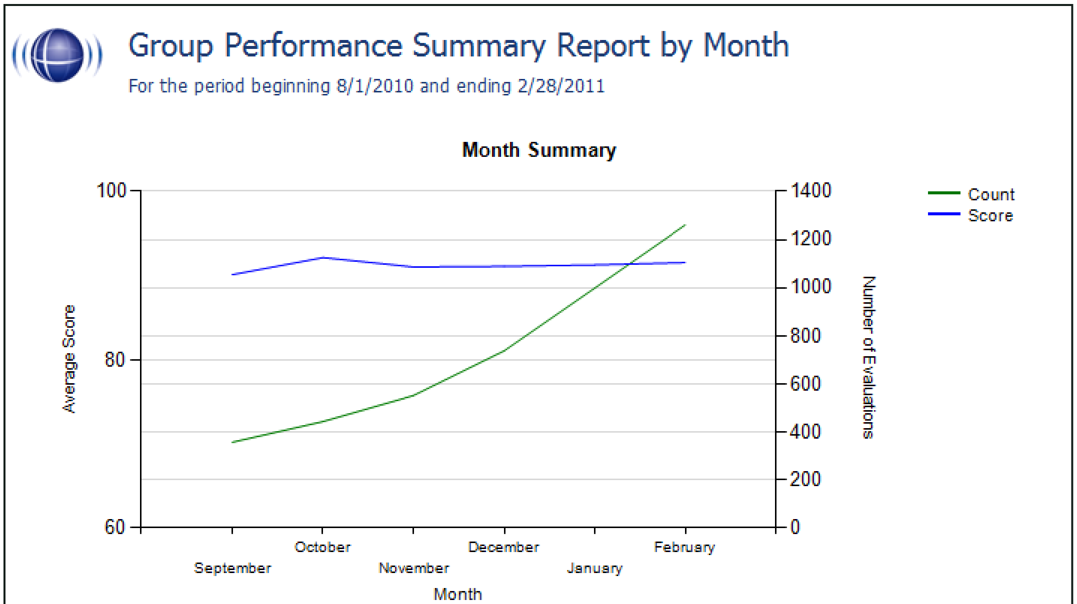
Month	# Evaluations	Score	Possible Score	Percentage
September	358	36560	40565	90.1%
October	444	47096	51110	92.1%
November	552	57454	63110	91.0%
December	738	75126	82455	91.1%
January	999	102264	112040	91.3%
February	1261	128843	140725	91.6%

Group Summary By Month - 2/24/2011 CallCopy 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**.



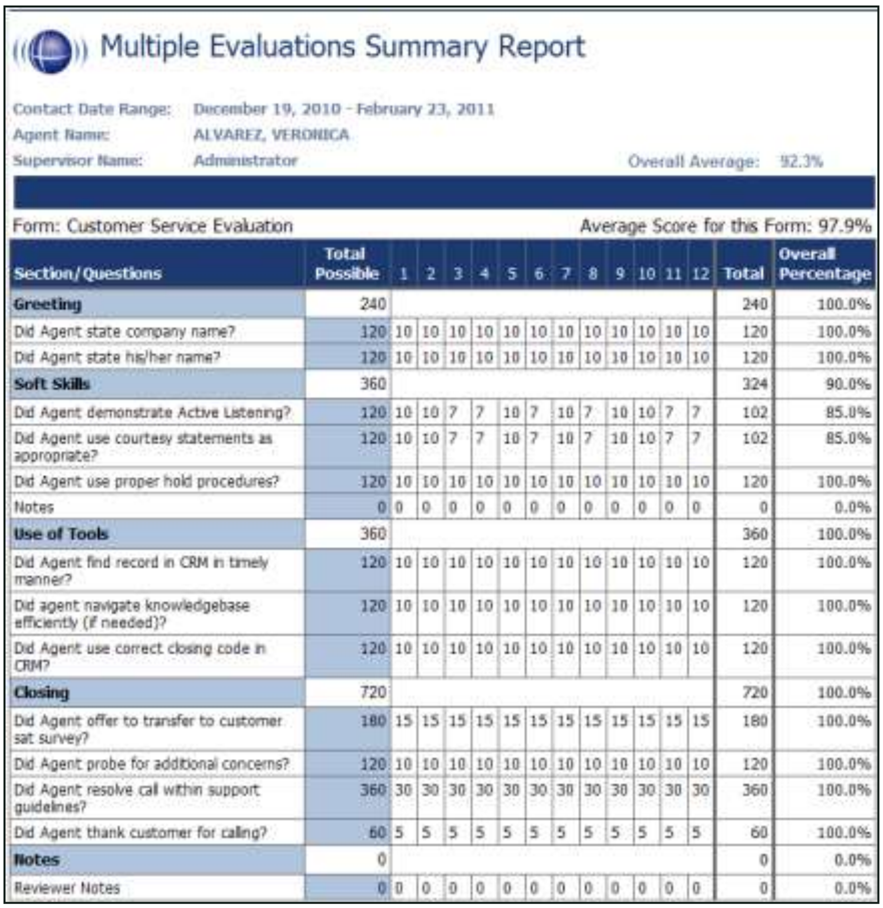


Month	Year	# Evaluations	Score	Possible Score	Percentage
September	2010	358	36560	40565	90.1%
October	2010	444	47096	51110	92.1%
November	2010	552	57454	63110	91.0%
December	2010	738	75126	82455	91.1%
January	2011	999	102264	112040	91.3%
February	2011	1261	128843	140725	91.6%

Group Summary By Period - 2/24/2011 CallCopy Recorder Reporting Service Page 1 of 1

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 Report

Contact Date Range: December 19, 2010 - February 23, 2011
Agent Name: ALVAREZ, VERONICA
Supervisor Name: Administrator
Overall Average: 92.3%

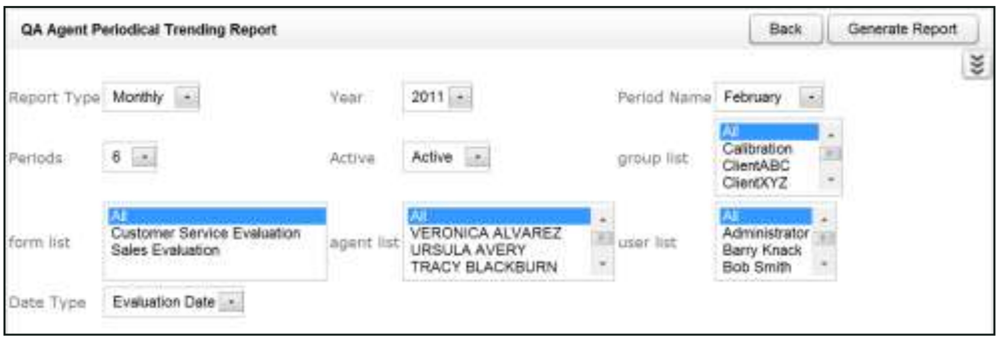
Form: Customer Service Evaluation
Average Score for this Form: 97.9%

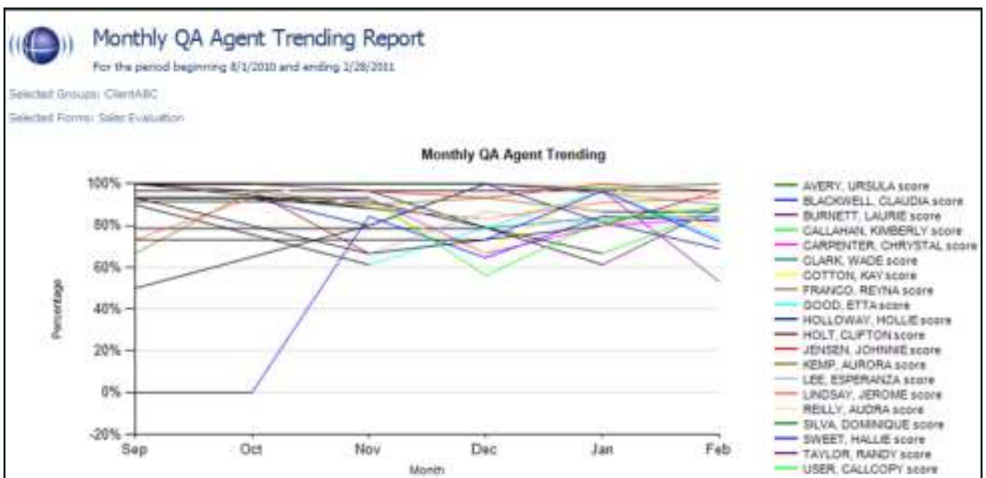
Section/Questions	Total Possible	1	2	3	4	5	6	7	8	9	10	11	12	Total	Overall Percentage
Greeting	240													240	100.0%
Did Agent state company name?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did Agent state his/her name?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Soft Skills	360													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**.



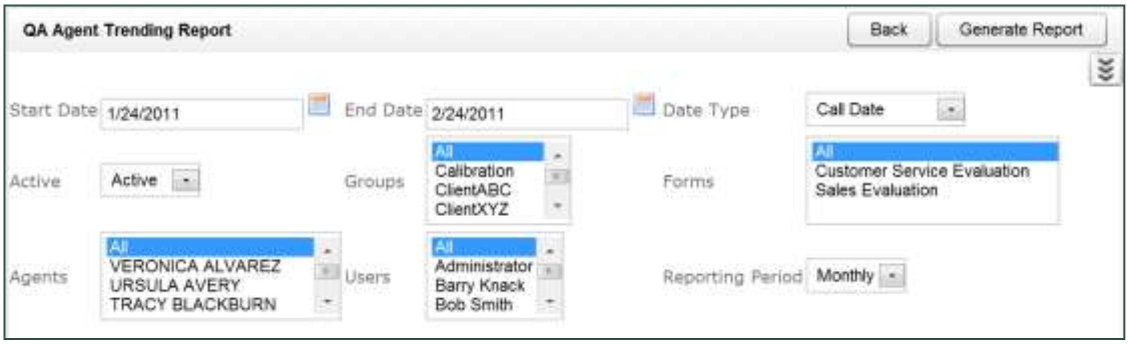


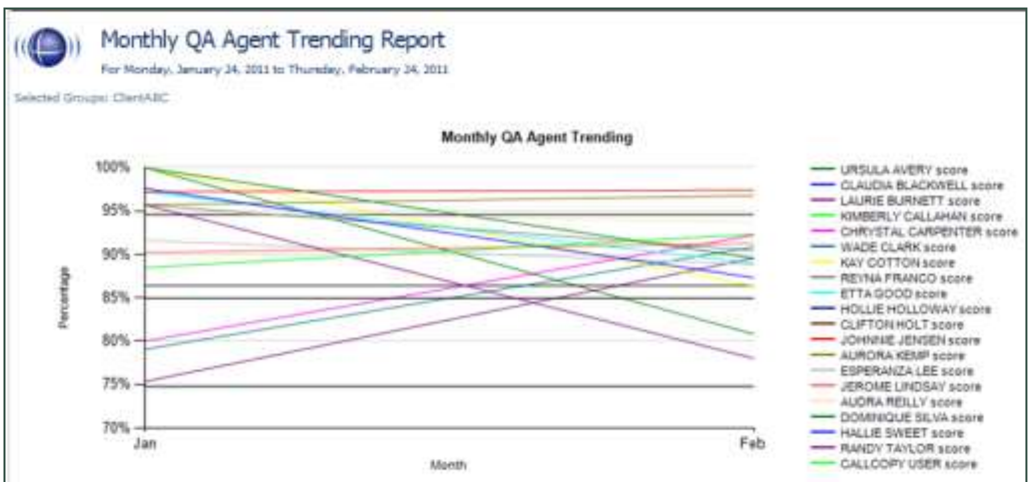
Sales Evaluation	Sep	Oct	Nov	Dec	Jan	Feb
Greeting	93.8%	90.0%	96.7%	92.3%	97.7%	92.1%
Sales Skills	81.3%	90.0%	69.4%	86.0%	75.6%	74.6%
Documentation	68.8%	81.0%	73.3%	66.4%	74.7%	78.2%

Greeting	Sep	Oct	Nov	Dec	Jan	Feb
AVERY, URSULA	100.0%	100.0%				100.0%
BLACKWELL, CLAUDIA		0.0%	100.0%	50.0%	100.0%	100.0%
BURNETT, LAURIE		100.0%	100.0%		57.1%	100.0%
CALLAHAN, KIMBERLY			100.0%		100.0%	100.0%
CARPENTER, CHRYSTAL		100.0%	100.0%	100.0%	100.0%	100.0%
CLARK, WADE				80.0%	100.0%	100.0%
COTTON, KAY	100.0%		100.0%	100.0%	100.0%	66.7%
FRANCO, REYNA	50.0%		100.0%	100.0%	100.0%	100.0%
GOOD, ETTA	100.0%		50.0%	75.0%	100.0%	66.7%

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**.

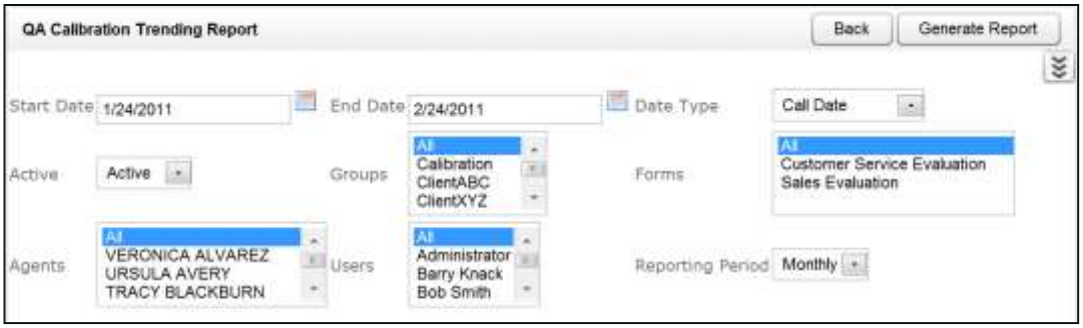


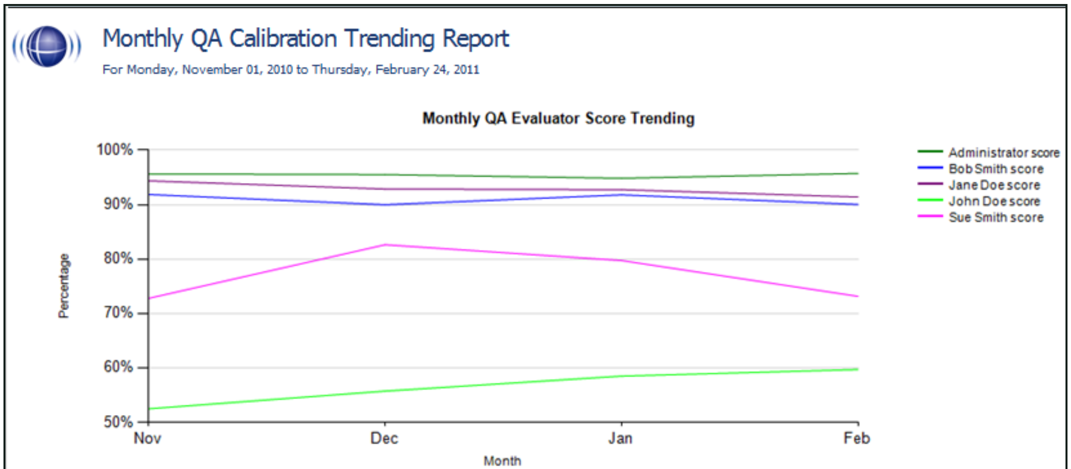


	2011	
	Jan	Feb
AVERY, URSULA	100.0%	80.8%
Customer Service Evaluation	100.0%	77.4%
Greeting	100.0%	80.0%
Did Agent state company name?	100.0%	80.0%
Did Agent state his/her name?	100.0%	80.0%
Soft Skills	100.0%	68.0%
Did Agent use courtesy statements as appropriate?	100.0%	62.0%
Did Agent demonstrate Active Listening?	100.0%	62.0%
Did Agent use proper hold procedures?	100.0%	80.0%
Notes	N/A	N/A
Use of Tools	100.0%	80.0%
Did Agent use correct closing code in CRM?	100.0%	80.0%
Did Agent find record in CRM in timely manner?	100.0%	80.0%
Did agent navigate knowledgebase efficiently (if needed)?	100.0%	80.0%
Closing	100.0%	80.0%
Did Agent resolve call within support guidelines?	100.0%	80.0%
Did Agent probe for additional concerns?	100.0%	80.0%
Did Agent thank customer for calling?	100.0%	80.0%

QA Calibration Trending Report

The **QA Calibration Trending Report** details an evaluator's performance on a particular QA evaluation 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 form was created.

