



# Uptivity WFO User Manual, v5.7

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on Premises

## Uptivity WFO User Manual, v5.7

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Uptivity WFO offers inContact customers a choice of deployment options. For more information about WFO for premise or hybrid environments, visit [www.Uptivity.com](http://www.Uptivity.com). To learn more about WFO in the cloud, visit [www.incontact.com](http://www.incontact.com).

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# Table of Contents

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<b>Introduction .....</b>	<b>9</b>
Audience .....	9
Goals .....	9
Assumptions .....	9
Need-to-Knows .....	9
<b>Uptivity WFO Basics .....</b>	<b>11</b>
Log Into the Discover Web Portal .....	11
Use the Forgot Password Feature .....	12
Locate the Version Number .....	12
Navigate the Discover Web Portal .....	13
Change Your Password .....	14
Log Out of the Discover Web Portal .....	14
<b>Managing Your Home Tab .....</b>	<b>15</b>
Dashboards Overview .....	15
Create Dashboards .....	16
Manage Dashboards .....	17
Assignment Inbox Overview .....	18
New Assignments .....	18
Pending Assignments .....	19
Reviewed Assignments .....	19
<b>Reviewing and Responding to Your QA Evaluations .....</b>	<b>20</b>
QA Review Process Overview .....	20

- Acknowledge a QA Evaluation ..... 21
- Question a QA Evaluation ..... 22
- Dispute a QA Evaluation ..... 22
- Finding Recorded Interactions ..... 23**
- Call List Overview ..... 23
  - Call List Filter Bar ..... 23
  - Call List Page Navigation ..... 24
- Manage Your Call List Settings ..... 25
- Call List Settings Reference ..... 25
- Quick Filter Menu Overview ..... 27
  - Calendar Quick Filter ..... 27
  - Agent Quick Filter ..... 27
  - Uptivity Group Quick Filter ..... 28
  - ACD Gate Quick Filter ..... 28
  - ACD Group Quick Filter ..... 28
  - Categories Quick Filter ..... 29
  - Create a Category ..... 29
  - Edit or Delete a Category ..... 30
  - My Filters Quick Filter ..... 30
  - Work with My Filters ..... 31
  - Tag Cloud Quick Filter ..... 32
- Create a Filter ..... 33
- Save a Filter ..... 33
- Access My Filters ..... 34

Filter Options Reference .....	35
Data Fields .....	35
Quality Management.....	38
Surveys.....	38
Date/Days of the Week .....	39
Duration.....	39
Data Comparison .....	40
Other Options .....	40
<b>Listening to Recorded Interactions .....</b>	<b>41</b>
Web Player Overview.....	41
Manage Your Web Player Settings .....	42
Play a Recorded Interaction .....	42
Playback Details Pane Overview .....	43
Player Controls.....	43
Waveform Display .....	44
Waveform Display Information Indicators Reference.....	46
Layer Details Pane Overview .....	47
Screen Capture Pane Overview .....	48
Manage Internal Bookmarks.....	49
Add Internal Bookmarks .....	49
View Internal Bookmarks .....	50
Edit or Delete Bookmarks .....	50
<b>Working with Recorded Interactions .....</b>	<b>51</b>
Call Records Overview .....	51

- Flag a Recording ..... 52
- Export a Recording..... 52
  - Filename Mask Overview ..... 54
  - Manage Filename Masks..... 55
- Export the Call List ..... 56
- Evaluate a Recording ..... 56
- View Completed Evaluations for a Recording..... 56
- View Completed Surveys for a Recording..... 57
- Bookmark a Recording..... 57
- Find Call Segments ..... 57
- Change Archive Options for a Recording ..... 59
- Categorize Recordings..... 59
- Edit a Recording ..... 61
- Copy a Recording Link ..... 62
- Delete a Recording ..... 62
- Apply a Manual Blackout to a Recording..... 63
- Monitoring Live Interactions..... 64**
  - Live Monitor List View..... 64
  - Manage Your Live Monitor List Settings..... 66
  - Search for Agents..... 66
  - Monitor a Call ..... 67
  - Live Monitor Screen View ..... 69
  - Screen View Playback..... 70
- Appendix: Uptivity WFO Home Tab Widgets..... 71**

Achievement Widget Overview .....	71
Permissions .....	72
Display .....	72
Configure the Achievements Widget .....	74
Assignment Inbox Widget Overview .....	75
Permissions .....	75
Display .....	75
Forecasted vs. Actual Calls Widget Overview .....	77
Permissions .....	77
Display .....	77
Configure the Forecasted vs. Actual Calls Widget .....	77
KPI Performance Widget Overview .....	78
Permissions .....	78
Display .....	78
Configure the KPI Performance Widget .....	78
Live Snapshot Widget Overview .....	79
Permissions .....	79
Display .....	80
Configure the Live Snapshot Widget .....	80
News Widget Overview .....	80
Permissions .....	80
Display .....	81
Configure the News Widget .....	81
Search News Items .....	81

- Post News Items ..... 82
- QA Benchmark Widget Overview ..... 82
  - Permissions ..... 83
  - Display ..... 83
- Configure the QA Benchmark Widget ..... 84
- Service Level Snapshot Widget Overview ..... 85
  - Permissions ..... 85
- Configure the Service Level Snapshot Widget ..... 86
- Document Revision History ..... 87**



## Introduction

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### Audience

This document is designed for all users of Uptivity WFO. It provides information and procedures around such basic Uptivity WFO functionality as accessing the Discover Web Portal, managing your Home tab, locating working with 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 knowledge, reference, and procedural information necessary to use basic Uptivity WFO 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 WFO has been installed and integrated with your PBX if applicable. It also assumes that your application administrator has configured the application for use based on your business rules and environment.

### Need-to-Knows

The *Uptivity WFO Quality Management Manual* contains knowledge and procedures related to creating and managing agent evaluations in the Discover Web Portal. The *Uptivity WFO Reporting Manual* contains knowledge and procedures related to reporting on contact center and agent activity with Uptivity WFO. These may prove to be helpful references to QA analysts, supervisors, and managers.

Several Uptivity WFO 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 Uptivity WFO site.

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

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

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

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

## Uptivity WFO Basics

### Log Into the Discover Web Portal

Your system administrator should provide you with this information to log in:

- Username
- Initial password (Uptivity WFO passwords are case sensitive)
- Login mode (your system may be set up to use your Windows network account or an Uptivity WFO account), and
- URL or link to the Discover Web Portal.

Uptivity WFO allows multiple simultaneous logins from the same account. If you log in on multiple computers or browsers and then log out on only one, Uptivity WFO removes you from the list of logged-in users, even if you remain logged in on another computer or in another browser. The impact of this behavior on system audit reports is explained in the *Uptivity WFO Reporting Manual*.

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

When you log into the Discover Web Portal, Uptivity WFO 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. Type your Uptivity WFO username and password.
3. Optional: select the **Remember my username?** checkbox.
4. 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

**i** This feature does not work if your account has been locked due to login failures and/or you do not have permission to change your password.

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. Type 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 Uptivity WFO system administrator to resolve the issue.

## Locate the Version Number

The version number for your Uptivity WFO 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 Discover Web Portal

You can navigate the **Discover 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 Uptivity WFO 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 shows the Discover Web Portal interface. At the top, there is a header with the 'Discover' logo and 'uptivity' branding. Below the header, there are navigation tabs: 'Home', 'Interactions List', 'Coaching', 'Reporting', 'Surveys', and 'Administration'. The 'Interactions List' tab is currently selected. On the left side, there is a navigation menu with options like 'Calendar', 'Agent', 'Discover Group', 'ACD Gate', 'Group', 'Categories', 'My Filters', and 'Tag Cloud'. The main content area displays a table of call records with columns for Record ID, First Name, Last Name, Device ID, Time Recorded, and Group. The table is filtered by 'Name'.

Record ID	First Name	Last Name	Device ID	Time Recorded	Group
1776	Daniel	Ayala	7504	1/22/2013 5:27:12 PM	40
1774	Daniel	Ayala	7504	1/22/2013 5:24:48 PM	30
1773	Daniel	Ayala	7504	1/22/2013 5:22:53 PM	40
1772	Daniel	Ayala	7504	1/22/2013 5:17:38 PM	20
1747	Daniel	Ayala	7504	1/22/2013 3:57:44 PM	40
1159	Daniel	Ayala	7504	12/4/2012 11:56:39 AM	20
183	Daniel	Ayala	7504	5/10/2012 10:01:59 AM	30
97	Daniel	Ayala	7504	5/9/2012 5:37:10 PM	30

All Uptivity WFO users, regardless of permissions, can access the:

- **Home** tab — left navigation menu items **Dashboard** and **Assignment Inbox**
- **Coaching** tab — left navigation menu item **Content Library**

For more information on **Dashboards** and the **Assignment Inbox**, see [Managing Your Home Tab](#). The **Content Library** contains current user guides and manuals for Uptivity WFO on premises, as well as any documents uploaded by your organization.

## Change Your Password

**i** You must have been granted permission by your administrator to change your password.

To change your password:

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

## Log Out of the Discover Web Portal

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.

## Managing Your Home Tab

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

### Dashboards Overview

Dashboards are part of the basic Uptivity WFO 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 Uptivity WFO administrator makes available, you can select those widgets you want to display on your Uptivity WFO Home tab dashboard. You can also create new dashboards.

Benefits of 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, and so forth 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.

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 Uptivity 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 Clarity WFM and Uptivity Speech Analytics. Not all widgets may apply to your system.

For additional information on available widgets and how to configure them, see [Appendix: Uptivity WFO Home Tab Widgets](#).

## Create Dashboards

The screenshot shows the 'Add New Dashboard' form. At the top right is a blue button labeled 'Add New Dashboard'. The form title is 'Add New Dashboard'. It contains the following fields and controls:

- Name:** A text input field.
- Description:** A text input field with a vertical ellipsis icon on the right.
- Add widget:** A section with two scrollable lists. The left list is titled 'Select: All | None' and contains the following items with checkboxes:
  - News
  - Forecast vs. Actual
  - KPI Performance
  - Live Snapshot
  - Service Level Snapshot
  - Assignment Inbox
  - QA Benchmark
  - AchievementThe right list is also titled 'Select: All | None' and is currently empty. Between the lists are two buttons: 'Add' with a right-pointing arrow and 'Remove' with a left-pointing arrow.
- Set this as your default dashboard:** Radio buttons for 'Yes' and 'No', with 'No' selected.
- OK or Cancel:** A blue 'OK' button and a grey 'Cancel' button.

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. Type a unique **Name** (25 characters max) and **Description** (200 characters max).
4. Select the checkboxes 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**.

