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Premises

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Introduction

Audience

This document is designed for users of the inContact Workforce Optimization (WFO) Reporting feature. This feature enables authorized users to generate and save or print reports as well as find real-time data about the system.

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

Goals

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

Assumptions

This document assumes that inContact 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 online help site for inContact WFO (<u>help.incontact.com/WFO/prem/help.htm</u>) contains general knowledge and procedures related to using the Web Portal, and may prove a helpful reference.

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

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

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

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

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

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

What's New in This Version

- inContact Quality Management now supports the use of negative point values. Two new fields have been added to the Quality Assurance category in ad hoc reporting to enable users to report around this feature. See <u>Quality Assurance Report Types</u>.
- The Completed QA Form report now displays all possible responses, as well as their associated points. This helps agents and coaches more easily compare possible and awarded scores for each question. See <u>Completed QA Form</u>.



Reporting Basics

Common Report Criteria Overview

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

This section provides an explanation of the available criteria items and instructions for defining each item. For related information, see <u>Generate a Printable Report</u> or <u>Generate an Ad Hoc Report</u>.

Start Date

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

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

End Date

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

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

Group

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

• Click the desired group (or All) in the list.

Call Direction

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

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

Period Type

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

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

Year

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

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

Period

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

To select the period:

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

Form

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

• Click one form (or All) in the list.

Agents

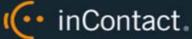
To narrow the report to specific agent(s):

• Click one agent (or All) in the list.

Tag Category

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

• Click one Tag (or All) in the list.



Status/Active

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

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

Date Type

Call Date is based on the date the call was recorded in the system. Evaluation Date is based on when the recorded contact was evaluated in the system. To specify which of these data sets you want to use for QA reporting:

• Click Call Date or Evaluation Date.

Users

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

• Click one user (or AII) in the list.

Report Type

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

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

Section

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

• Click one section (or AII) in the list.

Failure Type

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

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

Month

To select the starting month for your report:

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





Periods

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

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

Common Report Tasks

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

Navigate Report Pages

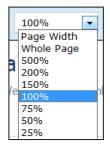
Once you have generated a report, you can use the navigation bar to move back and forth across appropriate report pages. The single arrow to the right takes you forward one page and the single arrow to the left takes you back one page. The arrow/line to the right takes you to the last page of your report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



Navigate Report Details

Some reports provide additional details in related reports. When you view a generated report, the mouse pointer turns to a hand if an item in a report has additional detail. The arrow allows you to go up one level if you have "drilled down" into a report.

Resize the Report Display



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

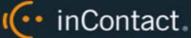
1 This feature is only supported in Internet Explorer. This is a limitation of Microsoft ReportViewer web server controls.

Search within a Report

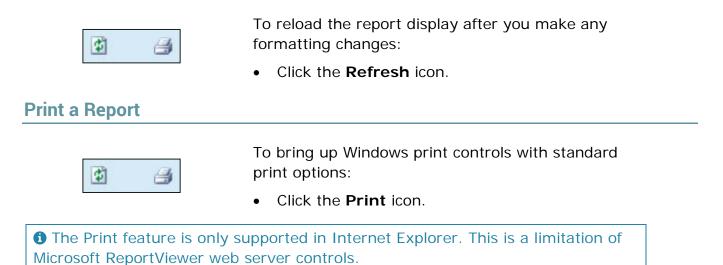
outbound	Find	I	Next
----------	------	---	------

To find specific text or values within the report:

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



Refresh the Report Display



Sort Records within a Report

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

• Click the top triangle by a column label.

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

• Click the bottom triangle by a column label.

To clear any sorting, Refresh the Report Display.

Group Membership Selected Group: Legends Team		
Group ≑	Agent ≑	Phone ID •
Legends Team	Coscia, Sheryl	5009
Legends Team	Cutting, Pietro	5032
Legends Team	Brooker, Anders	5228



Save and Export a Report

.	۰ 🖨
	XML file with report data
	CSV (comma delimited)
	Acrobat (PDF) file
	MHTML (web archive)
	Excel
	TIFF file
	Word

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

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



Working with Printable Reports

Printable Reports Overview

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

If your Premises deployment includes inContact Speech Analytics, inContact Survey, or both, you will see Printable Reports for those modules; these reports are discussed in their respective administration guides.

The System Reporting category of Printable Reports includes reports typically viewed onscreen by the inContact WFO administrator; see <u>Working with System Reports</u> for more information.

Printable Reports	Outre Lines		
Analytics Reporting Call Reporting Cal Reporting Cal Reporting Call Californian Reporting Call Leaf Contention Reporting Tystem Reporting Turvey Reporting	Printik Aspects - Call Reports Printik Aspects - Call Reports Printik Aspects Printik Aspects Printik Aspects Printik Aspects Printik Aspects Printik	Viela	70 ² Bodeline Assertion Learning Conserve and Para
	Printable Reports - Analytics Reporting Available Construction	Openet Constructions	Distance Company Transmission
Report Toole	Primate Research - Sub Researching Primate Research - Sub Researching Primate Research Research Researching Primate Research Research Research Primate Research Research Research Primate Research Research Research Primate Research Research Primate Research Research Primate R	7 444 Et douel Constructionem Lamma Result de	V C States
System Reports Jud Hoc Reports	Printable Reports - Goality Assocance Calification	Designed to prove the set of the set	Department random conservations
	Printable Reports - Quality Assurance Self Evaluation	D general and the second	D sets an and doug turned from
	Pointable Reports - Servey Resorting	Onum Sentannes	C Survey Street and
	Printable Reports - System Reporting	Constration Summary	Drownusse

Alternatively, you can view a **Report List** that provides the name, description, and creation date for each report in the chosen category. For more information on accessing printable reports, see <u>Generate a Printable Report</u>.

Filter the Printable Report List

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Printable Reports	Analytics Reporting		
Analytics Reporting Call Reporting QA Reporting QA Calibration Reporting QA Self Evaluation Reporting System Reporting Survey Reporting	Filter:	Search	
	Report	Description	Date Created
	Analytics Speech Tag Frequency	The Frequency with which Speech Tags Appear Over a Time Interval	10/22/2013 1:00:22 PM
	Speech Category Summary	Overview of the frequency with which speech tags in particular categories appear in a time interval.	10/22/2013 1:00:28 PM
	Speech Category Trending Report	Displays the speech category tag counts and how they change over time.	10/22/2013 1:00:29 PM
	Speech Tag Detail	Details of the Calls in Which a Particular Speech Tags Appear	10/22/2013 1:00:30 PM
	Speech Tag Exception Detail	A list of individual calls that were not tagged with a specified speech tag. Useful for script adherence or policy compliance.	10/22/2013 1:00:30 PM
	Speech Tag Exception Summary	A summary of calls that were not tagged with a specified speech tag. Useful for script adherence or policy compliance.	10/22/2013 1:00:31 PM
	Speech Tag Frequency Summary	Overview of the frequency with which speech tags appear over a time interval	10/22/2013 1:00:32 PM
	Speech Tag Trending Report	Displays the speech tag counts for a selected category, and how they change over time.	10/22/2013 1:00:32 PM
	Pages : 1		Go To Page : 1 of 1
Report Tools			

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

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

Generate a Printable Report

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

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

- 2. Click the applicable report category.
- 3. Click the name of the report.
- 4. Set the report criteria (for details, see <u>Common Report Criteria Overview</u>) or select a saved criteria set, then click **Generate Report**.

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

Agent Ranking By	Period		Back Generate Report
Creator	Name	Date Created	Date Modified
superuser	Sales Agents Ranking Repot	6/23/2011	6/23/2011
Form Sales Evaluation Year 2011 -	Search Name: Group Sales Team Period June	od Type Month ▼	Public : 🕅



Save Printable Report Criteria

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

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

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

Saved criteria sets can be accessed from the associated report when you generate it. You can also access report criteria from the Report Library (see <u>Report Library Overview</u>).

Call Reporting Reports Overview

inContact WFO Call Reporting provides information about calls, such as the ANI and DNIS, and agents, such as the total number of calls that were recorded for an agent over a period of time. This section provides a description and example of each printable report in the Call Reporting category. For more information on running any of these reports, see <u>Generate a Printable Report</u>.