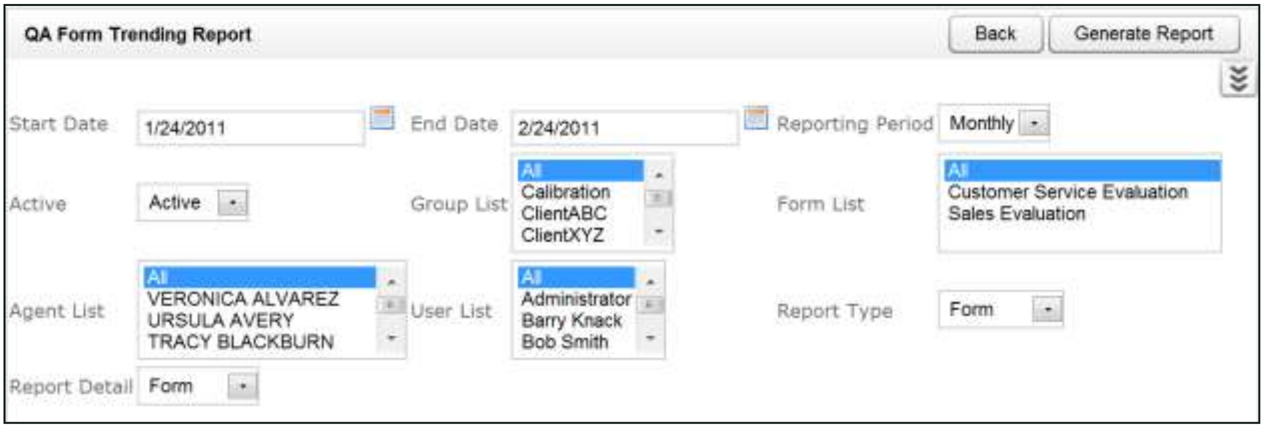


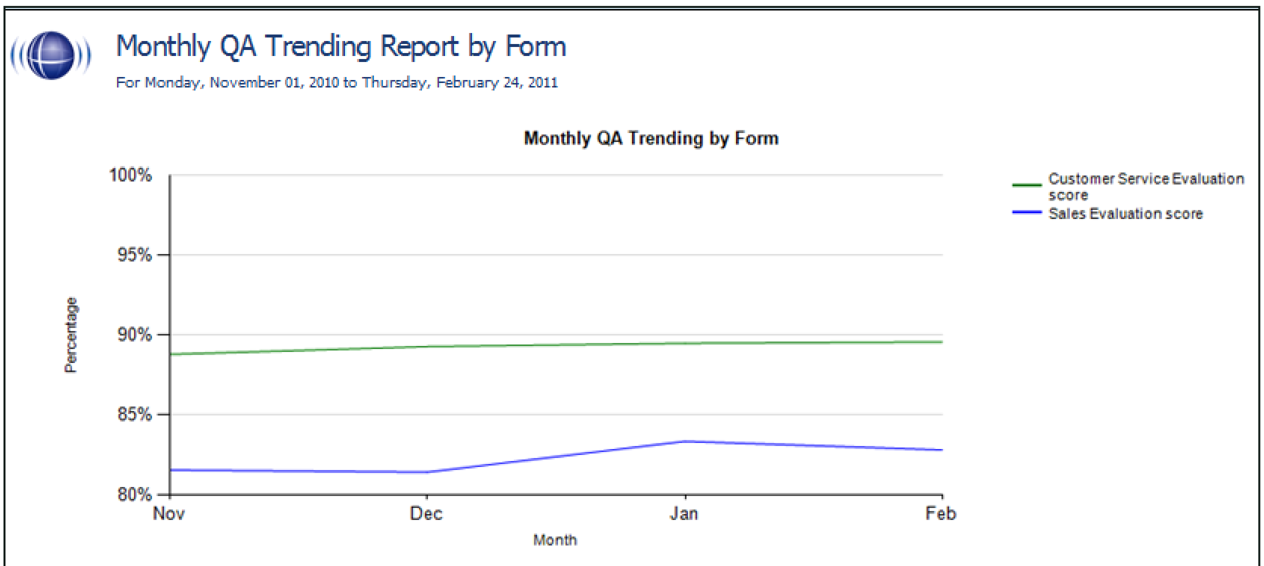


	2010		2011	
	Nov	Dec	Jan	Feb
Administrator	95.6%	95.5%	94.8%	95.7%
Customer Service Evaluation	96.2%	95.9%	95.4%	96.5%
Greeting	100.0%	98.9%	98.1%	99.4%
Did Agent state company name?	100.0%	98.9%	98.1%	99.4%
Did Agent state his/her name?	100.0%	98.9%	98.1%	99.4%
Soft Skills	86.6%	86.6%	86.9%	87.9%
Did 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%

QA Form Trending Report

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

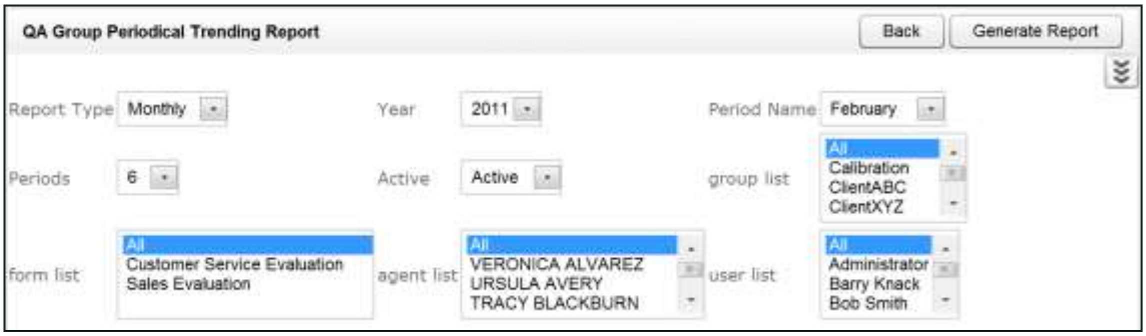


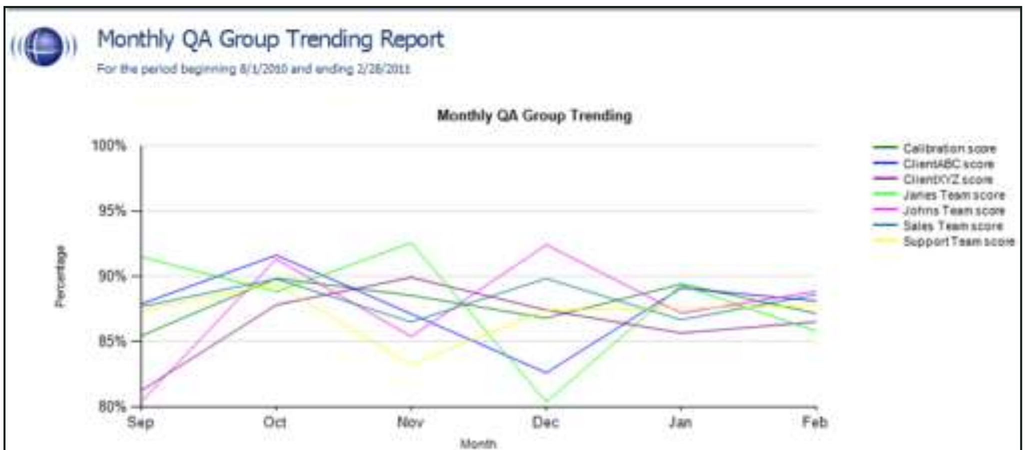


	2010		2011	
	Nov	Dec	Jan	Feb
Customer Service Evaluation	88.8%	89.3%	89.5%	89.6%
Customer Service Evaluation	88.8%	89.3%	89.5%	89.6%
Sales Evaluation	81.5%	81.4%	83.3%	82.8%
Sales Evaluation	81.5%	81.4%	83.3%	82.8%

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.





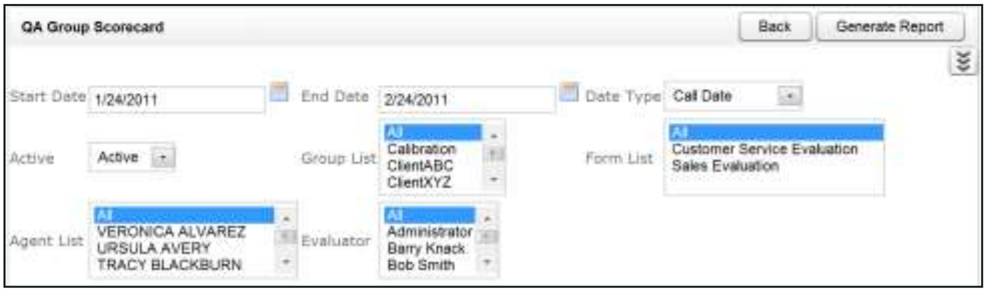
Customer Service Evaluation	Sep - 10	Oct - 10	Nov - 10	Dec - 10	Jan - 11	Feb - 11
Greeting	85.3%	91.2%	88.3%	89.0%	89.7%	91.0%
Soft Skills	79.0%	83.0%	80.2%	80.6%	80.4%	80.2%
Use of Tools	81.8%	87.2%	84.2%	84.8%	84.4%	85.2%
Closing	95.3%	97.5%	95.5%	95.9%	96.5%	96.0%
Notes	N/A	N/A	N/A	N/A	N/A	N/A

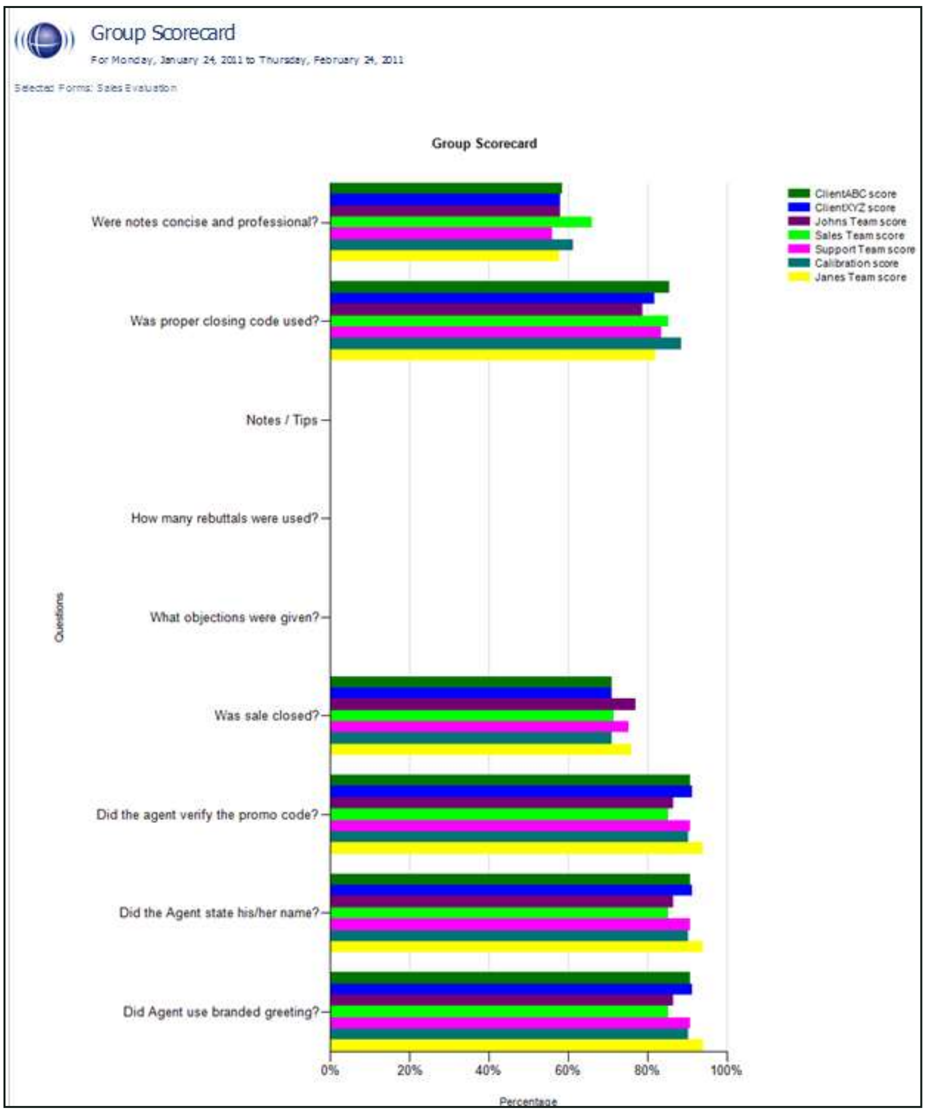
Sales Evaluation	Sep - 10	Oct - 10	Nov - 10	Dec - 10	Jan - 11	Feb - 11
Greeting	92.5%	95.3%	91.3%	91.0%	91.1%	90.4%
Sales Skills	76.2%	80.6%	72.9%	74.8%	74.1%	74.4%
Documentation	66.7%	68.8%	69.4%	68.7%	74.6%	74.0%

