



UPTIVITY DISCOVER WEB PLAYER MANUAL, V5.5.1

February 2015

www.incontact.com

UPTIVITY DISCOVER WEB PLAYER MANUAL, V5.5.1

Version: 5.5.1

Revision: February 2015

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.

Copyright: ©2015 inContact, Inc.

Disclaimer: inContact reserves the right to update or append this document, as needed.

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

Table of Contents

Introduction.....	9
Audience.....	9
Goals.....	9
Assumptions.....	9
Need-to-Knows.....	9
Web Portal Basics.....	11
Log In.....	11
Use the Forgot Password Feature.....	12
Locate Version Number.....	12
Navigate the Web Portal.....	13
Change Your Password.....	13
Log Out.....	13
Web Portal Home Tab.....	14
About Dashboards.....	14
Create Dashboards.....	15
Manage Dashboards.....	16
About the Assignment Inbox.....	17
New Assignments.....	17
Pending Assignments.....	18
Reviewed Assignments.....	18
Web Player Basics.....	19
About the Call List.....	19
Uptivity Discover Web Player Manual, v5.5.1	3

Use the Call List Filter Bar	19
About the Quick Filter Menu	20
About the Calendar Quick Filter	20
About the Agent Quick Filter	21
About the Discover Group Quick Filter	21
About the ACD Gate Quick Filter	21
About the ACD Group Quick Filter	22
About the Categories Quick Filter	22
Create a Category	22
Edit or Delete a Category	23
About the My Filters Quick Filter	23
Work with My Filters	24
About the Tag Cloud Quick Filter	25
Page Navigation Bar	26
About Call List Settings	27
Manage Your Call List Settings	29
About Web Player Settings	29
Manage Your Web Player Settings	29
Working with Call Records	30
Play a Call Recording	30
Flag a Call	30
Export a Call	31
Export the Call List	32

Evaluate a Call	32
View Completed Evaluations for a Call	33
View Completed Surveys for a Call	33
Bookmark a Call	33
Find Call Segments	34
Change Archive Options for a Call.....	34
Categorize Calls.....	35
Edit a Call Record	36
Copy Call Link	37
Delete Call.....	37
Working with Filters	39
Filter Options	39
Data Fields	39
Quality Management	42
Surveys	42
Date/Days of the Week	43
Duration.....	43
Data Comparison.....	44
Other Options	44
Create a Filter	44
Save a Filter	45
Access My Filters	45
Call Segments.....	46

Listening to Recordings	48
About the Web Player.....	48
About the Playback Details Panel.....	49
Waveform Display.....	49
Waveform Indicators	50
Play/Pause and Playback Speed	51
Interaction Timer.....	52
Volume Control	52
Bookmarks	52
Waveform Zoom.....	53
About the Layer Details Panel	54
About the Screen Capture Panel.....	55
About In-Call Bookmarking	56
Add Bookmarks	56
View Bookmarks.....	57
Edit or Delete Bookmarks.....	57
Live Monitoring	58
Live Monitor List.....	58
Manage Your Live Monitor List Settings	60
Quick Filter Agent List	60
Search for Agents	60
Monitor a Call.....	61
Screen View.....	64

Screen View Playback.....	64
Appendix: Discover WFO Home Tab Widgets	65
Achievement Widget	65
Permissions	66
Display	66
Configure the Achievements Widget.....	68
Assignment Inbox Widget	69
Permissions	69
Display	69
Forecasted vs. Actual Calls Widget	71
Permissions	71
Display	71
Configure the Forecasted vs. Actual Calls Widget	72
KPI Performance.....	72
Permissions	72
Display	72
Configure the KPI Performance Widget	73
Live Snapshot Widget.....	74
Permissions	74
Display	74
Configure the Live Snapshot Widget.....	75
News Widget.....	75
Permissions	75

Display	76
Configure the News Widget	76
Search News Items	76
Post News Item	77
QA Benchmark Widget.....	77
Permissions	78
Display	78
Configure the QA Benchmark Widget	79
Service Level Snapshot Widget	80
Permissions	80
Configure the Service Level Snapshot Widget	81
Document Revision History	82

Introduction

Audience

This document is designed for all users of Uptivity Discover WFO. It provides information and procedures for using the features accessed via the Discover Home and Web Player tabs. This functionality includes customizing the Home tab, locating and playing recordings, viewing associated data, and viewing agent audio and desktop activity in real time (also known as live monitoring).

Readers should have a basic level of familiarity with usage of a PC and its peripherals, the Windows operating system, and navigating in a web browser.

Goals

The goal of this document is to provide all knowledge, reference, and procedural information necessary to use basic Uptivity Discover features and functionality as part of your daily work. The document is NOT intended as a specific system or network design document, nor is it designed to educate the reader on contact center quality assurance 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 Quality Management Manual* contains general knowledge and procedures related to creating and managing agent evaluations in the Web Portal. It may prove a helpful reference to QA analysts, supervisors, and managers.

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.

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

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.

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

Web Portal Basics

The Uptivity Discover Web Portal is a series of Web pages that enable users to perform tasks. The Web Player is one page in the portal.

Log In

Your system administrator should provide you with the necessary information to log into the Discover Web Portal: username, initial password, possibly a login mode, and the URL or link to the portal. Your system may be set up to use your Windows network account or a Discover account, which your administrator should explain to you.

For security reasons, Discover does not support saving your username and/or password within your web browser. However, you can have Discover remember your username so you don't have to type it each time you login.

Discover passwords are case sensitive.

When you log into the Web Portal, Discover opens to the last page you accessed. The first time you log in, it opens to the Home tab.

To log in:

1. In a web browser, type the URL (hostname or IP address) of the site into your browser's address bar (for example, `http://discoverserver.yourcompany`).
2. Enter your Discover username and password.
3. If desired, select the **Remember my username?** check box and then click **Login**.

If your login fails, you will be presented with the following error: "An invalid username or password was used."

To attempt another login, you should:

- Verify that the Caps Lock is not on.
- Verify that you have the correct username, password, and login mode.

If you fail to log in after three or more attempts, you may be locked out of the system and have to contact the system administrator. Instead, after two login failures, use the Forgot Password feature if you have the appropriate permissions.

Use the Forgot Password Feature

Note: This feature does not work if your account has been locked due to login failures and/or you do not have the "Allow Password Changes" permission.

If necessary, you can use the Forgot Password feature on the login page. Your password will be reset and a temporary password will be emailed to you.

To use this feature:

1. Click **Forgot Password** on the login screen.
2. Enter your username and click **Submit**.

If the reset is successful, you will see the following message: "A new password has been generated and sent to your email address." Once you have logged into the system, you will be able to change your password.

If the reset fails, you will see this message: "User does not exist, or email address not available." If you do not have proper permissions, you will receive an email informing you of this. In either case, contact your Discover system administrator to resolve the issue.

Locate Version Number

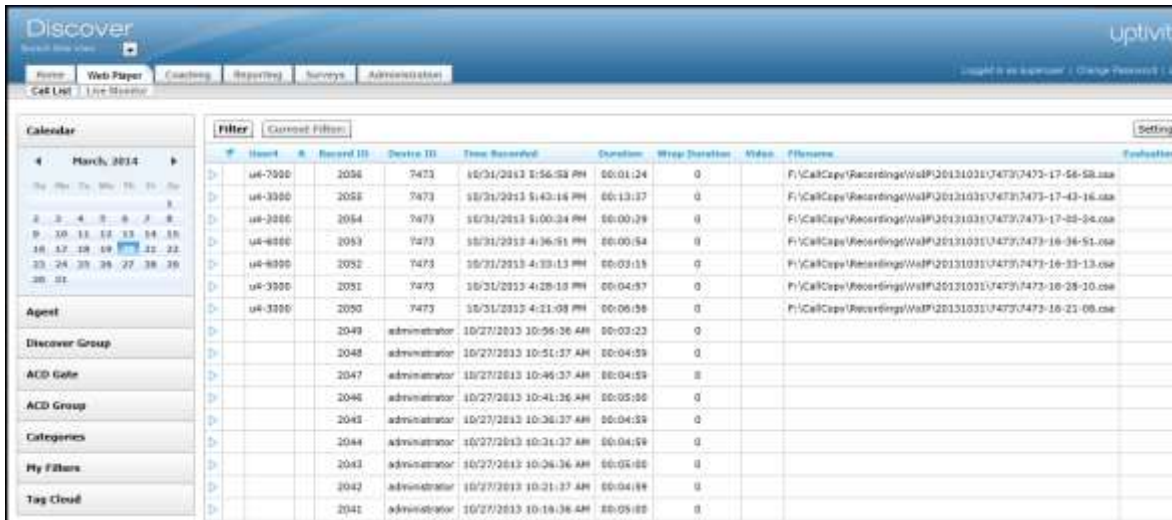
The version number for your Discover software appears in the upper-right corner of the login page. This version number can be useful for locating correct documentation for your software and obtaining support for your system.



Navigate the Web Portal

You can navigate the Web Portal via its tabs and menus. The tabs you see across the top of the portal window will depend on your security permissions and the Discover modules purchased and used by your organization.

Within a tab, the left navigation menu provides clickable access to page links, menu items, or other content. Only one item in the menu can be expanded at a time.



The screenshot displays the Discover Web Portal interface. At the top, there are navigation tabs: Home, Web Player, Coaching, Reporting, Surveys, and Administration. Below the tabs, there is a search bar and a user profile section. The main content area is divided into a left sidebar and a main table. The sidebar contains a calendar for March 2014, an Agent list, Discover Group, ACD Gate, ACD Group, Categories, My Filters, and Tag Cloud. The main table displays call records with columns: Heart, Record ID, Device ID, Time Recorded, Duration, Wrap Duration, Miss, File Name, and Evaluation. The table contains several rows of call data, including records for user-7000, user-3000, user-2000, user-8000, user-9000, user-3000, and user-3000, along with administrator records.

Heart	Record ID	Device ID	Time Recorded	Duration	Wrap Duration	Miss	File Name	Evaluation
▶	ua-7000	2036	7473	10/31/2013 1:56:53 PM	00:01:24	0	F:\CallCops\Recordings\WaP\20131031\7473\7473-17-56-53.mca	
▶	ua-3000	2058	7473	10/31/2013 5:43:14 PM	00:13:37	0	F:\CallCops\Recordings\WaP\20131031\7473\7473-17-43-14.mca	
▶	ua-2000	2054	7473	10/31/2013 5:00:34 PM	00:00:29	0	F:\CallCops\Recordings\WaP\20131031\7473\7473-17-00-34.mca	
▶	ua-8000	2053	7473	10/31/2013 4:36:51 PM	00:00:54	0	F:\CallCops\Recordings\WaP\20131031\7473\7473-16-36-51.mca	
▶	ua-9000	2052	7473	10/31/2013 4:33:13 PM	00:03:13	0	F:\CallCops\Recordings\WaP\20131031\7473\7473-16-33-13.mca	
▶	ua-3000	2051	7473	10/31/2013 4:28:10 PM	00:04:57	0	F:\CallCops\Recordings\WaP\20131031\7473\7473-16-28-10.mca	
▶	ua-3000	2050	7473	10/31/2013 4:21:09 PM	00:06:58	0	F:\CallCops\Recordings\WaP\20131031\7473\7473-16-21-09.mca	
▶		2049	administrator	10/27/2013 10:55:26 AM	00:03:23	0		
▶		2048	administrator	10/27/2013 10:51:37 AM	00:04:59	0		
▶		2047	administrator	10/27/2013 10:46:37 AM	00:04:59	0		
▶		2046	administrator	10/27/2013 10:41:26 AM	00:05:00	0		
▶		2045	administrator	10/27/2013 10:36:37 AM	00:04:59	0		
▶		2044	administrator	10/27/2013 10:31:37 AM	00:04:59	0		
▶		2043	administrator	10/27/2013 10:26:36 AM	00:05:00	0		
▶		2042	administrator	10/27/2013 10:21:37 AM	00:04:59	0		
▶		2041	administrator	10/27/2013 10:16:36 AM	00:05:00	0		

Change Your Password

Note: You must have the "Allow Password Changes" permission.

To change your password:

1. Click **Change Password** in the upper right-hand corner of every page.
2. On the Change Password screen, enter a new password, and then retype the password in the **Confirm New Password** field.
3. Click **Save**.

Log Out

Once you have completed your session, it is very important to log out for security purposes. To log out:

- Click **Logout** located at the top-right of every page

Web Portal Home Tab

All users have access to the Home tab and the two items in its left navigation menu: Dashboard and Assignment Inbox. The content visible in these items depends on your permissions, group memberships and the products licensed and used by your organization.

About Dashboards

Discover Dashboards are part of the basic Discover software installation. This feature includes a variety of widgets that display news, QA-related information, call center performance metrics, and more. Based on your permissions and the widgets your Discover administrator makes available, you can select those widgets you want to display on your Discover Home tab dashboard. You can also create new dashboards.

Benefits of Discover Dashboards include:

- Live feeds and performance metrics offer better awareness of performance against KPIs.
- Goal-oriented self-management allows agents to better prioritize duties and tasks.
- Near real-time data feeds allow supervisors, managers, etc., to manage more effectively.
- Managers or executives can manage utilization and quality, and push communication to staff.
- Widgets offer drill-down capabilities to provide users with additional insights.

For additional information on available widgets and how to configure them, see [Appendix: Discover WFO Home Tab Widgets](#). You can display the same widget multiple times on the same dashboard. For example, you might want to configure one version of the QA Benchmark widget to show your performance compared to your Discover Group, and another version to show your performance based on a specific QA evaluation form. A maximum of 10 widgets can be displayed per dashboard (this is a browser performance constraint).

Widgets pull information from different products, such as Uptivity Clarity WFM and Uptivity Speech Analytics. Not all widgets may apply to your system.

Create Dashboards

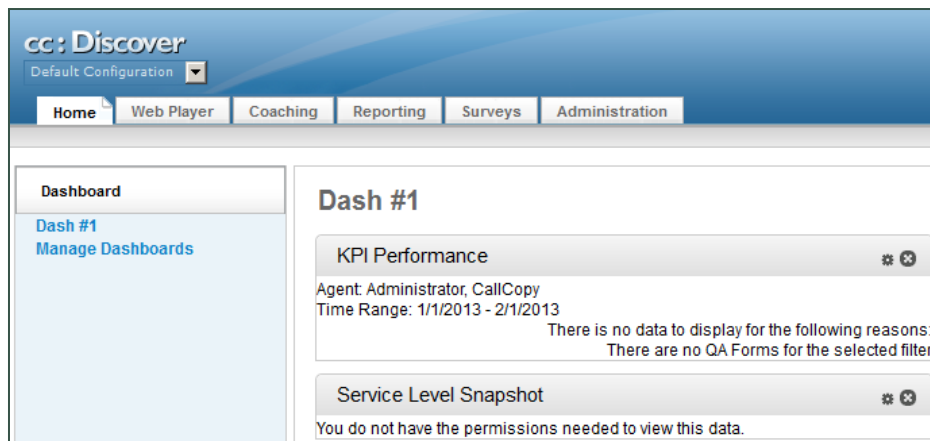
The screenshot shows the 'Add New Dashboard' interface. It features a title bar with an 'Add New Dashboard' button. Below the title, there are input fields for 'Name' and 'Description'. The 'Add widget:' section contains two scrollable lists. The left list has checkboxes next to the following widget names: News, Forecast vs. Actual, KPI Performance, Live Snapshot, Service Level Snapshot, Assignment Inbox, QA Benchmark, and Achievement. Between the lists are 'Add' and 'Remove' buttons. At the bottom, there is a radio button for 'Set this as your default dashboard' with 'Yes' and 'No' options, and 'OK' or 'Cancel' buttons.

To create a new dashboard:

1. Click the **Home** tab in the Discover Web Portal and expand **Dashboard** in the left navigation menu.
2. Click **Manage Dashboards** and then click **Add New Dashboard**.
3. Enter a unique **Name** (25 characters max) and **Description** (200 characters max).
4. Select the check boxes next to the widgets you want to display on the dashboard and then click **Add**.
5. **Set this as your default dashboard** if desired and then click **OK**.