Agent Call Summary

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

Agent Call Summary						Back Generate Report
Start Date 1/1/2013 Call Direction Incoming	[End Date 1/1	//2015	Group Legends Team	¥	
						3
4 4 1 of 1 ▶	⊳∎ ¢	Find	Next 🛃 🗸 🍪			
For period beginning : Selected Group: Leger Selected Call Direction	ids Team		Average Duration	Total Duration	Max Duration	N
Bern, Neil	5709	4	00:07:21	00:29:24	00:12:25	2
Chenier, Roy	8524	1	00:11:41	00:11:41	00:11:41	
Cutting, Pietro	5032	2	00:18:16	00:36:33	00:34:19	
Fearnley, Henry	7507	1	00:09:45	00:09:45	00:09:45	
	TOTAL	8	00:10:55	01:27:23	00:34:19	
Agent Call Summary - 1/1	3/2016				Page 1 of 1	



Assigned Agents Report

The **Assigned Agents Report** displays Active, Inactive, or All agents who are currently in the database, along with their System ID, Username (System Username), and Phone ID. An agent is Active if the Agent option has been enabled in the agent profile. An agent is inactive if the Agent option was selected at one point and that option is now cleared.

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

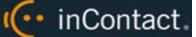
Assigned A	gents Report				Back	Generate Report
Status Active	a v					
I∢ ∢ 1	of 3 🕨 🌬 🖕	Find Next	• 🚯			
	gned Agents					
System I	(D ≑ Agent ≑	User Name 🕏	Status	Phone ID 🗧		
1	Administrator, Administrator		Active			
7	Gonzaga, Frode		Active	5004		
8	Coscia, Sheryl		Active	5009		
9	Snicket, Pietro		Active	5023		
10	Cicierega, Lemony		Active	5024		
11	Cunningham, Richard		Active	5016		
12	Carrozza, Jeremy		Active	5017		
14	Dwyer, Stuart		Active	5021		
15	Handler, Franko		Active	5028		
16	Boer, Orlando de		Active	5030		
17	Carstensen, Dimitri		Active	5031		
18	Cutting, Pietro		Active	5032		
19	Flanders, John		Active	5131		
20	Brooker, Anders		Active	5228		
21	Fronsini, Ramon		Active	5525		
22	Bibic, Cherie	cher	Active	5555		
23	Crowçœ, Alan		Active	5703		
24	Conlee, Jean-Pierre		Active	5704		
25	Chavis, Boris		Active	5705		
26	Byrd, Stian		Active	5706		



Call Recording Detail

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

all Recordi	ng Detan								Back	Generate F	-
t Date	1/1/2013	📕 End Date	1/15/2016	Agents	All ActiveAgent Act InactiveAgent A						
					Insight Agent			•			
cord ID	1776	Caller's Phone #	ŧ	Dialed Phone	#						
te		User 1		User 2							
er 3		User 4		User 5							
llCopyGroup	All	Skill Group List	All 20 30 40 ▼	User 6						ß	
er 7		User 8		User 9							
er 10		User 11		User 12							
er 13		User 14		User 15							
or Tuesday,	cording Deta January 01, 2013 to Friday ID: 1776										
	Agent: Ayala, Daniel		ANI: 7504	DNI5: 912	032998375	Call Directio	on:	Outbound			
	Time: 1/22	/2013 5:27 PM Du	ration: 00:00:47	Gate:	10 Device:	7504	Channel: 3				
	ct WFO Group01 Group:			ACD Group:	40						
Custom	er Number: u1-8000		User2:		u2-8000	User3:		u3-6000			
	User4: u4-4000		User5:	u	15-5000	User6:					
	User7:		User8:			User9:					
	User10:		User11:			User12:					



Duplicate ANI Report

The **Duplicate ANI Report** displays call metadata information for repeat calls into your organization from the same phone number over a period of time. If the same ANI has called into your location multiple times over your selected timeframe, you will see the result listed below. This can be useful for determining whether a specific customer or company calls you on a regular basis.

Duplicate ANI Report		Back Generate Report
Start Date 1/1/2013 End Date 1/13/2016 Call	Direction Incoming V	
4 4 1 of 1 ▷ ▷ 4 Find Next 🔍 ▼ ③		
Duplicate ANI Report		
For Tuesday, January 01, 2013 to Wednesday, January 13, 2016		
ANI 🖯	# Calls Observed 🗟	
2699860094	2	
3149935913	2	
4043758169	2	
5022	3	
5416170715	2	
5703	3	
5741	2	
6026832275	2	
6108311236	3	
6149463580	2	
6784278598	4	
7023636363	2	
7440	2	
7455	3	
7466	6	
7467	6	
7477	18	
7536	2	
7546	2	
7553	2	
8888260080	63	
9548176817	2	
Duplicate ANI Report - 1/13/2016	Page 1 of 1	



Group Membership Report

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

Group Membership Report			Back Generate	Report
Group Leaders Team V	Active All V			
[] 4 4 1 of 1 ▷ ▷ [] 4	💠 🛛 🖌 Find Next 🔍 🗸 🤻 🔇)		
Group Mem	bersnip			
Selected Group: Leaders Team Active: All				
Active: All Group ⇔	Agent 🖯	Phone ID ⇔		
Active: All Group 응 Leaders Team	Agent	7504		
Active: All Group 🕀 Leaders Team Leaders Team	Agent ⊖ Ayala, Daniel Barnes, Phil	7504 7502		
Active: All Group Ceaders Team Leaders Team Leaders Team Leaders Team	Agent ⇔ Ayala, Daniel Barnes, Phil Berner, Carmen	7504 7502 5019		
Active: All Group 🕀 Leaders Team Leaders Team	Agent ⊖ Ayala, Daniel Barnes, Phil	7504 7502		
Active: All Group Ceaders Team Leaders Team Leaders Team Leaders Team	Agent ⇔ Ayala, Daniel Barnes, Phil Berner, Carmen	7504 7502 5019		
Active: All Group Ceaders Team Leaders Team Leaders Team Leaders Team Leaders Team	Agent ⇔ Ayala, Daniel Barnes, Phil Berner, Carmen Bouclier, Jenny	7504 7502 5019 7522		
Active: All Group Ceaders Team Leaders Team Leaders Team Leaders Team Leaders Team Leaders Team Leaders Team	Agent ↔ Ayala, Daniel Barnes, Phil Berner, Carmen Bouclier, Jenny Brechin, Joe	7504 7502 5019 7522 5950		
Active: All Group ⇔ Leaders Team Leaders Team Leaders Team Leaders Team Leaders Team Leaders Team Leaders Team	Agent ⇔ Ayala, Daniel Barnes, Phil Berner, Carmen Bouclier, Jenny Brechin, Joe Burke, Keith	7504 7502 5019 7522 5950 7512		
Active: All Group ⇔ Leaders Team Leaders Team Leaders Team Leaders Team Leaders Team Leaders Team Leaders Team Leaders Team	Agent ⇔ Ayala, Daniel Barnes, Phil Berner, Carmen Bouclier, Jenny Brechin, Joe Burke, Keith Carrozza, Jeremy	7504 7502 5019 7522 5950 7512 5017		

QA Reporting Reports Overview

inContact WFO QA Reports allow you to trend and track the performance of your agents, analysts, and groups as part of your quality management program. The various QA reports give insight into critical areas such as calibration, trending, and team performance. QA reports also serve as extremely powerful coaching tools to help close knowledge gaps, as identified through the evaluation of calls and as shown through reporting.

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

This section provides a description and example of each printable report in the QA Reporting category. For more information on running any of these reports, see <u>Generate a</u> <u>Printable Report</u>.

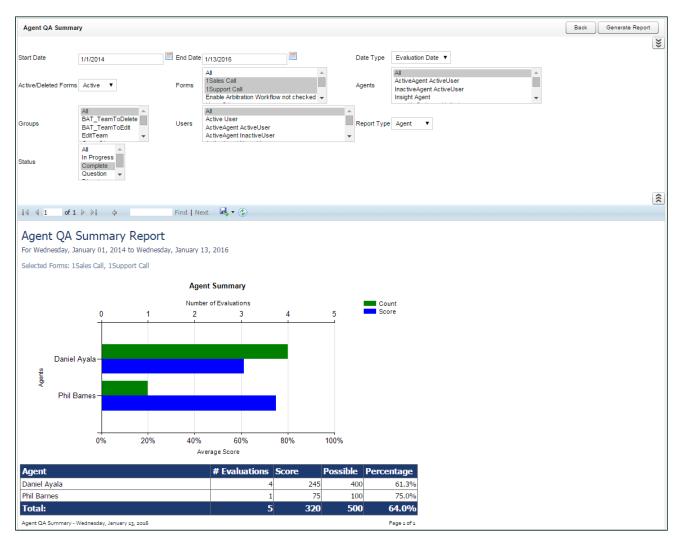


Agent QA Summary

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

You must select a Status to run this report.

In the example below, **Report Type** was set to **Agent**, and you can drill down to **Section**-level or **Question**-level results by clicking the agent's name. Report results are limited to groups to which you have access, even if you select **All**.





Agent Ranking by Period

The **Agent Ranking by Period** report compares an agent's QA performance from one time period to another: week to week, month to month, quarter to quarter, or year to year. The last column in the report ranks agents in your system from 1–X. Positive trending is shown with a green arrow and negative trending with a red arrow. Report results are limited to groups to which you have access, even if you select **All**.