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



## Manage Dashboards

**Discover**  
Switch Site View

Home Interactions List Coaching Reporting Surveys Administration

**Dashboard**  
All Widgets  
Assignment Inbox  
Forecast Widget

**Manage Dashboards**

Dashboard List [Add New Dashboard](#)

Name	Description	Widget	Date Created	Date Modified	Action
All Widgets		Forecast vs. Actual, KPI Performance, Live Snapshot, Service Level Snapshot, Assignment Inbox, QA Benchmark, Achievement	11/11/2014	11/11/2014	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Assignment Inbox		Assignment Inbox	8/1/2014	8/1/2014	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Forecast Widget		Empty	1/23/2013	1/23/2013	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

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**.

## Assignment Inbox Overview

The Home tab's Assignment Inbox enables supervisors to distribute evaluations and documents (for example, training material and announcements) to Uptivity WFO users. You can view new and pending assignments in your inbox, and mark them completed once you finish them.

If your organization uses the Uptivity WFO QA review process, you will also use the Assignment Inbox feature to review, question, or dispute evaluations. For more information on this process, see [Reviewing and Responding to Your QA Evaluations](#).

### New Assignments

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The New Assignments page shows documents that have been assigned to your groups but that you have not yet viewed. It also shows evaluations completed on your performance and awaiting your review or acknowledgment. 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 disabled 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, specific coaching permissions are necessary. Ask your Uptivity WFO administrator if you believe you need these permissions and do not have them.
- **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 (for example, Excel, Word, or PDF)
- **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. If the assignment is an evaluation, this field shows either "Not Disclosed" or the name of the evaluator, depending on whether your organization allows agents to see this information.

Clicking 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

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When you review an evaluation and question or dispute 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 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.

## Reviewed Assignments

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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).

## Reviewing and Responding to Your QA Evaluations

### QA Review Process Overview

Uptivity WFO provides an interactive process for agents and evaluators to review and agree upon completed QA evaluations. The process consists of two components: Acknowledgment and/or Arbitration. Organizations can decide whether to use Acknowledgment only, Acknowledgment and Arbitration together, or neither component, depending on their needs. Ask your supervisor if you are unsure which process is used in your organization.

When an Acknowledgment-only workflow is chosen, the process looks like this:

- The evaluator designates the completed evaluation as "Agent Acknowledgment Required".
- The evaluation is added to your Assignment Inbox as a New Assignment and a "new messages" envelope icon appears at the top of your Discover Web Portal. Depending on your system, you may also be notified via email about the evaluation.
- After reviewing the completed evaluation, and adding comments if desired, you can either acknowledge or question the evaluation. These choices result in different workflows:
  - If you acknowledge the evaluation, it moves to Reviewed Assignments in your Assignment Inbox and is flagged as Acknowledged in the list of QA Acknowledgments for the evaluator.
  - If you question the evaluation, it moves to Pending Assignments and is flagged as Question in the list of QA Acknowledgments for the evaluator. Once the evaluator has replied, the evaluation moves back to your New Assignments. This Q&A loop may be repeated as necessary until your questions are answered and you acknowledge the evaluation.

When Arbitration workflow is chosen, the process changes to allow for a third-party review of disputed evaluations:

- The creator of the evaluation form designates that it should be subject to Arbitration workflow. This workflow is enabled on a form-by-form basis.
- When performing the evaluation, the evaluator designates one or more evaluators to serve as arbitrators if the evaluation is disputed.
- When complete, the evaluation is added to your Assignment Inbox as a New Assignment and a "new messages" envelope icon appears at the top of your Discover Web Portal. Depending on your system, you may also be notified via email about the evaluation.

- After reviewing the completed evaluation, and adding comments if desired, you can either acknowledge, question, or dispute the evaluation. These choices result in different workflows:
  - If you acknowledge the evaluation, it moves to Reviewed Assignments in your Assignment Inbox and is flagged as Acknowledged in the list of QA Acknowledgments for the evaluator.
  - If you question the evaluation, it moves to Pending Assignments and is flagged as Question in the list of QA Acknowledgments for the evaluator. The evaluator can search for this status and reply to the question. Once the evaluator has replied, the evaluation moves back to your New Assignments. This Q&A loop may be repeated as necessary until your questions are answered and you acknowledge the evaluation.
  - If you dispute the evaluation, it moves to Pending Assignments and is flagged as Dispute in the list of QA Acknowledgments. Evaluators and arbitrators can search for this status and see that the evaluation was disputed, but only an arbitrator can respond to the dispute. Once the arbitrator has replied, the evaluation's status changes to Unacknowledged, it moves back to your New Assignments and your original three choices (acknowledge, question and dispute) are once again available. This loop may be repeated as necessary until you acknowledge the evaluation.

Evaluations include Comments fields for you, evaluator, and/or arbitrator to use during the review process. All comments are retained on the evaluation throughout this process. These comments also appear when an evaluation is converted to a PDF for printing. The Comments fields:

- Are limited to 1500 characters (including spaces) per field.
- Allow percent signs (%), parentheses, hyphens, commas, and periods, but no other special characters.

If either of these limitations is violated, an error message will appear when the form is submitted.

When an evaluation is in acknowledged, question, or dispute status, you cannot interact with any buttons on the evaluation or add additional questions or comments.

## Acknowledge a QA Evaluation

To acknowledge an evaluation:

1. Click the **Home** tab in the Discover Web Portal and expand **Assignment Inbox** in the left navigation menu.
2. Click **New Assignments**.

3. Click the desired evaluation to open it.
4. Review the evaluation and type **Comments** if desired.
5. Click **Acknowledge** at the bottom of the evaluation.

**Alternative:** Click **Back** and then click **Done** for that evaluation in the **New Assignments** list.

## Question a QA Evaluation

To question an evaluation:

1. Click the **Home** tab in the Discover Web Portal and expand **Assignment Inbox** in the left navigation menu.
2. Click **New Assignments**.
3. Click the desired evaluation to open it.
4. Review the evaluation and type **Comments** (this field is required for Questioned evaluations).
5. Click **Question** at the bottom of the evaluation.

After the evaluator has responded to your question, you may repeat this process if necessary or [Acknowledge a QA Evaluation](#). If your organization uses the Arbitration workflow, you may also [Dispute a QA Evaluation](#).

## Dispute a QA Evaluation

If your organization uses the Arbitration workflow and it has been enabled for an evaluation form, you can dispute the evaluation. To dispute an evaluation as an agent:

1. Click the **Home** tab in the Discover Web Portal and expand **Assignment Inbox** in the left navigation menu.
2. Click **New Assignments**.
3. Click the desired evaluation to open it.
4. Review the evaluation and type **Comments** (this field is required for Disputed evaluations).
5. Click **Dispute** at the bottom of the evaluation.

After the arbitrator has responded to your dispute, you may repeat this process if necessary, [Question a QA Evaluation](#), or [Acknowledge a QA Evaluation](#).

## Finding Recorded Interactions

### Call List Overview

Filter		Previous Filter		Current Filter: Name X		Settings	
Record ID	First Name	Last Name	Device ID	Time Recorded	Group		
▶ 1776	Daniel	Ayala	7504	1/22/2013 5:27:12 PM	40		
▶ 1774	Daniel	Ayala	7504	1/22/2013 5:24:48 PM	30		
▶ 1773	Daniel	Ayala	7504	1/22/2013 5:22:53 PM	40		
▶ 1772	Daniel	Ayala	7504	1/22/2013 5:17:38 PM	20		
▶ 1747	Daniel	Ayala	7504	1/22/2013 3:57:44 PM	40		
▶ 1159	Daniel	Ayala	7504	12/4/2012 11:56:39 AM	20		
▶ 183	Daniel	Ayala	7504	5/10/2012 10:01:59 AM	30		
▶ 97	Daniel	Ayala	7504	5/9/2012 5:37:10 PM	30		

The **Call List** lets you search for and review recorded interactions so you can listen to them (see [Listening to Recorded Interactions](#)) or perform other tasks (see [Working with Recorded Interactions](#)). 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 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 select which columns are displayed.

You are the only one affected by these changes. Uptivity WFO 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 [Call List Settings Reference](#).

### Call List Filter Bar

You can create custom Call List searches using the Quick Filter menu (see [Quick Filter Menu Overview](#)), the Filter page, or both. Filters created on the Filter page work together with Quick Filters, and any Quick Filters in effect are pre-selected when you open the Filter page.

At the top of the Call List is a Filter Bar which shows the currently-applied filter. The preceding 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:

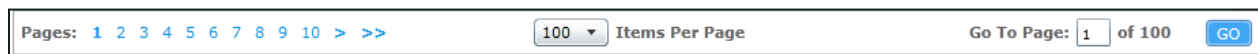
- Click **Previous Filter**.

Leaving the Call List screen clears the Previous Filter setting. When you return to the Call List, your default filter will be displayed and Previous Filter will be disabled.

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.

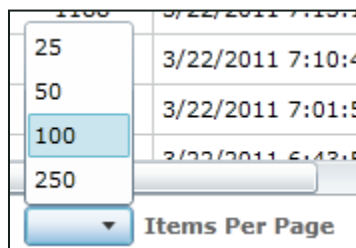
## Call List Page Navigation

The Page Navigation Bar will always be displayed at the bottom of the Call 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 type 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 Call List, by selecting the option from the drop-down list in the navigation bar.





## Manage Your Call List Settings

To configure your individual Call List settings:

1. Click the **Interactions List** tab and then click the **Call List** sub-tab.
2. Click **Settings** in the upper right corner of the Call List.
3. Select the checkbox(es) for the columns you want to display in your Call List. 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 selections you made since opening the page.
4. Click **Save**.

## Call List Settings Reference

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

"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 interaction.

- **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 ACD/PBX identifier associated with the person receiving or placing the call.
- **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 recording file.
- **ACD Queue:** The ACD Gate/Queue name, if the call was delivered over an ACD system and the information is available to Uptivity WFO.
- **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 PC applications related to the call.
- **Survey Score:** The overall score for a call if the customer completed a survey after the call ended. Not applicable unless your organization uses Uptivity Survey.

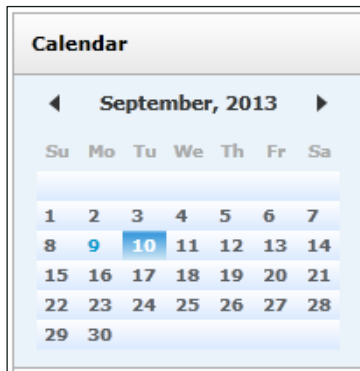
"User Columns" are data fields that can be used differently by each organization. Data received from third party IVR, CRM, or ACD platforms can be inserted into these fields, or agents can type information via Uptivity WFO On-Demand. Your Uptivity WFO administrator can tell you which of these fields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

For information on configuring items in the Call List Settings section, see [Manage Your Call List Settings](#).

## Quick Filter Menu Overview

On the Call List, 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.