Note: If you view another dashboard, the default setting is overwritten. When you log in again, the last dashboard viewed is displayed.

Manage Dashboards



Dashboards are listed alphabetically with numbers first. You can create an unlimited number of different dashboards. Within a dashboard, you can drag displayed widgets to rearrange them as needed, and they will retain the specified order across subsequent logins. The last dashboard selected persists when you switch tabs.

To access your dashboards:

1. Click the **Home** tab in the Discover Web Portal and expand **Dashboard** in the left navigation menu.
2. Click on the desired dashboard to display it.

Alternative: Click **Manage Dashboards** and then click **View** for the desired dashboard.

To edit or delete a dashboard:

1. Click the **Home** tab in the Discover Web Portal and expand **Dashboard** in the left navigation menu.
2. Click **Manage Dashboards**.
3. To edit the dashboard, click **Edit** for the desired dashboard, make any desired changes, and then click **Update**. To delete the dashboard, click **Delete** for the desired dashboard and then click **Yes**.

About the Assignment Inbox

The Home tab's Assignment Inbox enables supervisors to distribute evaluations and documents (e.g., training material and announcements) to Discover users. See the *Uptivity Discover Quality Management Manual* for additional information on:

- **Content Library:** Distributing items by adding content via the Coaching tab's Manage Content menu and assigning the content to groups.
- **QA Review Process:** Question and dispute actions involving evaluations in the Assignments Inbox.

Tip: Distributing Discover manuals to appropriate users via the Content Library ensures that users always have access to the manuals when they are in the application, and can reduce the number of questions to system administrators.

New Assignments

The New Assignments page shows documents that have been assigned to your groups but that you have not yet viewed. When you have new assignments, an envelope icon appears at the top of the portal. Clicking the letter icon opens the New Assignments list.

This information is assigned when the document is added to the Content Library:

- **Actions:** After you open documents, you can click **Done** in this column to report that you have reviewed and acknowledge the assignment, and to move it to the **Reviewed Assignments** section. The Done button is grayed out until you open and review the assignment. If **File Not Found** appears in the column, the assignment has been deleted, moved, or renamed in the database. Contact your supervisor to reload the assignment.
- **Title:** This is the title an administrator gave to the document.
- **Type:** A check mark appears for QA evaluations. A white square appears for all other documents. No special permissions are required for acknowledging QA evaluations, but to view, edit, or delete them, there are specific coaching permissions necessary. Refer to the *Uptivity Discover WFO Administration Manual* for more information on these permissions. For related information, refer to the "QA Dispute Process" section in the *Uptivity Discover Quality Management Manual*.
- **Assigned Date:** Date that a supervisor assigned the document to a group.
- **Priority:** Assigned by supervisor for agent to know how soon a document should be reviewed. Can be Low, Normal, or High.

- **Doc Type:** File type (e.g., Excel, Word, PDF, etc.)
- **Size:** File size
- **Duration:** Estimated length of time (hours:minutes:seconds) needed to review the document.
- **Assigned by:** Name of the user who assigned the document to a group.

Clicking on an assigned file opens it in a separate window or tab, depending on the file type. To confirm that a file has been reviewed, click **Done** on its entry. The entry is removed from New Assignments and now appears in Reviewed Assignments.

Pending Assignments

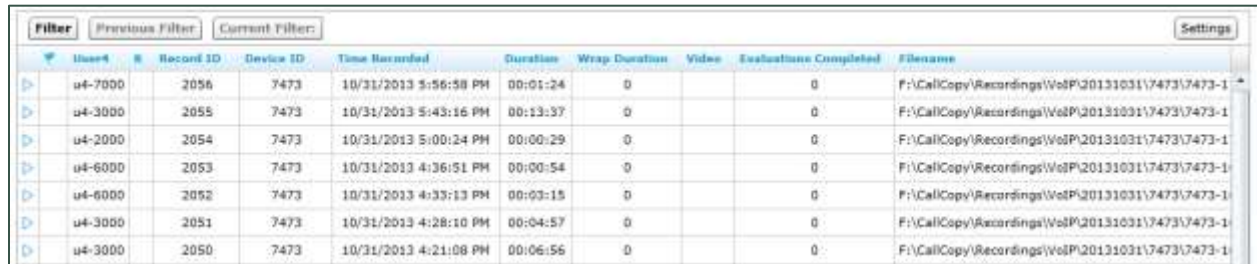
When an agent reviews an evaluation and questions or disputes it, the evaluation's status changes to Question or Dispute, respectively, and it moves from the New Assignments page to the Pending Assignments page. The status change is reflected when performing a search under the Coaching tab on the Search QA Acknowledgments page. The current number of pending assignments appears next to the link in the navigation pane. Items in the pending assignments list are sorted alphabetically by title, then by assigned date, oldest to newest. For more information, refer to the "QA Dispute Process" section in the *Uptivity Discover Quality Management Manual*.

Reviewed Assignments

Items remain in this list for you to review until they are deleted from the Content Library by an administrator (documents) or by an evaluator (evaluations).

Web Player Basics

About the Call List



User ID	Record ID	Device ID	Time Recorded	Duration	Wrap Duration	Video	Evaluations Completed	Filename
u4-7000	2056	7473	10/31/2013 5:56:58 PM	00:01:24	0		0	F:\CallCopy\Recordings\VolP\20131031\7473\7473-1
u4-3000	2055	7473	10/31/2013 5:43:16 PM	00:13:37	0		0	F:\CallCopy\Recordings\VolP\20131031\7473\7473-1
u4-2000	2054	7473	10/31/2013 5:00:24 PM	00:00:29	0		0	F:\CallCopy\Recordings\VolP\20131031\7473\7473-1
u4-6000	2053	7473	10/31/2013 4:36:51 PM	00:00:54	0		0	F:\CallCopy\Recordings\VolP\20131031\7473\7473-1
u4-6000	2052	7473	10/31/2013 4:33:13 PM	00:03:15	0		0	F:\CallCopy\Recordings\VolP\20131031\7473\7473-1
u4-3000	2051	7473	10/31/2013 4:28:10 PM	00:04:57	0		0	F:\CallCopy\Recordings\VolP\20131031\7473\7473-1
u4-3000	2050	7473	10/31/2013 4:21:08 PM	00:06:56	0		0	F:\CallCopy\Recordings\VolP\20131031\7473\7473-1

The Web Player tab displays the Call List, where you can search for and review recorded calls. You can customize the way your Call List looks. For example, you can click a column header and drag it to the left or right. You can also sort records (Low to High, High to Low, A to Z, Z to A) by clicking the column header and then clicking the up or down arrows that appear. You can also choose which columns are displayed.

You are the only one affected by these changes, and Discover will remember your configuration and display the Call List the same way the next time you log in. For related information, and an explanation of each column in the Call List, see [About Call List Settings](#).

Use the Call List Filter Bar

At the top of the Call List is a Filter Bar which shows the current filter. This example shows filtering by a specific agent.



To see the settings currently associated with a filter item:

- Hover over the item in the Filter Bar.

To remove a filter item from the current filter:

- Click the close icon **X** on that filter item's label.

To reapply the last filter used:

- Click **Previous Filter**.

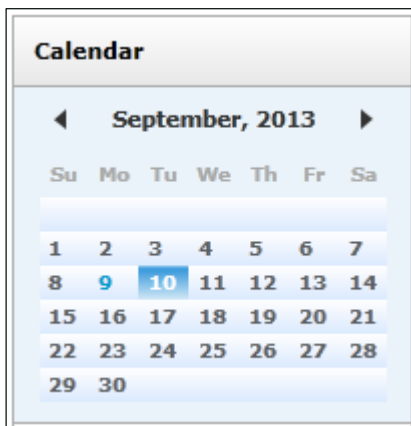
Leaving the Web Player screen clears the Previous Filter setting. When you return to the Web Player, your default filter will be displayed and Previous Filter will be grayed out.

Removing all filters displays all call recordings in the system. This can cause performance issues, especially if there are a lot of calls in your system.

About the Quick Filter Menu

On the Web Player tab, the left navigation menu serves a special purpose as the Quick Filter menu. This menu provides shortcuts for locating specific calls in the system. The available Quick Filters depend on your recording integration and settings configured by your application and/or system administrator.

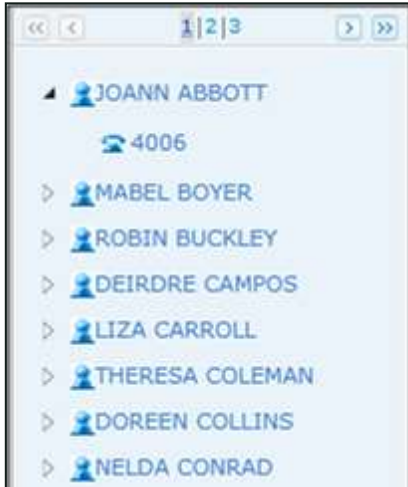
About the Calendar Quick Filter



The Calendar Quick Filter allows you to select and display records from a specific date. Dates with available records appear in blue, while dates without records are gray. The currently-selected date is highlighted. Each date is selectable, and you can move between months by using the arrow icons to the left and right of the Month and Year display.

You can use the Calendar Quick Filter in combination with a second Quick Filter. First, use a Quick Filter to select an agent, group, or category. Then click the Calendar menu and a specific date to narrow the search results. For details on applying multiple-criteria filter to the Call List, see [Working with Filters](#).

About the Agent Quick Filter

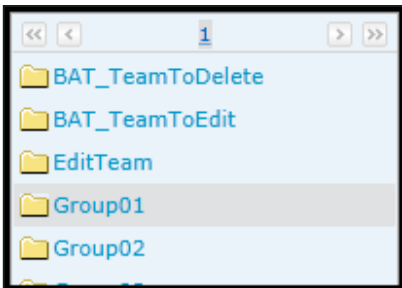


The Agent Quick Filter displays the list of agents to whom you have access. You can select an agent to display records for only that agent. This filtering is based on the Discover Agent ID field and not on the agent's name.

If an agent is configured for multiple phone extensions or login numbers, you can select and filter records for the individual identifier by clicking the triangle icon next to the agent icon.

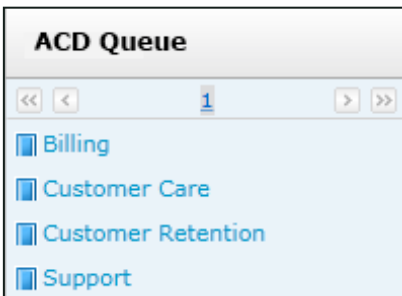
Only current extensions specified on the user account appear. If the agent had other extensions in the past, those extensions remain on the call record, but you cannot filter for them.

About the Discover Group Quick Filter



The Discover Group Quick Filter displays the Discover Groups to whom you have access. Discover Groups are collections of users that your application administrator has defined in a way that makes sense for your organization. Selecting a group displays records for agents that are members of that group.

About the ACD Gate Quick Filter



This list populates depending on the recording integration and telephony equipment setup. If available, values such as Queue or Gate can be listed by name or number. Selecting an item from this list would filter the Call List to only display calls that were delivered to selected queues or gates that you have permission to view.

About the ACD Group Quick Filter



This list populates depending on the recording integration and information configured on the telephony equipment. For example, values such as Hunt or Skill group, if available, can be listed by name or number.

About the Categories Quick Filter



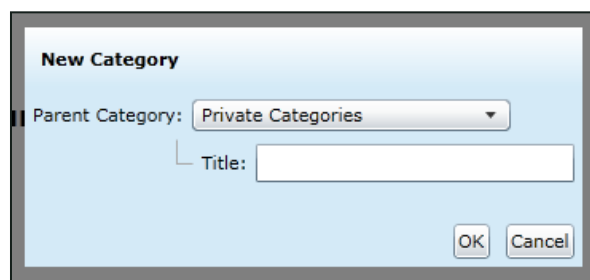
The Categories Quick Filter lists Categories to which you have access. The number of calls in a category appears in parentheses. Clicking a Category will display any calls tagged with that Category.

Private categories are those only you can see. Public categories can be seen by any user with access to the Web Player. However, users can see only the calls within that category for the Discover Group(s) and Skill Name(s) to which they have access. Only the creator of a public category can add or remove calls from that category.

For details, see [Categorize Calls](#).

Create a Category

You can create new categories from within the Categories Quick Filter. In addition to creating public or private categories, you can make sub-categories which inherit the private/public status of their parent.



To create a category:

1. Click the **Web Player** tab and then click **Categories** in the Quick Filter menu.
2. Click **New Category** at the top of the Category list.

Alternatives: Click the name of an existing category and then click **New** at the bottom of the Category list. You can also right-click the name of an existing category and select **New**.

3. Select a **Parent Category** from the drop-down list.
4. In the **Title** field, type a category name (25 characters max) and click **OK**.

Edit or Delete a Category

You can edit the name of a category, but not its status as public or private. You also cannot make a sub-category a main category, or vice versa.

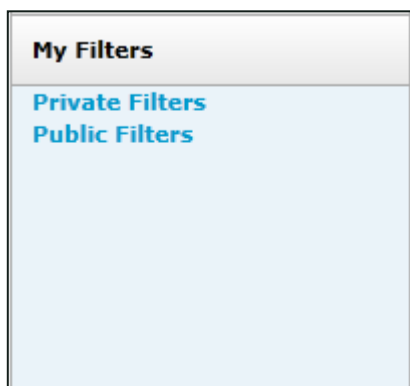
If you delete a category, the calls in it are not deleted. Only the category retrieval tag associated with the calls is deleted.

To edit or delete an existing category or sub-category:

1. Click the **Web Player** tab and then click **Categories** in the Quick Filter menu.
2. Click the category name.
3. Click **Edit** at the bottom of the Category list to edit the category or click **Delete** to delete the category.

Alternative: Right-click the name of an existing category and select **Edit** or **Delete**.

About the My Filters Quick Filter



The My Filters Quick Filter provides links to your Private and Public saved filters. For more information on creating and saving filters, see [Working with Filters](#).

Private Filters are those you have saved and marked as Private. **Public Filters** are those you or any other user has saved and marked as Public.

Work with My Filters

To load a filter from My Filters:

1. Click the **Web Player** tab and then click **My Filters** in the Quick Filter menu.
2. Click either **Private Filters** or **Public Filters** as desired.
3. Click **Apply**.

When you return to the Call List, your My Filter settings have been applied. You may adjust the filter settings using the standard Filter Options available on the Filter Bar at the top of the Call List.

The default Call List filter is normally the Today filter (i.e., calls recorded on the current day). To set a default Call List filter from My Filters:

1. Click the **Web Player** tab and then click **My Filters** in the Quick Filter menu.
2. Click either **Private Filters** or **Public Filters** as desired.
3. Click **Default**.

If you are the filter's owner and want to edit the filter:

1. Click the **Web Player** tab and then click **My Filters** in the Quick Filter menu.
2. Click either **Private Filters** or **Public Filters** as desired.
3. Click **Edit**.
4. Change filter settings as desired and then click **Save as My Filter**.

If you are the filter's owner and want to delete the filter:

1. Click the **Web Player** tab and then click **My Filters** in the Quick Filter menu.
2. Click either **Private Filters** or **Public Filters** as desired.
3. Click **Delete**.

About the Tag Cloud Quick Filter

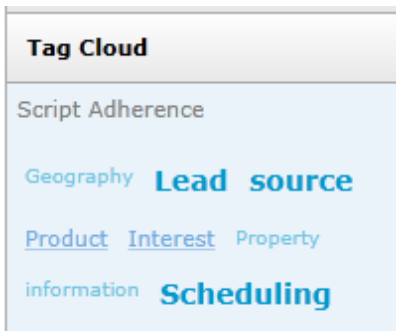
The Tag Cloud Quick Filter menu is available only if your organization uses Uptivity Speech Analytics. The Tag Cloud is used to sort call recordings by the tag groups assigned when the speech analytics engine reviewed the call.