Agent Ranking By Period				Back	Generate Report
Form 1Support Call Vear 2013 Vear 2013 Vear		od Type Month 🔻			*
					*
🕅 🖣 1 of 1 🖗 🖗 🕴 💠 Find Next	: 🛃 • 🛞				
Agent Ranking by Month For period beginning 1/1/2013 and ending 1/31/2013 Selected Form: 1Support Call					
Agent Name 🛱	Selected Month Score 🚊	Prior Month Score ⇔	Rank 🕆		
JIMENEZ, JUNE		3538 of 3970 (89.1%)			
FISCHER, HOWARD	1287 of 1335 (96.4%)	5428 of 5820 (93.3%)	2 (+6)		
DELACRUZ, BARRY	1831 of 1935 (94.6%)	3875 of 4195 (92.4%)	3 (+8)		
PECK, LUPE	1333 of 1420 (93.9%)	3383 of 3720 (90.9%)	4 (+24)		
BELL, ESTER	1067 of 1140 (93.6%)	3481 of 3840 (90.7%)	5 (+26)		
HOOPER, LARRY	995 of 1065 (93.4%)	3226 of 3495 (92.3%)	6 (+7)		
JONES, MARVIN	984 of 1055 (93.3%)	3388 of 3685 (91.9%)	7 (+10)		
HORN, ERIK	1804 of 1935 (93.2%)	4159 of 4495 (92.5%)	8 (+2)		
ASHLEY, RUBEN	1981 of 2140 (92.6%)	1948 of 2205 (88.3%)	9 (+29)		
SOLOMON, DUANE	784 of 850 (92.2%)	2892 of 3065 (94.4%)	10 (-8) 🤳		
BAUER, ALBERT	2361 of 2560 (92.2%)	3857 of 4290 (89.9%)	11 (+22)		
HOLDEN, ANTHONY	1516 of 1645 (92.2%)	4423 of 4860 (91%)	12 (+14)		
JENNINGS, TABITHA	1854 of 2020 (91.8%)	4114 of 4365 (94.2%)	13 (-10) 👃		
SLOAN, SHAWN	2286 of 2515 (90.9%)	2802 of 2990 (93.7%)	14 (-9) 🤳		
EWING, WILLA	2511 of 2765 (90.8%)	4700 of 5095 (92.2%)	15 (0)		
SAMPSON, THERESA	3561 of 3925 (90.7%)	3265 of 3580 (91.2%)	16 (+9)		
FOSTER, HAROLD	771 of 850 (90.7%)	3061 of 3430 (89.2%)	17 (+18)		
OCHOA, YOUNG	906 of 1000 (90.6%)	4406 of 4860 (90.7%)	18 (+12)		
CANTRELL, MADELEINE	1286 of 1420 (90.6%)	3435 of 3720 (92.3%)	19 (-7)		
FARRELL, HALEY	2100 of 2325 (90.3%)	4098 of 4505 (91%)	20 (+7)		



Agents Needing Evaluation Detail

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

- gonto nooding L	valuation Detail							Back	Generate
ast Evaluated Before.	12/1/2015	Group List	Group03 Group04 Group05 Leaders Team	For	rm List	All _BAT_2012-02-10 _BAT_2012-10-03-2:02 _CoachingRAT 2012-05-09	09:02:04 🗸		
Agent List	All ActiveAgent ActiveUser InactiveAgent ActiveUser Insight Agent	User List	All Active User ActiveAgent ActiveUser ActiveAgent InactiveUser	Acti	tive Agents/Users	All V			
[4 4 1 of 1		Find Next 🛛 🔍 🔹 🚯							
		• • •							
-	leeding Evalua								
Selected Groups: Le	eaders Team, Legends Team	Form	Evaluator	Last Evaluated					
Selected Groups: Le	-		Evaluator Gina George	Last Evaluated 6/18/2015					
Selected Groups: Le Agent Daniel Ayala	eaders Team, Legends Team Group	Form							
Selected Groups: Lo Agent Daniel Ayala Phil Barnes	eaders Team, Legends Team Group Legends Team	Form 1Support Call	Gina George	6/18/2015					
Selected Groups: La Agent Daniel Ayala Phil Barnes Phil Barnes	eaders Team, Legends Team Group Legends Team Leaders Team	Form 1Support Call Sales Evaluation v2	Gina George Gina George	6/18/2015 7/29/2014					
Selected Groups: Le Agent Daniel Ayala Phil Barnes Phil Barnes Neil Bern	eaders Team, Legends Team Legends Team Leaders Team Leaders Team	Form 1Support Call Sales Evaluation v2 1Sales Call	Gina George Gina George Jessica Hessler	6/18/2015 7/29/2014 6/18/2015					
Selected Groups: Le Agent Daniel Ayala Phil Barnes Phil Barnes Neil Bern Neil Bern	eaders Team, Legends Team Legends Team Leaders Team Leaders Team Leaders Team	Form 1Support Call Sales Evaluation v2 1Sales Call 1Support Call	Gina George Gina George Jessica Hessler Gina George	6/18/2015 7/29/2014 6/18/2015 11/5/2013					
Selected Groups: Li Agent Daniel Ayala Phil Barnes Phil Barnes Neil Bern Neil Bern Anders Brooker	eaders Team, Legends Team Legends Team Leaders Team Leaders Team Legends Team Legends Team	Form 1Support Call Sales Evaluation v2 1Sales Call 1Support Call Sales Evaluation v2	Gina George Gina George Jessica Hessler Gina George Gina George	6/18/2015 7/29/2014 6/18/2015 11/5/2013 6/18/2015					
Selected Groups: Li Daniel Ayala Phil Barnes Phil Barnes Neil Bern Neil Bern Anders Brooker Roy Chenier	eaders Team, Legends Team Legends Team Leaders Team Leaders Team Legends Team Legends Team Legends Team Legends Team	Form 1Support Call Sales Evaluation v2 1Sales Call 1Support Call Sales Evaluation v2 1Support Call	Gina George Gina George Jessica Hessler Gina George Gina George Gina George	6/18/2015 7/29/2014 6/18/2015 11/5/2013 6/18/2015 11/5/2013					
Selected Groups: Li Daniel Ayala Phil Barnes Phil Barnes Neil Bern Neil Bern Anders Brooker Roy Chenier Sheryl Coscia Pietro Cutting	eaders Team, Legends Team Legends Team Leaders Team Legends Team Legends Team Legends Team Legends Team Legends Team Legends Team	Form 1Support Call Sales Evaluation v2 1Sales Call 1Support Call Sales Evaluation v2 1Support Call 1Support Call	Gina George Gina George Jessica Hessler Gina George Gina George Gina George Gina George Gina George	6/18/2015 7/29/2014 6/18/2015 11/5/2013 6/18/2015 11/5/2013 11/5/2013 11/5/2013 11/5/2013					
Selected Groups: Li Daniel Ayala Phil Barnes Phil Barnes Neil Bern Neil Bern Anders Brooker Roy Chenier Sheryl Coscia Pietro Cutting	eaders Team, Legends Team Legends Team Leaders Team Leaders Team Legends Team Legends Team Legends Team Legends Team Legends Team Legends Team	Form 1Support Call Sales Evaluation v2 1Sales Call 1Support Call Sales Evaluation v2 1Support Call 1Support Call 1Support Call	Gina George Gina George Jessica Hessler Gina George Gina George Gina George Gina George Gina George	6/18/2015 7/29/2014 6/18/2015 11/5/2013 6/18/2015 11/5/2013 11/5/2013					
Selected Groups: Li Agent Daniel Ayala Phil Barnes Phil Barnes Neil Bern Neil Bern Anders Brooker Roy Chenier Sheryl Coscia Pietro Cutting Kevin Dimetrik	eaders Team, Legends Team Legends Team Leaders Team Leaders Team Legends Team Legends Team Legends Team Legends Team Legends Team Legends Team Legends Team	Form 1Support Call Sales Evaluation v2 1Sales Call 1Support Call 1Support Call 1Support Call 1Support Call 1Support Call 1Support Call	Gina George Gina George Jessica Hessler Gina George Gina George Gina George Gina George Gina George Gina George	6/18/2015 7/29/2014 6/18/2015 11/5/2013 6/18/2015 11/5/2013 11/5/2013 11/5/2013 11/5/2013					
-	eaders Team, Legends Team Legends Team Leaders Team Leaders Team Legends Team Legends Team Legends Team Legends Team Legends Team Legends Team Legends Team Legends Team	Form 1Support Call Sales Evaluation v2 1Sales Call 1Support Call 1Support Call 1Support Call 1Support Call 1Support Call 1Support Call 1Support Call	Gina George Gina George Jessica Hessler Gina George Gina George Gina George Gina George Gina George Gina George Gina George Gina George	6/18/2015 7/29/2014 6/18/2015 11/5/2013 6/18/2015 11/5/2013 11/5/2013 11/5/2013 11/5/2013 11/5/2013					

Agents Needing Evaluation Summary

The **Agents Needing Evaluation Summary** displays the same information as the <u>Agents</u> <u>Needing Evaluation Detail</u> report, but only shows one entry per agent regardless of the number of inContact Groups to which they belong. It offers the same criteria choices. Report results are limited to groups to which you have access, even if you select **All**.