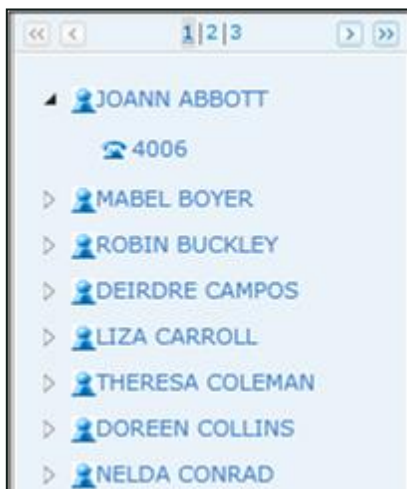
### Calendar Quick Filter



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 [Create a Filter](#).

### Agent Quick Filter



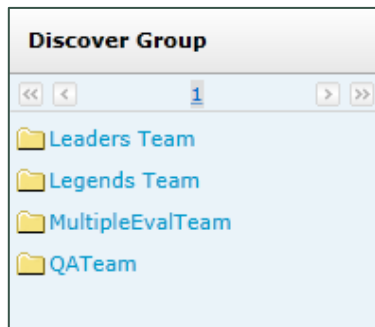
The Agent Quick Filter displays the list of agents to whom you have access. You can select an agent to display records for only that agent. This filtering is based on the Uptivity WFO Agent ID field and not on the agent's name.

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.

## Uptivity Group Quick Filter

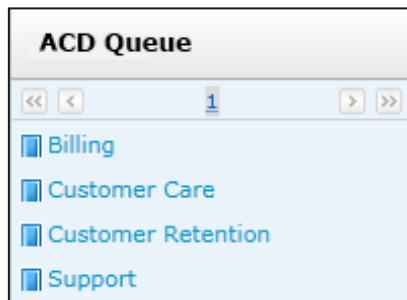
---



The Uptivity Group Quick Filter displays the Uptivity Groups to whom you have access. Uptivity 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.

## 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 filters the Call List to only display calls that were delivered to selected queues or gates that you have permission to view.

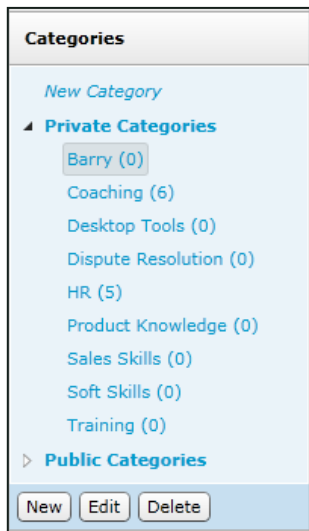
## ACD Group Quick Filter

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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.

## Categories Quick Filter

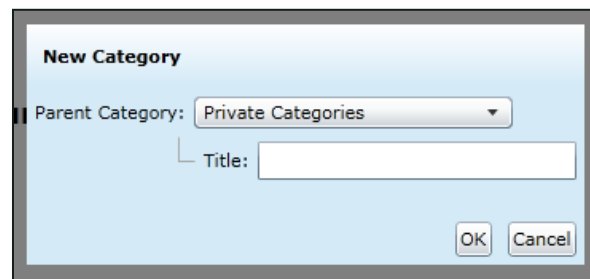


The Categories Quick Filter lists Categories to which you have access. The number of calls in a category appears in parentheses. Clicking a Category will display any calls tagged with that Category.

Private categories are those only you can see. Public categories can be seen by any user with access to the Call List. However, users can see only the calls within that category for the Uptivity 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 Recordings](#).

## 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 **Interactions List** 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 then click **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

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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.

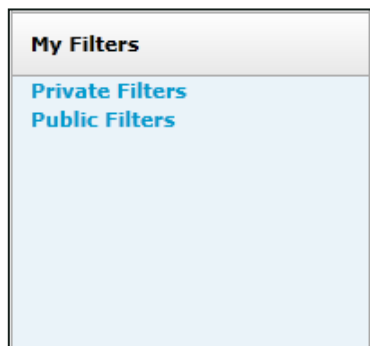
To edit or delete an existing category or sub-category:

1. Click the **Interactions List** tab and then click the **Call List** sub-tab.
2. Click **Categories** in the Quick Filter menu.
3. Click the category name.
4. 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 click **Edit** or **Delete**.

## My Filters Quick Filter

---



The My Filters Quick Filter provides links to your private and public saved filters. For more information, see [Create a Filter](#) and [Save a Filter](#).

**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 **Interactions List** tab and then click the **Call List** sub-tab.
2. Click **My Filters** in the Quick Filter menu.
3. Click either **Private Filters** or **Public Filters** as desired.
4. 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 (that is, calls recorded on the current day). To set a default Call List filter from My Filters:

1. Click the **Interactions List** tab and then click the **Call List** sub-tab.
2. Click **My Filters** in the Quick Filter menu.
3. Click either **Private Filters** or **Public Filters** as desired.
4. Click **Default**.

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

1. Click the **Interactions List** tab and then click the **Call List** sub-tab.
2. Click **My Filters** in the Quick Filter menu.
3. Click either **Private Filters** or **Public Filters** as desired.
4. Click **Edit**.
5. 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 **Interactions List** tab and then click the **Call List** sub-tab.
2. Click **My Filters** in the Quick Filter menu.
3. Click either **Private Filters** or **Public Filters** as desired.
4. Click **Delete**.

## Tag Cloud Quick Filter

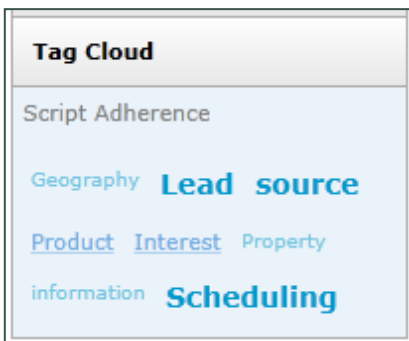
The Tag Cloud Quick Filter menu is available only if your organization uses Uptivity Speech Analytics. The Tag Cloud is used to sort call recordings by the tag groups assigned when the speech analytics engine reviewed the call.

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.



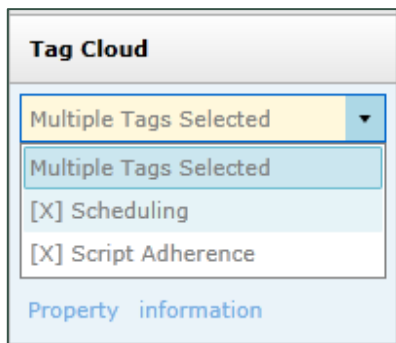
The tag size is weighted as shown in this table:

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 want to remove.



## Create a Filter

To build and apply a filter to the Call List:

1. Click the **Interactions List** tab in the Discover Web Portal and then click the **Call List** sub-tab.
2. Click **Filter** in the upper left corner.
3. Select the desired data field(s) and operator(s), and type the desired criteria value(s). You can filter for multiple data fields at once. See [Filter Options Reference](#).
4. 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:

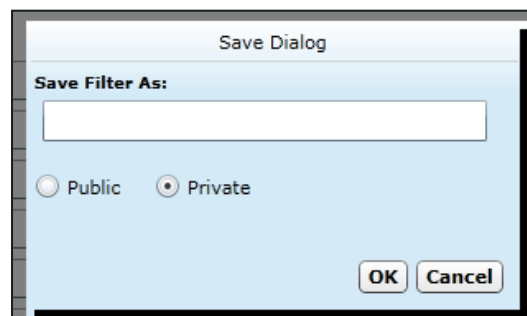
- Click **Cancel**.

## Save a Filter

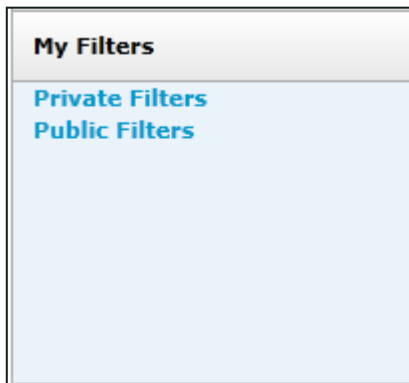
If you use some filters repeatedly, you can save them and access them again from the **My Filters** Quick Menu. Filters can be saved for either personal (private) or general (public) use. For information on using My Filters, see [My Filters Quick Filter](#) and [Work with My Filters](#).

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. Type a name in the **Save Filter As** field.
4. Select whether you want the filter to be **Public** or **Private** and then click **OK**.



## Access My Filters

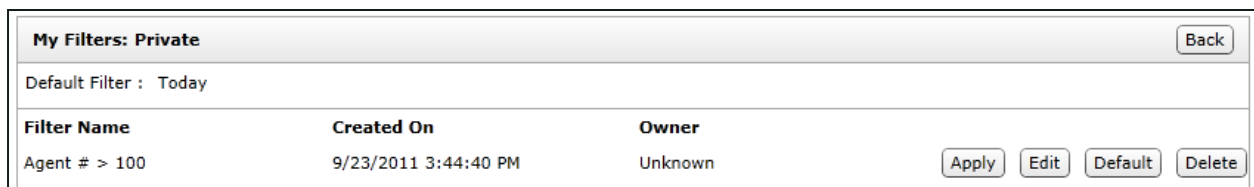


Click **My Filters** on the Quick Filter menu to use filters that have been saved.

**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.



- Click **Apply** on a filter to load the filter settings, and return to the Call List page. The Call List now displays 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 Call List page. The default filter is usually the Today filter (that is, calls recorded on the current day).

If you created the filter, you can:

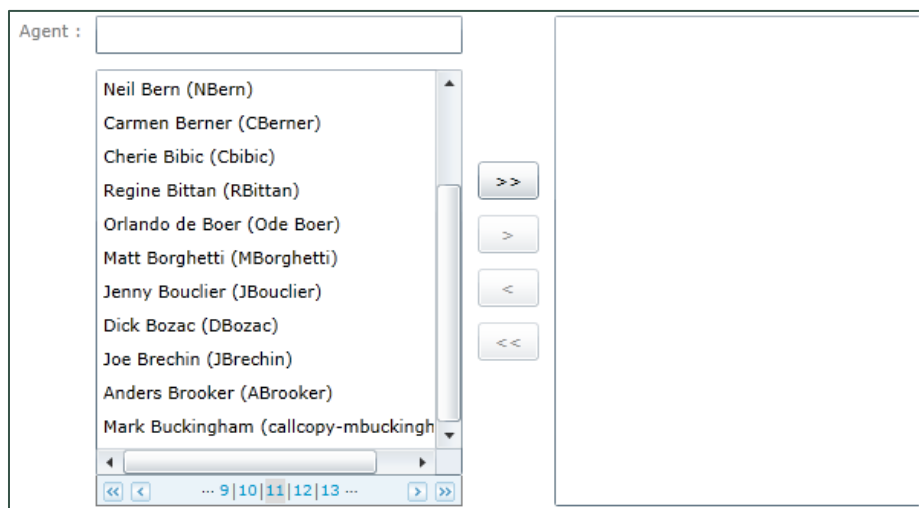
- Click **Edit** to open the Filter Options page and change any Filter settings. When you have completed your changes, click **Save as My Filter** to apply the changes to the saved filter. For additional information, see [Filter Options Reference](#).
- Click **Delete** to delete the selected filter.