If you have created a large number of call tags, or one particular tag occurs very frequently, the Tag Cloud may not display correctly. Notify your Speech Analytics administrator if you experience this issue.



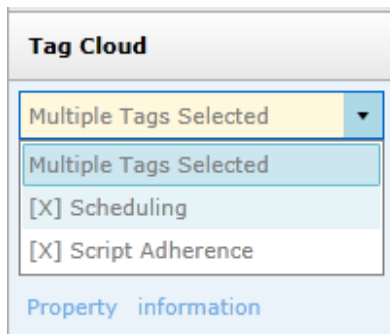
The tag size is weighted as shown in this table:

Weight	Found on (%) of the calls in the selection	Tag Image
1	99% or more	sales
2	70% but less than 99%	callcopy
3	40% but less than 70%	support
4	20% or more and less than 40%	survey
5	less than 20%	negative phrases



Clicking a tag once displays all recordings that match the tag; clicking the tag again removes it as the filter.

The selected tag (in the example shown here, Script Adherence) moves to the top left corner of the Tag Cloud menu. Notice that the tag weights change based on the new number of call records.



To view calls for multiple tag selections:

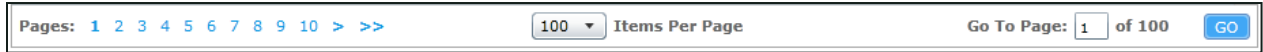
- Click additional tags.

The display changes to a drop-down list, as shown here. To remove a tag from the criteria:

- Expand the drop-down list and click the "x" next to the tag you wish to remove.

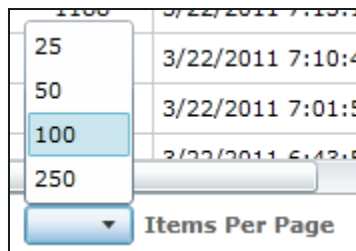
Page Navigation Bar

The Page Navigation Bar will always be displayed at the bottom of the Record List. This bar contains controls that allow you to easily switch between pages of records.



You can click an individual page number using the page links on the left-hand side. Clicking the single arrow link on the left side of the list will take you to the previous set of pages, clicking the icon on the right side will take you to the next set of pages. The double arrow links will take the user to the beginning or end of the entire list. Alternatively, you can manually enter a page number in the page field on the right-hand side of the bar, and click **Go** to take you to that page.

You can also select the number of records that you would like to display in the Record List, by selecting the option from the "dropdown" list in the navigation bar.



About Call List Settings

Call List Settings let you choose what information appears in the Call List records by selecting or clearing the available options.

The screenshot shows the 'Call List Settings' dialog box. It has a title bar with 'Reset', 'Cancel', and 'Save' buttons. The dialog is organized into four sections:

- Default Columns:** Contains checkboxes for Voice Port, Bookmarked, Evaluations Completed, Duration, QA Score, First Name, Record ID, Time Recorded, Last Name, and Video. Most are checked.
- Other Columns:** Contains checkboxes for CallerID ANI, Filename, Call Direction, Custom Filter, Call ID, Global ID, Channel, Skill Name, Agent ID, Wrap Duration, Number Called DTMF, Survey Score, and Total Hold Time. Most are checked.
- User Columns:** Contains checkboxes for User 1 through User 10, Agent Leg Contact ID, Recorder Contact ID, and Skill ID. Most are checked.
- Web Player Settings:** Contains checkboxes for Play Video Automatically, Always Play Calls In New Window, and Perform Evaluation In New Window. Most are checked.

"Default Columns" are shown by default, but can be changed:

- **Voice Port:** The physical port on which the call was recorded. This term is variable based on your system's Terminology settings.
- **Duration:** The time length of the recording.
- **First Name:** The first name of the recorded employee.
- **Last Name:** The last name of the recorded employee.
- **Record ID:** Unique ID used to identify call recordings.
- **Flagged:** Displays the flag icon (🚩), if a user has marked the record as Flagged.
- **Bookmarked:** Displays the bookmark icon (📌), if a user has marked the record with notes.
- **Evaluations Completed:** Indicates the number of Quality Assurance evaluations submitted.
- **QA Score:** The average score for all evaluations performed on the transaction.
- **Time Recorded:** The date and time of the recording. When viewing a call list in a time zone other than where the recording server resides, call times displayed may be off by the difference between the two time zones.
- **Video:** Indicates whether screen activity was recorded. Screen recording is a system and scheduling option.

"Other Columns" can be displayed if desired; depending on your integration, some of these fields may not contain data:

- **Caller ID (ANI):** The phone number or extension of the calling party.
- **Call Direction:** Denotes if a call was Inbound (I) or Outbound (O).
- **Call ID:** The Call ID assigned from the PBX/ACD to identify the call.
- **Channel:** Logical internal identifier for the recording port/channel.
- **Agent ID:** The Phone ID that will be recorded.
- **Number Called (DNIS):** The phone number or extension that was called.
- **Total Hold Time:** The total amount of time a call was in a "hold" status, according to your PBX. Availability of this feature and how it is calculated varies depending on the make/model of the PBX. For example, TSAPI integrations calculate and display hold time on the call list, and you can filter for this by searching for calls with hold time greater than zero. Hold time is treated the same way as Silence in playback.
- **Filename:** The location and name of the file with the call recording.
- **ACD Queue:** The ACD Gate/Queue name, if the call was delivered over an ACD system and the information is available to Discover.
- **Global ID:** Value used by the system to associate voice recording and video capture.
- **ACD Group:** Hunt Group or Skill value for inbound-routed ACD calls.
- **Wrap Duration:** For video captures, the time after a call ends and the agent finishes working with the PC applications.
- **Survey Score:** The overall score for a call if the customer completed an IVR survey after the call ended. Not applicable unless your organization uses Uptivity Discover Survey.

"User Columns" are data fields that can be used differently by each organization. Data received from third party IVR, CRM, or ACD platforms can be inserted into these fields, or agents can enter information via Discover On-Demand. Your Discover administrator can tell you which of these fields are used by your organization.

Manage Your Call List Settings

To configure your individual Call List settings:

1. Click the **Web Player** tab and then click **Settings** in the upper right corner of the Call List.
2. Select the check box(es) for the columns you want to display in your Web Player. You can click **Select All** if you want to see all columns, **Clear All** to clear all selections and start over, or **Reset** to clear the selection you made since opening the page.
3. Click **Save**.

About Web Player Settings

Web Player Settings allow individual users to set defaults for how they want the Web Player to handle the functions shown in the image below.

The **Auto Play Call Segments** setting applies only if your system supports call segments. When enabled, the setting causes the Web Player to automatically begin playing the next call segment when the end of the previous segment is reached. For more information, see [Call Segments](#).

Web Player Settings			
Play Video Automatically <input checked="" type="checkbox"/>	Always Play Calls In New Window <input type="checkbox"/>	Perform Evaluation In New Window <input type="checkbox"/>	Auto Play Call Segments <input checked="" type="checkbox"/>

Manage Your Web Player Settings

To configure your individual Web Player settings:

1. Click the **Web Player** tab in the Discover Web Portal and then click **Settings** in the upper right corner of the Call List.
2. Select the check box(es) for the **Web Player Settings** you want, or clear the check box(es) for any settings you don't want.
3. Click **Save**.

Working with Call Records


The Call List allows you to view all call records to which you have access. There are a variety of tasks you can perform related to these recordings. Your permissions determine the tasks you can perform. If you need to perform a particular task and are unable to do so, see your Discover administrator.

Play a Call Recording

This feature is available to all users, based on the calls to which they have access.

To play a recording in the Call List:


1. Click the **Web Player** tab in the Discover Web Portal.
2. Right click the desired call record and select **Play** from the pop-up menu.
3. Select whether to play the call **In Current Window** or **In New Window**.
4. If applicable, select whether to play the call **With Video** or **Without Video**.

Alternative: Click the **Play** icon  at the beginning of the desired record's row. This alternative plays the recording in the same window and includes video if available.

If you want to play recordings in a new window, your Web browser must be configured to allow pop-up windows.

For information on viewing and listening controls, see [Listening to Recordings](#).

Flag a Call

This feature is available to all users, based on the calls to which they have access. Flagging a call displays the flag icon  on the selected record so you can more easily see certain calls. The flag does not affect reporting or other Discover functions. Flags can be removed when they are no longer needed.

To flag or unflag a call:

1. Click the **Web Player** tab in the Discover Web Portal.
2. Right-click the desired call record and select **Flag** from the pop-up menu. If the call is already flagged, the flag will be removed.

To flag multiple calls:

- Hold down the CTRL key and click each record.

To flag a range of calls:

- Click the first record in the range, hold down the SHIFT key, and click the last record in the range.

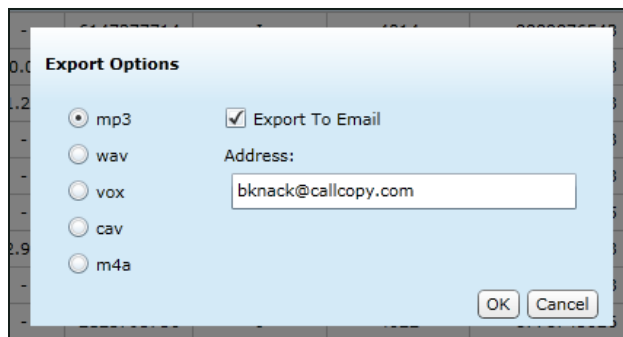
Export a Call

This feature is only available to permissioned users. If you do not have this permission, you will not see an option for exporting calls in the Web Player. Exporting allows you to save a recording for special purposes, or send it to someone who does not have access to the Web Portal.

Files are exported to the location specified by your Discover administrator. If you do not have access to that directory, you can send the file to an email account if you have permission to export via email and if your system is configured to use SMTP. If you have questions, talk to your Discover administrator.

Recordings can be exported in any of these supported file types:

- **MP3:** Suitable for playback on most computer and portable media players. File sizes can be large depending on call length; this can cause issues when emailing the file.
- **WAV:** Compatible with most computer media players. Uses GSM compression to achieve a very small file size. Ideal for transfer via email or other methods.
- **VOX:** An older file type, normally used for playing back over a telephony system. Not compatible with most computer or portable media players.
- **CAV:** A proprietary format that contains both the audio and video for a call. Requires the use of the Discover CAV Player application for playback, which is available from your Discover administrator.
- **M4A:** Primarily associated with 'MPEG-4 Audio Layer'. Files in .M4A format are actually the audio layer of (non-video) MPEG 4 movies.



To export a call:

1. Click the **Web Player** tab in the Discover Web Portal.
2. Right-click the desired call record and select **Export Selected** from the pop-up menu.
3. Select the desired file type for the exported call.
4. If desired, select the **Export to Email** check box and enter an email address in the **Address** field.
5. Click **OK**.

Export the Call List

This feature is only available to permissioned users. If you do not have this permission, you will not see an option for exporting calls in the Web Player.

Exporting the Call List allows you to generate a CSV file containing information that you define during the export process. This file can then be used in external reports or for other purposes. You can export the same columns that are available in your Call List settings. If you have a filter in place when you export the list, only the filtered results appear in the CSV file.

To export the Call List:

1. Click the **Web Player** tab in the Discover Web Portal.
2. Right-click any call record and select **Export Call List** from the pop-up menu.
3. Select the check box(es) for the columns you want to export. You can click **Select All** if you want all columns or **Clear All** to clear selections and start over.
4. Select whether to **Open** or **Save** the file. If you choose to save, the file is stored as a download by your web browser.
5. Click **OK**.

Evaluate a Call

This feature is only available to permissioned users. If you do not have coaching permissions, you will not see an option for performing evaluations in the Web Player. See the *Uptivity Discover Quality Management Manual* for more information.

View Completed Evaluations for a Call


This feature is only available to permissioned users. If you do not have coaching permissions, you will not see an option for viewing evaluations in the Web Player. See the *Uptivity Discover Quality Management Manual* for more information.

View Completed Surveys for a Call

This feature is only available to permissioned users and only if your organization uses Uptivity Discover Survey. If one or both of these criteria do not apply, you will not see an option for viewing completed surveys in the Web Player. In addition, this feature is only available when a survey has been completed for a given call. See the *Uptivity Discover Survey Guide* for more information.

Bookmark a Call

This feature is only available to permissioned users. If you do not have this permission, you will not see an option for bookmarking calls in the Web Player. Discover supports both internal and external bookmarks. This section covers external bookmarks only. For information on internal bookmarks, see [About In-Call Bookmarking](#).

Bookmarking allows you to add a free-form text note to a call. An icon  appears in the Bookmark column for notated records and the contents of the bookmark are visible when playing back the call. Bookmarks are searchable using the Filter Options.

Bookmarks can contain up to 200 characters (including spaces), and can be either Public or Private. Public bookmarks can be read by any users that have access to play back the selected call. Private bookmarks can be read only by you, and other users will not even see a bookmark icon for the call.

To add an external bookmark to a call:

1. Click the **Web Player** tab in the Discover Web Portal.
2. Right-click the desired call record and select **Bookmark** from the pop-up menu.
3. Type your notes in the **Bookmark Notes** text field.
4. Select whether to make the bookmark **Public** or **Private**.
5. Click **Confirm Bookmark**.

For information on editing or deleting external bookmarks, see [Edit or Delete Bookmarks](#).

Find Call Segments

This feature is only available to permissioned users. If you do not have this permission, you will not see an option for finding call segments in the Web Player.

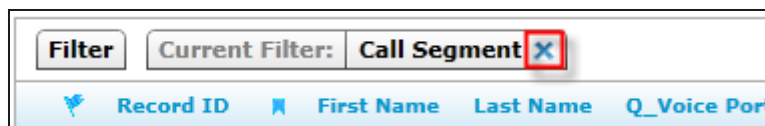
In some cases, a call may be broken into segments due to conferences, holds, transfers, etc. The Find Call Segments feature acts as a filter to display call records related to the selected call in the order in which they occurred chronologically. This allows you to review the entire call event without having to manually search for each individual segment. The feature ignores any filters currently applied to the Call List because some segments would not fit the criteria of filters such as Time Recorded, Agent, and Discover Group. For additional information, see [Call Segments](#).

To find segments related to a call:

- Click the **Web Player** tab in the Discover Web Portal, then right-click the desired call record and select **Find Call Segments** from the pop-up menu.

To clear the Call Segments filter once applied:

- Click the X next to **Call Segment** on the Filter Bar.

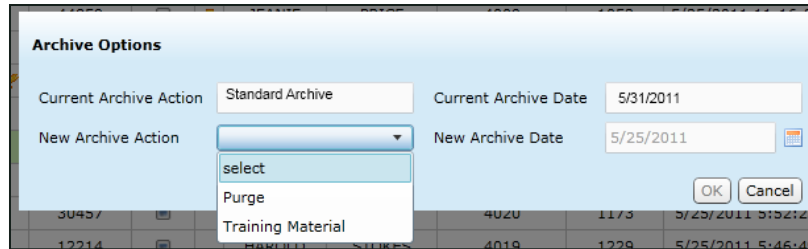


Change Archive Options for a Call

This feature is only available to permissioned users. If you do not have archiving permissions, you will not see an option for changing archiving in the Web Player.

Archiving strategies are set by your Discover administrator. However, there may be times when you want to change the disposition of a single call. For example, your system may be set to purge calls after six months, but you find a call that you want to keep indefinitely for training purposes. Or you might find a call that should not have been recorded and needs to be purged.

Through this feature, you can manually apply any archive action that has already been created by your Discover administrator. You will be able to see the action that will apply to the call if you make no changes and the date on which that action will take effect. When you select a new archive action, it will be effective that day.



To change archive options for a call:

1. Click the **Web Player** tab in the Discover Web Portal.
2. Right-click the desired call record and select **Archive Options** from the pop-up menu.
3. Select the desired action from the **New Archive Action** drop-down list and click **OK**.