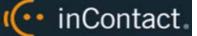
4 4 1 of 1 ▷	∳ 4	Find Next 🔍 🔍 😳						
Agents Needing Evaluation Summary								
Selected Groups: Lead	ers Team, Legends Team							
Agent	Group	Form	Evaluator	Last Evaluated				
Ayala, Daniel	Legends Team	1Support Call	Gina George	6/18/2015				
Barnes, Phil	Leaders Team	1Sales Call	Jessica Hessler	6/18/2015				
Bern, Neil	Legends Team	Sales Evaluation v2	Gina George	6/18/2015				
Bouclier, Jenny	None	None		Never				
Brechin, Joe	None	None		Never				



Blank QA Form

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

Blank QA Form	Back Generate Report
Form 1Support Call	
4 4 1 of 1 ▶ ▶	
1Support Call	
Opening	
Proper introduction?	
Yes No	
Ask for caller's name?	
Yes	
No Restate problem to ensure understanding?	
Yes	
No	
Comments:	
Communication Skills	
Technical language at caller's level of understanding?	
Yes	
No Pace and enunciation clear and understandable?	
Yes	
No	
Patient and empathetic tone?	
Yes No	
Comments:	
Technical Skills	
Application UI knowledge and proficiency	
Excellent Acceptable	
Unacceptable	
Underlying system knowledge and proficiency (DB, OS, scripts, etc.)	
Excellent	
Acceptable Unacceptable	
Overall technical speed and proficiency (moving through screens, using tools, etc.)	
Excellent	
Acceptable	
Unacceptable Comments:	
Closing	
Clarify and communicate next steps?	
Yes	
No Thank caller?	
Yes	
No	



Call Evaluation Detail

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

You must select a Status to run this report.

Call Evaluation Detail										Back Gene	rate Report
											≫
Start Date	10/1/2015		End	I Date	1/15/20	016			Date Type	Evaluation Da	te 🔻
Agent	Daniel Ayala		▼ Eva	aluator	All				▼ Form	All	
Active/Deleted Evaluations	Active v		Gro	oup	All		•		Question	Any 🔻	
Response	Any 🔻		Cal	ler's Phone #					Dialed Pho	one #	
Gate			Use	er 1					User 2		
User 3			Use	er 4					User 5		
					All	<u> </u>					
QA Record ID			stat	tus	In Pro Compl				User 6		
					Quest	ion 👻					
User 7			Use	er 8					User 9		
User 10				er 11					User 12		
User 13			Use	er 14					User 15		
											^
											*
I	Find 🖗	Next	🔍 🗸 🔹 🚯								
Call Evaluatio	n Detail										
	n Detail										
For Thursday, October	01, 2015 to Friday, January 15,	2016									
Selected Agent: Daniel		2010									
Selected Agent. Damer	Ayala										
Agent: Ayala,	Daniel										
Form Name			Call ID			valuated By			te Date		
2Sales Call	Leaders Team		NI: 7504	<u></u>		ina George 5: 9120329983	70	1/13/201 Call Directi		Outbound	
Time:			ion: 00:00:45	62	te:	10	Device:	7504	Channel: 2	Catbound	
Customer Numb			User			u2-3000		User3:		u3-4000	
	r4: u4-7000		User			u15-8000		User6:			
Use			User					User9:			
User			User1					User12:			
User			User1	_				User15:			
Section Nam											
Question			Evaluation					Score			
Proper intr			Yes						10.00 (100.0%	.)	1
	ler's name?		No						0.00 (0.0%)	- /	
Restate pro	blem to ensure understanding	J?	Yes					10.00 of	10.00 (100.0%	»)	1
Ask for per	mission to place customer on	hold?	Not Applicable	9				N/A			
Comments								N/A			
			Subtotal:					20.00 o	f 30.00 (67%)	
	e: Communication Skills										
Question			Evaluation					Score			
Technical la understand	anguage at caller's level of		Yes					10.00 of	10.00 (100.0%	»)	
	nunciation clear and		Yes					10.00 of	10.00 (100.0%)	
	able? I empathetic tone?		Yes					10.00 of	10.00 (100.0%)	-
Comments								N/A	100.07	1	1
		;	Subtotal:						f 30.00 (100%	⁄₀)	



Completed QA Form

The **Completed QA Form** report displays scoring data for a specific QA evaluation. The report shows both earned and possible points for each question so that agents and evaluators can more clearly see areas for improvement. The report is automatically generated when you print a QA Record via Search QA Evaluations on the Coaching tab, and is rarely printed from the Reporting tab since you must know the **QA Record ID** to generate the report. Report results are limited to groups to which you have access. All comments by agents, evaluators, and arbitrators appear at the bottom of the report.

Completed	QA Form											
Agent:	Barnes, Phil	Evaluation ID:										
Evaluator:	George, Gina	Call ID:	No Recording									
Date of Evaluation:	7/29/2014 Date of Recording:											
Duration:	0:0:0 Arbitrator: No Dispute											
Evaluation Form:	Sales Evaluation v2 Station ID:											
Agent Number:	Number Called DNIS:											
CallerID ANI:	Channel:											
Group:		ACD Gate:										
Call Direction:		Screen Capture:										
User1:		User2:										
User3:		User4:										
User5:												
Intro			2	20 of 3	0 (66.67%							
Did the agent intro	oduce him/herself by name?											
Yes				1	10pts							
No			0pts									
ů,	for the caller's name?											
Yes			10pts									
No I Opts Did the agent use the current promotional greeting?												
ů,	the current promotional greeti	ngr			10pts							
Yes No					Opts							
Soft Skills			0 (50.00%									
	sonalize the conversation by u	sing the caller's name on at lea			0 (50.00 /							
Yes					10pts							
No					Opts							
Did the agent sug	gest appropriate add-on produc	cts based on the caller's initial	order?									
Yes				1	10pts							
No					0pts							
Was the agent wa	rm and friendly while remainin	g professional?										
Exceeds Expect					10pts							
Meets Expectati					5pts							
Did Not Meet Ex	pectations				0pts							
Technical Skills			1	L5 of 2	0 (75.00%							
-	e to navigate through product	screens efficiently?										
Exceeds Expect					10pts							
Meets Expectati Did Not Meet Ex					5pts Opts							
	ectly handle credit card proces	ssing?			opto							
Yes		-		1	10pts							
No												
Form Total:			5	50 of 8	0 (62.50%							
Comments												
connients												
Completed QA Form - 6/7	/2016				Page 1 of							



Critical Question Detail

The **Critical Question Detail** report provides detailed insight as to how each agent has scored on Critical questions on the forms you specify across a period of time. The report shows a line for every evaluation that included a Critical question. Report results are limited to groups to which you have access, even if you select **All**.

Critical Question Detail			Back Generate Report
Start Date 12/13/2015 End Date	1/13/2016 Group List	All	33
AllA 	InactiveAgent ActiveUser User List	All Active User ActiveAgent ActiveUser ActiveAgent InactiveUser	* *
Date Type Evaluation Date Active/Deleted Evaluation	Active T		*
🞼 4 1 of 1 🕨 🖓 🔶 🕴 Find Next 🔍 🗸 🤇)		
Critical Question Detail For Sunday, December 13, 2015 to Wednesday, January 13, 2016			
Agent: Ayala, Daniel			
Date of Call Record Date of Eval Form	Question	Score	
1/22/2013 122 1/13/2016 2Sales Call	Restate problem to ensure understanding?	10 of 10 (100.0%)	
Gritical Question Detail - 1/13/2016		Page 1 of 1	

Critical Question Summary

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

Evaluation List Report

The **Evaluation List Report** generates a list of standard QA evaluations performed within the specified time period. Self-evaluations and calibration evaluations are not included. The report provides a means of tracking the evaluation process and the scoring of evaluations. Report results are limited to groups to which you have access, even if you select **All**.