## Filter Options Reference

### 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 type your desired search item in the text field. The **Agent** field offers some advanced functionality.



On the left, Uptivity WFO 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, Uptivity WFO 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. 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:

<b>Equals:</b>	Field being filtered must match the typed value exactly. Example: <i>"CallerID" Equals "614-555-5555"</i> will only return calls from that exact phone number.
<b>Not Equals:</b>	Field being filtered must not exactly match the typed value. Example: <i>"CallerID" Not Equals "614-555-5555"</i> will return every call recorded <i>except</i> those from 614-555-5555.
<b>Starts With:</b>	Field being filtered must begin with the typed value. Example: <i>"CallerID" Starts With "614"</i> will display every call recorded where Caller ID begins with 614. <b>TIP:</b> Useful for area code searches.
<b>Ends With:</b>	Field being filtered must end with the typed value. Example: <i>"CallerID" Ends With "5555"</i> will display every call recorded where Caller ID ends with "5555". <b>TIP:</b> Useful for locating calls when you only have the last four digits of the caller's phone number.
<b>Contains:</b>	Field being filtered must contain the typed 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". <b>TIP:</b> Useful for locating calls with only a partial phone number.
<b>Does Not Contain:</b>	Field being filtered must not contain the typed 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.
<b>Less Than:</b>	Contents of field being filtered must be less than typed value (numeric values only). Example: <i>"Record ID" Less Than "3264"</i> will exclude every call with a record ID number greater than "3264".
<b>Greater Than:</b>	Contents of field being filtered must be greater than typed value (numeric values only). Example: <i>"Record ID" Greater Than "3264"</i> will exclude every call with a record ID number less than "3264".
<b>In:</b>	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.
<b>Not In:</b>	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="checkbox"/>	Agent Number :	Equals	
<input type="checkbox"/>	Agent Name :	Equals	
<input type="checkbox"/>	Group :	Equals	
<input type="checkbox"/>	Queue :	Equals	
<input type="checkbox"/>	CallerID ANI :	Equals	
<input type="checkbox"/>	Number Called DNIS :	Equals	
<input type="checkbox"/>	Record ID :	Equals	
<input type="checkbox"/>	Account Number :	Equals	
<input type="checkbox"/>	CSN :	Equals	
<input type="checkbox"/>	User3 :	Equals	
<input type="checkbox"/>	Salesforce Case :	Equals	
<input type="checkbox"/>	Public Bookmark :	Equals	
<input type="checkbox"/>	User6 :	Equals	
<input type="checkbox"/>	User7 :	Equals	
<input type="checkbox"/>	User8 :	Equals	
<input type="checkbox"/>	User9 :	Equals	
<input type="checkbox"/>	User10 :	Equals	
<input type="checkbox"/>	User11 :	Equals	
<input type="checkbox"/>	User12 :	Equals	
<input type="checkbox"/>	User13 :	Equals	
<input type="checkbox"/>	User14 :	Equals	
<input type="checkbox"/>	User15 :	Equals	
<input type="checkbox"/>	Channel :	Equals	
<input type="checkbox"/>	Bookmark :	Equals	
<input type="checkbox"/>	CallCopy group :	select	
<input type="checkbox"/>	Categories :	select	
<input type="checkbox"/>	Tag :	<ul style="list-style-type: none"> <li>Script Adherence</li> <li>Property Information</li> <li>Scheduling</li> <li>Lead Source</li> <li>Product Interest</li> <li>Geography</li> </ul>	<div style="display: flex; align-items: center; gap: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 40px; height: 20px; text-align: center;">&gt;&gt;</div> <div style="border: 1px solid #ccc; width: 150px; height: 100px;"></div> </div> <div style="display: flex; align-items: center; gap: 10px; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 40px; height: 20px; text-align: center;">&lt;&lt;</div> </div>

## Quality Management

**Quality Management**

Evaluations Completed : Equals

Avg. QA Score : Equals

Randomizer : Number

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 select whether the Randomizer should display a chosen number of calls or a percentage of calls.

## Surveys

If your organization uses Uptivity 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 Survey Administration Guide*. 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**

Survey Score : Equals

Other Score Values : Equals

## 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, typing 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

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**Other**

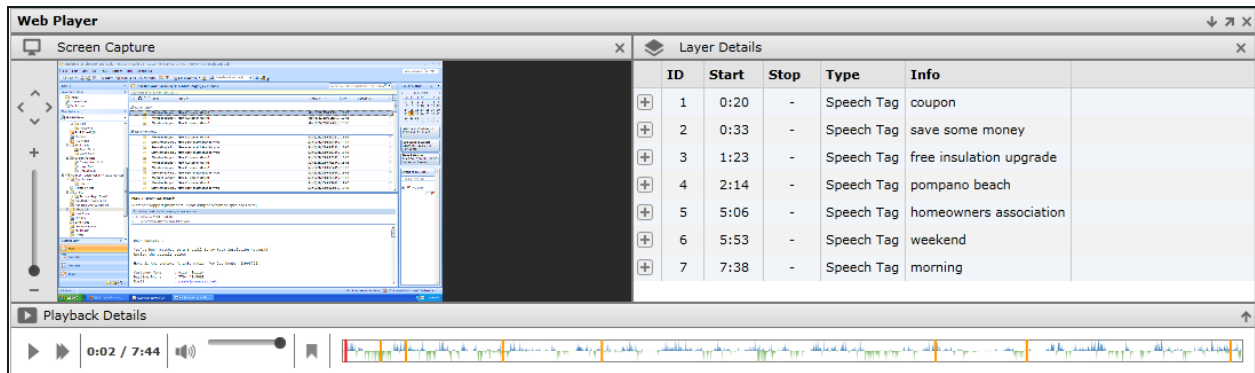
Display Records :

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.



## Listening to Recorded Interactions




### Web Player Overview



The **Web Player** appears at the bottom of the Discover Web Portal once you take action to [Play a Recorded Interaction](#). The Web Player consists of up to three panes, which are covered in more detail in the following sections:

- [Playback Details Pane Overview](#)
- [Layer Details Pane Overview](#)
- [Screen Capture Pane Overview](#) (if your organization uses Uptivity Screen Recording)

You can manipulate these panes to customize your playback experience. Common interface controls include:

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

To launch the Web Player in a separate window:

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

## Manage Your Web Player Settings

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"/>

**Web Player Settings** allow you to set defaults for how you want the Web Player to handle the functions shown in this image.

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

To configure your individual Web Player settings:


1. Click the **Interactions List** tab and then click the **Call List** sub-tab.
2. Click **Settings** in the upper right corner of the Call List.
3. Under Web Player Settings, select or clear the applicable checkbox(es) and then click **Save**.

## Play a Recorded Interaction

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 **Interactions List** tab in the Discover Web Portal and then click the **Call List** sub-tab.
2. Right-click the desired call record and click **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 record's row. This 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 customizing your Web Player, see [Manage Your Web Player Settings](#). For information on viewing and listening controls, see [Player Controls](#).

## Playback Details Pane Overview

The Playback Details pane includes the following components:

- Player Controls
- Waveform Display

### Player Controls



The **Play** and **Pause** icons are similar to what you would see on any standard media player. You can toggle between these icons to start and stop playback.

The **Playback Speed Selection** icon appears to the right of the Play/Pause icon. When you click this icon, a pop-up menu lets you select the appropriate speed. Audio pitch is not affected by changes in playback speed. Playback speed options are:

- **Faster:** 200% of normal speed.
- **Fast:** 150% of normal speed.
- **Normal:** 100% of normal speed.
- **Slow:** 75% of normal speed.



When the Call Segments feature is used, **Previous** and **Next** icons appear to the left and right of the Play/Pause and Playback Speed icons to allow you to skip between sequential related calls. This function is not supported when you choose to play the interaction in a new window. For more information, see Find Call Segments.

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

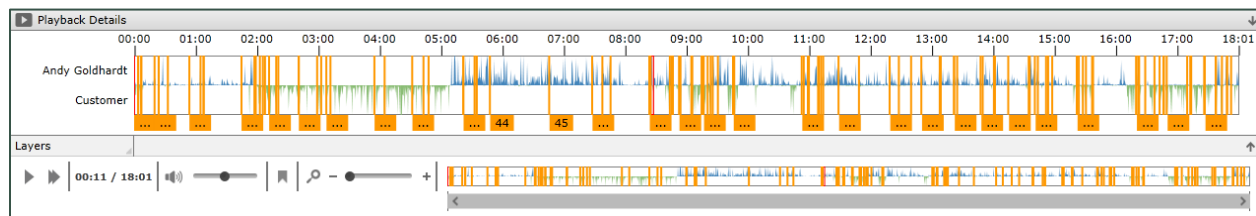
Volume controls are also similar to those found in standard media players. You can click the **Volume** icon to mute and unmute playback, or use the slider to adjust the volume up or down. The current volume level (0-100%) is displayed when the mouse hovers over the slider bar(s).

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.

🔗 The Web Player Volume Control is limited by the Master Volume level set in your Windows Audio settings. You may need to adjust these settings to make the Web Player controls effective.

The **Bookmark** icon appears if you have permission to bookmark calls, and can be used to add an internal bookmark to the recording. For more information, see [Manage Internal Bookmarks](#).

## Waveform Display

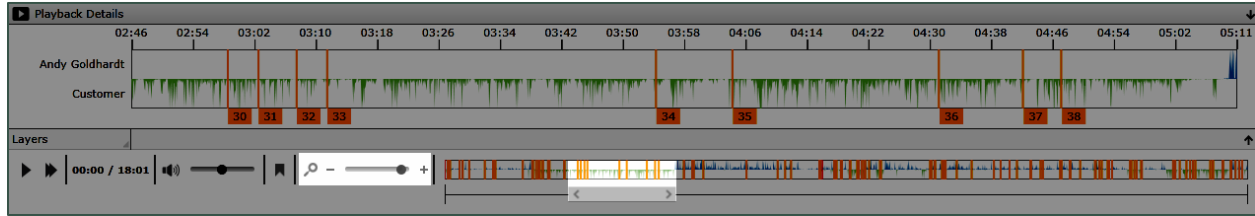


By default, the **Waveform Display** is visible at the bottom right of the Playback Details Panel. This display shows audio activity on the line for the duration of the call. For some telephony systems, audio from the agent and customer side can be separated for easier viewing. In these cases the agent audio is displayed in blue at the top and the customer audio is displayed in green at the bottom (as shown in the preceding image). If you are unsure whether your integration supports speaker separation, ask your Discover administrator.

You can click at any point in the Waveform Display 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.