Categorize Calls

This feature is available to all users based on the calls to which they have access.

Only the creator of a category can add calls to or remove calls from that category. For more information on Categories, see [About the Categories Quick Filter](#).

To categorize a call:

4. Click the **Web Player** tab in the Discover Web Portal.
5. Right-click the desired call record and select **Categorize** from the pop-up menu.
6. Select the desired category. If the call is already in a category, a check mark appears next to that category. In this case, selecting that category removes the call from the category.



Alternative: Drag the desired call record to the Quick Filter Menu and drop it in the desired category.

To categorize multiple sequential calls:

1. Left-click the first call you want to categorize, then press and hold the Shift key on the keyboard and left-click the last call to be categorized.
2. Release the Shift key and then press and hold the Ctrl key. Click once on any of the highlighted calls (it will deselect it for the moment).

3. Left-click the same call, hold the mouse button down, and drag all the calls to the Quick Filter menu, then drop them in the desired category.

Hunt Group			CLINTON	STRONG	1385	4033
Categories			DUANE	HUNT	1441	4037
New Category			ERIK	JUAREZ	1497	4030
Private Categories			ERIK	JUAREZ	1096	4030
Coaching (20)			DOMINIQUE	CLARK	1174	4034
Desktop (3)	3115	ERIK JUAREZ	RAFAEL	YORK	1096	7/13/2012 11:14:17 PM
Dispute Resolution (6)	26528	DOMINIQUE CLARK	KRISTINE	CONTRERAS	1174	7/13/2012 11:13:04 PM
HR (23)	39782	RAFAEL YORK	TRACY	MARSHALL	1225	7/13/2012 11:12:28 PM
Product Knowledge (2)	742	KRISTINE CONTRERAS	ERASMO	MONTECARY	1041	7/13/2012 11:00:47 PM
Sales Skills (2)			NICHOLAS	MILLER	1212	4026
Soft Skills (3)			RENE	RILEY	1317	4027

To categorize multiple non-sequential calls:

1. Left-click the first call you want to categorize, then press and hold the CTRL key on the keyboard and left-click the last call to be categorized.
2. Release the Shift key and then press and hold the Ctrl key. Click once on any of the highlighted calls (it will deselect it for the moment).
3. Left-click the same call, hold the mouse button down, and drag all the calls to the Quick Filter menu, then drop them in the desired category.

Edit a Call Record

This feature is only available to permissioned users. If you do not have permission to update at least one of the user-defined data fields, you will not see an option for editing calls in the Web Player.

You can add information (metadata) to an individual call record after the call has been captured in the system. Uptivity Discover provides two user-defined fields (User9 and User10) that can be edited from within the Discover Web Player, and these fields are both searchable and filterable. Each field is limited to fifty (50) characters.

You can only see information that has been added to a call record if the Call List settings are configured to display the specific user-defined fields.

To edit a call record:

1. Click the **Web Player** tab in the Discover Web Portal.
2. Right-click the desired call record and select **Edit** from the pop-up menu.
3. Select a field to edit from the drop-down menu.
4. Enter the desired text in the field. If data already exists, you can edit that data.
5. Repeat steps 3 and 4 as desired to edit additional fields, and then click **OK**.

To remove a field:

- Click the red X to remove a field.

Copy Call Link

This feature is available to all users based on the calls to which they have access. The feature provides a link to an individual call. You can provide that link to another user so they can easily access the call directly.

Standard permission checks control access to the call by viewers using the link. For example, a user with the **Allow Viewing of User's Own Records** permission could not see calls for another user, even if you send them the link.

To open a window with the call link:

- Click the **Web Player** tab in the Discover Web Portal, right-click the desired call record and select **Copy Call Link** from the pop-up menu.

Delete Call

This feature is only available to permissioned users. If you do not have permission to delete calls, you will not see this option in the Web Player.

Deleting a call record removes the record of the call from the database and also deletes any audio and video files associated with the call. However, any evaluations and scores associated with the call are not deleted in order to preserve historical and reporting accuracy. A record of any user performing a delete is written to the system's audit log.

Deletion causes the record to be deleted from the database immediately and it will disappear from the Web Player. The audio, video, and metadata files will be deleted the next time files are purged. Ask your Discover administrator for more information.

To delete a call:

1. Click the **Web Player** tab in the Discover Web Portal.
2. Right-click the desired call record and select **Delete** from the pop-up menu.
3. Click **OK**.

Working with Filters

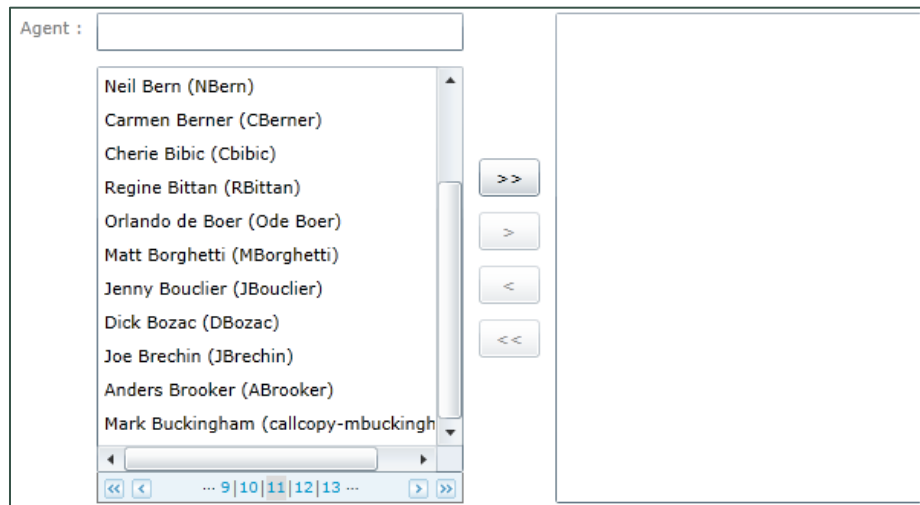
Filter Options

Filters allow you to create custom Call List searches. This section lists and explains the multiple options offered on the Filter page. Filters work together with Quick Filters, and any Quick Filters in effect are pre-selected when you open the Filter page.

Data Fields

The **Data Fields** section allows you to search against specific metadata recorded in the call record. This could include agent information, caller information, or any custom data fields that may be used by your organization.

The image later in this section shows all data fields available for filtering. For most of the fields, you can simply enter your desired search item in the text field. The **Agent** field offers some advanced functionality.



On the left, Discover lists all agents in the system, and you can move between "pages" using the standard controls at the bottom of the list. When you begin typing an agent's name in the text field, Discover dynamically updates the list to match your entry. To add agents to your filter:

- Select an agent from the left column and move the agent to the right column by clicking the > or >> keys. You depress and hold the SHIFT or CTRL keys to select multiple consecutive or non-consecutive agents. Use the < or << keys to move agents from the right column to the left.

These standard operators can be used with most data field search criteria:

Equals:	Field being filtered must match the entered value exactly. Example: <i>"CallerID" Equals "614-555-5555"</i> will only return calls from that exact phone number.
Not Equals:	Field being filtered must not exactly match the entered value. Example: <i>"CallerID" Not Equals "614-555-5555"</i> will return every call recorded <i>except</i> those from 614-555-5555.
Starts With:	Field being filtered must begin with the entered value. Example: <i>"CallerID" Starts With "614"</i> will display every call recorded where Caller ID begins with 614. TIP: Useful for area code searches.
Ends With:	Field being filtered must end with the entered value. Example: <i>"CallerID" Ends With "5555"</i> will display every call recorded where Caller ID ends with "5555". TIP: Useful for locating calls when you only have the last four digits of the caller's phone number.
Contains:	Field being filtered must contain the entered value at any location in the field. Example: <i>"CallerID" Contains "555-55"</i> will display every call recorded where Caller ID contains the numbers "555-55". TIP: Useful for locating calls with only a partial phone number.
Does Not Contain:	Field being filtered must not contain the entered value at any location in the field. Example: <i>"CallerID" Does Not Contain "555-5555"</i> will exclude all calls with caller phone number "555-5555", regardless of area code.
Less Than:	Contents of field being filtered must be less than entered value (numeric values only). Example: <i>"Record ID" Less Than "3264"</i> will exclude every call with a record ID number greater than "3264".
Greater Than:	Contents of field being filtered must be greater than the entered value (numeric values only). Example: <i>"Record ID" Greater Than "3264"</i> will exclude every call with a record ID number less than "3264".
In:	Contents of field being filtered must match one of a list of values. Example: <i>"Extension" In "1234, 1235, 1236"</i> will return all calls recorded on the listed extensions.
Not In:	Contents of field being filtered must NOT match one of a list of values. Example: <i>"Extension" Not In "1234, 1235, 1236"</i> will return all calls recorded on extensions other than the ones listed.

Data Fields

<input type="checkbox"/>	Extension :	Equals	<input type="text"/>
<input type="checkbox"/>	Agent Number :	Equals	<input type="text"/>
<input type="checkbox"/>	Agent Name :	Equals	<input type="text"/>
<input type="checkbox"/>	Group :	Equals	<input type="text"/>
<input type="checkbox"/>	Queue :	Equals	<input type="text"/>
<input type="checkbox"/>	CallerID ANI :	Equals	<input type="text"/>
<input type="checkbox"/>	Number Called DNIS :	Equals	<input type="text"/>
<input type="checkbox"/>	Record ID :	Equals	<input type="text"/>
<input type="checkbox"/>	Account Number :	Equals	<input type="text"/>
<input type="checkbox"/>	CSN :	Equals	<input type="text"/>
<input type="checkbox"/>	User3 :	Equals	<input type="text"/>
<input type="checkbox"/>	Salesforce Case :	Equals	<input type="text"/>
<input type="checkbox"/>	Public Bookmark :	Equals	<input type="text"/>
<input type="checkbox"/>	User6 :	Equals	<input type="text"/>
<input type="checkbox"/>	User7 :	Equals	<input type="text"/>
<input type="checkbox"/>	User8 :	Equals	<input type="text"/>
<input type="checkbox"/>	User9 :	Equals	<input type="text"/>
<input type="checkbox"/>	User10 :	Equals	<input type="text"/>
<input type="checkbox"/>	User11 :	Equals	<input type="text"/>
<input type="checkbox"/>	User12 :	Equals	<input type="text"/>
<input type="checkbox"/>	User13 :	Equals	<input type="text"/>
<input type="checkbox"/>	User14 :	Equals	<input type="text"/>
<input type="checkbox"/>	User15 :	Equals	<input type="text"/>
<input type="checkbox"/>	Channel :	Equals	<input type="text"/>
<input type="checkbox"/>	Bookmark :	Equals	<input type="text"/>
<input type="checkbox"/>	CallCopy group :	select	<input type="text"/>
<input type="checkbox"/>	Categories :	select	<input type="text"/>
<input type="checkbox"/>	Tag :	<ul style="list-style-type: none"> Script Adherence Property Information Scheduling Lead Source Product Interest Geography 	<input type="text"/> <input type="text"/>

Quality Management

Quality Management	
<input type="checkbox"/>	Evaluations Completed : Equals <input type="text"/>
<input type="checkbox"/>	Avg. QA Score : Equals <input type="text"/>
<input type="checkbox"/>	Randomizer : Number <input type="text"/>

These fields filter for quality management (QA) data associated with the call. You can search for calls based on **Evaluations Completed** or **Average QA Score** percentage. For more information on the operators available in the drop-down list, see [Data Fields](#).

Randomizer is a tool to assist QA teams that perform evaluations on random sets of calls. This option works in conjunction with any other selected filters. Once all other selected filters are applied to the records, the randomizer will find and display a random selection of calls meeting the desired criteria. You can choose whether the Randomizer should display a chosen number of calls or a percentage of calls.

Surveys

If your organization uses Uptivity Discover Survey, the Surveys filter allows you to show only calls matching score criteria. Displaying this column can be toggled from the Call List view settings. For details, see the *Uptivity Discover Survey Administration Guide* for details on Survey Call Linking. The **Survey Score** field only accepts positive numerical values. The **Other Score Values** drop-down allows you to search for values matching **Inc** (Incomplete), **N/A**, or both. For more information on the operators available in the drop-down list, see [Data Fields](#).

Surveys	
<input type="checkbox"/>	Survey Score : Equals <input type="text"/>
<input type="checkbox"/>	Other Score Values : Equals <input type="text"/>

Date/Days of the Week



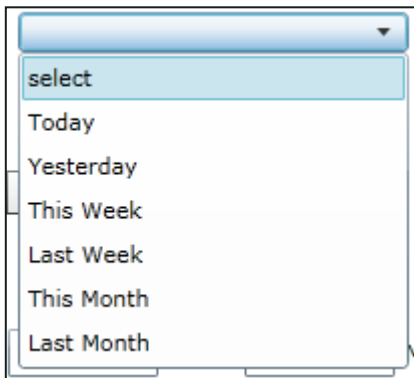
Date

Start Date : 3/25/2011 10:39:29 AM 

End Date : 3/25/2011 10:39:29 AM 

Relative Date Range : select ▼

This section allows you to specify a Start and End Date to filter for calls recorded over a specific date range. You can change the hours/minutes/seconds by directly typing in the field. You can change the date by directly typing in the field or using the date picker. For example, if you want to find records for yesterday and today, set the **Start Date** time to 12:00 AM and the **End Date** time to 11:59:59 PM.



select

Today

Yesterday

This Week

Last Week

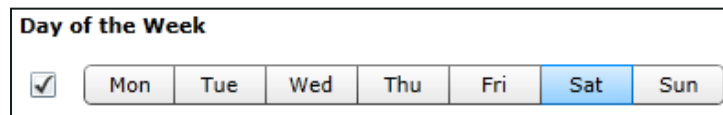
This Month

Last Month

Relative Date Range allows you to search for calls based on the intervals shown here.

Day of the Week allows you to filter for specific days of the week. Days that have calls are highlighted.

For example, to find all calls that occurred on Saturdays during a three month period, select the Start and End dates of the period and select Saturday in the Day of the Week option.



Day of the Week

Mon Tue Wed Thu Fri Sat Sun

Duration

Duration directs the system to return calls that continue for either a minimum OR a maximum length of time. For example, entering 5 minutes in the Minimum option would cause the system to return calls that were at least 5 minutes long.

Data Comparison

Data Comparison

Call Direction :

Screen Capture :

Call Type :

Data Comparison options include:

- **Call Direction:** Filter for only inbound, only outbound, or both directions.
- **Screen Capture:** Filter for calls with screen capture, calls without, or both.
- **Call Type:** Search for calls that have been moved to an archive location, calls that are still on the local system, or all calls.

Other Options

Other

Display Records :

If you set multiple filter options, **Display Records** can be used to specify whether records must meet all filter criteria (AND) or if they can meet any filter criteria (OR) to be displayed.

Create a Filter

To build and apply a filter to the Call List:

1. Click the **Web Player** tab in the Discover Web Portal and then click **Filter** in the upper left corner.
2. Select the desired data field(s) and operator(s), and enter the desired criteria value(s). You can filter for multiple data fields at once.
3. Select any additional filter options as desired and then click **Apply**.

To clear selections but remain on the Filter page:

- Click **Reset**.

To clear selections and return to the Call List:

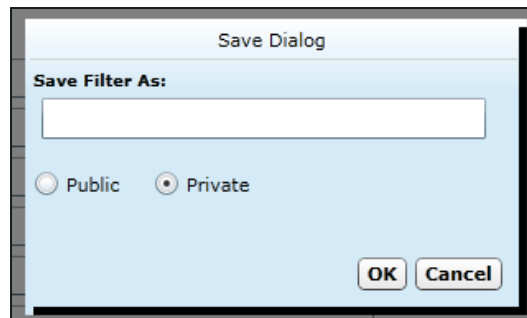
- Click **Cancel**.