Greeting	Sep - 10	Oct - 10	Nov - 10	Dec - 10	Jan - 11	Feb - 11
Calibration	83.3%	96.2%	91.7%	90.9%	92.5%	88.5%
ClientABC	85.7%	93.3%	88.2%	80.9%	92.2%	90.4%
ClientXYZ	80.6%	90.0%	93.5%	88.3%	88.8%	90.0%
Janes Team	91.7%	92.3%	96.2%	72.7%	92.9%	88.9%
Johns Team	75.0%	93.8%	82.6%	95.8%	85.7%	94.1%
Sales Team	90.5%	88.6%	85.4%	91.2%	87.5%	94.3%
Support Team	87.5%	88.5%	83.7%	92.0%	88.8%	91.4%

QA Group Scorecard

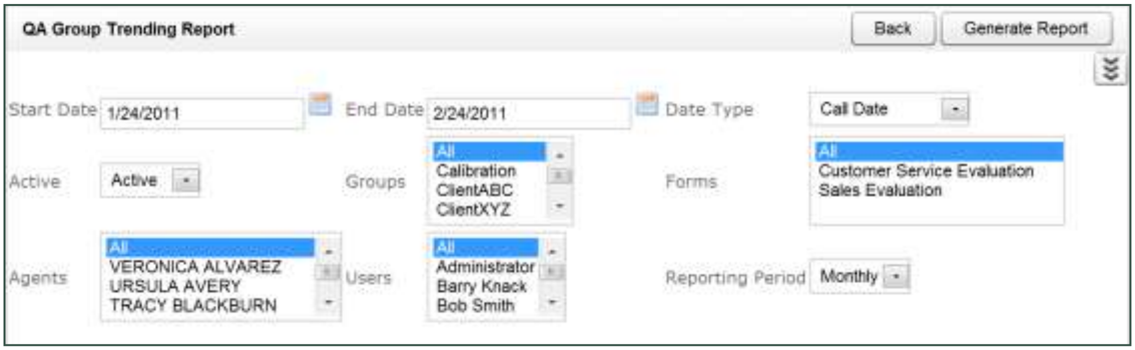
The **QA Group Scorecard** displays a group-by-group comparison of results for a QA evaluation form, at a question level, based on a period of time.





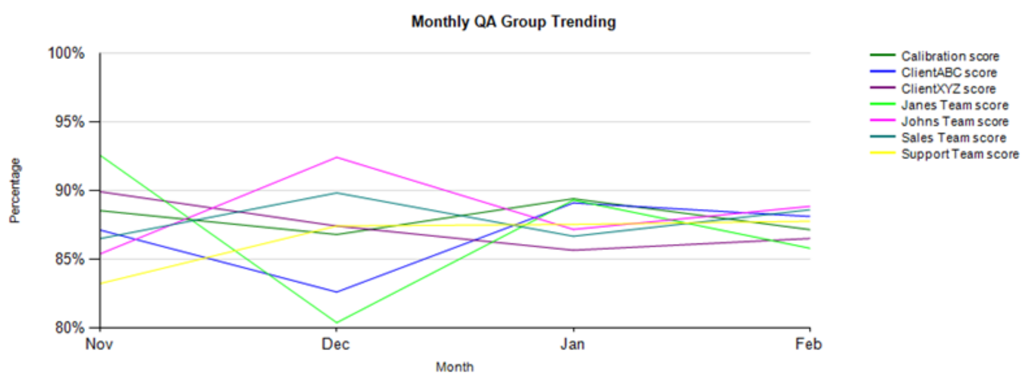
QA Group Trending Report

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.



Monthly QA Group Trending Report

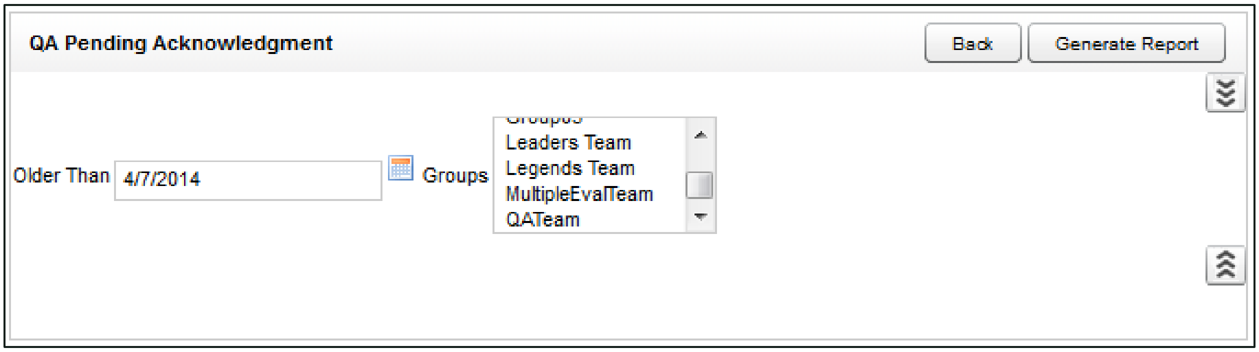
For Monday, November 01, 2010 to Thursday, February 24, 2011

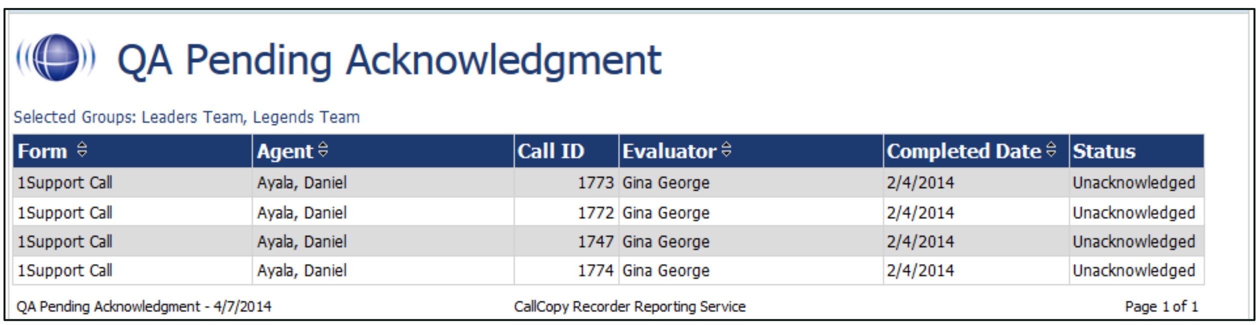


	2010		2011	
	Nov	Dec	Jan	Feb
Calibration	88.5%	86.8%	89.4%	87.2%
Customer Service Evaluation	90.7%	89.1%	90.8%	88.8%
Greeting	91.7%	90.9%	92.5%	88.5%
Did Agent state company name?	91.7%	90.9%	92.5%	88.5%
Did Agent state his/her name?	91.7%	90.9%	92.5%	88.5%
Soft Skills	81.1%	81.5%	81.2%	80.3%
Did Agent use courtesy statements as appropriate?	72.6%	74.7%	71.7%	71.5%
Did Agent demonstrate Active Listening?	73.5%	76.2%	73.8%	73.6%
Did Agent use proper hold procedures?	97.2%	93.5%	98.1%	95.9%
Notes	N/A	N/A	N/A	N/A
Use of Tools	87.0%	86.6%	85.2%	83.9%
Did Agent use correct closing code in CRM?	97.2%	93.5%	98.1%	95.9%
Did Agent find record in CRM in timely manner?	84.7%	83.1%	78.3%	75.4%
Did agent navigate knowledgebase efficiently (if needed)?	79.2%	83.1%	79.2%	80.3%
Closing	97.0%	93.5%	97.8%	95.7%
Did Agent resolve call within support guidelines?	97.2%	93.5%	98.1%	95.9%
Did Agent probe for additional concerns?	97.2%	93.5%	98.1%	95.9%
Did Agent thank customer for calling?	94.4%	93.5%	94.3%	93.4%
Did Agent offer to transfer to customer sat survey?	97.2%	93.5%	98.1%	95.9%

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 Discover Quality Management Manual*.





QA Pending Acknowledgment

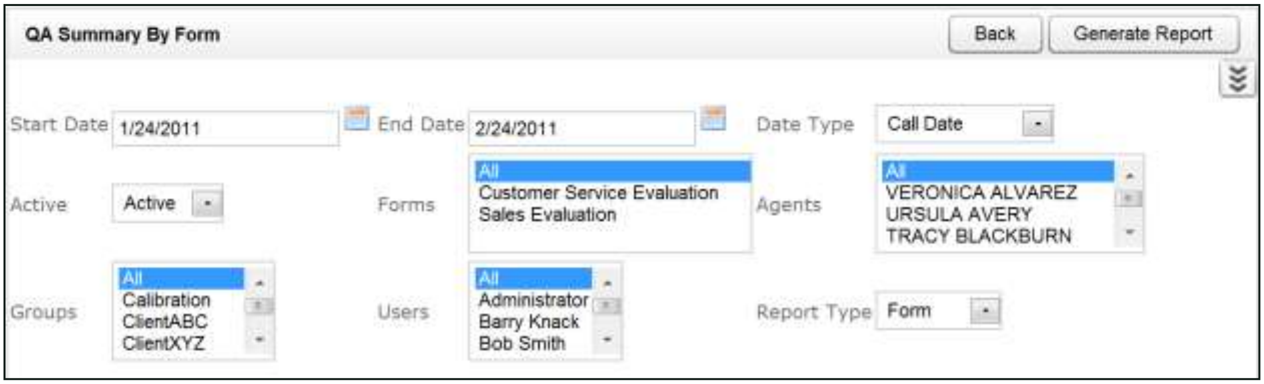
Selected Groups: Leaders Team, Legends Team

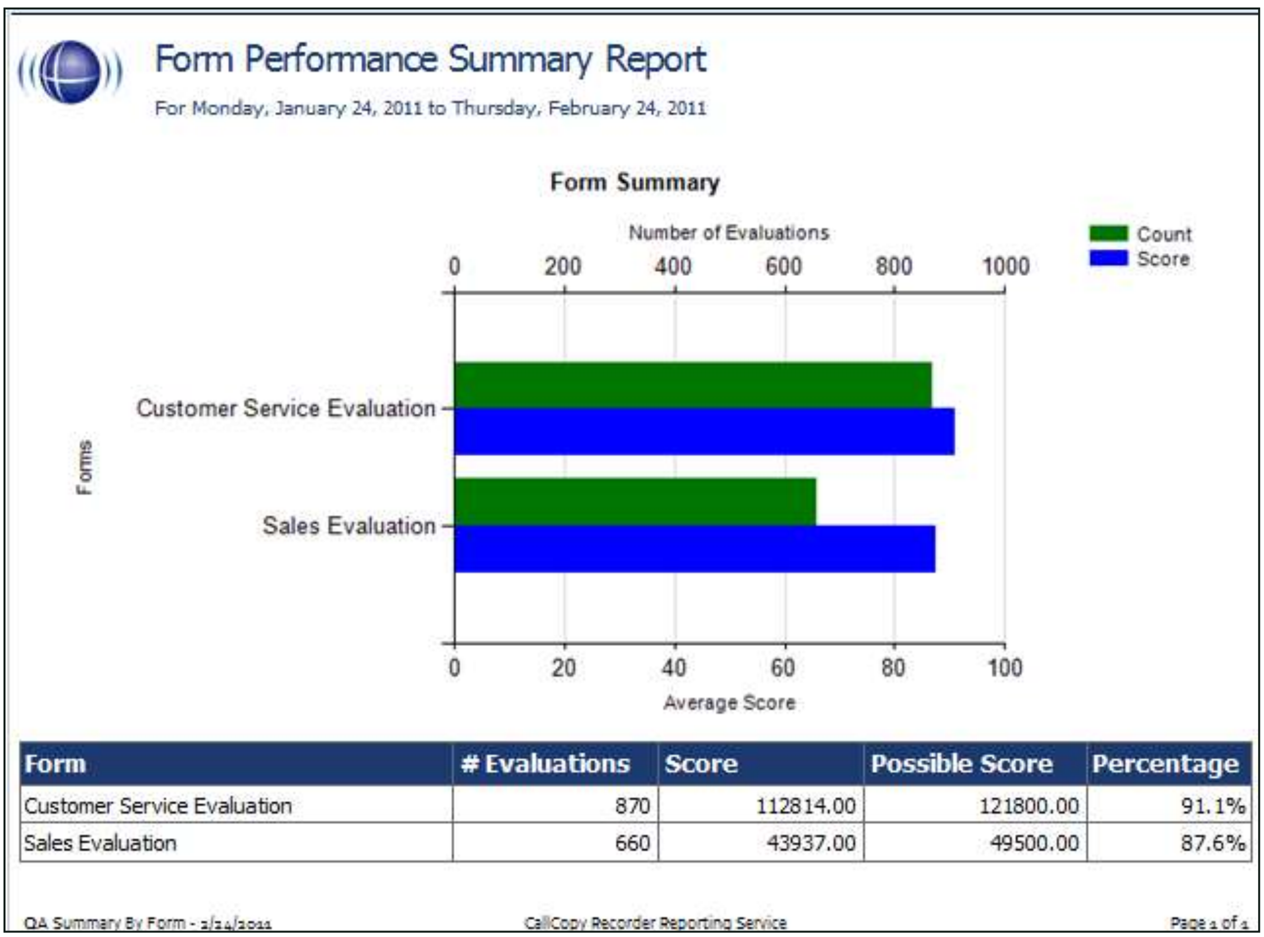
Form	Agent	Call ID	Evaluator	Completed Date	Status
1Support Call	Ayala, Daniel	1773	Gina George	2/4/2014	Unacknowledged
1Support Call	Ayala, Daniel	1772	Gina George	2/4/2014	Unacknowledged
1Support Call	Ayala, Daniel	1747	Gina George	2/4/2014	Unacknowledged
1Support Call	Ayala, Daniel	1774	Gina George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