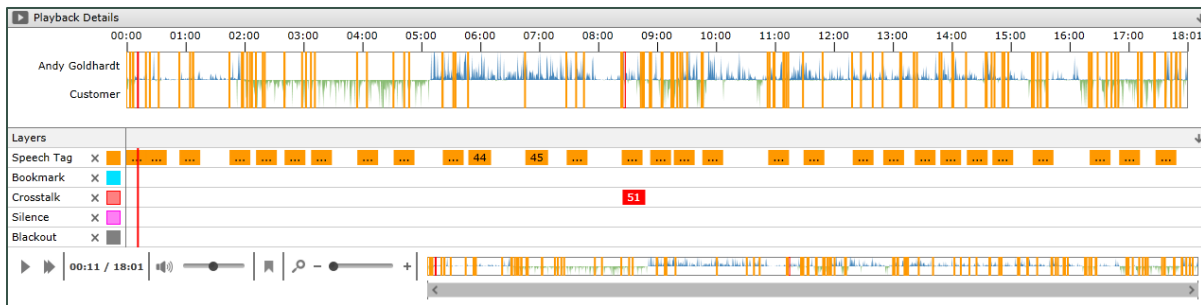
To enlarge the Waveform Display as shown at the beginning of this section:

- Click the **Restore**  icon located in the top right corner of the Playback Details Panel.



When you view the enlarged Waveform Display, additional viewing controls become available: the Waveform Zoom slider and the Viewable Time scrollbar. When you move the Waveform Zoom 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.

In the preceding image, the Waveform Zoom slider has been set to 90%. The enlarged waveform shows only that part of the interaction that is within the highlighted area of the Waveform Display. Moving the Viewable Time indicator (shown within the highlighted area) to the left or right would change the portion of the interaction shown in the enlarged waveform.



The Waveform Display also shows indicators that provide additional information about the interaction. These indicators are overlaid on the Waveform Display in separate layers, so you can adjust which layers are visible. For example, this image shows many speech tags and one instance of crosstalk. You can remove the Speech Tag layer from the display to make it easier to focus on the Crosstalk layer.

To hide/display layers in the Playback Details Panel:

- Toggle the Restore/Minimize icon on the Layers bar.

To remove a layer from the Playback Details Panel:

- Click the **x** next to the layer you want to remove.

To see a hidden layer in the Playback Details Panel:

- Click the eye icon next to the layer you want to see.

## Waveform Display Information Indicators Reference

	<p><b>Playhead Indicator</b> –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. While the Playhead is being moved, the duration status will change to match the position of the Playhead.</p>
	<p><b>Cross-talk</b> – times when both parties on the line are speaking simultaneously. Shaded red in the waveform display. Click the number following the highlighted area to seek to the corresponding ID in the Layer Details panel. Only available if cross-talk detection has been configured.</p>
	<p><b>Silence</b> – periods where neither party is speaking during a call. Shaded magenta in the waveform display. Click the number following the highlighted area to seek to the corresponding ID in the Layer Details panel. Only available if silence detection has been configured.</p>
	<p><b>Speech Tags</b> – when Speech Analytics checks a call and detects key words or phrases based on established criteria, indicators are placed on the waveform to show what the tags are and where they occur in the call. Click the number following the highlighted area to seek to the corresponding ID in the Layer Details panel. Only available with Uptivity Speech Analytics.</p>
	<p><b>Bookmarks</b> – internal bookmarks are denoted with a blue indicator. Click the number following the highlighted area to seek to the corresponding ID in the Layer Details panel. For more information, see <a href="#">Manage Internal Bookmarks</a>.</p>
	<p><b>Blackouts</b> – specific sections of audio or video that have been blacked out are shaded black in the waveform display. Click the number following the highlighted area to seek to the corresponding ID in the Layer Details panel. This feature is only available if blackouts have been configured. There may be a very slight (less than one second) difference between start/stop points in the display and actual start/stop of the blackout.</p>

If indicators for different items overlap, their number tags following the Waveform Display are stacked. Move your mouse over the corresponding indicator to see a more detailed window containing Layer Details ID numbers and timestamps.



## Layer Details Pane Overview


Layer Details					
	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** pane provides additional information about the tags shown in the various layers on the Waveform Display, including any metadata added to the call after it was recorded (see [Waveform Display Information Indicators Reference](#)). The pane shares horizontal space with the Screen Capture pane (if your organization uses Uptivity Screen Recording). To minimize either pane, click on the icon to the left of the pane header.

Data in the pane is organized into these columns:

- **ID:** This is an identifier (for example, 1, 2, 3, A, B) for the tag. For data tagged at a specific time within a call, this ID also appears on the Waveform Display.
- **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 Display Information Indicators Reference](#).
- **Info:** Data contained in the tag. Information in this field can vary, depending on the tag type. For bookmarks, the Bookmark Notes display here (for example, "Great sales pitch"). For Analytic tags, the detected phrase is listed.

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:

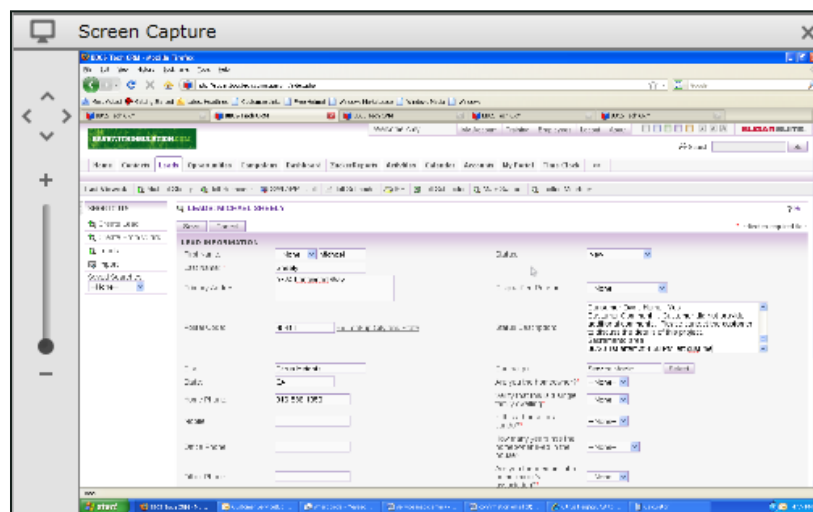
- Click a column heading.

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 interaction 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 interaction and the waveform.


For bookmarks and speech tags, additional information is displayed when you click the expand icon. 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*.

## Screen Capture Pane Overview



The **Screen Capture** pane is available only if your organization uses Uptivity Screen Recording. It displays a scaled-down feed of recorded video for the call. The pane shares horizontal space with the Layer Details pane. To minimize either pane, click the icon to the left of the pane header.

To move your view within the screen capture 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.



**i** 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 .

## Manage Internal Bookmarks

Uptivity WFO supports both internal and external bookmarks. This section covers internal (in-call) bookmarks only. For more information on external bookmarks, see [Bookmark a Recording](#). This feature is only available to permissioned users.

Internal bookmarks allow you to tag a specific point within a call while you're listening to it, 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 Internal Bookmarks

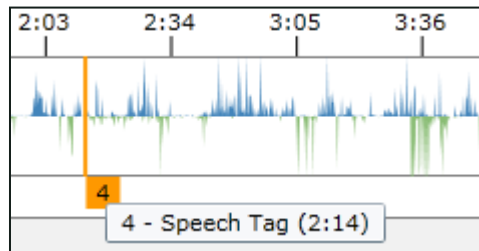
To insert a bookmark at a specific point in a call:

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

## View Internal Bookmarks

Once an internal bookmark has been inserted, you will 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. To view the bookmark:

- Hover your mouse over the bookmark in the Waveform Display to pop up the tag type and timestamp. This information is also displayed in the Layer Details Pane.




## 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

All bookmarks are edited or deleted in the Layer Details pane.

To edit a bookmark:

1. Click the **Interactions List** tab in the Discover Web Portal and then click the **Call List** sub-tab.
2. Right-click the desired call record and click **Play** from the pop-up menu.
3. Locate the bookmark in the Layer Details pane and click the expand icon  next to it.
4. 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.

## Working with Recorded Interactions

### Call Records Overview

The Call List allows you to view all call records to which you have access. In addition to listening to recordings, there are a number of other tasks you can perform based on your permissions and the Uptivity WFO modules used by your organization. If you need to perform a particular task and are unable to do so, see your Uptivity WFO administrator.

Tasks that can be performed in conjunction with recorded interactions include:

- [Flag a Recording](#)
- [Export a Recording](#)
- [Export the Call List](#)
- [Evaluate a Recording](#)
- [View Completed Evaluations for a Recording](#)
- [View Completed Surveys for a Recording](#)
- [Bookmark a Recording](#)
- [Find Call Segments](#)
- [Change Archive Options for a Recording](#)
- [Categorize Recordings](#)
- [Edit a Recording](#)
- [Copy a Recording Link](#)
- [Delete a Recording](#)
- [Apply a Manual Blackout to a Recording](#)

Most of these tasks are accessed via a pop-up menu in the Call List.

## Flag a Recording

This feature is available to all users, based on the recordings to which they have access. Flagging a recording displays the flag icon 🚩 on the selected record so you can more easily see certain calls. You can select multiple recordings and flag them at the same time. The flag does not affect reporting or other Uptivity WFO functions. Flags can be removed when they are no longer needed.

To flag or unflag a recording:

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

## Export a Recording

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

You can export multiple records at one time. However, once an export is started you must wait until it completes before you can continue working in the Discover Web Portal. It is thus a good idea to limit the number of files you export in a single batch to fewer than 200 (or even less if calls themselves are lengthy).

Files are exported to the location specified by your Uptivity WFO 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 Uptivity WFO 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 Uptivity WFO CAV Player application for playback, which is available from your Uptivity WFO administrator.
- **M4A:** Primarily associated with 'MPEG-4 Audio Layer'. Files in .M4A format are actually the audio layer of (non-video) MPEG 4 movies.

If you export multiple recordings at once, Uptivity WFO creates a zip file which contains all the files in the specified file format. The name of the zip file is the Record ID of the first record in the batch (for example, 1775.zip).

To export a recording:

1. Click the **Interactions List** tab in the Discover Web Portal and then right-click the **Call List** sub-tab.

2. Right-click the desired call record and click **Export Selected** from the pop-up menu.

**Alternative:** Select multiple records; then right-click any of the selected records and click **Export Selected** from the pop-up menu.

3. Select the desired file type for the exported recording.

4. If applicable, select the **Export to Email** checkbox and type an email address in the **Address** field.

5. Click **Next**.

6. Click an existing filename mask to apply it to the exported recording, or click **New** to create a new mask (see [Manage Filename Masks](#)).

7. Click **OK**.

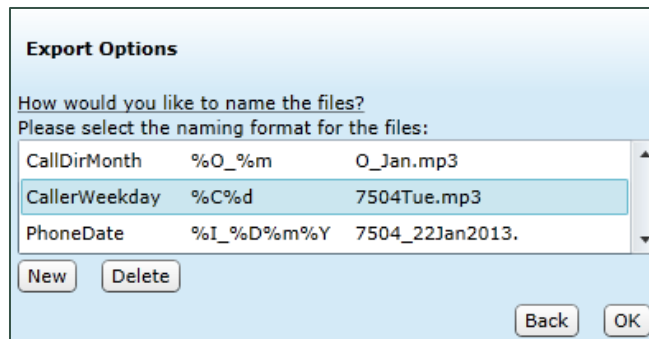
## Filename Mask Overview

Recording files in Uptivity WFO have non-intuitive filenames by design. When you export a recording, you may want to give the exported file a new name that is more descriptive of the recording.