Save a Filter

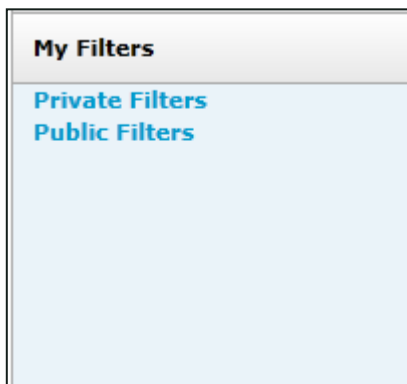
If you have filters that you use repeatedly, you can save them and access them again from the **My Filters** Quick Menu. Filters can be saved for either personal (Private) or general (Public) use. For information on using My Filters, see [About the My Filters Quick Filter](#) and [Work with My Filters](#).

To save a filter to the My Filters Quick Menu:

1. Follow the procedure to [Create a Filter](#).
2. Click **Save as My Filter** at the top of the Filter Options page.
3. Enter a name in the **Save Filter As** field.
4. Choose whether you want the filter to be **Public** or **Private** and then click **OK**.



Access My Filters



Click **My Filters** on the Quick Filter menu to use filters that have been saved.

Private Filters displays a list of Filters you have saved and marked as Private.

Public Filters displays a list of any filters you or any other user has saved and marked as Public.

The **My Filters** list displays the available filters.

My Filters: Private			Back	
Default Filter : Today				
Filter Name	Created On	Owner		
Agent # > 100	9/23/2011 3:44:40 PM	Unknown	Apply	Edit
			Default	Delete

- Click **Apply** on a filter to load the filter settings, and return to the Call List page. The Call List will now display with the My Filter settings applied. You may adjust the filter settings using the standard Filter Options available on the Filter Bar at the top of the Call List.
- Click **Default** to have this filter applied each time you open the Web Player page. The default filter is usually the Today filter (i.e., calls recorded on the current day).

If you created the filter, you can:

- Click **Edit** to open the Filter Options page and change any Filter settings. When you have completed your changes, click **Save as My Filter** to apply the changes to the saved filter. For additional information, see [Filter Options](#).
- Click **Delete** to delete the selected filter.

Call Segments

This feature is only supported in some recording environments, including Avaya TSAPI and inContact PBX. Ask your Discover administrator if the call segments feature is used in your organization.

Call segments are separate, but related, call recording files. Users may consider an interaction one call, but Discover may have multiple, separate recording files (i.e., segments) for that interaction. Examples include:

- **Transferred calls:** an agent transfers a call to another agent or supervisor.
- **Conference calls:** may create multiple call recordings based on the number of call participants and the call instancing.
- **Related calls:** transfers, conferences, or calls performed by one or more agents involved in an original call. For example, if an agent is on a call, puts the first call on hold, calls a supervisor, ends the supervisor call, and returns to the original call, the call to the supervisor is a related call.

This feature provides a comprehensive record of an interaction by identifying all recordings for that interaction and displaying them together in chronological order.

The **Find Call Segments** option appears in the Call List pop-up menu if:

- The global **Allow Call Segments** setting is enabled in the system and
- The selected call has existing call segments related to it.

This option does not provide any permissions beyond those you already have for individual call recordings. If you can see and review only your own call records, the system displays only your records using the Find Call Segments option. For example, if you transferred a call to another agent, you will see the initial call record but not the call record for the portion of the interaction conducted by the second agent after the transfer.




Listening to Recordings

About the Web Player



Once you have located calls in the Web Portal, you use the Web Player to listen to the recordings. You can also use the Web Player to view screen recordings if your organization has Uptivity Discover Screen Recording.

The Web Player, as shown here, appears at the bottom of the Web Portal once you take action to [Play a Call Recording](#). Player controls (e.g., wave bar, volume controls, and feature panels) are used for listening to the call and viewing the agent's desktop activities. The Web Player is made up of several different panes or panels that you can manipulate to customize your playback experience. Common interface controls include:

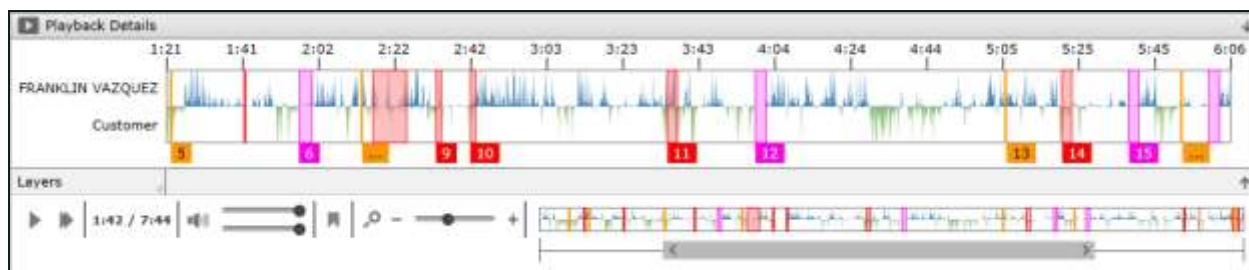
- Restore  to expand panels
- Minimize  to shrink panels
- Close  to hide panels

Detailed explanations of Web Player features are provided in the following sections.

To launch the Web Player in a separate window:

- Click the Full Screen icon  in the upper right corner of the Web Player.

About the Playback Details Panel



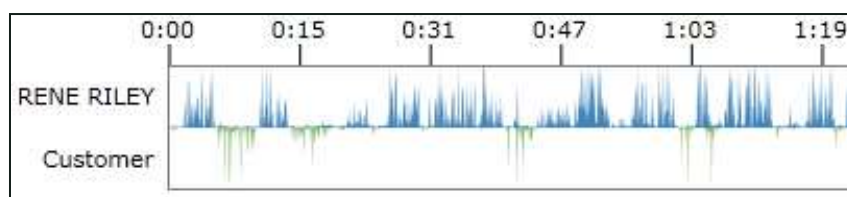
This panel lets you control call playback by pausing or playing the call. When you select a call record for playback, the player controls load and immediately begin playback.

By default, the **Interaction Overview Bar** is visible at the bottom right, which summarizes tags and action areas on the waveform. You can click at any point in the bar and the playback marker will move to that position and play back the interaction from that point. If this is outside the length of the Viewable Area control, playback will still occur, but progress will not be visible in the Playback Details panel.

To enlarge the Interaction Overview Bar to the larger version shown here:

- Click the **Restore** ↑ icon located to the upper right of the overview bar.



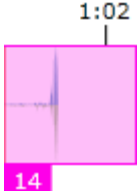


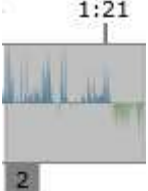
Waveform Display



The Waveform Display shows audio activity on the line for the duration of the call. For some telephony systems, audio from the agent and customer side can be separated for easier viewing. In these cases the agent audio is displayed in blue at the top and the customer audio is displayed in green at the bottom. If you are unsure whether your integration supports speaker separation, ask your Discover administrator.

Waveform Indicators

Information about the call is highlighted on the waveform with the following overlay indicators:

	<p>Playhead Indicator – this shows what point of the call is currently playing back. Drag this indicator to any point in the Waveform Display to start playback at that point. When the Playhead is being moved, you will see the duration status also change to match the position of the Playhead.</p>
	<p>Cross-talk – times when both parties on the line are speaking simultaneously may be shaded red in the waveform display. Click the number below the highlighted area to seek to the corresponding ID in the Layer Details panel. This feature is only available if cross-talk detection has been configured.</p>
	<p>Silence – periods where neither party is speaking during a call may be shaded magenta in the waveform display. Click the number below the highlighted area to seek to the corresponding ID in the Layer Details panel. This feature is only available if silence detection has been configured.</p>
	<p>Speech Tags – when Speech Analytics checks a call and detects key words or phrases based on established criteria, these indicators are placed on the waveform to show what the tags are and where they occur in the call. Click the number below the highlighted area to seek to the corresponding ID in the Layer Details panel. This feature is only available if Uptivity Speech Analytics is licensed and configured in your deployment.</p>
	<p>Bookmarks – when reviewing a call, bookmarks can be inserted manually into the waveform to leave notes or comments, denoted with a blue indicator. Click the number below the highlighted area to seek to the corresponding ID in the Layer Details panel. For more information, see About In-Call Bookmarking.</p>
	<p>Blackouts – specific sections of audio or video that have been blacked out are shaded black in the waveform display. Click the number below the highlighted area to seek to the corresponding ID in the Layer Details panel. This feature is only available if blackouts have been configured.</p>

If tags for different items overlap, their number tags below the waveform show in a stack. Placing the mouse cursor over the corresponding tag will cause a more detailed pop-up to appear, containing the Layer Details ID numbers and timestamps.



Play/Pause and Playback Speed

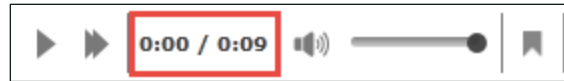


The **Play** icon ► denotes the call is currently playing. Click the **Play** icon to pause playback; the icon will switch to the **Pause** icon ||. To speed up or slow down playback speed, click the **Playback Speed Selection** icon ► and choose the appropriate speed. Audio pitch is not affected by changes in playback speed.

	<p>Faster: 200% of normal speed.</p> <p>Fast: 150% of normal speed.</p> <p>Normal: 100% of normal speed.</p> <p>Slow: 75% of normal speed.</p>
--	--

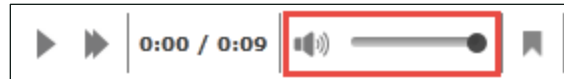
<p>When the Call Segments feature is in use, Previous and Next buttons will also appear to allow you to skip between sequential related calls. This function is not supported in the external player (i.e., playback in a new window). For more information, see Call Segments.</p>	
---	--

Interaction Timer



The **Interaction Timer** displays the point of time the call is currently playing, and the total duration of the call in HH:MM:SS format.

Volume Control



The **Volume** icon can be used to mute and unmute playback. The slider can be used to adjust the volume up or down. The current volume level (0-100%) is displayed when the mouse hovers over the slider bar(s).

If your system is configured to save files in stereo CSA format, you will see dual volume control sliders. These can be used to raise or lower the volume of the individual audio streams.

Note: The Web Player Volume Control is limited by the Master Volume level set in your Windows Audio settings. These settings may need to be adjusted to make the Web Player controls effective.


Bookmarks

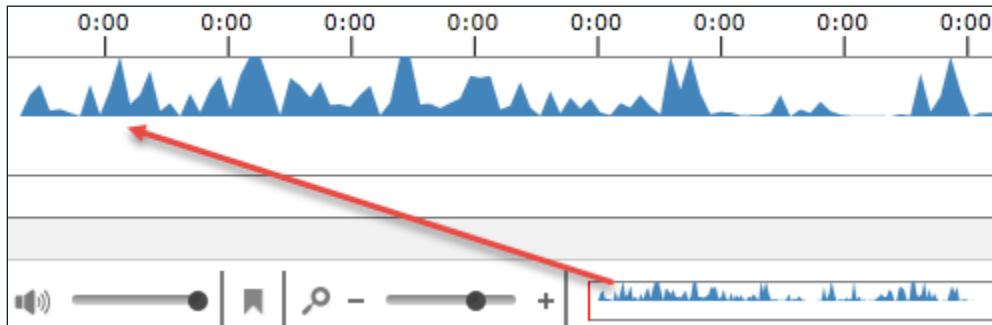


The **Bookmark** icon can be used to add an internal bookmark to the recording. For more information, see [About In-Call Bookmarking](#).

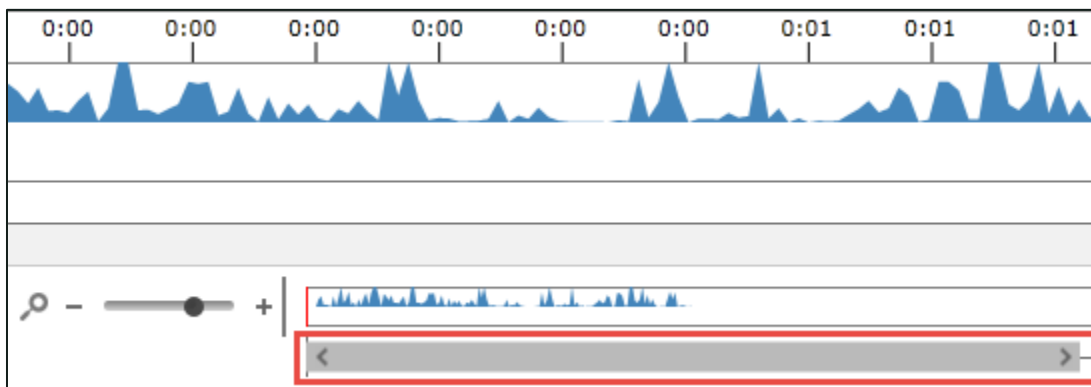
Waveform Zoom



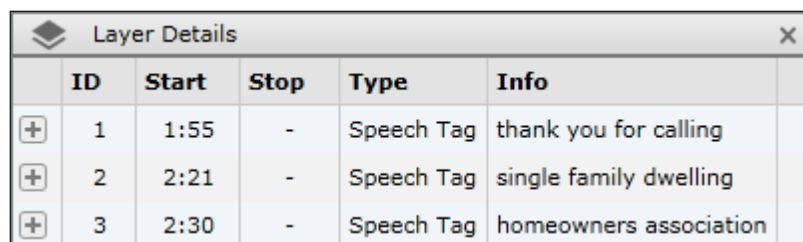
The **Restore** icon  on the Playback Details bar can be used to expand the waveform and show greater detail. This also makes the Waveform Zoom slider appear. When you move the slider from left to right, the zoom level and waveform detail increase.



With the view zoomed in, you can use the horizontal **Viewable Time** scroll bar to reposition the view within the waveform.



About the Layer Details Panel




	ID	Start	Stop	Type	Info
+	1	1:55	-	Speech Tag	thank you for calling
+	2	2:21	-	Speech Tag	single family dwelling
+	3	2:30	-	Speech Tag	homeowners association

The **Layer Details** panel displays any metadata added to the call after it was recorded. This could include user-generated data such as bookmarks, data generated from another component such as Uptivity Speech Analytics, or detected cross-talk or silence. To hide or restore this panel:

- Click the Layer Details icon .

Data in the panel is organized into columns. The type of data determines which columns are populated. To resize column width:


- Hover your mouse over the borders between column headings. When the cursor changes to a double-headed arrow , click and drag to resize.

To sort data in ascending or descending order:

- Click a column heading.

Columns include:

- **ID:** This is an identifier (e.g., 1, 2, 3, A, B) for the tag. For data tagged at a specific time within a call, this ID also displays on the Wave Bar.
- **Start:** For data tagged at a specific point within a call, the starting location of the tag is listed in mm:ss format. For data that is not tagged at a specific point inside a call, the time "00:-01" is listed.
- **Stop:** Indicates the ending point for data relative to its starting point. Some data types like Speech Tags and Bookmarks will not have a stop time, but instead display a dash (-).
- **Type:** This field lists the type of tag listed: bookmark, speech analytics tag name or category, cross-talk, silence, or other type. For details, see [Waveform Indicators](#).
- **Info:** Data contained in the tag. Information in this field can vary, depending on the tag type. For bookmarks, the Bookmark Notes display here (e.g. "Great sales pitch"). For Analytic tags, the detected phrase is listed.


The expand icon  can be used to display a list of options relative to that particular item. Options vary depending on the type of item and whether or not you created the item, but can include:

- **Seek:** Moves the Playhead Indicator on the waveform to the place in the call where the item occurs.
- **Edit:** Allows changes to be made to the item, such as updating notes or the bookmark timestamp.
- **Delete:** Removes the item from the call and the waveform.


For bookmarks and speech tags, additional information is displayed. Bookmarks indicate whether the bookmark is public or private, and display the username of the creator. Speech tags show Confidence (likelihood of match), Group (if specified by your organization during setup), and the Phrase detected by speech analytics. For more information, refer to the *Uptivity Speech Analytics Administration Guide*.