Form Performance Summary Report

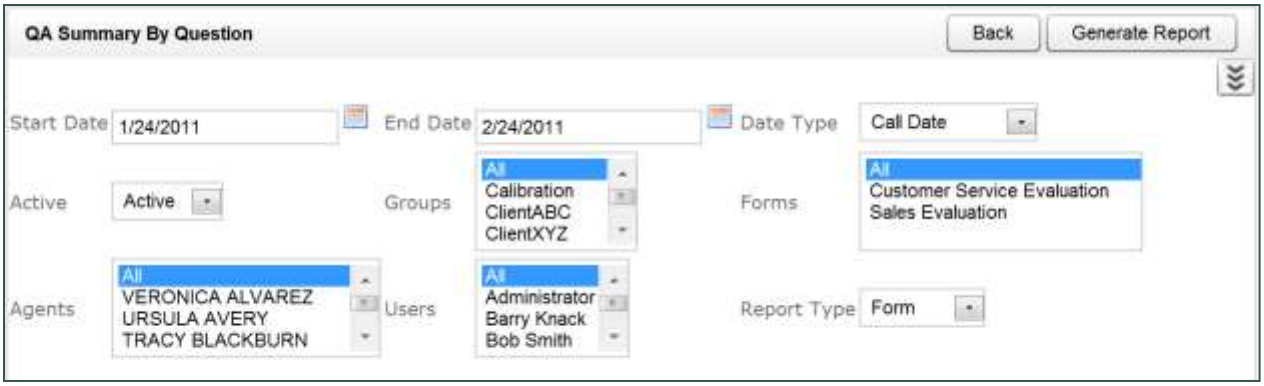
For Monday, January 24, 2011 to Thursday, February 24, 2011

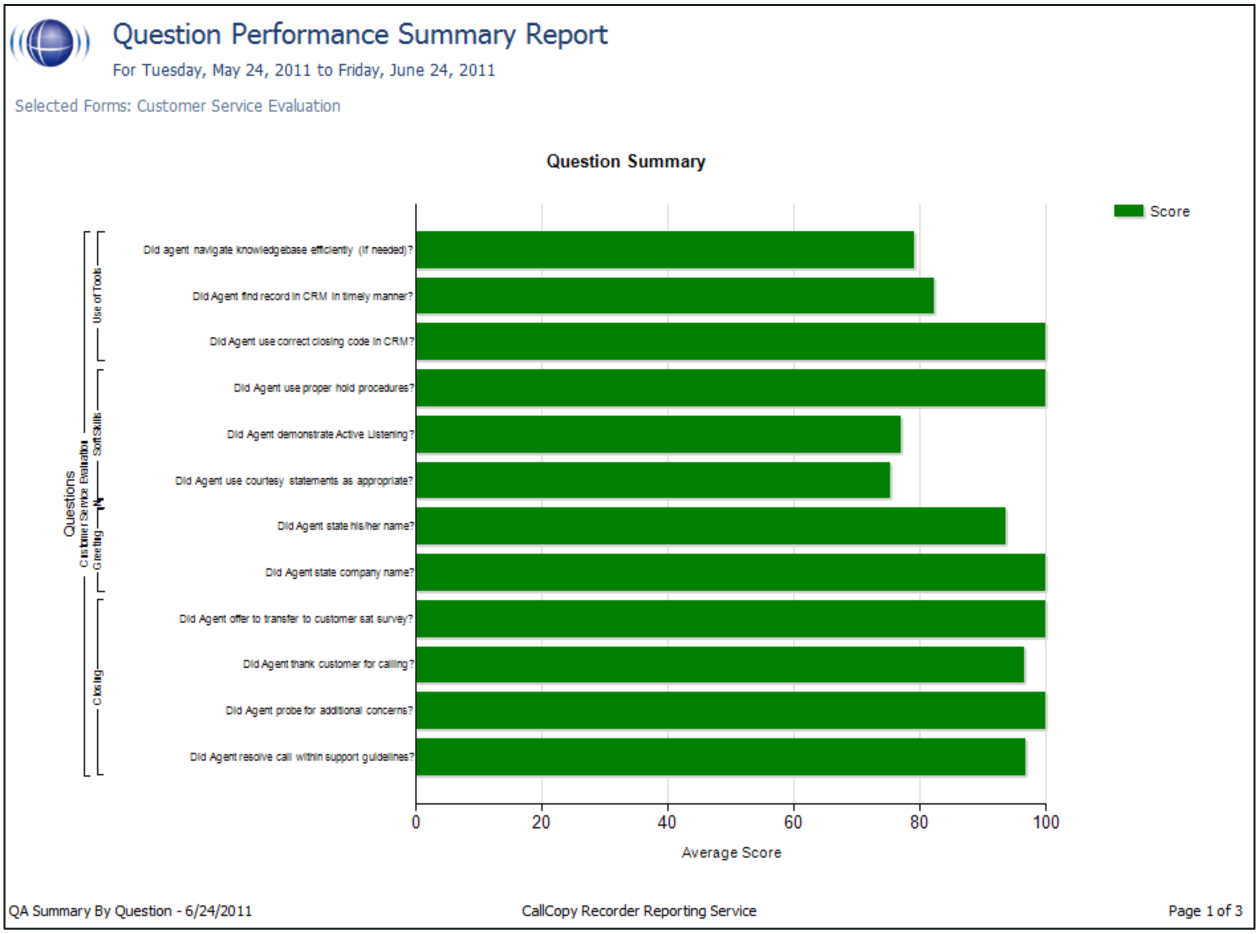
Form	# Evaluations	Score	Possible Score	Percentage
Customer Service Evaluation	870	112814.00	121800.00	91.1%
Sales Evaluation	660	43937.00	49500.00	87.6%

QA Summary By Form - 2/24/2011 CallCopy Recorder Reporting Service Page 1 of 1

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.





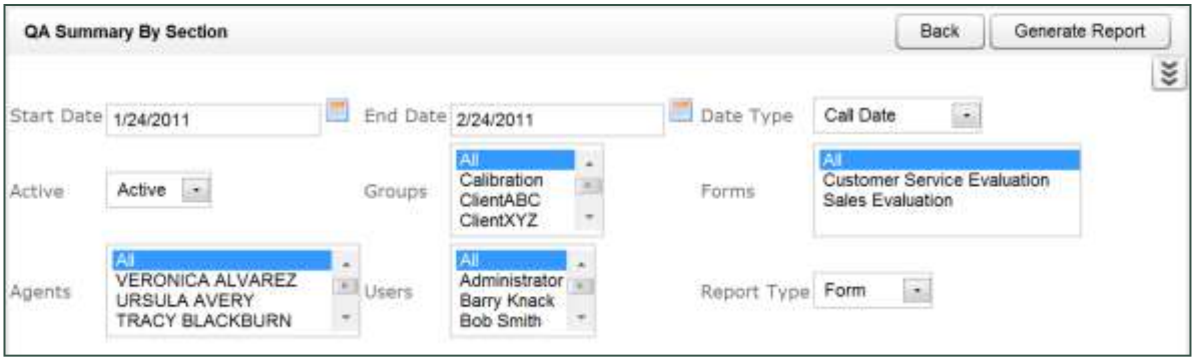
Question Performance Summary Report

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

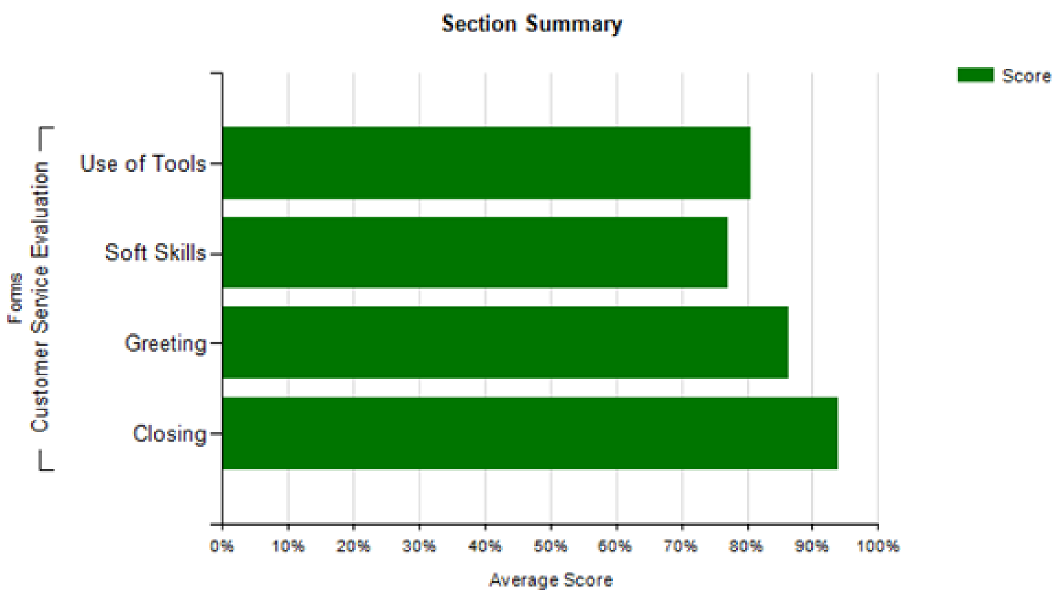
The **QA Summary by Section** report displays performance on a QA evaluation form's sections over a period of time. You can drill down into the report for additional details.



Section Performance Summary Report

For Monday, January 24, 2011 to Thursday, February 24, 2011

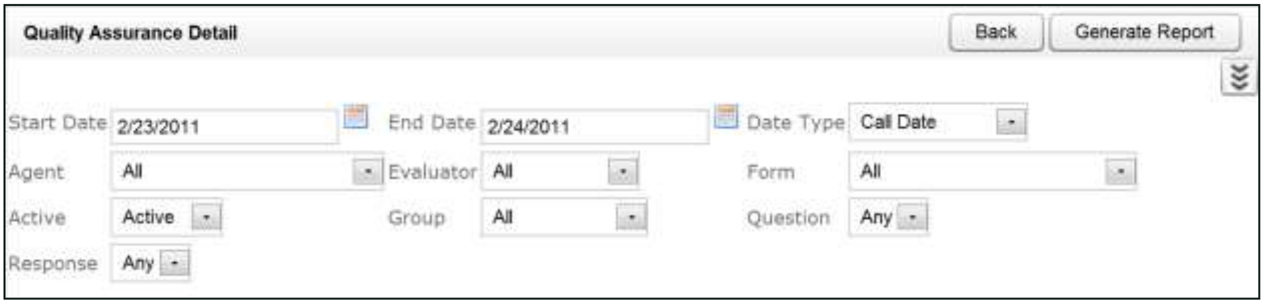
Selected Forms: Customer Service Evaluation



Form	# Evaluations	Score	Possible Score	Percentage
Customer Service Evaluation	870	108964.00	121800.00	84.5%
Greeting		15820.00	17400.00	86.5%
Soft Skills		20904.00	26100.00	77.1%
Use of Tools		22190.00	26100.00	80.5%
Closing		50050.00	52200.00	93.8%

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.



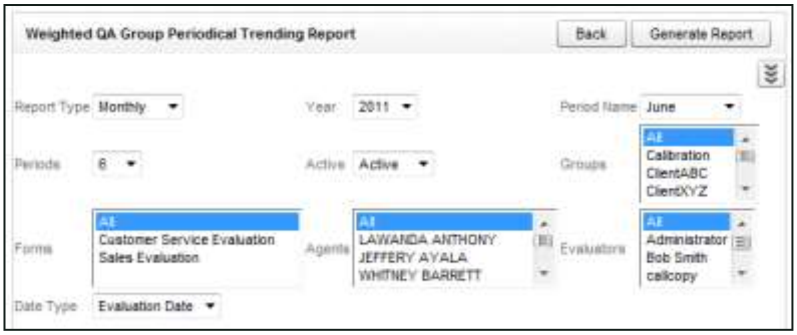
Quality Assurance Detail

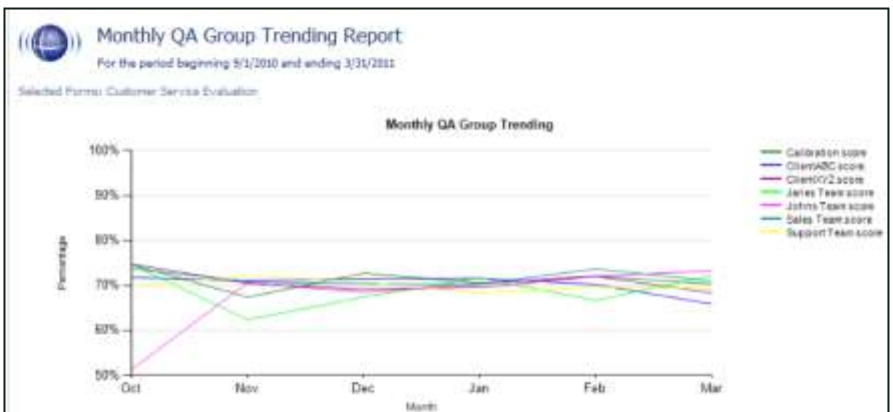
Agent: ALVAREZ, VERONICA

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.





Customer Service Evaluation	Oct	Nov	Dec	Jan	Feb	Mar
Greeting	91.0%	88.8%	91.0%	89.8%	91.3%	89.0%
Soft Skills	82.7%	80.3%	80.3%	80.5%	80.8%	80.2%
Use of Tools	86.2%	83.8%	84.3%	83.8%	85.5%	84.4%
Closing	96.8%	95.9%	97.4%	96.2%	97.4%	95.1%
Notes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

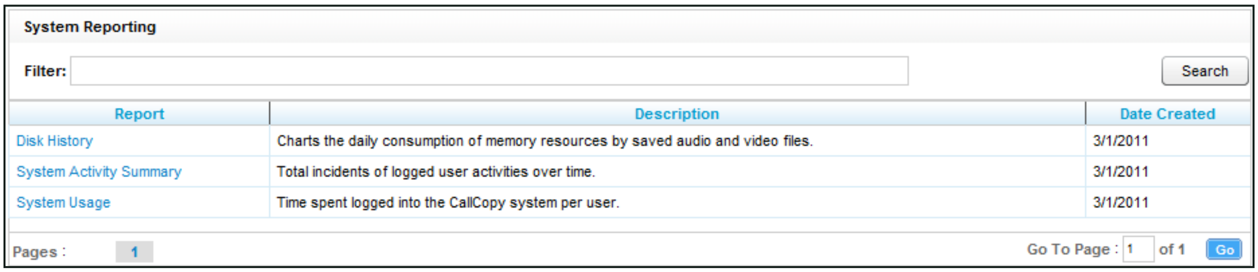
Greeting	Oct	Nov	Dec	Jan	Feb	Mar
Calibration	98.5%	84.0%	95.1%	89.7%	92.6%	89.4%
ClientABC	88.5%	87.8%	90.8%	94.0%	90.9%	85.0%
ClientXYZ	96.4%	88.7%	89.4%	91.5%	93.0%	87.7%
Janes Team	97.5%	77.8%	86.8%	90.9%	85.0%	94.1%
Johns Team	64.3%	82.9%	89.6%	89.2%	90.9%	96.8%
Sales Team	96.7%	93.2%	87.7%	90.0%	95.5%	87.7%
Support Team	88.6%	92.7%	92.2%	86.5%	89.4%	88.0%