Filename masks can be used for this purpose. Masks use variables to create a filename that includes various pieces of information from the call metadata. The following table shows the variables that can be used in file masks.

Variable	Value	Variable	Value
%Y	Full (four-digit) year	%A	Device Alias (Agent Number or ID)
%y	Short (two-digit) year	%R	Record ID
%M	Two-Digit Month	%C	Counter
%m	Month Name (three-letter abbr. – Jan, Feb, May, Dec)	%T	Call duration
%D	Two-digit day of month (date)	%I	Device ID (extension)
%d	Day of week (name)	%W	Call wrap
%H	Hour	%C	ANI (CallerID)
%N	Minute	%U<1> through %U<15>	User fields
%S	Seconds	%c	DNIS (dialed number)
%O	Call direction (inbound/outbound)		

You can create different masks and choose which one to use on a case-by-case basis. You can also use an underscore (\_) or hyphen (-) between variables to make the mask easier to read. Masks can be used to create any filename that is legal in your system and that matches any file naming strategy used by your organization. The following image provides some examples of filename masks.

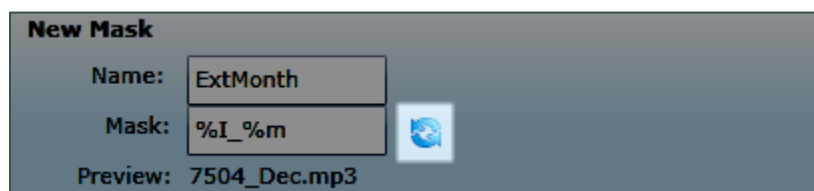


## Manage Filename Masks

Creating a filename mask is a sub-procedure within the [Export a Recording](#) procedure. The following steps assume you have reached the appropriate point in that procedure.

To create a filename mask:

1. Click **New**.
2. In the **Name** field, type a name for this filename mask.
3. In the **Mask** field, type the variables and any separation characters as applicable (see [Filename Mask Overview](#)).
4. To see a preview of how the mask looks when applied to the selected file, click the Refresh icon.



5. Click **Save** and return to the [Export a Recording](#) procedure.

You cannot edit a filename mask after it has been created, but you can delete filename masks that are no longer needed. To delete a filename mask:

6. Follow the necessary steps in the [Export a Recording](#) procedure to access the Export Options dialog.
7. Select the filename mask to be deleted and then click **Delete**.

This action is final and cannot be reversed.

## 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 this feature.

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 **Interactions List** tab in the Discover Web Portal and then right-click the **Call List** sub-tab.
2. Right-click any call record and click **Export Call List** from the pop-up menu.
3. Select the checkbox(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 Recording

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 Call List. See the *Uptivity WFO Quality Management Manual* for more information.

## View Completed Evaluations for a Recording

In most organizations, this feature is available to all users so they can view evaluations of their own calls. Other evaluations may be available depending on the recordings to which you have access.

To view a completed evaluation from the Call List:

1. Click the **Interactions List** tab in the Discover Web Portal and then right-click the **Call List** sub-tab.
2. Right-click the desired call record and click **View Completed Evaluations** from the pop-up menu.
3. Double-click the evaluation record.



## View Completed Surveys for a Recording

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

## Bookmark a Recording

This feature is only available to permissioned users. If you do not have this permission, you will not see an option for bookmarking recordings in the Call List. Uptivity WFO supports both internal and external bookmarks. This section covers external bookmarks only. For information on internal bookmarks, see [Manage Internal Bookmarks](#).

Bookmarking allows you to add a free-form text note to a recording. An icon 📌 appears in the Bookmark column for notated records and the contents of the bookmark are visible when you play 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 who have access to play back the selected recording. Private bookmarks can be read only by you, and other users will not even see a bookmark icon for the recording.

To add an external bookmark to a recording:

1. Click the **Interactions List** tab in the Discover Web Portal and then right-click the **Call List** sub-tab.
2. Right-click the desired call record and click **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 and only if your organization's recording environment supports call segments. If one or both of these criteria do not apply, you will not see an option for finding call segments in the Call List. In addition, this feature is only available when the feature is enabled in your system and when a recording

has related segments. Ask your Uptivity WFO administrator if you are unsure whether 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 Uptivity WFO may have multiple, separate recording files, or 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. It 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.

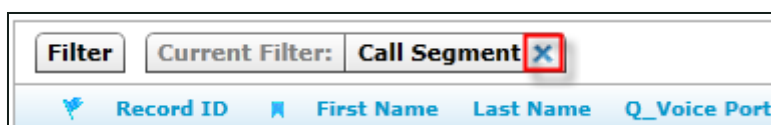
The Find Call Segments option ignores any filters currently applied to the Call List because some segments would not fit the criteria of filters such as Time Recorded, Agent, and Uptivity Group.

To find segments related to a call:

1. Click the **Interactions List** tab in the Discover Web Portal and then click the **Call List** sub-tab.
2. Right-click the desired call record and click **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.

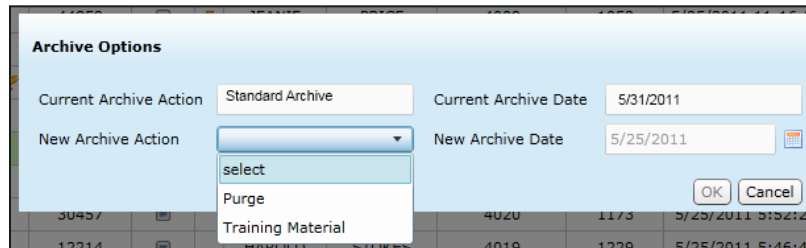


## Change Archive Options for a Recording

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

Archiving strategies are set by your Uptivity WFO administrator. However, there may be times when you want to change the disposition of a single recording. For example, your system may be set to purge call records after six months, but you find a recording 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 Uptivity WFO 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 recording:

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

## Categorize Recordings

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

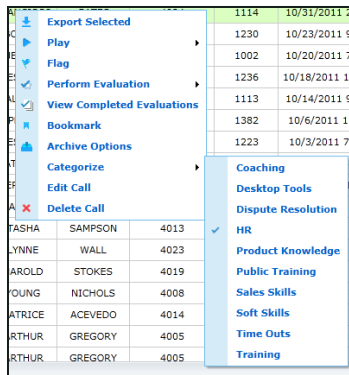
Only the creator of a category can add recordings to or remove recordings from that category. For more information, see [Categories Quick Filter](#).

To categorize a recording:

1. Click the **Interactions List** tab in the Discover Web Portal and then click the **Call List** sub-tab.
2. Right-click the desired call record and click **Categorize** from the pop-up menu.

3. 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 recordings:

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 Tools (3)	3115	ERIK JUAREZ	RAFAEL	YORK	1096	7/13/2012 11:14:17 PM
Dispute Resolution (6)	26528	DOMINIQUE CLARK	KRISTINE CONTRERAS	MONTELEONE	1174	7/13/2012 11:13:04 PM
HR (23)	39782	RAFAEL YORK	TRACY	MILLER	1225	7/13/2012 11:12:28 PM
Product Knowledge (2)	742	KRISTINE CONTRERAS	ACEVEDO	MONTELEONE	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 recordings:

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 Recording

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 recordings in the Call List.

You can add information (metadata) to an individual call record after the call has been captured in the system. Uptivity WFO provides multiple user-defined fields that can be edited from within the Call List, and these fields are both searchable and filterable. Your Uptivity WFO administrator defines how these fields, if applicable, are used in your organization.

Depending on the fields used, the number of characters you can type may be different. General limitations for field length are shown here (ask your administrator if you have questions about the specific fields in your system):

- User 1 – User 3: Up to 20 alphanumeric characters
- User 4 – User 8: Up to 255 alphanumeric characters
- User 9 – User 15: Up to 50 alphanumeric 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 **Interactions List** tab in the Discover Web Portal and then click the **Call List** sub-tab.
2. Right-click the desired call record and click **Edit** from the pop-up menu.
3. Select a field to edit from the drop-down menu.
4. Type the desired text in the field. If data already exists, you can edit or clear that data.
5. Repeat steps 3 and 4 as desired to edit additional fields, and then click **OK**.

To remove a field from the Edit Call dialog box:

- Click the **X** (this does not remove the data from the field in the call record).

## Copy a Recording Link

This feature is available to all users based on the recordings to which they have access. The feature provides a link to an individual recording. You can provide that link to another user so they can easily access the recording directly. That user must have permission in Uptivity WFO to access the recording. For example, a user with the **Allow Viewing of User's Own Records** permission could not see recordings for another user, even if you send them the link.

To copy a call link:

1. Click the **Interactions List** tab in the Discover Web Portal and then click the **Call List** sub-tab.
2. Right-click the desired call record and click **Copy Call Link** from the pop-up menu.
3. Select and copy the link text using standard Windows methods (for example, press the CTRL and C keys).
4. Click **OK**.

## Delete a Recording

This feature is only available to permissioned users. If you do not have permission to delete recordings, you will not see this option in the Call List.

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 Call List. The audio, video, and metadata files will be deleted the next time files are purged. Ask your Uptivity WFO administrator for more information.

To delete a recording:

1. Click the **Interactions List** tab in the Discover Web Portal and then click the **Call List** sub-tab.
2. Right-click the desired call record and click **Delete** from the pop-up menu.
3. Click **OK**.

## Apply a Manual Blackout to a Recording

This feature is only available to permissioned users. If you believe you should have the ability to apply manual blackouts and are unable to do so, talk to your Discover administrator.

Depending on your organization, interactions may include sensitive data (for example, credit card numbers, protected health information, and so forth). Through blackouts, Discover provides a way to blank audio and screen recording when such information is referenced or collected.

Blackouts are usually handled by the Uptivity WFO application or by an agent using Uptivity WFO On-Demand. If you listen to a recorded interaction and find sensitive information that was not blacked out, you can apply a blackout manually.

**⚠ Manual blackouts result in a permanent deletion of audio and video information from the file, and cannot be undone.**

To apply a manual blackout to a recorded interaction:

1. Follow the procedure to [Play a Recorded Interaction](#).
2. Note the start and end times of the desired blackout area as shown in the Waveform Display.
3. Right-click in the Waveform Display and drag to select an area of the recording.
4. In the **Start** field, type the time at which you want the blackout to begin.
5. In the **Stop** field, type the time at which you want the blackout to end.
6. Click **OK**, and then click **OK** again to confirm the blackout.

## Monitoring Live Interactions

The **Live Monitor** feature in Uptivity WFO enables supervisors to listen to an agent's calls 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 on the Interactions List tab. Live Monitor offers two views: List View and Screen View.