About the Screen Capture Panel



The **Screen Capture** panel is available only if your organization uses Uptivity Discover Screen Recording. It displays a scaled-down feed of recorded video for the call. The **Screen Capture** icon  can be used to hide or restore this panel.


To move your view within the playback window:

- Use the arrow  icons. An alternative way to reposition video playback is to click on the video and drag until the desired area is in view.

To increase **+** or decrease **-** the size of video playback:

- Use the zoom slider shown at right. Alternatively, you can resize the playback pane by dragging the right edge of it or the top border of the Web Player. Video is auto-scaled to fit the window when playback begins, but you can zoom in up to 100% of the original capture size. You can also adjust playback zoom by scrolling the mouse inside the playback pane.



Note: Due to Microsoft Silverlight limitations, mouse-scroll zoom in the playback pane only works in Internet Explorer. To use mouse-scroll zoom in another browser, first open the recording in the external player by clicking the **Full Screen** icon .


About In-Call Bookmarking

This feature is only available to permissioned users. If you do not have this permission, you will not see an option for bookmarking calls in the Web Player. Discover supports both internal and external bookmarks. This section covers internal (in-call) bookmarks only. For more information on external bookmarks, see [Bookmark a Call](#).

In-call bookmarking allows you to tag a specific point within a call and add notes. These bookmarks can be set to personal (Private) or general (Public) use. Public bookmarks (icon and text) are visible to any users with access to play the selected call. Only you can see private bookmarks (icon and text). Bookmarks appear on the Interaction Overview Bar and in the Tags panel immediately after you create them.

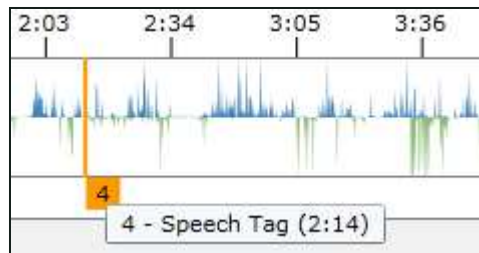
Add Bookmarks

To insert a bookmark at a specific point in a call:

1. Click the **Web Player** tab in the Discover Web Portal, right-click the desired call record and select **Play** from the pop-up menu.
2. Place the Playhead Indicator where you want to set the bookmark and then click the **Bookmark** icon .
3. Enter the bookmark text (up to 200 characters, including spaces) in the **Notes** field.
4. If you want to refine the tag point, change the value in the **Start** field.
5. Select the **Public** check box if desired, or leave it unselected to make the bookmark Private, and then click **OK**.

View Bookmarks

After an in-call bookmark has been inserted, you'll see a mark in the Waveform Display at the time indicated for the bookmark. The mark will be labeled with the Tag ID assigned to the bookmark. Hover your mouse over a mark in the Waveform Display to pop up the tag type and timestamp. This information is also displayed in the Layer Details Panel above the Interaction Overview Bar.




Edit or Delete Bookmarks

Web Player					
Layer Details					
	ID	Start	Stop	Type	Info
+	1	0:00	3:16	Silence	
-	2	0:17	-	Bookmark	Dead air; agent should have spoken here.

Seek Edit Delete

To edit a bookmark:

1. Click the **Web Player** tab in the Discover Web Portal, right-click the desired call record and select **Play** from the pop-up menu.
2. Locate the bookmark in the Layer Details pane and click the expand icon  next to it.
3. Click **Edit**, make any desired changes to the bookmark, and then click **Save**.

You can only delete bookmarks that you inserted. To delete a bookmark:

- Follow the Edit Bookmark procedure but click **Delete** in step 3.

Live Monitoring

The **Live Monitor** feature in Discover enables supervisors to listen to an agent's call and/or view an agent's desktop in near-real time. It also enables system administrators to see if calls are being recorded. This feature is only available to permissioned users. If you do not have this permission, you will not see the Live Monitor sub-tab in the Web Player.

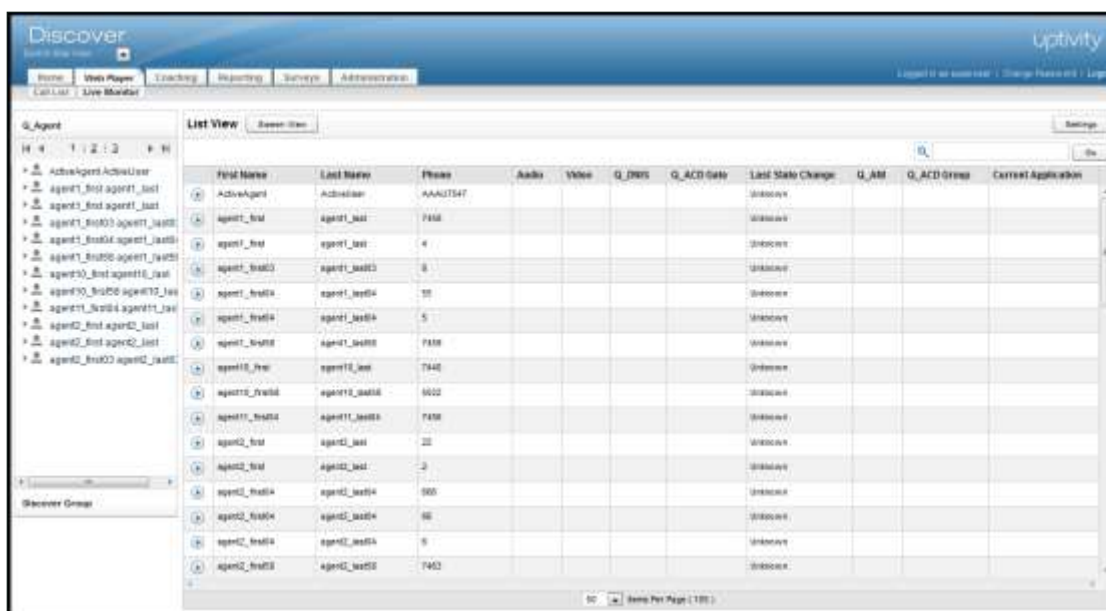
Live monitoring of audio is a basic Discover feature, but requires configuration by your Discover administrator. Live monitoring of agent desktops is a separate feature licensed as part of Uptivity Discover Screen Recording.

Live Monitor List




Note: The Live Monitor List and screen view pages do not time out like other pages in Discover due to frequent refreshes of page content. When you use Live Monitor, you should close your browser or lock your computer screen before leaving it unattended, particularly if you have administrative access to the Discover system.



The **Live Monitor** list is accessed via the **Web Player** tab and loads in place of the Call List. The Live Monitor List view displays, on a single page, agents in the system and their current call state. You can use the **Items Per Page** drop-down at the bottom of the list to adjust (from 25 to all) the number of agents visible on the list at one time. The number displayed in parentheses represents the total number of results for the given filter or search, regardless of how many agents are displayed.



The following columns appear in the Live Monitor list:

- **Playback Indicator** : If an agent is on a call that is currently recording, the playback indicator displays. Click the indicator to begin playing back the live audio and video stream.
- **First Name:** Displays the agent's first name.
- **Last Name:** Displays the agent's last name.
- **Phone:** Lists the Voice Port being used by the agent.
- **Audio:** Indicates whether the agent is generating audio that can be monitored.
- **Video:** If screen capture is being recorded for the call, the Video icon  displays in this field. If PC users lock their computers (i.e. press Windows key and the L key), a lock icon  appears. If a supervisor is monitoring the user, the display closes when the PC is locked and opens again when the PC is unlocked.
- **Caller ID (ANI):** Caller's phone number for the agent's active call.
- **Number Called (DNIS):** Number dialed by the caller for the agent's active call.
- **ACD Group:** ACD Group/Skill number configured on the switch, if available.
- **ACD Gate:** ACD Gate/Queue number, if available.
- **Current Application:** Title of the application window currently open on the agent desktop. This information is updated every 5 seconds and is only available for agent workstations running the Screen Recording agent.
- **Last State Change:** Timestamp of the agent's last state change.

Manage Your Live Monitor List Settings

To configure your individual Live Monitor List settings:

1. Click the **Web Player** tab and then click the **Live Monitor** sub-tab.
2. Click the **Settings** button in the upper right corner of the Live Monitor List.
3. Select the check box(es) for the columns you want to display in your Web Player. You can click **Select All** if you want to see all columns, **Clear All** to clear all selections and start over, or **Reset** to clear the selection(s) you made since opening the page.
4. Click and drag columns from top to bottom to reorder their display if desired, and then click **Save**.

Quick Filter Agent List

Quick Filters for agents and groups work the same way in Live Monitor as they do in the Call List. For more information, refer to [About the Agent Quick Filter](#) and [About the Discover Group Quick Filter](#).

Search for Agents

To the upper right of the Live Monitor Agent List is a search field indicated by a magnifying glass. This search can be used in combination with the Quick Filters to further refine the list. Search criteria are not column-specific. To search:

- Enter an item to search for (full or partial name, extension, etc.) and click **Go**.





A search field with a magnifying glass icon on the left, the text 'agent' in the input area, and a 'Go' button on the right.

To display the entire list of users again:

- Clear the terms in the **Search** field and click the search icon.

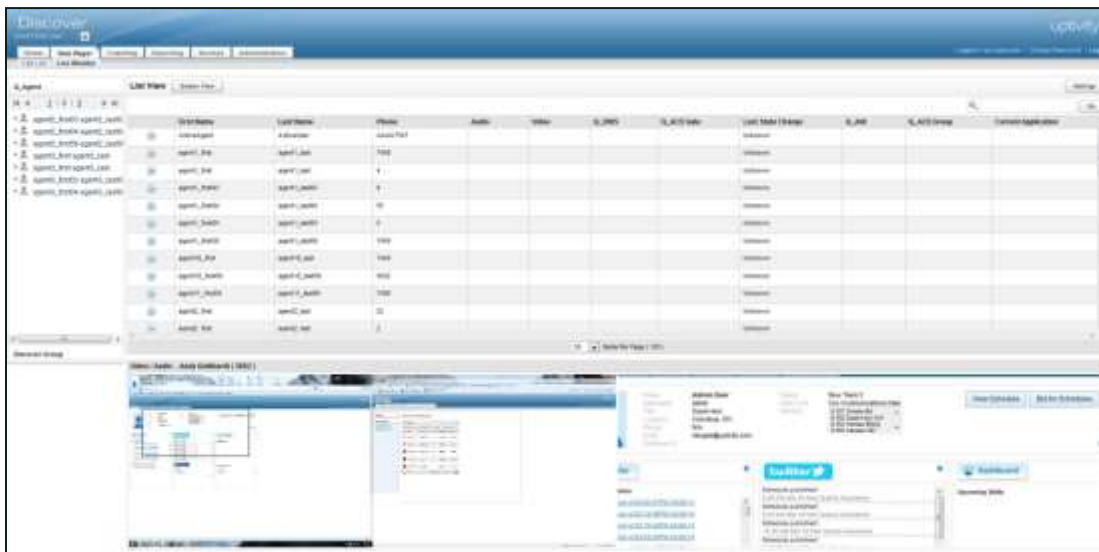
Monitor a Call

When you live monitor a call, you will hear monaural audio streamed from the Discover recording server to your workstation. If video is available, a screen capture viewing panel will appear below the Live Monitor list. Streaming begins when you click Play  and stops when you click Stop .


To monitor (play) a call from the Live Monitor List view:

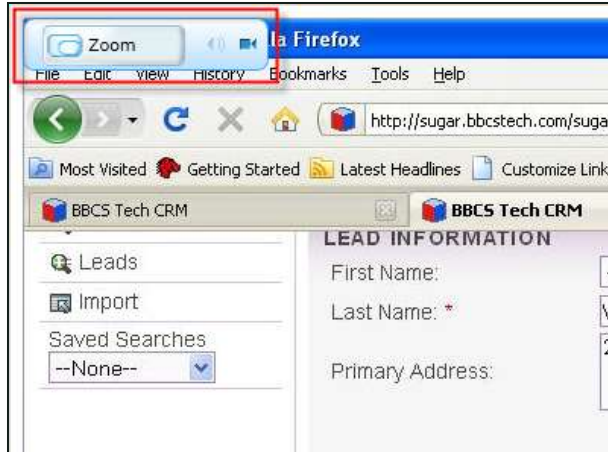
1. Click the **Web Player** tab in the Discover Web Portal and then click the **Live Monitor** sub-tab.
2. Click the **Play** icon next to the desired call.

Alternative: Right-click a user and select **Play** from the pop-up menu, then choose whether to monitor in the current window or a new window (for an example, see [Screen View](#)).



To display the zoom menu:

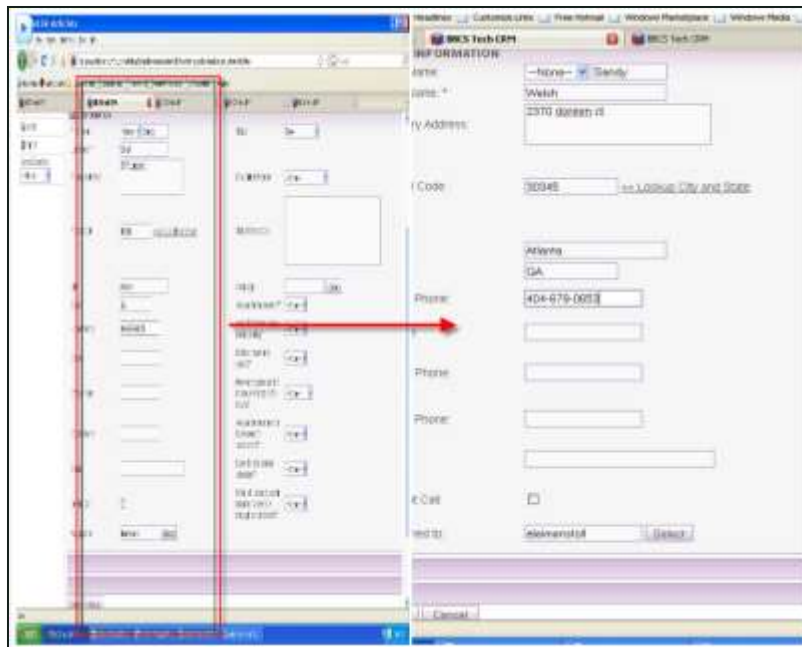
- Hover your mouse cursor over the tab  in the upper left of the playback area.



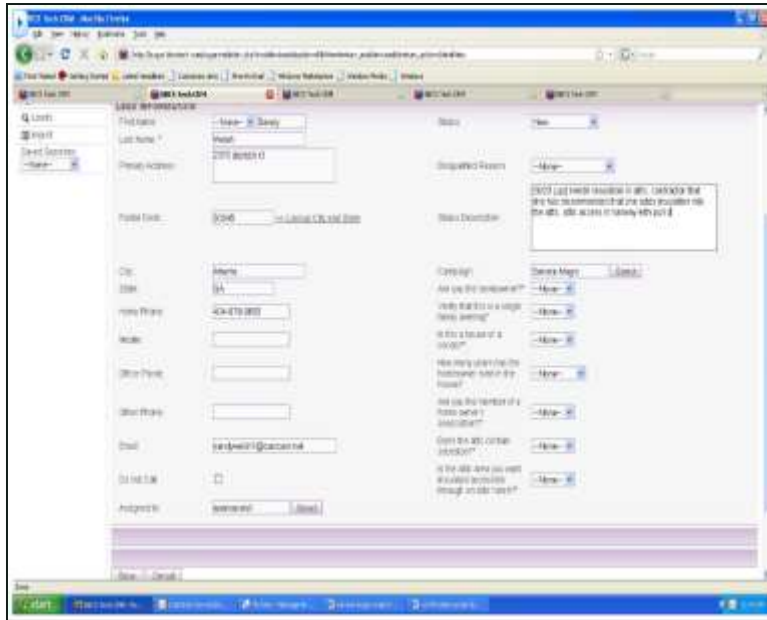
The speaker and camera icons indicate the presence or absence of audio and screen feeds. In this example, video is available, but no audio.