Soft Skills	Oct	Nov	Dec	Jan	Feb	Mar
Calibration	83.8%	78.4%	82.3%	81.7%	82.2%	80.7%
ClientABC	85.8%	83.2%	81.9%	79.1%	78.2%	74.4%
ClientXYZ	87.6%	80.8%	78.6%	79.0%	82.4%	78.0%
Janes Team	85.6%	71.9%	76.8%	84.3%	74.7%	82.1%
Johns Team	87.9%	79.0%	77.0%	81.8%	81.7%	82.4%

System Reports

About System Reports

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



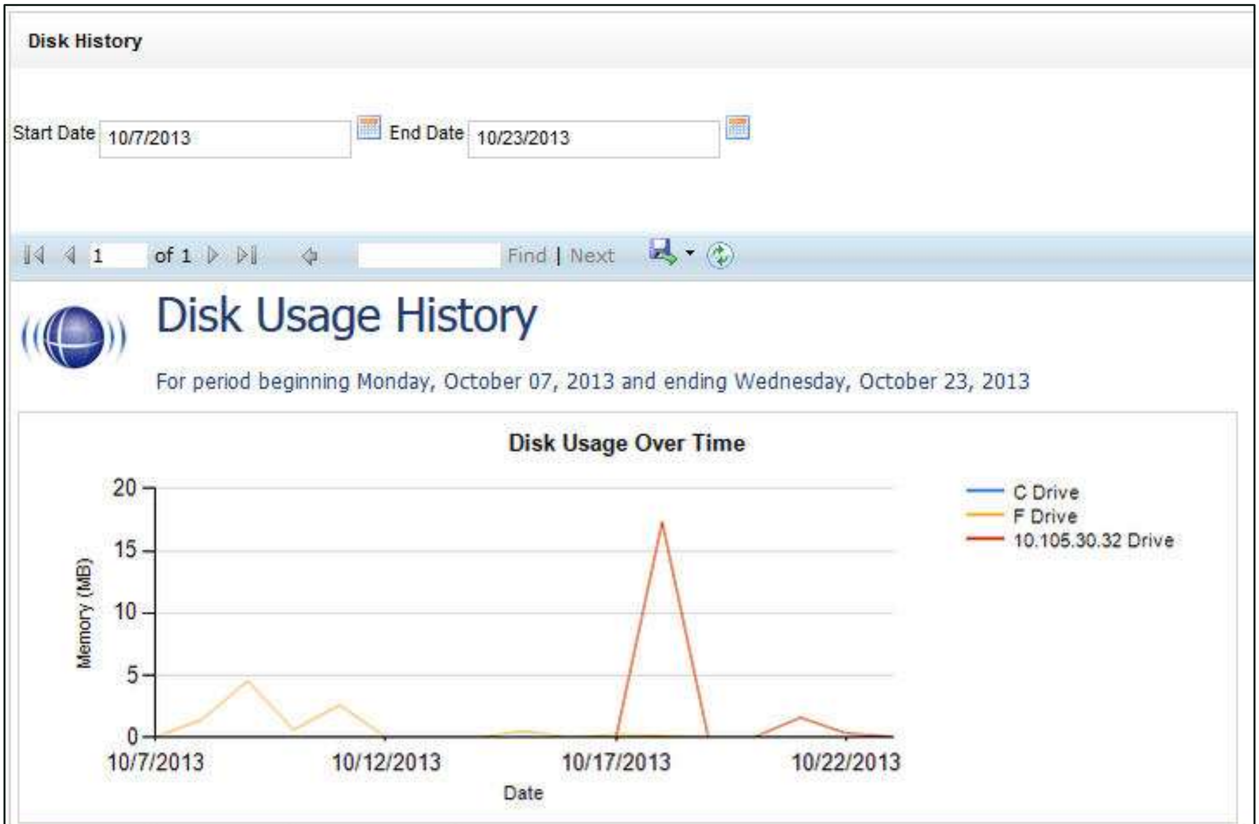
Report	Description	Date Created
Disk History	Charts the daily consumption of memory resources by saved audio and video files.	3/1/2011
System Activity Summary	Total incidents of logged user activities over time.	3/1/2011
System Usage	Time spent logged into the CallCopy system per user.	3/1/2011

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.

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

Disk History

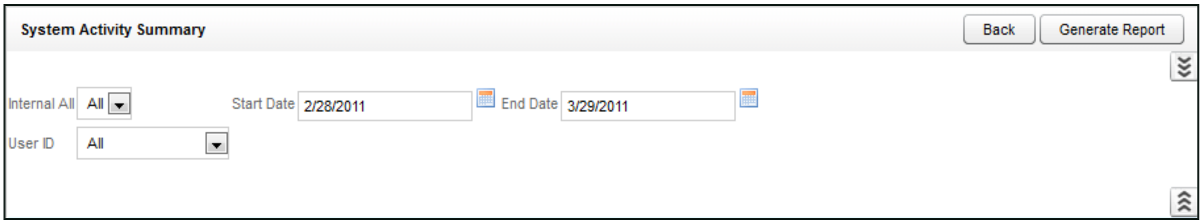
The **Disk History Report** displays historical disk usage in MB for recording data over a range of days. Results are displayed in both line chart and list format. Multiple drives are distinguished by differently-colored lines.

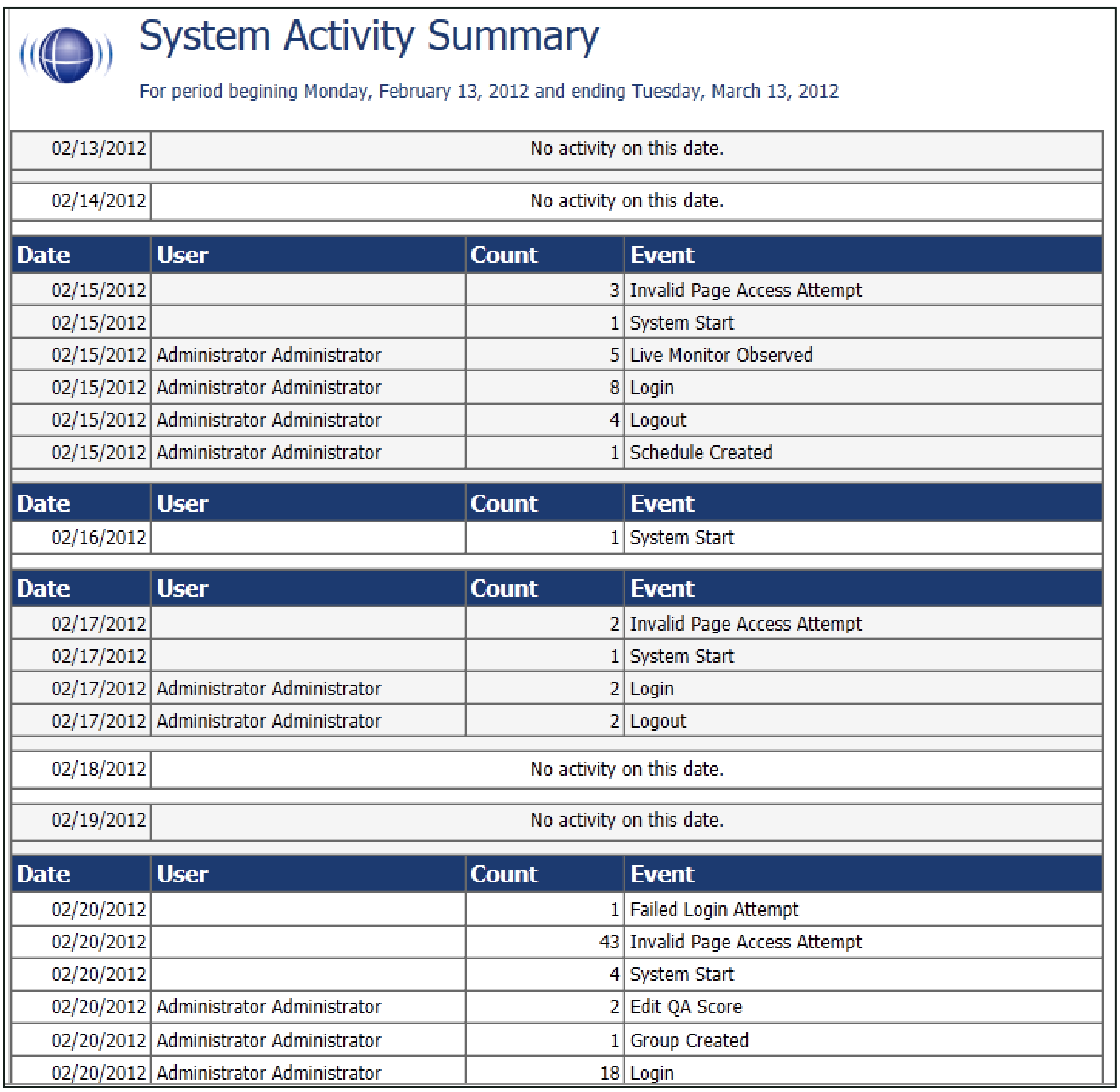


Date	Type	Drive	Disk Usage
10/07/2013		C	0.00 MB
10/08/2013	Audio	F	1.41 MB
10/09/2013	Audio	F	4.53 MB
10/10/2013	Audio	F	0.20 MB
10/10/2013	Video	F	0.39 MB
10/11/2013	Audio	F	0.81 MB
10/11/2013	Video	F	1.78 MB
10/12/2013		C	0.00 MB
10/13/2013		C	0.00 MB

System Activity Summary

The **System Activity Summary** displays the actions performed in the Discover system 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 deletes, and QA functions are all tracked with this report.




System Activity Summary

For period begining 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

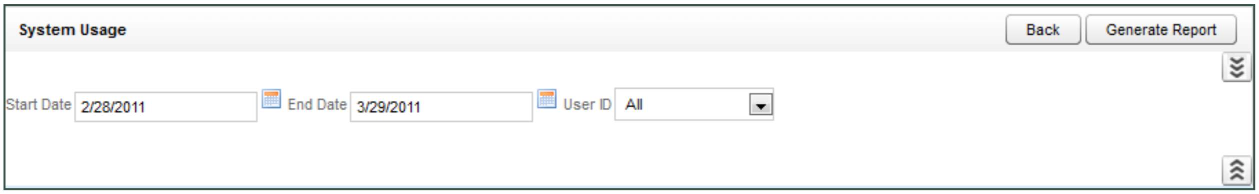
Date	User	Count	Event
02/17/2012		2	Invalid Page Access Attempt
02/17/2012		1	System Start
02/17/2012	Administrator Administrator	2	Login
02/17/2012	Administrator Administrator	2	Logout

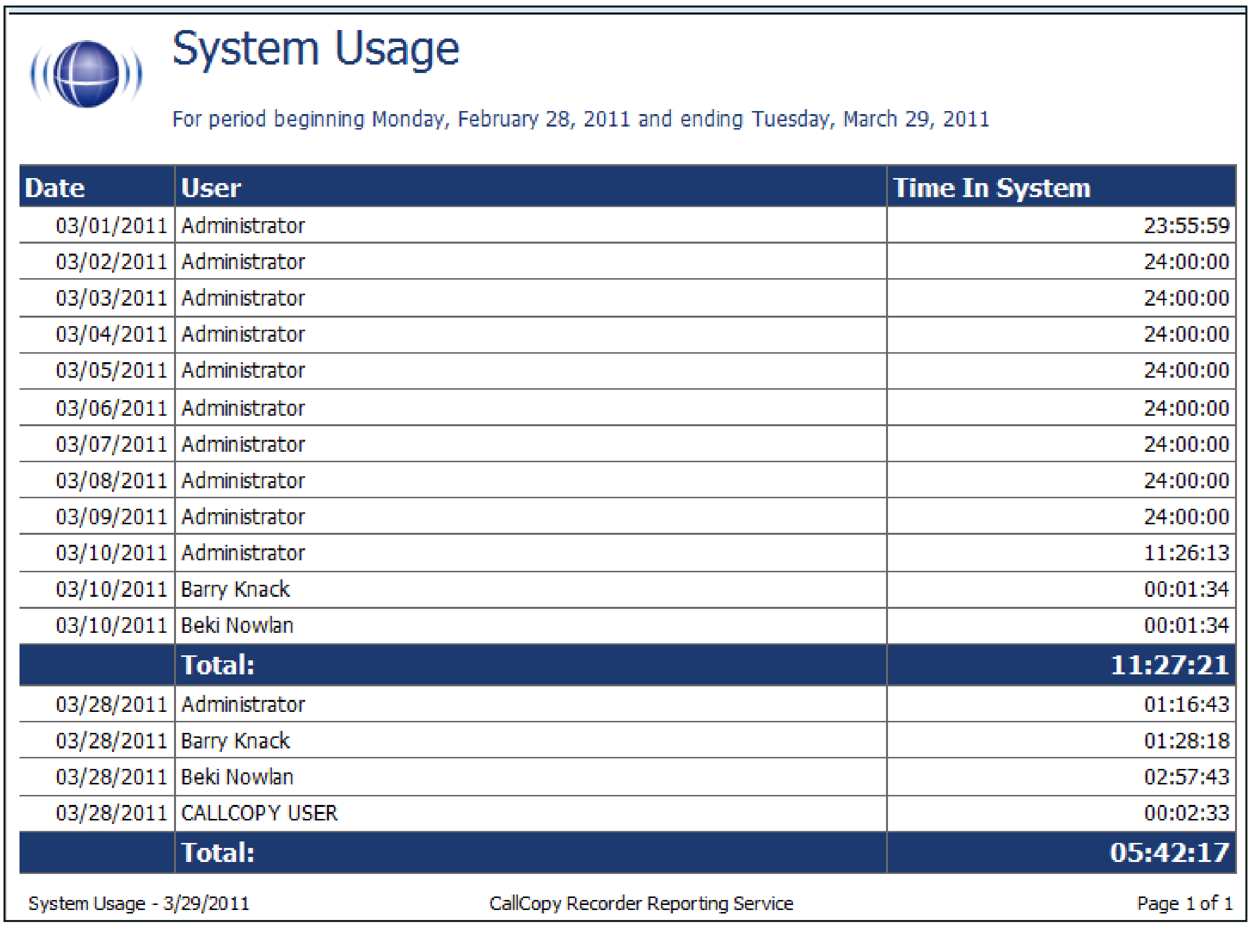
02/18/2012	No activity on this date.
02/19/2012	No activity on this date.