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

### Live Monitor List View

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



The **Live Monitor** List View is shown by default and 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.




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



The screenshot shows the 'Discover' interface with the 'Live Monitor' tab selected. On the left is an 'Agent' list with expandable icons for each agent. The main area is a 'List View' table with the following columns: First Name, Last Name, Phone, Audio, Video, CallerID, Dialed Number, Group, ACD Gate, Current Application, and Last State Change. The table contains 17 rows of agent data.

First Name	Last Name	Phone	Audio	Video	CallerID	Dialed Number	Group	ACD Gate	Current Application	Last State Change
Daniel	Ayala	7594								Unknown
Daniel	Ayala	8504								Unknown
Phil	Barnes	7502								Unknown
George	Barsa	7548								Unknown
Slavko	Bates	7537								Unknown
Neil	Bern	5709								Unknown
Cherie	Bibic	5555								Unknown
Regine	Bittan	7538								Unknown
Orlando de	Boer	5030								Unknown
Matt	Borghetti	7540								Unknown
Jenny	Bouclier	7522								Unknown
Dick	Bozac	7521								Unknown
Joe	Brechin	5950								Unknown
Anders	Brooker	5228								Unknown
Keith	Burke	7575121212								Unknown
Keith	Burke	7512								Unknown
Keith	Burke	75751212								Unknown

The following columns can 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 (that is, press the Windows and "L" keys), 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 (inbound) or the agent (outbound) 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 five 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 **Interactions List** tab and then click the **Live** Monitor sub-tab.
2. Click the **Settings** button in the upper right corner.
3. Select the checkbox(es) for the columns you want to display in your Live Monitor list. 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**.

## Search for Agents

A search field with a magnifying glass icon on the left, the text "Larry" entered, and a "Go" button on the right.

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



To search the Live Monitor list:

- Type an item to search for (for example, full/partial name or extension) and click **Go**.

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 Uptivity WFO recording server to your workstation. If video is available, a screen capture viewing panel will appear following the Live Monitor list. Streaming begins when you click Play  and stops when you click Stop .

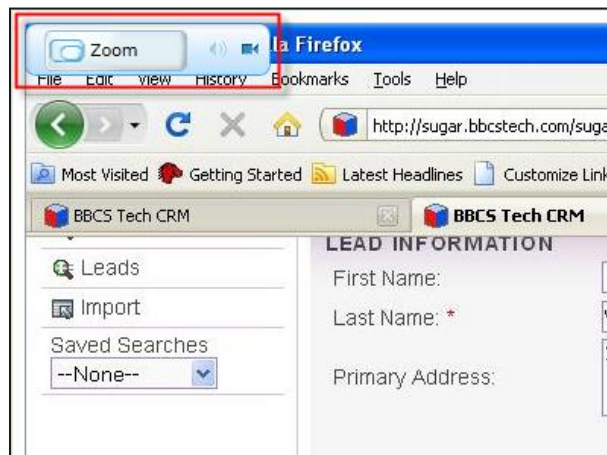
To monitor (listen to) a call from the Live Monitor List view:

1. Click the **Interactions List** 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 click **Play** from the pop-up menu, then select whether to monitor in the current window or a new window (for an example, see [Live Monitor Screen View](#)).

To display the zoom menu:

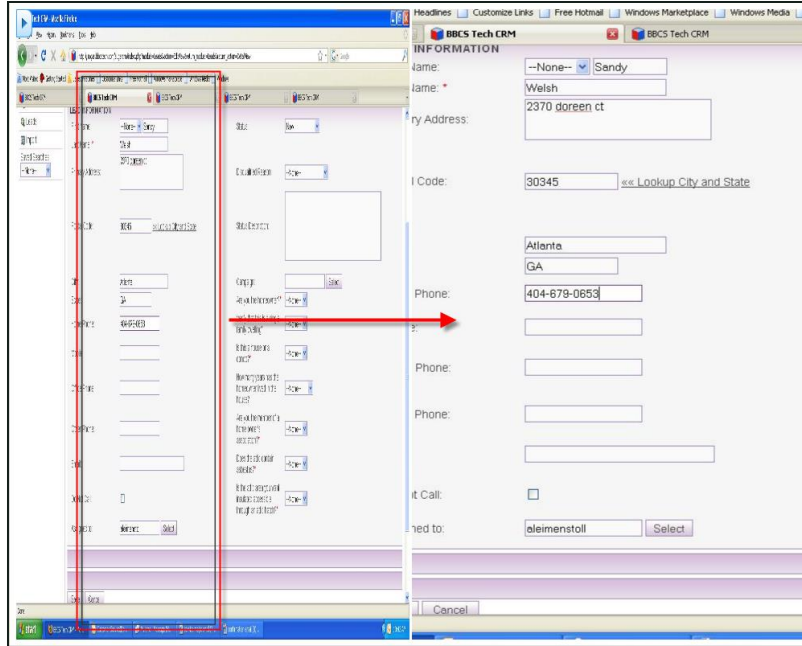
- Hover your mouse cursor over the tab  in the upper left of the playback area.



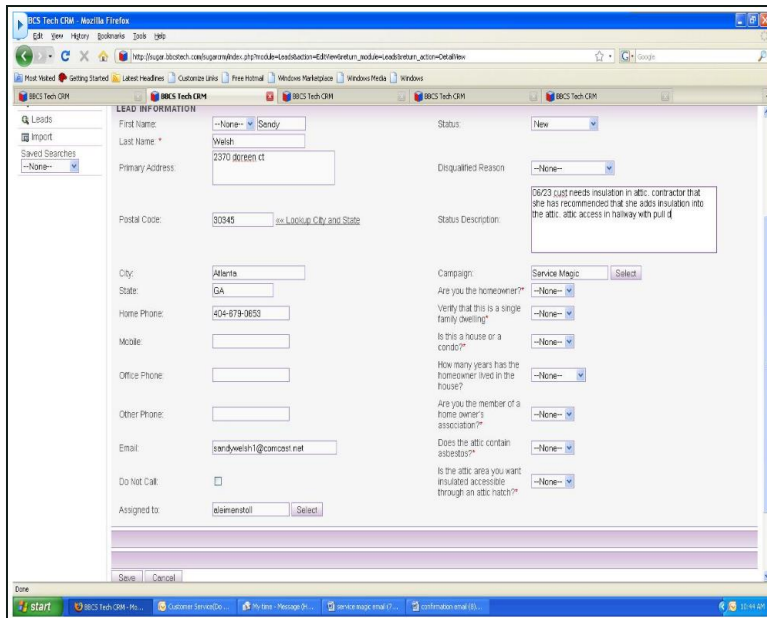
The speaker and camera icons indicate the presence or absence of audio and screen feeds. In this example, video is available, but no audio.

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

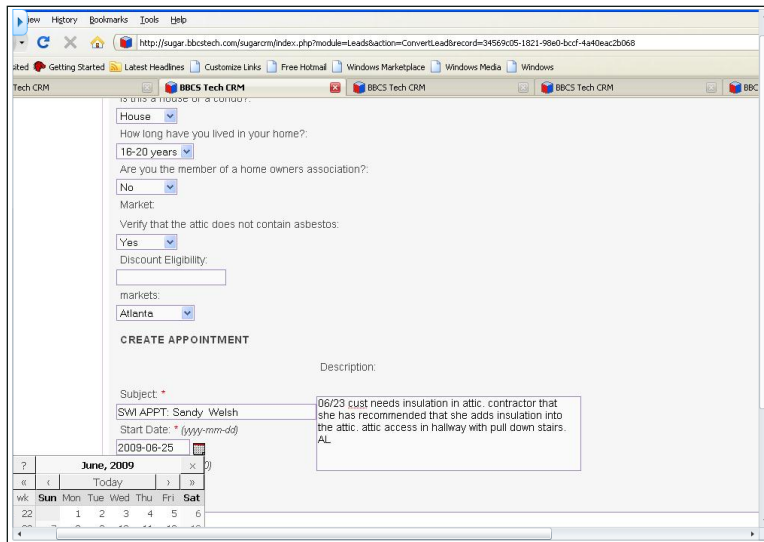
- **Split** shows a compressed view of the entire screen on one side. A movable zoom marker lets you indicate a portion of the screen to show zoomed to 100%.



- **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.



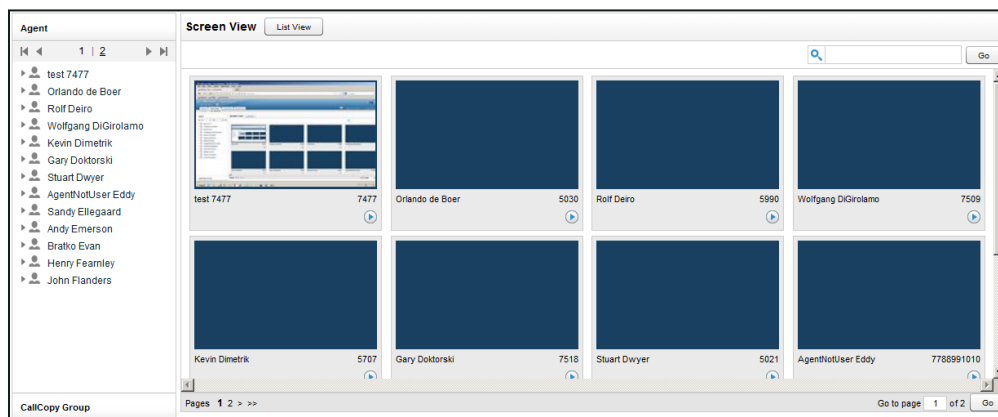
- **Actual Size** displays the live feed at 100% of what the agent sees. Scrollbars appear at the side and bottom of the playback area to allow you to scroll to different parts of the screen.



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

- Click the **Stop** icon .

## Live Monitor Screen View



You can activate Screen View by clicking the **Screen View** button at the top of the Live Monitor page. Agent and Uptivity Group Quick Filters can be used with Screen View. For more information, refer to [Agent Quick Filter](#) and [Uptivity Group Quick Filter](#).

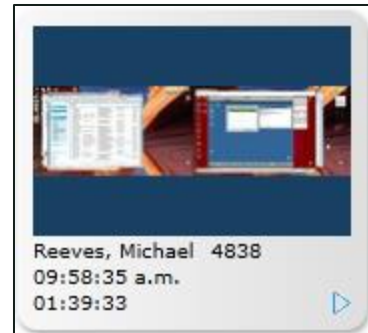
Screen View displays each agent thumbnail in alphabetical order, according to agent last name. To navigate between pages in Screen View:

- Click the page numbers at the bottom of the page or type 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.