Clicking the **Zoom** button lets you toggle through three different zoom levels:

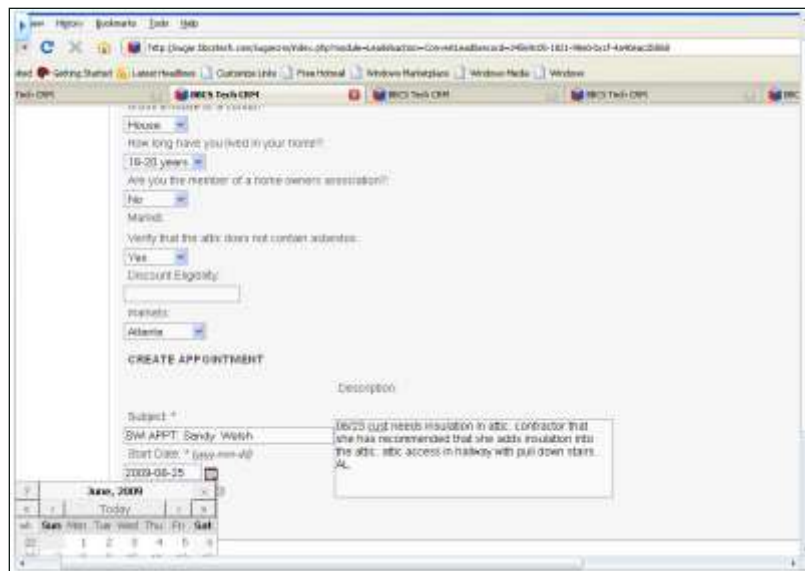
- **Split** shows a compressed view of the entire screen on one side. A movable zoom marker lets you indicate a portion of the screen to show zoomed to 100%.



- **Stretch-to-Fit** resizes the full screen image to fit the window. It allows you to view the entire screen but may be difficult to read due to the compression.



- **Actual Size** displays the live feed at 100% of what the agent sees. Scrollbars appear at the side and bottom of the playback area to allow you to scroll to different parts of the screen.



Live monitoring runs continuously until you stop playback. To stop monitoring (playing) the live stream:

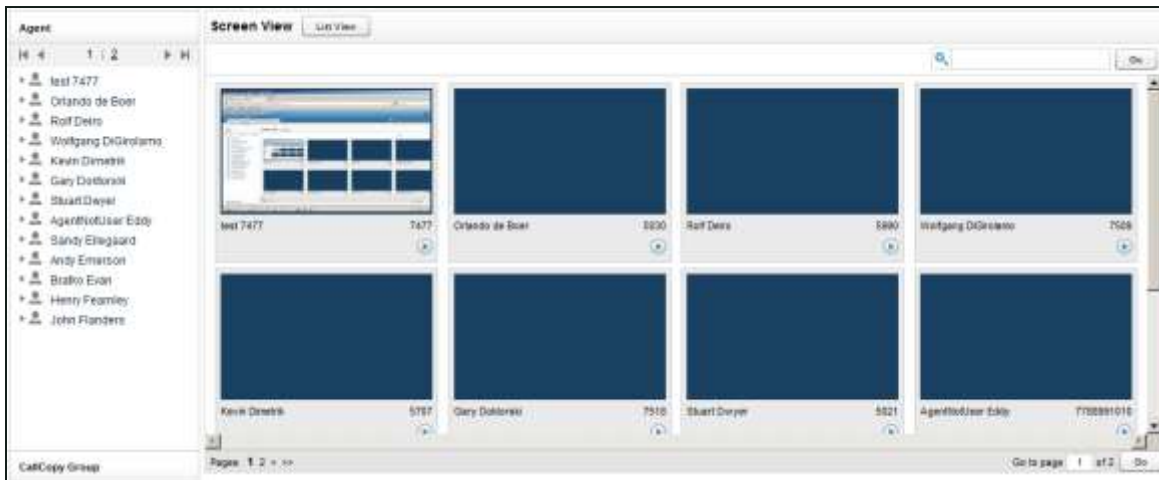
- Click the **Stop** icon .

Screen View

You can activate Screen View by clicking the **Screen View** button at the top of the Live Monitor page. For more information, refer to [Quick Filter Agent List](#) and [Search for Agents](#).

Screen View displays each agent thumbnail in alphabetical order, according to agent last name. To navigate between pages:

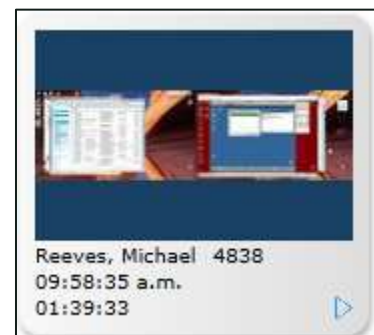
- Click the buttons at the bottom of the page or enter a specific page number in the text field and then click **Go**.



Screen View Playback

Screen thumbnails are updated every five seconds for each agent desktop. The thumbnails are compressed to 60% of JPEG quality and scaled down to a width of 120 pixels to help conserve network bandwidth. If an agent is being recorded and their call is available for live monitoring, the thumbnail includes a playback indicator along with the:

- Agent Name
- Caller ID
- Time the recording started
- Duration of call recording



To return to the List View so you can play the live stream from the selected agent:

- Click the playback indicator.

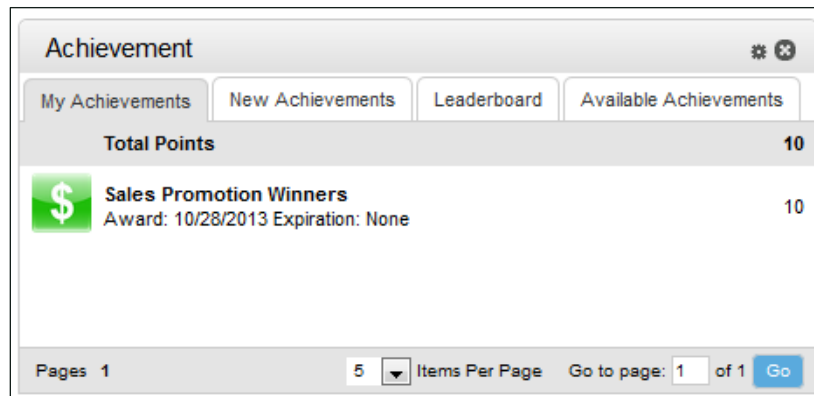
Appendix: Discover WFO Home Tab Widgets

Uptivity Discover WFO includes a variety of widgets that display news, QA-related information, call center performance metrics, and more. Some widgets apply to any Discover WFO implementation. Others only provide data for specific Discover WFO components (for example, Clarity WFM).

Based on your organization's Discover system, and your permissions, you may be able to select the widgets to display on your Discover Home tab dashboard. You may also be able to create new dashboards. In some cases, your Discover administrator may define your dashboard, and the widgets it displays, based on your role within your organization.

This appendix provides information about each of the widgets available in Uptivity Discover WFO and how to customize the information they display, where applicable.

Achievement Widget



The **Achievement** widget allows users to view information about achievement awards. Agents can view a list of achievements they have received as well as any achievements potentially available to them. Agents can also see achievements awarded to other agents. Managers and supervisors, as well as agents, can also use this widget to view a list of high-scoring agents and newly-added achievement types.

Information displayed on the widget can be filtered to include only achievements and points received by specific Discover Groups.

Note: Discover Groups are displayed on the widget with the name of the group in Discover at the time the achievement was awarded. If this name is changed after the achievement is awarded, be aware that the achievement is still displayed with the old group name.

For information about creating and managing achievement awards, see the *Uptivity Discover Quality Management Manual*.

Permissions

No special permissions are needed to use this widget.

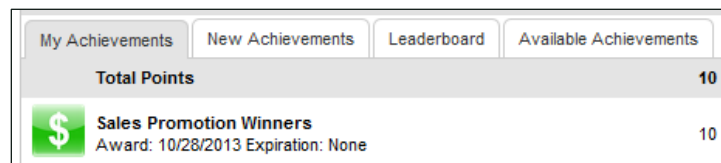
Display


The Achievement widget has four tabs: My Achievements, New Achievements, Leaderboard, and Available Achievements. Each of these tabs is described below.

Information displayed on these tabs does *not* include:

- Achievements awarded to a Discover Group that the widget was filtered to exclude.
- Achievements with expired points.

My Achievements Tab





My Achievements		New Achievements	Leaderboard	Available Achievements
Total Points			10	
	Sales Promotion Winners Award: 10/28/2013 Expiration: None	10		

The **My Achievements** tab displays a list of achievements awarded to the logged-in agent and includes the following information:

- **Total Points:** Total number of points awarded to the agent for achievements included on this tab.
- For each listed achievement:
 - **Award:** Date the achievement was awarded.
 - **Expiration:** Date the points for the achievement will expire. If this achievement was not set up to expire, this field displays *None*.
 - Number of points awarded for the achievement.

New Achievements Tab

Icon	Name	Recipient	Points	Awarded Date	Expiration Date
	Team Competit...	Burke, Keith	8	11/06/2013	
	Sales Promoti...	Bouclier, Jenny	10	10/28/2013	

The **New Achievements** tab displays the last 10 achievements awarded to any agent and includes the following information:

- **Icon:** Icon set up to be displayed with this achievement type.
- **Name:** Name of the achievement type.
- **Recipient:** Name of the agent who received the achievement.
- **Points:** Number of points awarded for the achievement.
- **Awarded Date:** Date the achievement was awarded.
- **Expiration Date:** Date the points for the achievement will expire. If this achievement was not set up to expire, this field is blank.



Leaderboard Tab

Rank	Name	Group	Points
1	Burke, Keith	Group01	13
2	Bouclier, Jenny	Group01	10

The **Leaderboard** tab displays the top 20 agents with the highest number of awarded points and includes the following information:

- **Rank:** Number ranking for the agent (1 to 20).
- **Name:** Name of the agent.
- **Group:** Discover group to which the agent belongs. If the agent belongs to more than one group, the group that is first alphabetically is listed. If the widget has been filtered to restrict a group, that group does not appear.
- **Points:** Total number of points awarded to the agent. This total does not include expired points.

Available Achievements Tab

Icon	Name	Points	Start Date	End Date
	High Scores for the Month	10	11/01/2013	11/30/2013
	Sales Promotion Winners	10	10/25/2013	12/31/2013

The **Available Achievements** tab displays a list of all achievements that are currently available to the logged-in agent. This list includes any achievement that has not reached its end date and which the agent, or a Discover group to which the agent belongs, is eligible to receive.


This tab includes the following information:

- **Icon:** Icon set up to be displayed with this achievement type.
- **Name:** Name of the achievement type.
- **Points:** Number of points received when this achievement type is awarded.
- **Start Date:** First date this achievement type can be awarded.
- **End Date:** Last date this achievement type can be awarded.

Configure the Achievements Widget

You can filter the information displayed on the Achievement widget based on specific Discover Groups. If you belong to more than one Discover Group, the widget display can be restricted to show achievements and points received only for the specified groups. This filter setting stays in effect only until you log out of Discover or move to another page.

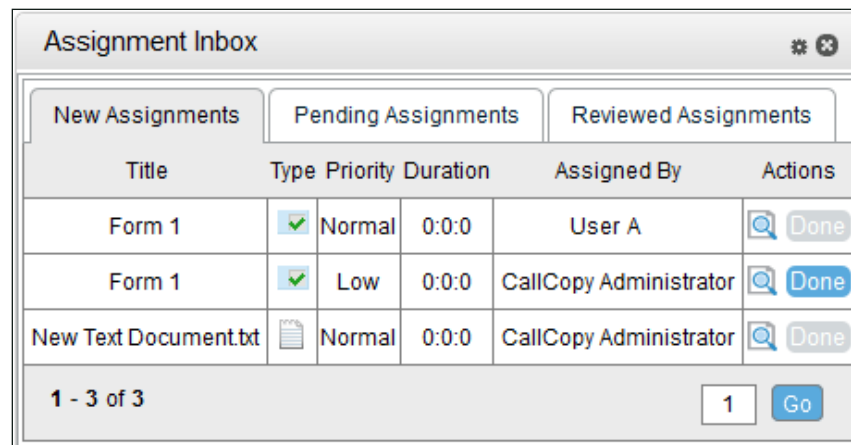
To filter the Achievement widget, follow these steps:

1. Click the gear  icon located in top right-hand corner of widget.
2. Select one or more Discover Groups for which you want to display achievement information. If you do not select a group, information related to that group will not display.

Note: To select multiple groups, press the **CTRL** key and click the groups you want. To clear a selection, press **CTRL** and click the selected group.

3. Click **Save**.

Assignment Inbox Widget



Assignment Inbox						
New Assignments		Pending Assignments		Reviewed Assignments		
Title	Type	Priority	Duration	Assigned By	Actions	
Form 1		Normal	0:0:0	User A		Done
Form 1		Low	0:0:0	CallCopy Administrator		Done
New Text Document.txt		Normal	0:0:0	CallCopy Administrator		Done

1 - 3 of 3

The **Assignment Inbox** widget can be accessed by up to 200 simultaneous users. It displays messages that are generated when:

- An evaluation is completed for you.
- You receive a response to a question or dispute concerning an evaluation.
- Training material is assigned to you via the Content Library.

Permissions

Use of this widget is restricted to permissioned users. If you need to use the Assignment Inbox widget and are not able to do so, talk to your Discover administrator.

Display

The Assignment Inbox widget has three tabs: New Assignments, Pending Assignments, and Reviewed Assignments. All of the existing functionality and visual style of the Assignment Inbox screen in Discover is duplicated in this widget. Each tab in the widget is paginated and displays 10 items per page. See [About the Assignment Inbox](#) and the *Uptivity Discover Quality Management Manual* for more information on the functionality of this screen.

Note: When you open a document from the Assignment Inbox widget in Firefox, the browser will ask if you want to Save or Open the document. You must manually verify that the correct application is selected from the drop-down list for the type of document being opened, or it may open or display incorrectly.

All three tabs display the following information:

- **Title:** Name of the assignment. For documents assigned in the Content Library, this is the name of the document. For evaluations, this is the QA form name.
- **Type:** QA evaluation has a page icon with a checkmark. All other file types have an icon based on their file extension. Supported files are: Word, Excel, PowerPoint, PDF, JPG, and PNG.
- **Priority:** Priority assigned in the Content Library: Low, Normal, High. Evaluations have a Normal priority.
- **Assigned by:** Name of the user who assigned the document.

The **New Assignments** tab also displays:

- **Duration:** Duration value assigned in the Content Library.
- **Actions:** Users click the magnifying glass icon to view the assignment. The **Done** icon becomes available (changing from gray to blue) after the assignment has been viewed, and the user can click to confirm the assignment is complete. If an assignment has been moved or deleted, this field shows File Not Found.

The **Pending Assignments** tab also displays:

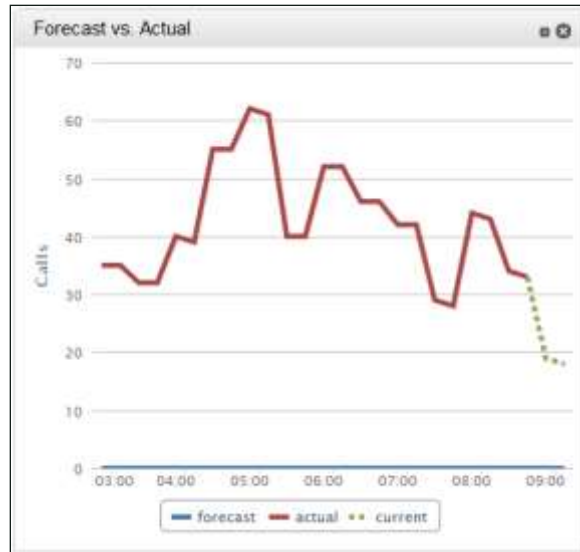
- **Assigned Date:** Date that a supervisor assigned the document to a group.