Evaluation List Report								Back Gener	rate Report
									>>>
Start Date	9/1/2015		End Date	1/14/2016	Date Ty	pe Call Date	•		
Group	All	•	Status	All In Progress Complete Question	Agent	All	T		
Active/Deleted Evaluations	Active v		Form	All	 Evaluate 	or All	•		
									**
🛛 🗐 1 of 133 🕨	• M •	Find N	Vext 🗖	ļ - 🕲					
Quality Ass	surance	1	n Lis						
Form 🗧		Agent 🗧		Record ID 🗧	Recording ÷ Date	Evaluated ÷ By	Evaluation Date		
Customer Service Eval	luation	Administrator, Uptiv	/ity	22388	09/09/15	Vicki Hardwick	09/09/2015	140.0 of 140.0 (100.0%)	
Customer Service Eval	luation	Administrator, Uptiv	/ity	13256	09/12/15	Abe Capote	09/12/2015	120.0 of 140.0 (85.7%)	
Customer Service Eval	luation	Administrator, Uptiv	/ity	13170	09/20/15	Vicki Hardwick	09/20/2015	140.0 of 140.0 (100.0%)	
Customer Service Eval	luation	Administrator, Uptiv	/ity	15658	10/06/15	Your Uptivity Administrator	10/06/2015	134.0 of 140.0 (95.7%)	
Customer Service Eval	luation	Administrator, Uptiv	/ity	25477	10/14/15	Your Uptivity Administrator	10/14/2015	134.0 of 140.0 (95.7%)	
Customer Service Eval	luation	Administrator, Uptiv	/ity	25478	10/14/15	Abe Capote	10/14/2015	134.0 of 140.0 (95.7%)	
Customer Service Eval	luation	Administrator, Uptiv	/ity	15567	10/19/15	Your Uptivity Administrator	10/19/2015	134.0 of 140.0 (95.7%)	
Customer Service Eval	luation	Administrator, Uptiv	/ity	15568	10/19/15	Your Uptivity Administrator	10/19/2015	140.0 of 140.0 (100.0%)	



Evaluator QA Summary

The **Evaluator QA Summary** displays results of one or more evaluator's QA performance over a selected period of time. It can be used to compare scoring practices among evaluators, and help determine when it might be appropriate to have evaluators perform a calibration evaluation. The initially-generated report is a high-level comparison, but you can drill down for more granular detail.

You must select a Status to run this report.

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

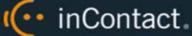
Evaluator QA Sum	mary								Back	Generate Report
										≫
Start Date	1/1/2014	End Date	1/13/2016			Dat	e Type Eva	aluation Date 🔻		
Active/Deleted Forms	Active v	Forms	All 1Sales Call 1Support Call 2Sales Call			Age	ents Inaci	veAgent ActiveUser ttiveAgent ActiveUser ght Agent		
Groups	All	Users	All Active User ActiveAgent Act ActiveAgent Ina			Rep •	oort Type Eva	aluator 🔻		
Status	All In Progress Complete Question									
										*
4 4 1 of 1	Þ ÞI 4	Find Nex	d 🔍 🗟 🔹 🛞							
	QA Summary Re Inuary 01, 2014 to Wedner		3, 2016							
		Evalua	tor Calibratio	n						
			Number of E	valuations			Count			
	0	2	4		6	8	Score			
	nistrator Administrator –									
Groups										
5	<u>.</u>									
	Gina George-									
	1									
	0	20	40	60	80	100				
			Average	Score						
Evaluator			# Evalua	tions S			Percentag	ge		
Administrator Ad	ministrator			5	226		80.3			
Gina George				6	365		62.9			
Total:				11	591.0	860.0	68.7			
Evaluator QA Summary	- 1/13/2016						Page 1	ofi		



Form and Section Failures Report

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

Form and Section Failu	ires Report							Back	Generate Repo	rt
										¥
Start Date	1/1/2015	End Date	1/14/2016		Date Type	Evaluation Date <				
Active/Deleted Evaluations	Active 🔻	Form	All	•	Section	All 🔻				
Agents	All Uptivity Administrator Germaine Ahner Barry Aman v	Groups	All Billing - Location A Billing - Location B Corporate Account Records		Users	All Abe Capote Aleshia Zahm Alesia Cravey	•			
Report Type	Agent 🔻	Failure Type	e Any 🔻							
										~
🛛 🖣 🖣 1 🛛 of 48 🕨	Fii 💠 Fii	nd Next	🛃 • 📀							
E	tion Estima Dana									
	tion Failure Repo		gent							
For Thursday, January (01, 2015 to Thursday, January	14, 2016								
Customer Service	Evaluation	Gree	ting							
Agent		Failu	Failure Count							
Administrator, Uptivity	/	Form	Form Failures: 0, Section Failures: 1							
Ahner, Germaine		Form	Failures: 0, Section Failure							
Aman, Barry		Form	Form Failures: 0, Section Failures: 4							
Armstead, Bobbye		Form	Form Failures: 0, Section Failures: 4							
Arriaga, Shanita			Form Failures: 0, Section Failures: 1							
Balcom, Jerry			Form Failures: 0, Section Failures: 3							
Baughman, Lilly			Form Failures: 0, Section Failures: 3							
Belle, Joey			Form Failures: 0, Section Failures: 1							
Berard, Elmo			Form Failures: 0, Section Failures: 2							
Bullen, Daniella		Form	Failures: 0, Section Failure	es: 3						
Burling, Leona		Form	Failures: 0, Section Failure	es: 2						



Group QA Summary

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

Group QA Summa	ary								Back	Generate R	eport
											¥
Start Date	1/1/2014	[End Date	1/14/2016		0	Date Type Evalu	ation Date 🔻			
				All			All			*	
Active/Deleted Forms	Active v			1Sales Call 1Support Call		A		Agent ActiveU veAgent Active			
				2Sales Call		-		t Agent		-	
	Group03			All		*					
Groups	Group04 Group05		Users	Active User ActiveAgent ActiveUse		F	Report Type Grou	р 🔻			
	Leaders Team	•		ActiveAgent InactiveUs	er	•					

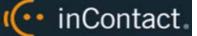
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14 4 1 01 1	V VI V		This Pres								
Group QA	Summary	Report									
For Wednesday, J				2016							
Selected Groups: I	Leaders Team, Le	gends Team									
			Grou	ip Summary							
				ber of Evaluations			Count Score				
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	ers Team-										
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Legends Team Total:				1		56 83 00 1220.0					
Group QA Summary -	electore6				020.0	1220.0	Page 1 of				
Group QA Summary -	1/14/2016						Mage 1 of	1			

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Group Summary by Month

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

Month Active/Deleted Parms Active/Deleted								
Active/Deleted Forms Active Torrest	Group Summ	ary By Month					Back	Generate Report
Active Deleted Forms Active Torma Active Tor								
Active Underted Forms Active Forms	Month	January 🔻	Year 201	IG 🔻	Periods 6 v			
Groups Brog-Location A Brog-Location B Corporate Account Records Users and Aleis Cravey Report Type Month • Aleis Cravey	Active/Deleted F	orms Active	Forms Adn Cas	e Audit	Agents Uptivity Germa	Administrator ine Ahner		
Group Performance Summary Report by Month To the period beginning 7/1/2015 and ending 1/31/2016 Month Summary	Groups	Billing - Location A Billing - Location B	Users Ales	e Capote shia Zahm		T		
Group Performance Summary Report by Month For the period beginning 7/1/2015 and ending 1/31/2016 Month Summary								3
Group Performance Summary Report by Month For the period beginning 7/1/2015 and ending 1/31/2016 Month Summary	4 4 1	of 1 ▷ ▷ 🛛 📣	Find Next	L - 🕲				6
August656664707305591.0%September749774778438591.8%October9479587910586590.6%November119612377413591591.1%December127513128714327091.6%January160016456517921591.8%	For the period	beginning 7/1/2015 and en	ding 1/31/2016 Month Su	mmary	- 1500 Number of Evaluations			
August656664707305591.0%September749774778438591.8%October9479587910586590.6%November119612377413591591.1%December127513128714327091.6%January160016456517921591.8%	Month		# Evaluations	Score	Possible Score	Percentage		
September 749 77477 84385 91.8% October 947 95879 105865 90.6% November 1196 123774 135915 91.1% December 1275 131287 143270 91.6% January 1600 164565 179215 91.8%								
October9479587910586590.6%November119612377413591591.1%December127513128714327091.6%January160016456517921591.8%								
December 1275 131287 143270 91.6% January 1600 164565 179215 91.8%			947		105865	90.6%		
January 1600 164565 179215 91.8%	November		1196	i 123774	135915	91.1%		
, , , , , , , , , , , , , , , , , , ,	December		1275	i 131287	143270	91.6%		
	January		1600	164565	179215	91.8%		
Total: 6423 659452.00 721705.00 91.4%	Total:		6423	659452.00	721705.00	91.4%		