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

For period beginning Monday, February 28, 2011 and ending Tuesday, March 29, 2011

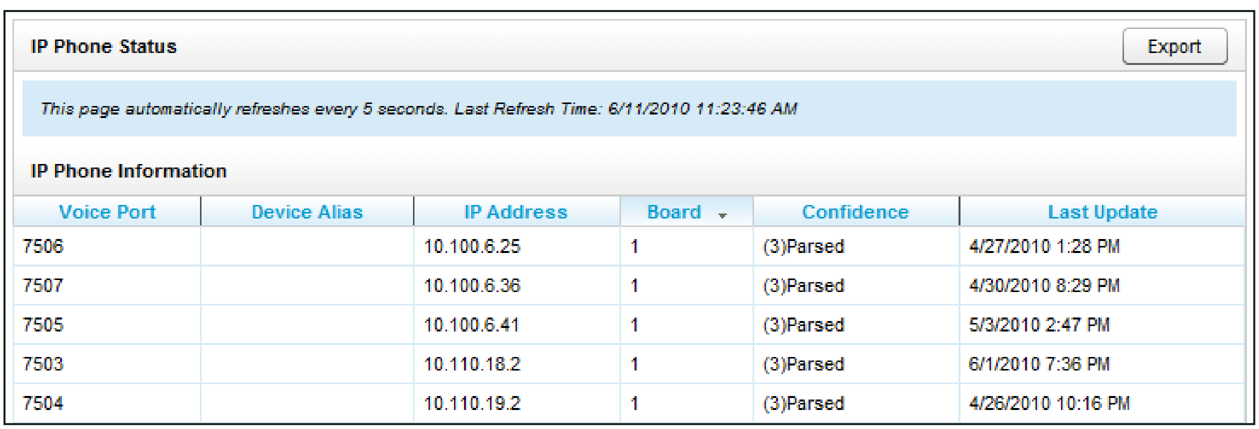
Date	User	Time In System
03/01/2011	Administrator	23:55:59
03/02/2011	Administrator	24:00:00
03/03/2011	Administrator	24:00:00
03/04/2011	Administrator	24:00:00
03/05/2011	Administrator	24:00:00
03/06/2011	Administrator	24:00:00
03/07/2011	Administrator	24:00:00
03/08/2011	Administrator	24:00:00
03/09/2011	Administrator	24:00:00
03/10/2011	Administrator	11:26:13
03/10/2011	Barry Knack	00:01:34
03/10/2011	Beki Nowlan	00:01:34
	Total:	**11:27:21**
03/28/2011	Administrator	01:16:43
03/28/2011	Barry Knack	01:28:18
03/28/2011	Beki Nowlan	02:57:43
03/28/2011	CALLCOPY USER	00:02:33
	Total:	**05:42:17**

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

IP Phone Status

The **IP Phone Status** report shows the status of all IP phones detected on the network for passive VoIP integrations. The report 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 Discover's certainty that the voice port is actually assigned to the IP address. Confidence can be:

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


IP Phone Status

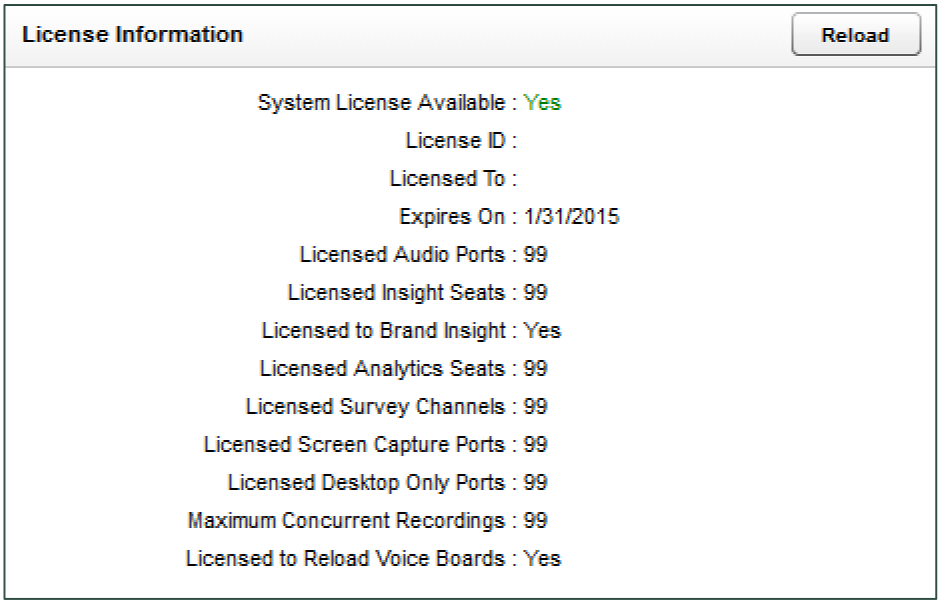
Export

This page automatically refreshes every 5 seconds. Last Refresh Time: 6/11/2010 11:23:46 AM

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

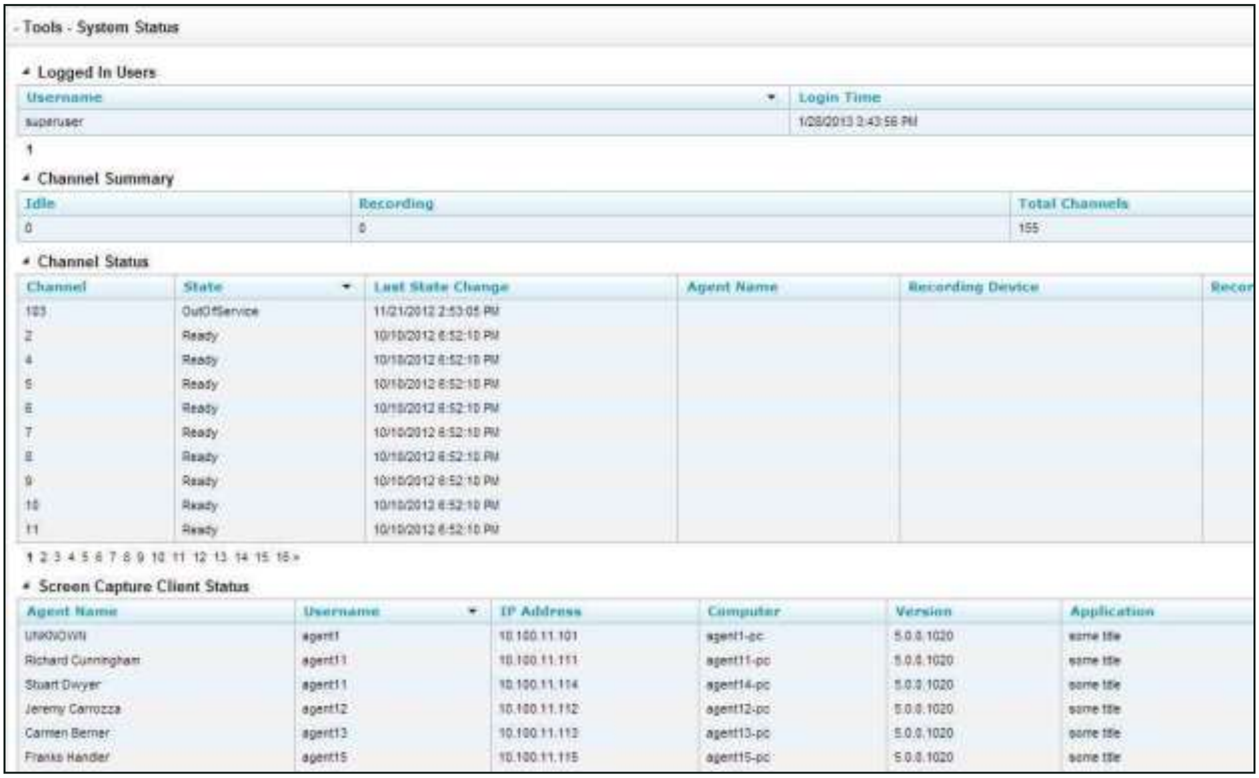


The **License Information** report shows in real time whether the system is currently licensed for recording and other features. It displays the License ID number, the expiration date (if applicable), and the number of channels for which the system is licensed for each feature.

> **Note:** The "Licensed Insight Seats" and "Licensed to Brand Insight" items refer to an Uptivity Discover 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



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.

> **Note:** 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

This page automatically refreshes every 5 seconds. Last Refresh Time: 10/22/2013 11:06:12 AM

Completed Records

Identity	Source	Destination	Queued Time	Last Update Time
5279	F:\CallCopy\Recordings\20131009\3602\3602-08-59-39.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

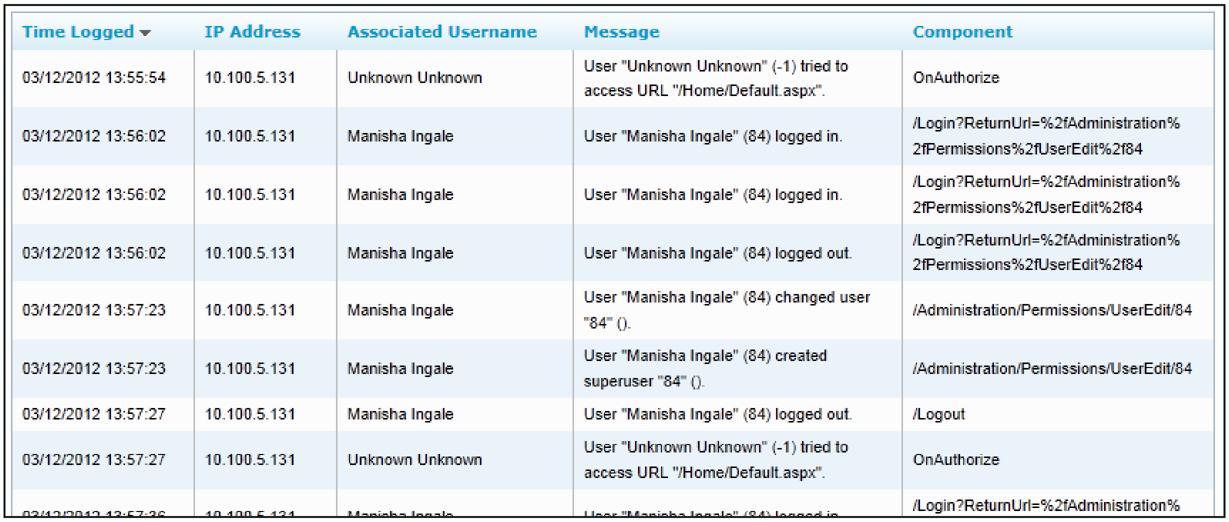
Failed Records

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\7546-18-53-38.cca	F:\Recordings\VoIP\20130703\7546\7546-18-53-38.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
[illegible]	[illegible]	[illegible]	[illegible]	/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 a Discover 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 Discover systems as objects with ID numbers. Some event types (e.g. Call Playback) can therefore include this number as a criterion, and you can enter it in the open-entry text box. Other event types (e.g. Login or Changed Password) will not have any related objects.

- **Message Text 1/2/3:** Enter search criteria in the open-entry text box. 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).

Ad Hoc Reports

About 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. Up to ten users can simultaneously use the ad hoc reporting feature in Discover.

Benefits of this feature include:

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

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 Discover deployment team or after deployment by Uptivity Discover Support. A warning message is displayed when results exceed this limit. There is also a 30-second time-out in the report builder.

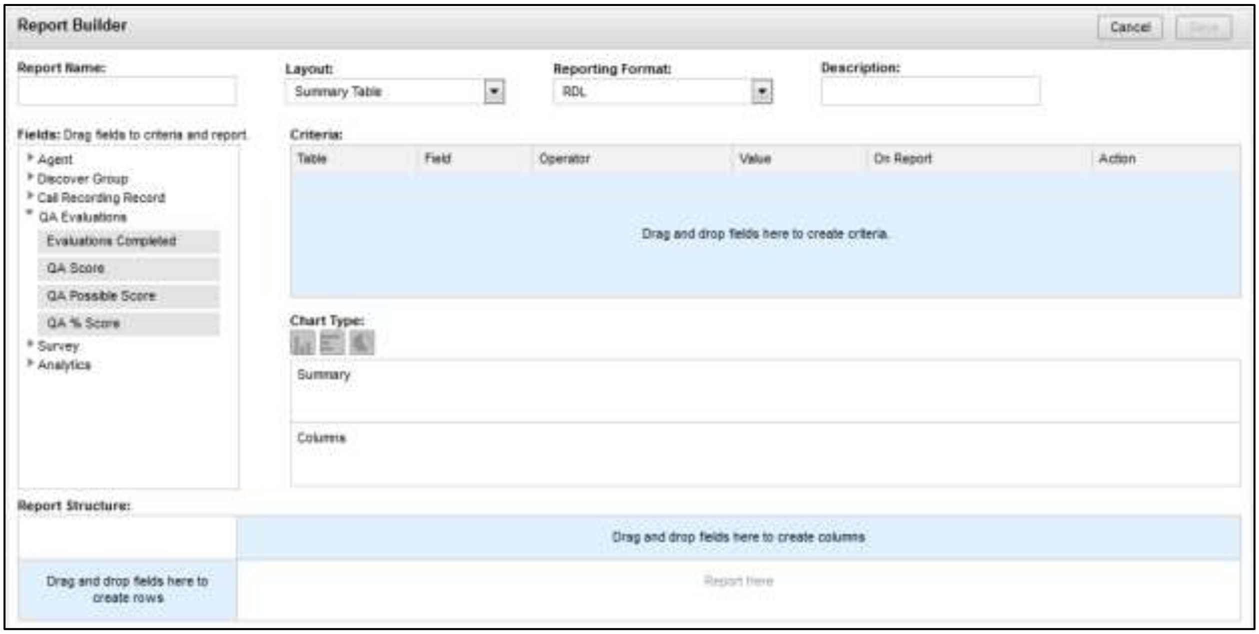
These safeguards prevent you from generating reports that would bog down the system when requesting large amounts of data. If the retrieved information is incomplete, try redefining search criteria or redesigning the report. There is no time-out associated with report rendering.

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 Discover 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 Discover 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 (i.e., middle management), not a standard supervisor or QA analyst.

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

About the 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 (e.g., 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.

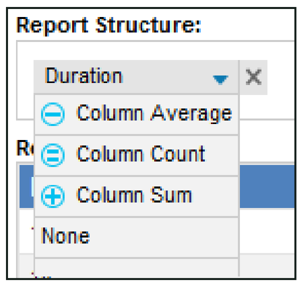
The procedure for building an ad hoc report is the same for each report category. For example, a call recording ad hoc report is built using the same steps as those for creating a QA ad hoc report.

To build a new report, see Create a New Ad Hoc Report. To edit an existing report, see Edit Existing Ad Hoc Reports.

About 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.