The **Reviewed Assignments** tab also displays:

- **Assigned Date:** Date that a supervisor assigned the document to a group.
- **Reviewed Date:** Date that the user clicked **Done** to move the assignment from the New Assignments page to Reviewed Assignments.

Forecasted vs. Actual Calls Widget

Note: This widget will not contain any data unless your installation includes Uptivity Clarity WFM.



The **Forecasted vs. Actual Calls** widget can be accessed by up to five simultaneous users, and allows users to compare actual call volume against forecasted call volume. The comparison is based on the forecast designated as the "use for reporting" set for the Labor Unit being viewed. For additional information, see the *Uptivity Clarity WFM User Manual*.

This widget would be used by those in charge of staffing and day-to-day operations, such as WFM personnel, managers, supervisors, etc.

Permissions


Use of this widget is restricted to permissioned users. If you need to use the Forecasted vs. Actual Calls widget and are not able to do so, talk to your Discover administrator.

Display

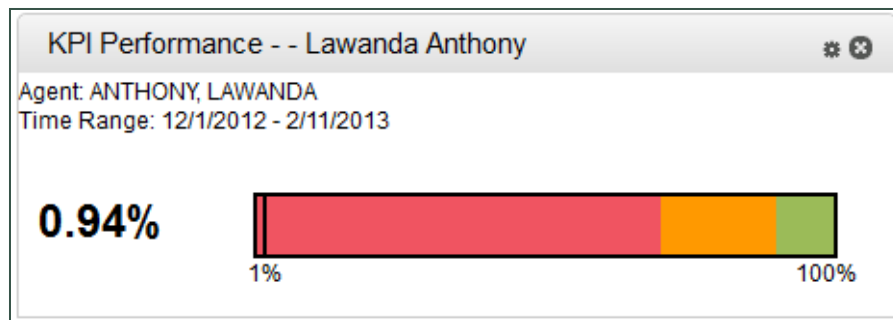
The widget displays a line chart showing the current call volume and the forecasted call volume over the previous six hours. You can filter the data based on Labor Unit.

Configure the Forecasted vs. Actual Calls Widget

To configure the widget:

1. Click the  icon located in top right hand corner of widget. The Forecast vs. Actual Filter dialog box opens.
2. In the **Widget Subtitle** field, give widget a subtitle name (100 characters max) if desired.
3. Use the **Labor Units** list to select the Labor Unit that you want to view as your default. Press and hold the Shift or CTRL key, then click, to make multiple selections.
4. Click **OK**.

KPI Performance



The **KPI Performance** widget can be accessed by up to 10 simultaneous users, and allows you to see the average score for quality assurance evaluations. You can then compare the actual performance against predetermined thresholds.

Permissions

Use of this widget is restricted to permissioned users. If you need to use the KPI Performance widget and are not able to do so, talk to your Discover administrator.

Display

The KPI Performance widget displays QA performance of an Agent or a Discover Group over a user-defined period of time. You can filter the display by agent, group and/or QA form. The average QA score for the period is shown as a percentage, and is calculated by dividing the (sum of awarded points for all evaluations fitting the selected criteria) by the (sum of possible points for all evaluations fitting the selected criteria).


The display shows the placement of the agent on a colored bar that represents these user-defined thresholds:

- **Red**: below the lowest acceptable low score (Low Threshold).
- **Yellow**: between the lowest acceptable low score and the optimal minimum score (Target).
- **Green**: above the optimal minimum score (Target).

Configure the KPI Performance Widget

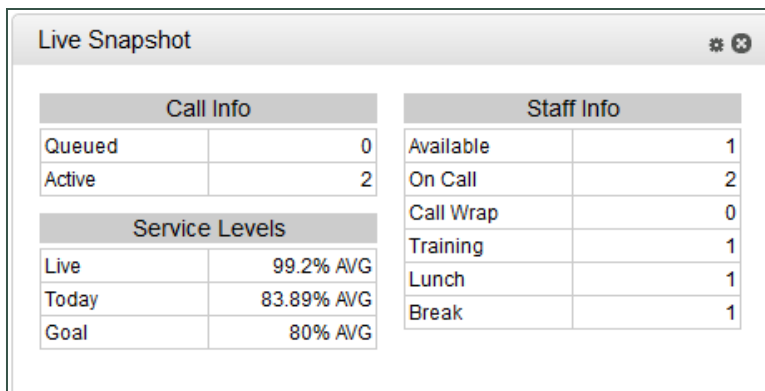
Filter settings stay in effect after you have logged out of Discover or moved to another page. The combination of **Filter by** and **Criteria** settings determine the data used in calculating each KPI. For example, if Agent and Joe Smith are selected, the KPIs calculations are for the agent Joe Smith. Only the agents, groups, and evaluation forms to which you have access will be available in the widget.

To configure the KPI Performance Widget:

1. Click the  icon located in top right hand corner of widget.
2. In the **Widget Subtitle** field, give widget a subtitle name (100 characters max) if desired.
3. Use the **Filter by** drop-down list to select either Agent or Discover Group.
4. Use the **Criteria** drop-down list to select the Agent or Group you wish to view.
5. Use the **QA Form** drop-down list to select the Evaluation Form.
6. In the **Date Range** field, use the date picker to select a start and end date.
7. Enter the **Low Threshold**.
8. Enter the **Target** and then click **OK**.

Live Snapshot Widget

Note: This widget will not contain any data unless your installation includes Uptivity Clarity WFM.



The screenshot shows a window titled "Live Snapshot" with three data tables. The "Call Info" table shows 0 Queued and 2 Active calls. The "Service Levels" table shows a Live service level of 99.2% AVG, Today at 83.89% AVG, and a Goal of 80% AVG. The "Staff Info" table shows 1 Available staff member, 2 On Call, 0 Call Wrap, 1 Training, 1 Lunch, and 1 Break.

Call Info	
Queued	0
Active	2

Service Levels	
Live	99.2% AVG
Today	83.89% AVG
Goal	80% AVG

Staff Info	
Available	1
On Call	2
Call Wrap	0
Training	1
Lunch	1
Break	1

The **Live Snapshot** widget can be accessed by up to five simultaneous users, and allows for users to view call data, staffing information, and service levels. This widget is primarily for users managing day-to-day operations such as WFM personnel, supervisors, managers, etc. It features:

- Ability to view amount of calls in queue vs. active calls for a particular group.
- Ability to view live service level, ASA and Service Level goal.
- Ability to view staffing information such as available, on call, lunch, etc.

For additional information, see the *Uptivity Clarity WFM User Manual*.

Permissions


Use of this widget is restricted to permissioned users. If you need to use the Assignment Inbox widget and are not able to do so, talk to your Discover administrator.

Display

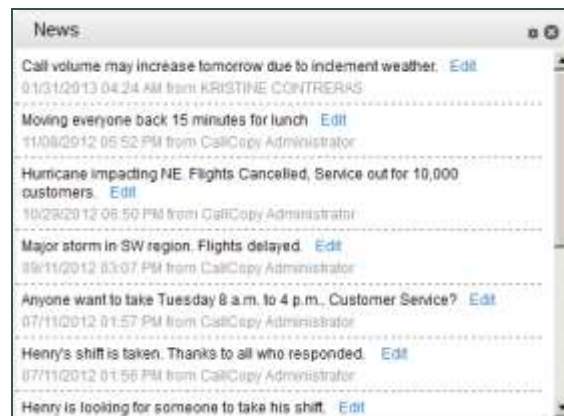
A Subtitle text entry field on the dialog box enables you to enter a name (100 characters max) for this instance of the widget. You can filter the display based on Labor Unit.

Configure the Live Snapshot Widget

Filter settings stay in effect after the user has logged out of Discover or moved to another page. To configure the widget:

1. Click the gear icon  located in top right corner of widget.
2. In the **Widget Subtitle** field, give widget a subtitle name (100 characters max) if desired.
3. Use the **Labor Units** list to select the Labor Unit that you want to view as your default. Press and hold the Shift or CTRL key, then click, to make multiple selections.
4. Click **OK**.

News Widget



The **News** widget can be accessed by up to 200 simultaneous users, and allows administrative users to quickly push one-line information to group(s) of agents and other users. Supervisors/managers can use this for recognition, updates, briefs, etc. Users can search within the widget for news that contains certain keywords and/or that was posted within specific date ranges.

Permissions

No special permissions are required to load and view this widget. However, posting news items is restricted to permissioned users. If you need to post news items and are not able to do so, talk to your Discover administrator.

Display


Each News posting displays this information in this order:

- Text of the news post.
- Users with permission to post news items will see an Edit link next to the text of the post.
- Date the posting was made in the format: MM/DD/YYYY.
- Time the posting was made in the format: HH:MM AM/PM.
- First and last name of the user who posted the news.

When the dashboard/Home tab opens and the News widget loads, the widget displays the 10 most recent news postings. When you select filter criteria, the widget displays all postings that were ever posted that meet the search criteria.

Configure the News Widget

Widget filter settings are not retained after you log out of Discover. To configure the News Widget:


1. Click the  icon located in top right hand corner of widget.
2. In the **Widget Subtitle** field, give widget a subtitle name (100 characters max) if desired.
3. Use the **Labor Units** list to select the Labor Unit that you want to view. Press and hold the Shift or CTRL key, then click, to make multiple selections.

Note: The Labor Unit list will not contain any data unless your installation includes Uptivity Clarity WFM.

4. Use the **Callcopy Groups** list to select the Discover Groups that you want to view. Press and hold the Shift or CTRL key, then click, to make multiple selections.
5. Click **Save**.


Search News Items

To search for news items:

1. Click the  icon located in top right hand corner of widget.
2. Enter keyword text in **the Search news by keywords** field.
3. Use the date picker to enter a **Start date** and **End date** if you want to limit your search to a specific date range, and then click **Save**.

Post News Item

Posts are limited to 288 characters, including all letters, numerals, and characters. The Enter key can be used to create line breaks. Posts are sent to all users unless you limit the posting to specific Labor Units and/or Discover Groups.

1. Click the  icon located in top right hand corner of widget.
2. In the **Add News** text entry field, enter text for the post.
3. Use the **Labor Units** list to select the Labor Unit(s) that you want to view this posting. Press and hold the Shift or CTRL key, then click, to make multiple selections.

Note: The Labor Unit list will not contain any data unless your installation includes Uptivity Clarity WFM.

4. Use the **Callcopy Groups** list to select the Discover Groups that you want to view this posting. Press and hold the Shift or CTRL key, then click, to make multiple selections.
5. Click **Save** (either Save button will commit changes for the entire dialog box).

QA Benchmark Widget



The **QA Benchmark** widget can be accessed by up to 10 simultaneous users, and enables you to compare QA score averages for agents, Discover Groups, and forms. A benchmark entity is selected. For example, if an Agent-to-Group comparison is used, a Discover Group is selected as a benchmark. This information allows for a quick assessment of QA performance. An unlimited number of comparisons can be added to the widget.

This widget supplements the printable QA comparison reports that provide more robust reporting and analysis: Group QA Summary, QA Agent Periodical Trending, QA Agent Trending, QA Form Trending, QA Group Scorecard, etc. For additional information, see the *Uptivity Discover Reporting Manual*.

The Comparison drop-down list has these values:

- Agent to Agent
- Agent to Group
- Group to Group
- Agent to Form
- Group to Form
- Form to Form

The colors in the display show the placement of the benchmark as compared to these user-defined thresholds:

- **Red**: below the lowest acceptable low score, a whole number entered as the Low Threshold.
- **Yellow**: between the Low Threshold and the optimal minimum score, a whole number entered as the Target).
- **Green**: above the Target.

Permissions

Use of this widget is restricted to permissioned users. If you need to use the QA Benchmark widget and are not able to do so, talk to your Discover administrator.

Display

The benchmark name, average QA score, and arrow appear at the top of the widget. In this example, the Group ABC is the benchmark. Eighty-five percent (85%) is the average QA score. The color yellow and downward arrow indicates that the score is below the target score but above the low threshold.

Group ABC 85% ↓

These rules determine the average QA score:

- If Agent is the benchmark, the average is for all completed QA evaluations for that agent, regardless of form, for the specified time period. If an evaluator was specified, only evaluations done by that evaluator are included in the calculation.
- If Group is the benchmark, the average is for all completed QA evaluations for all forms and agents in that group for the specified time period. If an evaluator was specified, only evaluations done by that evaluator are included in the calculation.

- If Form is the benchmark, the average is for all completed QA evaluations for that form for all agents for the specified time period. If an evaluator was specified, only evaluations done by that evaluator are included in the calculation.

For all rules, data is pulled based on groups to which you have access.

The lower half of the widget allows you to add an unlimited number of comparisons for different benchmarks (Agent, Group, or Form). If the benchmark type is:


- Agent: only Agent appears in the comparison list.
- Group: Agent and Group appear in the comparison list.
- Form: Agent, Group, and Form appear in the comparison list.

The second drop-down list populates based on the selection made in the first list. If the benchmark type is:

- Agent: this list shows all agents to whom you have access.
- Group: this list shows all groups to which you have access.
- Form: this list shows all forms assigned to groups to which you have access.

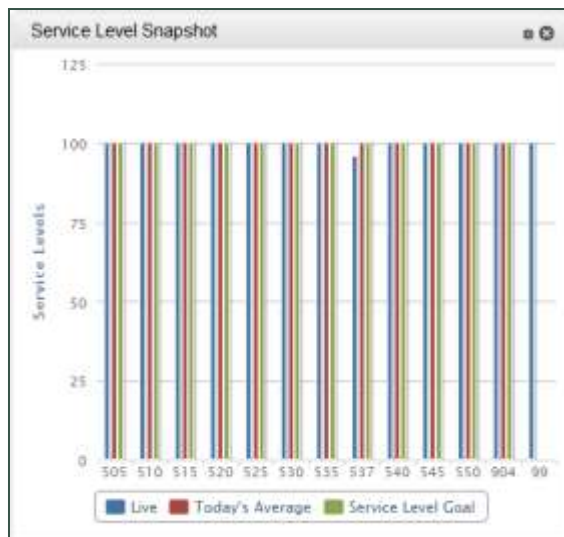
Configure the QA Benchmark Widget

Filter settings stay in effect after the user has logged out of Discover or moved to another page. To configure the widget:

1. Click the  icon located in top right hand corner of widget.
2. In the **Widget Subtitle** field, give widget a subtitle name (100 characters max) if desired.
3. Use the **Benchmark Type** drop-down list to choose Form, Group, or Agent as your benchmark type.
4. Use the **Benchmark** drop-down list to select the benchmark (choices depend on the Benchmark Type selected and on your permissions).
5. Select an **Evaluator** from the drop-down list if desired ("Any" is the default).
6. Use the date pickers to select a **Start Date** and **End Date** for your desired date range.
7. Enter a **Low Threshold**.
8. Enter a **Target** and then click **OK**.

Service Level Snapshot Widget

Notes: The Service Level Snapshot widget may require a page refresh to display the latest information. This widget will not contain any data unless your installation includes Uptivity Clarity WFM.



The **Service Level Snapshot** widget can be accessed by up to five simultaneous users, and allows users to view Service Level percentages for various Labor Units. WFM personnel, managers, and supervisors can use this widget to receive quick-glance service levels, helping them manage their day-to-day operations.

The widget lets you:


- Display Service level goals for a specific group.
- Display Service Level live data for a specific group.
- Displays Service Level average for a specific group.

Permissions

Use of this widget is restricted to permissioned users. If you need to use the Service Level Snapshot widget and are not able to do so, talk to your Discover administrator.

Configure the Service Level Snapshot Widget

Filter settings stay in effect after you have logged out of Discover or moved to another page. To configure the widget:

1. Click the  icon located in top right hand corner of widget
2. In the **Widget Subtitle** field, give widget a subtitle name (100 characters max) if desired.
3. Use the **Labor Units** list to select the Labor Unit(s) that you want to view this posting and then click **OK**.

Document Revision History

Revision	Change Description	Effective Date
0	Initial release for this version	2015-02-13