Group Summary by Period

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

Group Su	Immary By Period							Back	Generate Report
									*
Period Type	Quarter 🔻	Year	2016 ▼		Period Name	1 🔻			
						All			
Periods	6 🔻	Active/Deleted Forms	Active v		Forms	Admissions	_		
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	All		All						
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Agents	Germaine Anner	Groups	Billing - Location B		Users	Aleshia Zahm			
	Barry Aman 👻		Corporate Account Rec	cords 👻		Alesia Cravey	•		
Report Type	e Period 🔻								
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		-							
Group	Performance Su	ımmary Rep	ort by Quar	ter					
For the pe	eriod beginning 7/1/2014 and	d ending 3/31/2016							
		Qua	rter Summary						
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Quarter		# Evaluat			sible Scor				
1st Quarte			5704	585521		8950 91.6%			
2nd Quart			1059	109909		9985 91.6%			
3rd Quart			1971	203448		2055 91.6%			
4th Quart	ter 2015		3418	350940		5050 91.1%			
Total:		12152	1249818.	00 136	6040.00	91.5%			

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Multiple Evaluations Summary

The **Multiple Evaluations Summary** displays the last 12 evaluations conducted on a selected agent and form, based on a selected end date. **Overall Average** % is the average score of all evaluations done using the selected form regardless of agent or evaluator. **Average Score for this Form %** is the total average of the last 12 evaluations performed using the selected form, by the selected evaluator, for the selected agent. Individual percentages in the **Overall Percentage** column are Section totals. Individual question **Totals** are for the last 12 evaluations performed on the selected form, by the selected evaluator, for the selected form, by the selected evaluator of the selected form, by the selected on the selected form, by the selected evaluator of the selected agent.

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

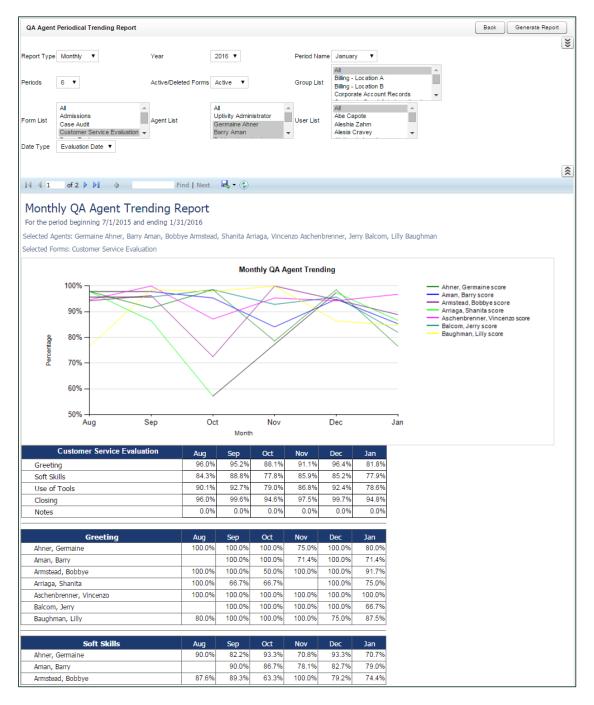
Multiple Evaluations Summary															Back	Gene	arate Rep
ind Date 1/14/2016	Agent ID Gern	naine A	hner		▼ Fo	orm ID	Custo	mer Sei	vice Ev	aluatio	n 🔻						
	All		<u> </u>														
Supervisor ID Your Uptivity Administrator 🔻	Status Comp	ogress olete															
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 ≪ 1 of 1 ▷ ▷ ↓	Find M	lext	H -	٢													
Multiple Evelvetiene C		. D.															
Multiple Evaluations Su	ummary	/ K6	epo	τ													
Contact Date Range: July 22, 2015		2016	^j														
Agent Name: Germaine Ahne Supervisor Name: Your Uptivity A							0	erall A			92.4%						
Supervisor Name: Your Uptivity A	dministrator						UVe	anan A	verag	e: :	9ℤ.470		-				
🛄 Farma Custanan Canaisa Farkatian																	
Form: Customer Service Evaluation																	
Average Score for this Form: 97.1%																	
Average Score for this form. 97.176					1												
5	Total Possible	1	2	3	4	5	6	7	8	٥	10	11	12	Total	Overal		
Section/Questions	Possible	1	2	3	4	5	6	7	8	9	10	11	12	Total	Percenta	age	
Section/Questions Greeting	Possible 240													240	Percenta 1	age 00.0%	
Section / Questions Greeting Did Agent state company name?	Possible	1 10 10	2 10 10	3 10 10	4 10 10	5 10 10	6 10 10	7 10 10	8 10 10	9 10 10	10 10 10	11 10 10	12 10 10		Percenta 1 1	age 00.0% 00.0%	
Section / Questions Greeting Did Agent state company name? Did Agent state his/her name?	Possible 240 120	10	10	10	10	10	10	10	10	10	10	10	10	240 120	Percenta 1 1 1	age 00.0%	
Section/Questions Greeting Did Agent state company name? Did Agent state his/her name? Soft Skills	Possible 240 120 120	10	10	10	10	10	10	10	10	10	10	10	10	240 120 120	Percenta 1 1 1	age 00.0% 00.0% 00.0%	
Section / Questions Greeting Did Agent state company name? Did Agent state his/her name? Soft Skills Did Agent demonstrate Active Listening? Did Agent use courtesy statements as	Possible 240 120 120 360	10 10	10 10	10 10	10 10	10 10	10 10	10 10	10 10	10 10	10 10	10 10	10 10	240 120 120 332	Percenta 1 1 1	age 00.0% 00.0% 00.0% 92.2%	
Section / Questions Greeting Did Agent state company name? Did Agent state his/her name? Soft Skills Did Agent demonstrate Active Listening? Did Agent use courtesy statements as appropriate?	Possible 240 120 120 360 120	10 10 10	10 10 7	10 10 10	10 10 7	10 10 10	10 10 10	10 10 10	10 10 7	10 10 10	10 10 10	10 10 7	10 10 10	240 120 120 332 108	Percenta 1 1 1	age 00.0% 00.0% 00.0% 92.2% 90.0%	
Section / Questions Greeting Did Agent state company name? Did Agent state his/her name? Soft Skills Did Agent demonstrate Active Listening? Did Agent use courtesy statements as appropriate? Did Agent use proper hold procedures?	Possible 240 120 120 360 120 120	10 10 10 10	10 10 7 7 7	10 10 10 10	10 10 7 5	10 10 10 10	10 10 10 10	10 10 10 10	10 10 7 7	10 10 10 10	10 10 10 10	10 10 7 5	10 10 10 10	240 120 332 108 104	Percenta 1 1 1	age 00.0% 00.0% 92.2% 90.0% 86.7%	
Section / Questions Greeting Did Agent state company name? Did Agent state his/her name? Soft Skills Did Agent demonstrate Active Listening? Did Agent use courtesy statements as appropriate? Did Agent use proper hold procedures? Notes Use of Tools	Possible 240 120 120 360 120 120 120	10 10 10 10 10	10 10 7 7 10	10 10 10 10 10	10 10 7 5 10	10 10 10 10 10	10 10 10 10 10	10 10 10 10 10	10 10 7 7 10	10 10 10 10 10	10 10 10 10 10	10 10 7 5 10	10 10 10 10 10	240 120 332 108 104 120	Percenta 1 1 1	age 00.0% 00.0% 92.2% 90.0% 86.7% 00.0%	
Section / Questions Greeting Did Agent state company name? Did Agent state his/her name? Soft Skills Did Agent demonstrate Active Listening? Did Agent use courtesy statements as appropriate? Did Agent use proper hold procedures? Notes Use of Tools Did Agent find record in CRM in timely	Possible 240 120 360 120 120 120 120 0	10 10 10 10 10	10 10 7 7 10	10 10 10 10 10	10 10 7 5 10	10 10 10 10 10	10 10 10 10 10	10 10 10 10 10	10 10 7 7 10	10 10 10 10 10	10 10 10 10 10	10 10 7 5 10	10 10 10 10 10	240 120 332 108 104 120 0	Percenta 1 1 1	age 00.0% 00.0% 92.2% 90.0% 86.7% 00.0%	
Section / Questions Greeting Did Agent state company name? Did Agent state his/her name? Soft Skills Did Agent demonstrate Active Listening? Did Agent use courtesy statements as appropriate? Did Agent use proper hold procedures? Notes Use of Tools Did Agent find record in CRM in timely manner? Did agent navigate knowledgebase	Possible 240 120 360 120 120 120 120 0 360	10 10 10 10 10 0	10 10 7 7 7 10 0	10 10 10 10 10 0	10 10 7 5 10 0	10 10 10 10 10 0	10 10 10 10 10 0	10 10 10 10 10 0	10 10 7 7 10 0	10 10 10 10 10 0	10 10 10 10 10 0	10 10 7 5 10 0	10 10 10 10 10 0	240 120 332 108 104 120 0 340	Percenta 1 1 1 1 1	age 00.0% 00.0% 92.2% 90.0% 86.7% 00.0% 0.0% 94.4%	
Section / Questions Greeting Did Agent state company name? Did Agent state his/her name? Soft Skills Did Agent demonstrate Active Listening? Did Agent use courtesy statements as appropriate? Did Agent use proper hold procedures? Notes Use of Tools Did Agent find record in CRM in timely manner? Did agent navigate knowledgebase efficiently (if needed)? Did Agent use correct closing code in CRM?	Possible 240 120 360 120 120 120 0 360 120 120 120	10 10 10 10 10 0 10 10 10	10 10 7 7 7 10 0	10 10 10 10 10 0 10	10 10 7 5 10 0	10 10 10 10 10 0	10 10 10 10 10 0 10	10 10 10 10 10 0 10	10 10 7 7 10 0	10 10 10 10 10 0 10	10 10 10 10 10 0 10	10 10 7 5 10 0	10 10 10 10 0 10	240 120 332 108 104 120 0 340 100 120 120	Percenta 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	age 00.0% 00.0% 92.2% 90.0% 86.7% 00.0% 94.4% 83.3% 00.0% 00.0%	
Section / Questions Greeting Did Agent state company name? Did Agent state his/her name? Soft Skills Did Agent demonstrate Active Listening? Did Agent use courtesy statements as appropriate? Did Agent use proper hold procedures? Notes Use of Tools Did Agent find record in CRM in timely manner? Did agent navigate knowledgebase efficiently (if needed)? Did Agent use correct closing code in CRM?	Possible 240 120 360 120 120 120 0 360 360 120 120	10 10 10 10 10 0 10 10 10	10 10 7 7 10 0 10 10	10 10 10 10 10 0 10 10 10	10 10 7 5 10 0 10	10 10 10 10 10 0 10 10 10	10 10 10 10 10 0 10 10	10 10 10 10 10 0 10 10 10	10 10 7 7 10 0 10 10	10 10 10 10 10 0 10 10	10 10 10 10 10 0 10 10	10 10 7 5 10 0 0 10	10 10 10 10 10 0 10 10	240 120 332 108 104 120 0 340 100 120	Percenta 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	age 00.0% 00.0% 92.2% 90.0% 86.7% 00.0% 94.4% 83.3% 00.0%	
Section/Questions Greeting Did Agent state company name? Did Agent state his/her name? Soft Skills Did Agent demonstrate Active Listening? Did Agent use courtesy statements as appropriate? Did Agent use proper hold procedures? Notes Use of Tools Did Agent find record in CRM in timely manner? Did agent navigate knowledgebase efficiently (if needed)? Did Agent use correct closing code in CRM? Closing Did Agent offer to transfer to customer sat survey?	Possible 240 120 360 120 120 120 0 360 120 120 120 120 720 180	10 10 10 10 10 0 10 10 10	10 10 7 7 7 10 0 10 10 10 10 10	10 10 10 10 10 0 10 10 10	10 10 7 5 10 0 0 10 10 10 10	10 10 10 10 10 10 10 10 10 10	10 10 10 10 10 10 10 10 10 10	10 10 10 10 10 0 10 10 10 10 10	10 10 7 7 10 0 10 10	10 10 10 10 10 0 10 10 10 10 10	10 10 10 10 10 0 10 10	10 10 7 5 10 0 10 10 10 10	10 10 10 10 10 10 10 10 10 10	240 120 332 108 104 120 0 340 100 120 120 120 720 180	Percenta 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	age 00.0% 00.0% 92.2% 90.0% 86.7% 00.0% 94.4% 83.3% 00.0% 00.0% 00.0%	
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Section / Questions Greeting Did Agent state company name? Did Agent state his/her name? Soft Skills Did Agent demonstrate Active Listening? Did Agent use courtesy statements as appropriate? Did Agent use proper hold procedures? Notes Use of Tools Did Agent find record in CRM in timely manner? Did agent navigate knowledgebase efficiently (if needed)?	Possible 240 220 120 360 120 120 0 360 120 120 120 120 120 120 120 360	10 10 10 10 10 0 10 10 10 10 15 10 30	10 10 7 7 7 10 0 10 10 10 10 15 10 30	10 10 10 10 10 10 10 10 10 10 15 10 30	10 10 7 5 10 0 0 10 10 10 10 15 10 30	10 10 10 10 10 10 10 10 10 10 10 30	10 10 10 10 10 10 10 10 10 10 15 10 30	10 10 10 10 10 0 10 10 10 10 10 15 10 30	10 10 7 7 7 10 0 10 10 10 15 10 30	10 10 10 10 10 0 10 10 10 10 15 10 30	10 10 10 10 0 10 10 10 10 10 15 10 30	10 10 7 5 10 0 10 10 10 15 10 30	10 10 10 10 10 10 10 10 10 15 10 30	240 120 332 108 104 120 0 340 100 120 120 720 180 120 360	Percenta 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	age 00.0% 00.0% 92.2% 90.0% 86.7% 00.0% 94.4% 83.3% 00.0% 00.0% 00.0% 00.0% 00.0%	