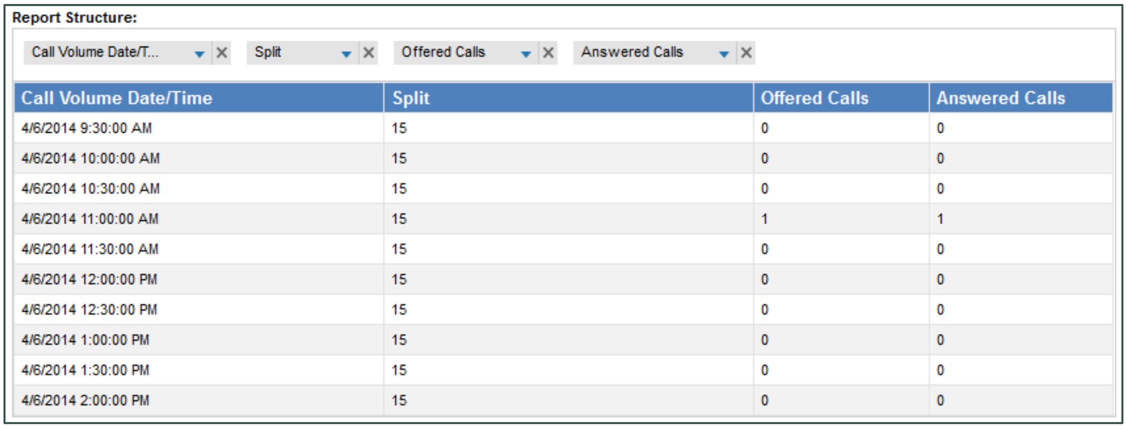
Reports are built by dragging fields from the **Fields** area to the **Report Structure** and/or **Criteria** areas. If your organization uses custom field names, these names will be shown in the Report Builder. However, changes to these names on the **Terminology** page will not appear in the ad hoc reporting pages immediately. The Discover 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 About Chart Types in Ad Hoc Reports).

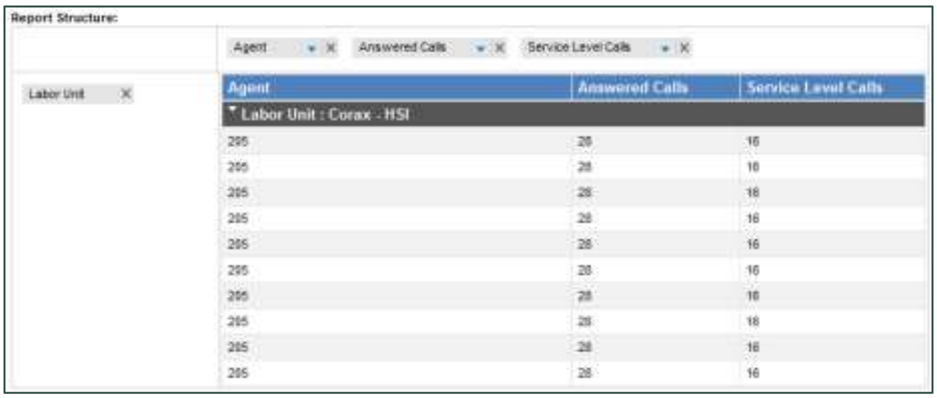
In the Report Structure area, you can't duplicate fields within the row or column areas. However, you can use the same field to create both a row and a column if appropriate.

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.



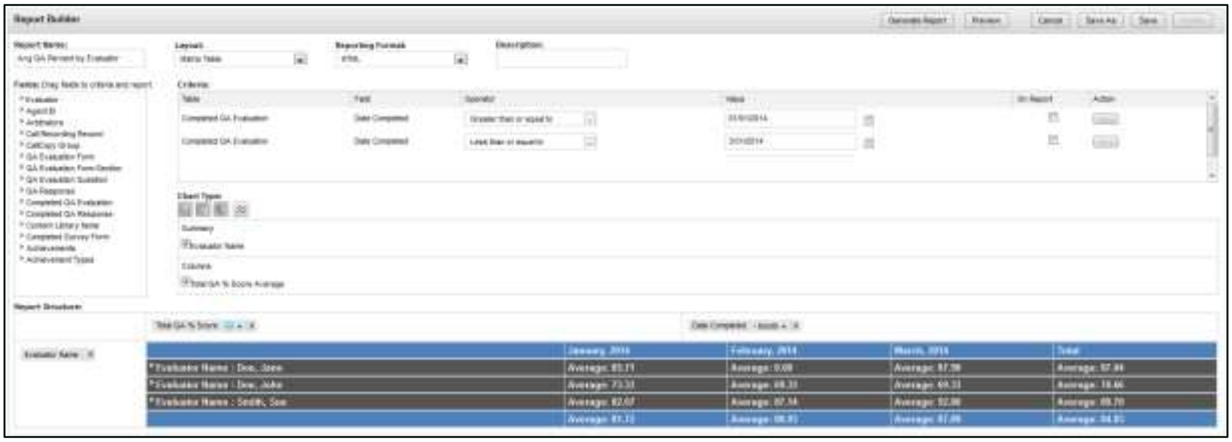
Call Volume Date/Time	Split	Offered Calls	Answered Calls
4/6/2014 9:30:00 AM	15	0	0
4/6/2014 10:00:00 AM	15	0	0
4/6/2014 10:30:00 AM	15	0	0
4/6/2014 11:00:00 AM	15	1	1
4/6/2014 11:30:00 AM	15	0	0
4/6/2014 12:00:00 PM	15	0	0
4/6/2014 12:30:00 PM	15	0	0
4/6/2014 1:00:00 PM	15	0	0
4/6/2014 1:30:00 PM	15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

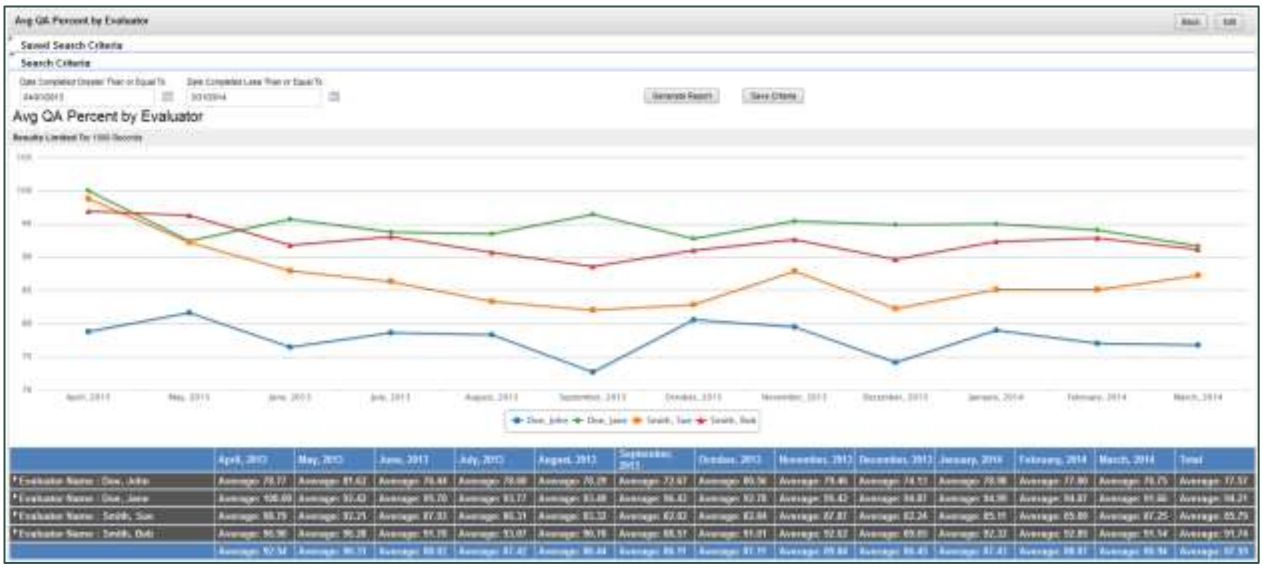
Simple Tables are basic, list-style reports displaying a single row of fields in the Structure area. Columns can be rearranged by dragging fields left and right. Charts are not supported.



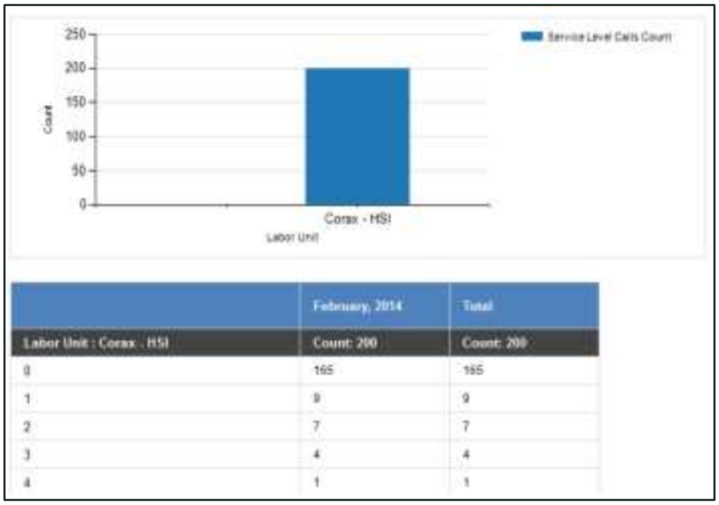
Agent	Answered Calls	Service Level Calls
Labor Unit : Corax - HSI		
285	28	16
285	28	16
285	28	16
285	28	16
285	28	16
285	28	16
285	28	16
285	28	16
285	28	16
285	28	16

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.

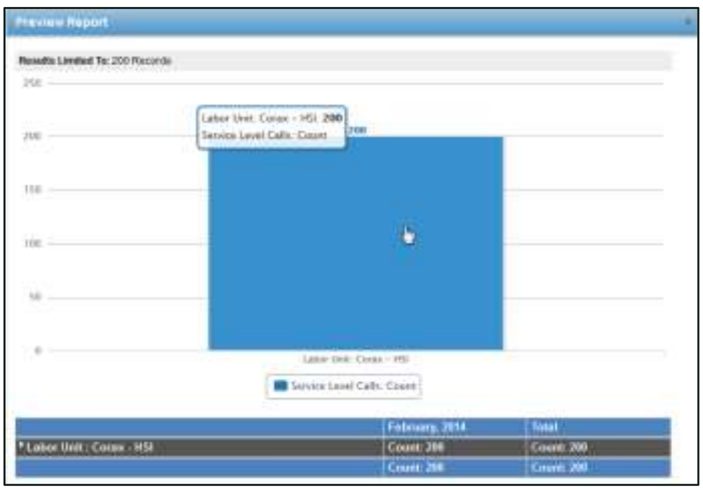




Matrix Tables measure one or more pieces of information across a period of time. Fields controlling the information to be measured and the time range are displayed in the Columns area, and are limited to one field in each area per report. Fields that control grouping of that information are displayed 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.

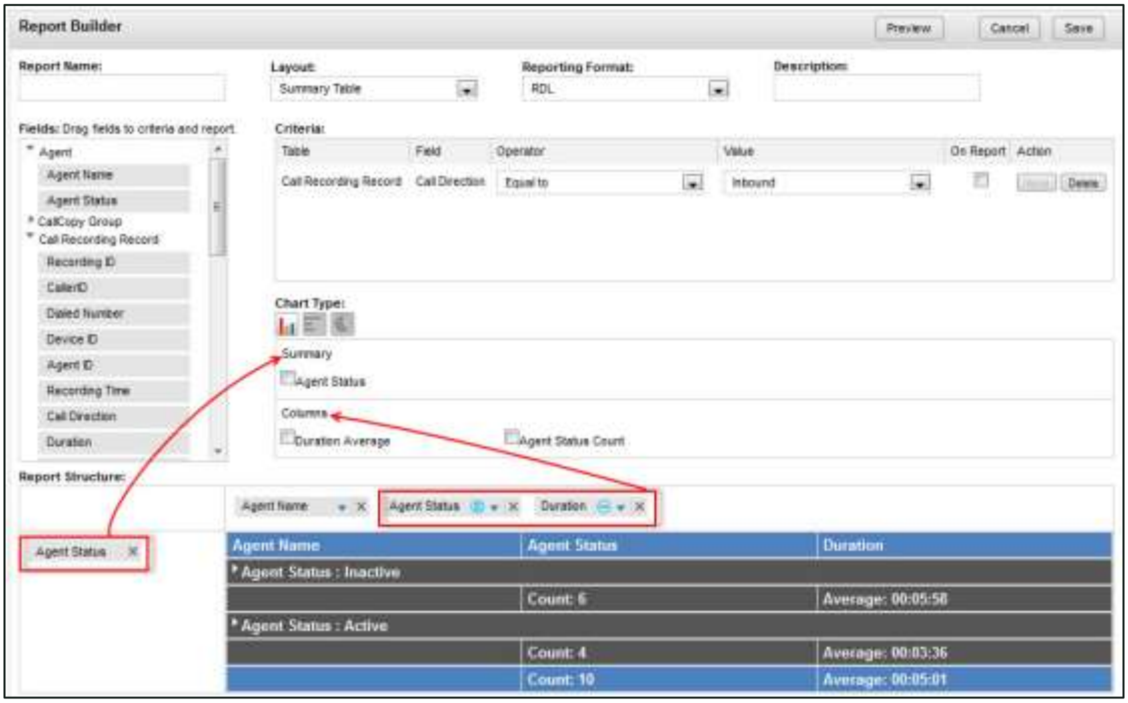


The **RDL** report format works with Microsoft SQL Reporting Services and provides export formats of PDF, Microsoft Word, or Microsoft Excel files. Charts are simply laid out, displaying all the information in a non-interactive way. Large reports with pagination can be created. Categories and groupings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

About 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.

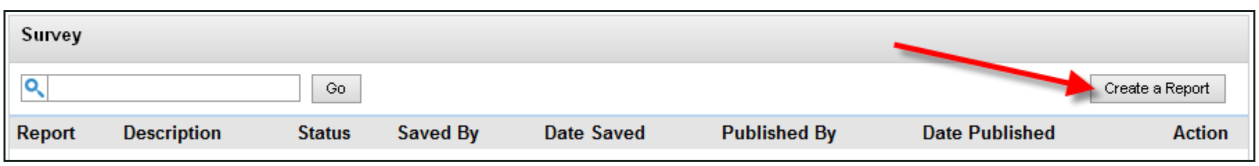
About the Ad Hoc Report List

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.

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 the report's **Delete** button. Deleting a report removes the saved report and all saved search criteria for the report.

Create a New Ad Hoc Report



To create a new report:

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. See About Ad Hoc Report Structure for more information.

6. Choose a **Reporting Format** from the drop-down list. See About Ad Hoc Report Structure for more information.
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 if desired. For related information, see About Ad Hoc Report Structure.
9. Drag any desired fields to the **Criteria** section, select an operator and enter a value. For related information, see About Ad Hoc Report Structure.
10. Set **Chart Type** options if desired. For related information, see About Chart Types in Ad Hoc Reports.
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 of the report.

If you choose to **Save** the existing report, Discover 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 any desired changes to the report. For related information, see About the 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 (e.g., 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. You can 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 Working with Reports.

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 box to this effect.