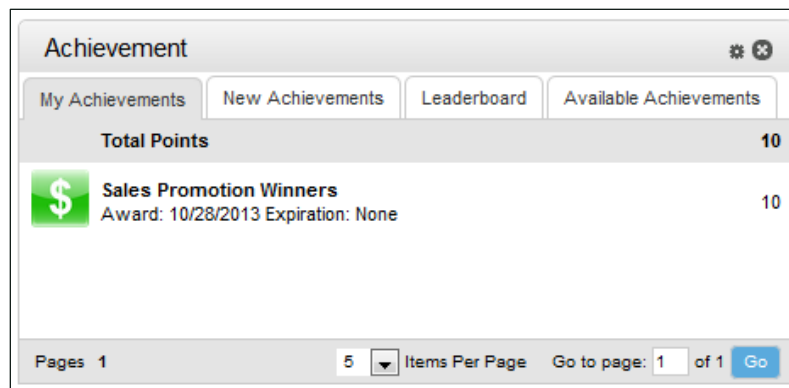
## Appendix: Uptivity WFO Home Tab Widgets

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

Based on your organization's Uptivity WFO system, and your permissions, you may be able to select the widgets to display on your Uptivity WFO Home tab dashboard. You may also be able to create new dashboards. In some cases, your Uptivity WFO 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 WFO and how to customize the information they display, where applicable.

### Achievement Widget Overview



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 Uptivity Groups.

**i** Uptivity Groups are displayed on the widget with the name of the group in Uptivity WFO at the time the achievement was awarded. If this name is changed after the achievement is awarded, the achievement is still displayed with the old group name.

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

## Permissions

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No special permissions are needed to use this widget.

## Display


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

Information displayed on these tabs does *not* include:

- Achievements awarded to an Uptivity Group that the widget was filtered to exclude.
- Achievements with expired points.

### My Achievements Tab



My Achievements		New Achievements	Leaderboard	Available Achievements
<b>Total Points</b>				<b>10</b>
	<b>Sales Promotion Winners</b> 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

My Achievements					
New Achievements					
Leaderboard					
Available Achievements					
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

My Achievements			
New Achievements			
Leaderboard			
Available Achievements			
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:** Uptivity 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

My Achievements		New Achievements		Leaderboard		Available Achievements	
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 an Uptivity 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 Uptivity Groups. If you belong to more than one Uptivity 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 Uptivity WFO 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 Uptivity Groups for which you want to display achievement information. If you do not select a group, information related to that group will not display.
3. Click **Save**.

## Assignment Inbox Widget Overview

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 Uptivity WFO 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 Uptivity WFO is duplicated in this widget. Each tab in the widget is paginated and displays 10 items per page. See [Assignment Inbox Overview](#) for more information on the functionality of this screen.

**⚠** When you open a document from the Assignment Inbox widget in Firefox, the browser asks 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:

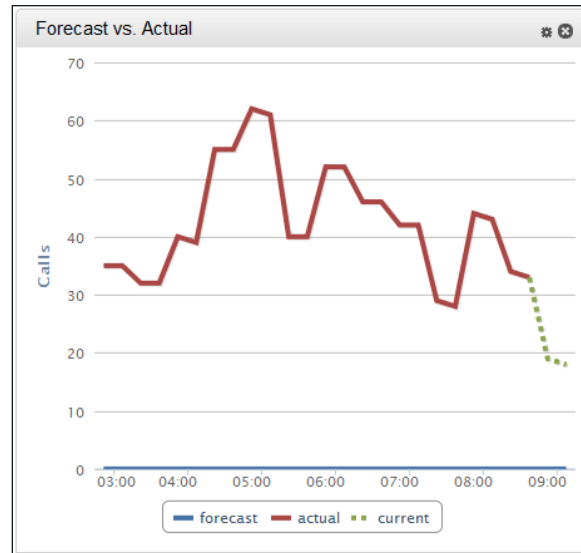
- **Assigned Date:** Date that a supervisor assigned the document to a group.

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 Overview

**i** This widget will not contain any data unless your installation includes 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 *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, and so forth.

### 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 Uptivity WFO administrator.

### Display

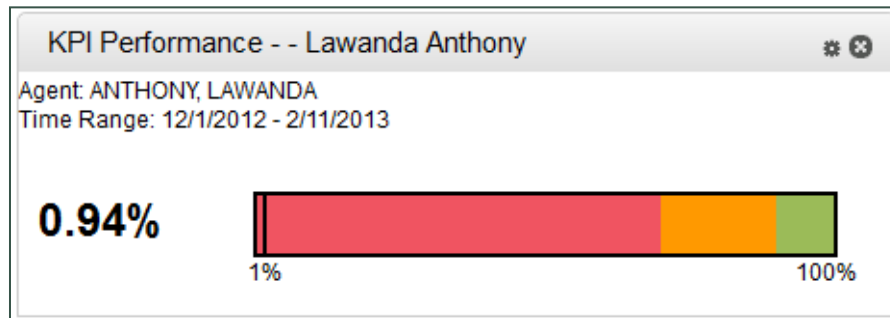
The widget displays a line chart showing the current call volume and the forecasted call volume over the previous six hours. You can filter the data based on Labor Unit.

## Configure the Forecasted vs. Actual Calls Widget

To configure the widget:

1. Click the  icon located in top right hand corner of widget.
2. Optional: in the **Widget Subtitle** field, give widget a subtitle (100 characters max).
3. From the **Labor Units** list, select a default Labor Unit and then click **OK**.

## KPI Performance Widget Overview



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 Uptivity WFO administrator.

### Display

The KPI Performance widget displays QA performance of an Agent or an Uptivity 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 Uptivity WFO 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. Optional: in the **Widget Subtitle** field, give widget a subtitle (100 characters max).
3. Use the **Filter by** drop-down list to select either **Agent** or **Uptivity Group**.
4. Use the **Criteria** drop-down list to select the Agent or Group you want 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. Type the **Low Threshold**.
8. Type the **Target** and then click **OK**.

## Live Snapshot Widget Overview

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

Call Info		Staff Info	
Queued	0	Available	1
Active	2	On Call	2
Service Levels		Call Wrap	0
Live	99.2% AVG	Training	1
Today	83.89% AVG	Lunch	1
Goal	80% AVG	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, and so forth. 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 (for example, available, on call, or lunch).

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

## Permissions


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

## Display

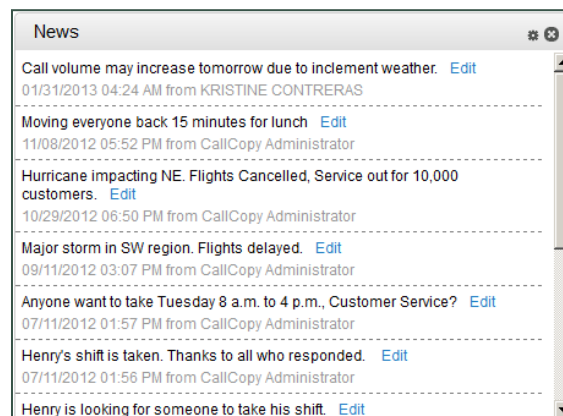
A Subtitle text entry field on the dialog box enables you to type a name (100 characters max) for this instance of the widget. You can filter the display based on Labor Unit.

## Configure the Live Snapshot Widget

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

1. Click the gear icon  located in top right corner of widget.
2. Optional: in the **Widget Subtitle** field, give widget a subtitle (100 characters max).
3. From the **Labor Units** list, select a default Labor Unit and then click **OK**.

## News Widget Overview



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, and so forth. 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 Uptivity WFO 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 Uptivity WFO. To configure the News Widget:


1. Click the  icon located in top right hand corner of widget.
2. Optional: in the **Widget Subtitle** field, give widget a subtitle (100 characters max).
3. From the **Labor Units** list, select the Labor Unit you want to view.

**i** The Labor Unit list will not contain any data unless your installation includes Clarity WFM.

4. From the **Callcopy Groups** list, select the Uptivity Groups that you want to view.
5. Click **Save**.

## Search News Items

To search for news items:

1. Click the  icon located in top right hand corner of widget.
2. Type 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 Items

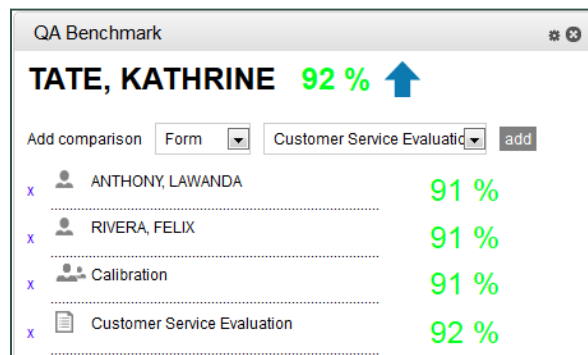
Posts are limited to 288 characters, including all letters, numerals, and characters. The Enter key can be used to create line breaks. Posts are sent to all users unless you limit the posting to specific Labor Units and/or Uptivity Groups.

1. Click the icon located in top right hand corner of widget.
2. In **Add News** field, type text for the post.
3. From the **Labor Units** list, select the Labor Unit(s) you want to view this posting.

**i** The Labor Unit list will not contain any data unless your installation includes Clarity WFM.

4. From the **Callcopy Groups** list, select the Uptivity Groups you want to view this posting.
5. Click **Save** (either **Save** button will commit changes for the entire dialog box).

## QA Benchmark Widget Overview



The **QA Benchmark** widget can be accessed by up to 10 simultaneous users, and enables you to compare QA score averages for agents, Uptivity Groups, and forms. A benchmark entity is selected. For example, if an Agent-to-Group comparison is used, an Uptivity 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, and QA Group Scorecard. For additional information, see the *Uptivity WFO 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

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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 Uptivity WFO administrator.

## Display

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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.

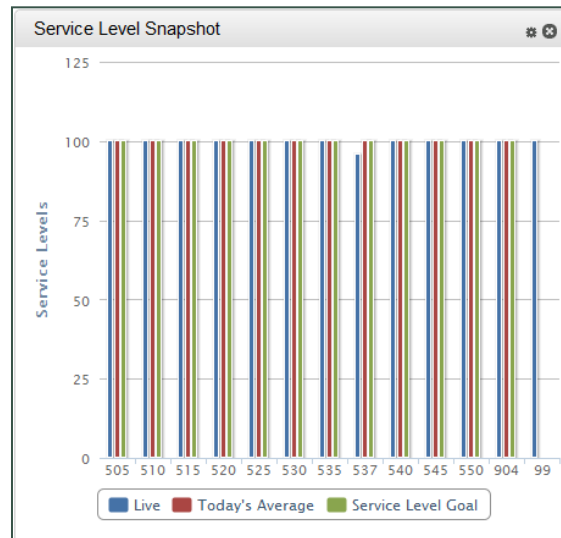
## Configure the QA Benchmark Widget

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

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

## Service Level Snapshot Widget Overview

**i** 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 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 Uptivity WFO administrator.

## Configure the Service Level Snapshot Widget

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

1. Click the  icon located in top right hand corner of widget
2. Optional: in the **Widget Subtitle** field, give widget a subtitle (100 characters max).
3. From the **Labor Units** list, select the Labor Unit(s) you want to view and then click **OK**.

## Document Revision History

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