QA Agent Periodical Trending Report

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

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



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QA Agent Trending Report

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

2										
QA Agent Trendi	ing Report								Back Generate Re	
										×
Start Date	10/1/2015	End Date	12/31/2015			Date Type	Evaluation D	Date 🔻		
Active Agents/Users	s Active v	Groups	All Billing - Location Billing - Location Corporate Accou	в		Forms	All Admissions Case Audit Customer S	ervice Evaluati	ion 👻	
Agents	All Uptivity Administrator Germaine Ahner Barry Aman	Users	All Abe Capote Aleshia Zahm Alesia Cravey	I	•	Reporting P	eriod Monthly T			
										**
[4 4 1 of 2	8 🕨 🕅 💠	Find N	ext 🛛 🛃 🔹 🍪							
For Thursday, Oc	A Agent Trendir tober 01, 2015 to Thursday Germaine Ahner, Barry Amar	, December 3	1, 2015	rriaga, Vin	icenzo As	chenbrenner	, Jerry Balcom, Li	illy Baughmai	n	
			Мо	nthly QA	Agent T	rending				
100	1%								Germaine Ahner score	
								; =	Barry Aman score Bobbye Armstead score	
90	1% -								 Shanita Arriaga score Vincenzo Aschenbrenner score 	
유 80	10/			/				_	 Jerry Balcom score Lilly Baughman score 	
130			>							
Bercentage Percentage 70	1%									
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60	1% -									
50			,					,		
	Oct		Nov Monti				D	ec		
			Monti	1						
					2015					
				Oct	Nov	Dec				
Ahner, Germair	ne			85.6%	77.7%	98.6%				
Customer S	ervice Evaluation			98.6%	78.6%	98.6%				
Greeting				100.0%	75.0%	100.0%				
	gent state company name?			100.0%	75.0%	100.0%				
	gent state his/her name?			100.0%	75.0%	100.0%				
Soft Skil	ls			93.3%	70.8%	93.3%				
Dist 4-				N/A	N/A	N/A				
	gent use courtesy statements gent demonstrate Active List		le ?	90.0% 90.0%	61.3% 63.8%	90.0% 90.0%				
	gent use proper hold proced	_		100.0%		100.0%				
Use of To				100.0%		100.0%				
	gent find record in CRM in tir	mely manner?		100.0%		100.0%				
	jent navigate knowledgebas			100.0%	62.5%	100.0%				
Did Ag	gent use correct closing code	e in CRM?		100.0%		100.0%				
Closing				100.0%	87.5%	100.0%				
Did Ag	gent resolve call within supp	ort guidelines	?	100.0%	87.5%	100.0%				
Did Ag	gent probe for additional con	icerns?		100.0%	87.5%	100.0%				
Did Ag	gent thank customer for callin	ng?		100.0%	87.5%	100.0%				



QA Form Trending Report

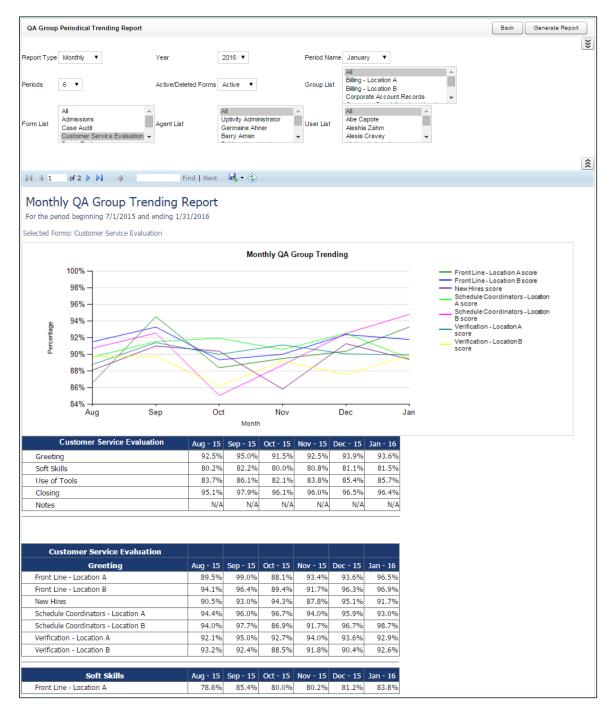
The **QA Form Trending Report** displays total quality performance on a particular QA evaluation form over a period of time.