To publish an ad hoc report:

1. Click the **Reporting** tab in the Discover Web Portal 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**.

About Discover Ad Hoc Report Types

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.

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

Analytic Tag Group

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

Analytic Tag

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

Analytic Speech Tag

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

Analytic Recording Tags

- **Tag Text:** Enter search criteria in the open-entry text box.
- **Seconds from Start:** Indicates when a text tag starts. Enter search criteria in the open-entry text box; numeric values only.
- **Seconds from End:** Indicates when a text tag ends. Enter search criteria in the open-entry text box; numeric values only.
- **Audio Channel:** Allows for speaker separation when audio is provided in separate channel streams. Only available in certain integrations.

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

Call Recording

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

Agent

- **Agent Name:** Reports display as Last Name, First Name. Enter search criteria in the open-entry text box.
- **Phone ID:** This is the physical device. Enter search criteria in the open-entry text box.

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

Audio Information

- **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. Enter search criteria in the open-entry text box as number of seconds; whole number values only.
- **Audio Info Stop:** Indicates when an audio information type stops. Enter search criteria in the open-entry text box as number of seconds; whole number values only.

Derived Audio Tags

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

Audit 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

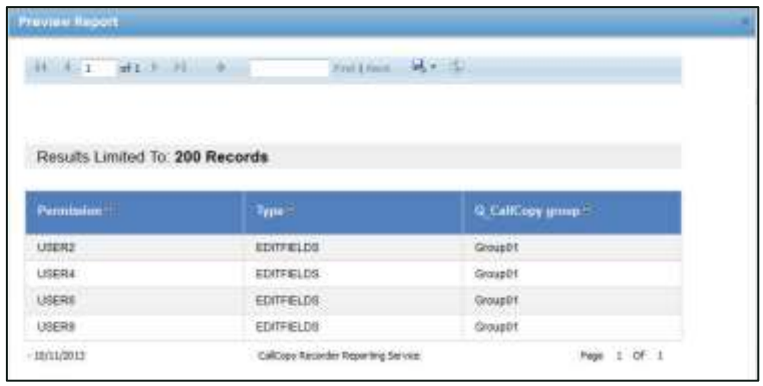
- **Last, First Name:** Enter search criteria in the open-entry text box (e.g. Pond, Amelia).
- **Username:** Enter search criteria in the open-entry text box in the format used in your system (e.g. apond).
- **Superuser:** Reports display as Yes or No. Select search criteria from the drop-down list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

Role

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

Permission

To see a complete list of possible values for either of the fields in this section, drag the **Permission** and/or **Type** fields to the Report Structure area and click **Preview**. Some of 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 Discover Administration Manual*.

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

Group

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

Audit Trail

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

  Note: Audit messages consist of one to three parts. Each part contains different text. After a list of events is retrieved, review the messages to find which events are useful. Pick the appropriate 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.

> **Note:** Users who have permission to view their own calls in the Call List will be able to see the QA and Survey scores for those calls, even if they do not have QA or Survey permissions.

Agent ID

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

Group

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

Call Recording Record

- **Recording ID:** Enter search criteria in the open-entry text box; numeric values only.
- **Caller ID (ANI):** This is an inbound caller's number. Enter search criteria in the open-entry text box.
- **Called Number (DNIS):** This is the outbound called number. Enter search criteria in the open-entry text box.
- **Device/Port ID:** "Hardware" identifier in your ACD/PBX (for example, Position ID, Phone Port, DN, or Extension). Enter search criteria in the open-entry text box.
- **Agent Number (Device Alias):** Agent-associated identifier in your ACD/PBX (for example, extension, agentID, etc.). Enter search criteria in the open-entry text box
- **Recording Time:** This is the date/time the recording occurred. Click on calendar icon to enter search criteria using date selector.
- **Call Direction:** Reports display as Inbound or Outbound. Select search criteria from the drop-down list 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:** Group setting in your ACD/PBX (for example: Hunt Group, Skill Group, or Labor Group). Enter search criteria in the open-entry text box.
- **ACD Gate:** Call gate or queue setting in your ACD/PBX (for example: Application, Split, Gate, etc.). Enter search criteria in the open-entry text box.
- **Total Hold Time:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **User1-15:** Names and values of these fields are defined in the Web Portal's **Terminology** page. For more information, see the *Uptivity Discover Administration Manual*.

QA Evaluations

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

Survey

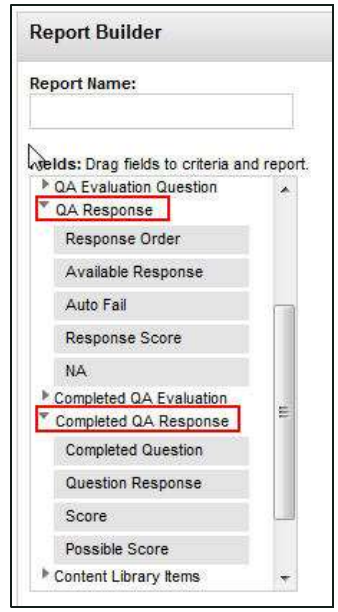
- **Survey Score:** Enter search criteria in the open-entry text box; whole numbers only.
- **Survey Possible Score:** Enter search criteria in the open-entry text box; whole numbers only.
- **Survey % Score:** Reports display scores calculated from Survey Score/Survey Possible Score. Enter search criteria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

Analytics

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

Quality Assurance 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 Forms, which is what the vast majority of our existing reports provide.

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

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

The following entities and fields are available for use in **Quality Assurance** ad hoc reports. If your 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. Enter search criteria in the open-entry text box.
- **Evaluator Status:** Reports display as Active or Inactive. Select search criteria from the drop-down list of these choices and All.

Agent

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

Arbitrator

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

Call Recording Record

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

Group

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

QA Evaluation Form

- **Form Name:** Enter search criteria in the open-entry text box.
- **Acknowledgment Required:** Reports display as Yes, No. Select search criteria from the drop-down list 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:** Enter search criteria in the open-entry text box; whole numbers only.
- **Section Name:** Enter search criteria in the open-entry text box.

QA Evaluation Question

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

QA Response

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

Completed QA Evaluation

- **Evaluation ID:** Enter search criteria in the open-entry text box; numeric values only.
- **Date Completed:** Click on calendar icon to enter search criteria using date selector.
- **Total Form Possible Score:** Enter search criteria in the open-entry text box; numeric values only.
- **Total Actual Score:** Enter search criteria in the open-entry text box; numeric values only.
- **Total QA % Score:** Reports display scores calculated from QA Score/QA Possible Score. Enter search criteria in the open-entry text box; numeric values up to two decimal places (e.g. 75.36).
- **Acknowledgment Status:** Reports display as Unacknowledged or Acknowledged. Select search criteria from the drop-down list of these choices and All.

- **Notes:** Enter search criteria in the open-entry text box.
- **Score Changes:** This is the number of times an evaluation score has been changed. Enter search criteria in the open-entry text box; whole numbers only.
- **QA Status:** Reports display as Completed, In Progress, Question or Dispute. Select search criteria from the drop-down list 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. Enter search criteria in the open-entry text box; numeric values only.
- **Questioned Count:** This is the number of times an agent questioned an evaluation comment or score. Enter search criteria in the open-entry text box; numeric values only.

Completed QA Response

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

Content Library Items

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

Completed Survey Form

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

- **Survey Name:** Enter search criteria in the open-entry text box.
- **Status:** Reports display as Not Started, Complete, Incomplete or Taken. Select search criteria from the drop-down list of these choices and All.
- **Completed Survey ID:** Enter search criteria in the open-entry text box; numeric values only.

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

Achievements

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

Achievement Types

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

Question

- **Question:** Enter search criteria in the open-entry text box.
- **Question Type:** Reports display Present Question and Wait for Result, Collect Customer Information, Collect Digits, End Survey, Transfer, or Skip. Select search criteria from the drop-down list 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:** Enter search criteria in the open-entry text box; numeric values only.

Response

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

Completed Survey

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

Call Recording

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

Agent

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

About Clarity Ad Hoc Report Types

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

ACD Agent/Split Call Data

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

- **Split:** Enter search criteria in the open-entry text box.
- **Call Volume Date/Time:** Click on calendar icon to enter search criteria using date selector.
- **Interval Seconds:** This is the time interval for which data should be pulled. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).

- **Answered Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Hold Calls:** This is the number of calls that were placed on hold one or more times. Enter search criteria in the open-entry text box; whole number values only.
- **Ring Calls:** Enter search criteria in the open-entry text box; whole number values only.
- **Customer Seconds:** This is the talk time in seconds. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **Hold Seconds:** Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).
- **ACW Seconds:** This is time spent on after-call work. Enter search criteria in the open-entry text box as seconds (e.g. 3600 seconds = 1 hour).

ACD Agent Data

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

Skill

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

Labor Unit

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

User

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

Team

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

Service Level

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

Forecast Call Data

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

  Note: 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 (e.g. 150% is not a good result).

- **Split:** Enter search criteria (split or skill number) in the open-entry text box.
- **Forecasted Calls:** Enter search criteria in the open-entry text box; numeric values only.
- **Forecast Interval Seconds:** Enter search criteria in the open-entry text box; numeric values only.
- **Forecast Skill Name:** Enter 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:** Enter search criteria in the open-entry text box.
- **Date Created:** Click on calendar icon to enter search criteria using date selector.
- **Start Date:** Click on calendar icon to enter search criteria using date selector.
- **End Date:** Click on calendar icon to enter search criteria using date selector.
- **Leave Duration:** Reports display as HH:MM:SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.
- **Comment:** Enter search criteria in the open-entry text box.
- **Status:** 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:** Enter search criteria in the open-entry text box.

Agent

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

Team

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

Labor Unit

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

Skill

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

Shift Report Types

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

Shift

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

Labor Unit

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

Skill

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

Team

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

Sample Ad Hoc Reports

This section provides parameters for a variety of ad hoc reports, so as 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

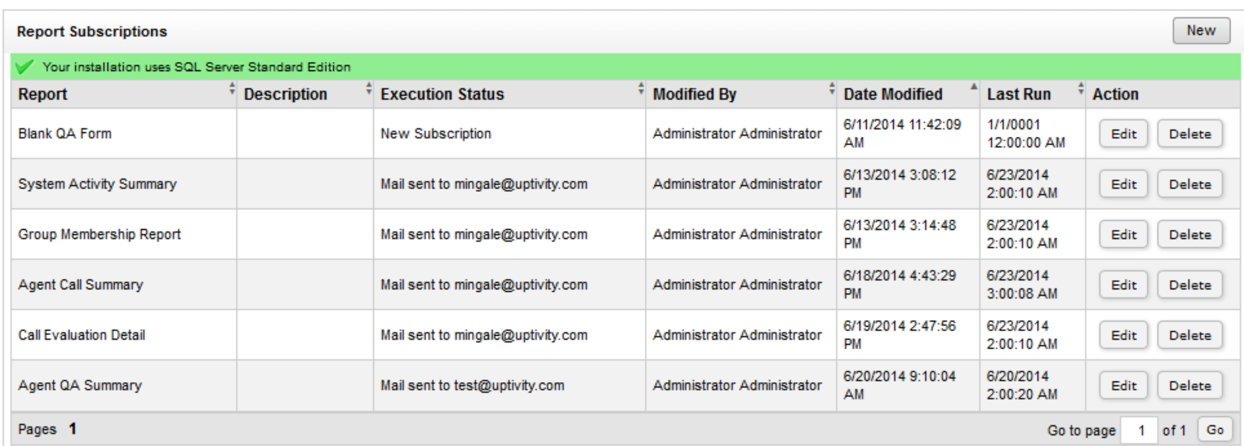
Report Tools

About Report Subscriptions

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 Discover administrator.

Report subscriptions use SQL Server Reporting Services (SSRS) and are limited by the edition of SQL (Standard or Express) used in your deployment.


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

Pages 1 Go to page 1 of 1 Go

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.

About 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 Discover (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 Discover:

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 Clarity:

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 Discover or Clarity.
2. Click the **New** button at the top-right corner of the page.
3. Choose a report from the **Select a Report** drop-down list.
4. Enter a custom title for your subscription in the **Description** field (required).
5. Select the Email 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 will also need to 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.

    Note: 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, enter email address(es) for primary recipient(s). Use a semi-colon to separate addresses.
2. In the **Cc:** and **Bcc:** boxes, enter email address(es) for secondary recipient(s). Use a semi-colon to separate addresses.
3. In the **Reply-To:** box, enter the email address to which recipients should respond if they have questions. This field is required.
4. In the **Subject** box, enter 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, enter 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 (e.g. Hourly Schedule, One-time Schedule, etc.).
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 the **Edit** button in the **Action** column for the desired subscription.
2. Edit the desired settings and then click the **Save** button.

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

About Shared Schedules

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 Discover administrator.

Load the Shared Schedules Page

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

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 Clarity:

1. Click the **Reports** tab and then click the **Tools** button.
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 Discover or Clarity.
2. Click the **New** button 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 the **Edit** button in the **Action** column for the desired schedule.
2. Edit the desired settings and then click the **Save** button.

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 the **Delete** button 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 the **Pause** button in the **Action** column for the desired schedule.

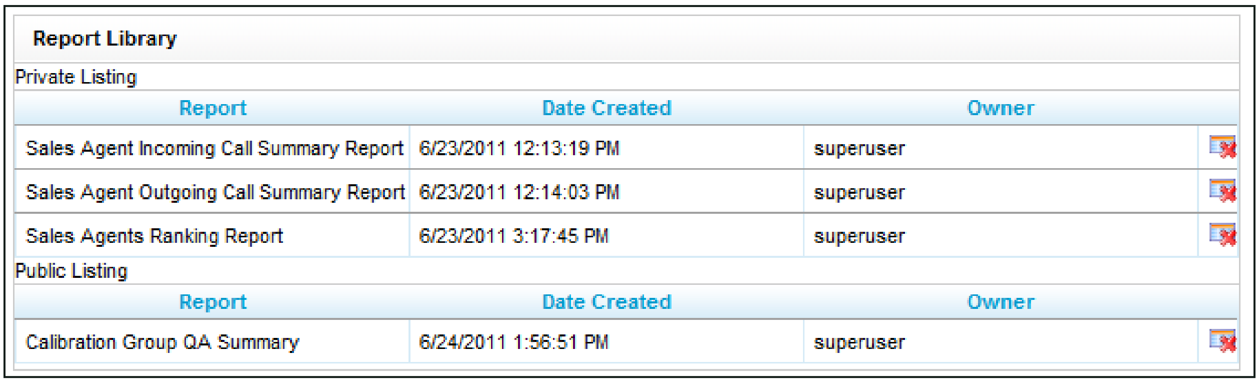
To resume running a **Shared Schedule** that has been paused, and has not expired:

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

About the Report Library

The **Report Library** is available only in Discover. 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.



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 release for this version	2015-02-13