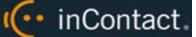
QA Form	Trending R	eport								Back	Generate Rep	ort
												¥
Start Date	10/1/2015		End Date	12/31/2015		Reporting	Period Monthly v					
Internal All	All T		Active/Deleted Forms	Active v		Group Lis	All Billing - Location Billing - Location Corporate Acco	n B	•			
Form List	All Admission Case Audi Customer		Agent List	All Uptivity Admin Germaine Ahn Barry Aman	ner	User List	All Abe Capote Aleshia Zahm Alesia Cravey	* •				
Report Type	Form	•	Report Detail	Form v								
												**
	of 1 🕨	▶	Find Next	🛃 • 🚯								~
		-	Report by For aday, December 31, 2									
				Mont	hly QA Tre	nding by Form	n					
	100%							_	score	er Service E valuation so		
	95% -											
Percentage	90% -							_				
Per												
	85% -											
								-				
	- 80% O	ct		Nov Monti			[Dec				
					:	2015]					
						Nov Dec						
		Evaluation				89.1% 90.0%						
Sales Eva		e Evaluation				89.1% 90.0% 82.4% 83.2%						
	Evaluation					82.4% 83.2%						

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QA Group Periodical Trending Report

The **QA Group Periodical Trending Report** displays performance of one or more group(s) on one or more form(s) over a period of time. This time period begins with the date or period selected in the **Period Name** field and looks backward over the specified number of periods. The reporting period can be daily, weekly, monthly, quarterly or yearly. The first table shows the average monthly score for all selected groups on each section of the evaluation. The second table shows the average monthly score for each group individually on each section of the evaluation.





QA Group Scorecard

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

QA Group So	corecard							Back	Generate Rep
Start Date	12/14/2015	End Date 1/14	W2016	Da	te Type (Call Date 🔻			
Active/Deleted F		Group List Billin	ng - Location A ng - Location B porate Account Record	Fo	rm List C	M Admissions Case Audit Customer Service Et	✓aluation →		
Agent List	All Uptivity Administrator Germaine Ahner Barry Aman v	Evaluator Ale:	e Capote shia Zahm sia Cravey	*					
	of 2 ▶ ▶ ↓ ↓	Find Next	₽, • ③						
	Scorecard December 14, 2015 to Thursday,	January 14, 2016							
Selected Form	s: Customer Service Evaluation								
			Group	Scorecard					
								ne - Location A sc	
		Reviewer N	lotes —				A score Front Li	ne - Location B sc	ore
	Did Agent offer to transfer	to customer sat sur	vey?—				B score New Hir	le Coordinators - l es score tion - Location A	Location
							score	tion - Location B	
	Did Agent tha	nk customer for call	ling? —						
	Did Agent probe	for additional conce	erns?—						
	Did Agent resolve call wi	this support avideli	aer 2						
	Did Agent resolve call wi	thin support guiden	nes (
	Did Agent use corre	ct closing code in C	RM? -						
	Did agent navigate knowledgebas	e efficiently (if need	ed)? —						
Questions		, , , , , , , , , , , , , , , , , , , ,							
đ	Did Agent find record in	CRM in timely man	ner? —			-			
		N	lotes —						
	Did Agent use p	proper hold procedu	ures?—						
	Did Agent demo	nstrate Active Listen	ing?—						
	Did Agent use courtesy sta	tements as appropr	iate?—		-				
	Did A	gent state his/her na	ame?—						
	Did Age	nt state company na	ame?—						
			0% 20%	40% 6	0% 8	30% 100%			
				Percentag	16				

🜔 inContact.

QA Group Trending Report

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

QA Group Trendi	ng Report							Back	Generate Repor	_
Start Date	12/14/2015	End Date			Date Type	Call Date	•			×
Active/Deleted Forms	s Active V	Groups	All Billing - Location A Billing - Location B Corporate Account Record	s •	Forms	All Admissions Case Audit Customer Serv	ice Evaluation 👻			
Agents	All Uptivity Administrator Germaine Ahner Barry Aman v	Users	All Abe Capote Aleshia Zahm Alesia Cravey	•	Reporting Period	Monthly v				
4	5 Þ Þi 💠	Find Ne	xt 🖳 • 😳							~
	A Group Trending mber 14, 2015 to Thursday,									
Selected Forms: Cu	ustomer Service Evaluation									
			Monthly QA	Group Tr	rending					
1009	% –							ine - Location A so		
989	%						- New Hi	ine - Location B so res score		
969	%						Ascor	ule Coordinators - e ule Coordinators -		
뺤 949	04						Biscore		Locaborr	
cents							score	tion - Location B		
a 929	%						score			
909	%									
88	%									
86	%									
	Dec		Month			Jan				
			1							
			2015	2016						
Front Line - Loc	ation A		Dec 93.7%	Jan 93.3%						
	ervice Evaluation		93.7%	93.3%						
Greeting			98.9%	95.4%						
Did Ag	ent state company name?		100.0%	100.0%						
	ent state his/her name?		97.8%	90.7%						
Soft Skill			84.6%	83.8%						
	ent use courtesy statements a			75.4%						
	ent demonstrate Active Lister ent use proper hold procedur	-	77.8%	76.1%						
Notes			N/A	N/A						
Use of To	ols		89.1%	88.3%						
Did Ag	ent find record in CRM in time	ely manner?	87.0%	85.2%						
	ent navigate knowledgebase		needed)? 80.4%	79.6%						
	ent use correct closing code i	n CRM?	100.0%	100.0%						
Closing			98.7%	99.8%						
	ent resolve call within suppor			100.0%						
	ent probe for additional conce ent thank customer for calling		97.8%	100.0% 98.1%						
L Diu Ag	ent traint customer for calling		97.8%	90.1%						



QA Pending Acknowledgment

The **QA Pending Acknowledgment** report displays a list of unacknowledged QA evaluations on an agent-by-agent and form-by-form basis. This report is only needed if you use the acknowledgment-only or acknowledgment and arbitration workflows. For more information, see the *inContact WFO QM Manual* or the online help for inContact WFO.

You must select a Group to run this report.

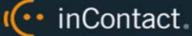
QA Pending Acknowledgment					Back Ge	enerate Report
Older Than 1/15/2016	Groups	Corporate Specialist - Location A Corporate Specialist - Location B Foundation Front Line - Location A				>>>
						≈
[4 4 1 of 1 ▷ ▷] 4		Find Next 🛛 🛃 🔹 🛞				
QA Pending Selected Groups: Front Line - Loc	ation A					
Form 🗧	Agent 🗧	Call ID	Evaluator 🗧	Completed Date 🕀	Status	
Customer Service Evaluation	Garner, Dwayne		2 Meda Swindall	8/8/2015	Unacknowledged	
Sales Evaluation	Costales, Brice	36702	2 Kendra Breed	9/1/2015	Unacknowledged	
QA Pending Acknowledgment - 1/15/	/2016				Page 1 of 1	



QA Summary by Form

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

QA Summary By F	orm					Back Generate Report
		-				
Start Date	12/15/2015	End Date	1/15/2016	Date Type	Call Date 🔻	
Active/Deleted Forms	Active V	Forms	All Admissions Case Audit Customer Service Eve	Agents	All Uptivity Administrator Germaine Ahner Barry Aman	▲
Groups	All Billing - Location A Billing - Location B Corporate Account Records	s v	All Abe Capote Aleshia Zahm Alesia Cravey	Report Type	Form V	
4 4 1 of 1		Find Next	🛃 • 🕲			
Form Perfo	rmance Summa	arv Report				
	mber 15, 2015 to Friday, Ja					
		Form Sun	nmary			
		Nu	mber of Evaluations		Count	
	(0.2 0.4	0.6 0.8	1 1.2	Score	
	-					
Custor	mer Service Evaluation -					
Forms						
2						
	Sales Evaluation -					
	-					
	(20	40 60 Average Score	80 100		
			-		_	
Form		# Evaluations			Percentage	
Customer Service Sales Evaluation	Evaluation	891 678	116171 45430	124740 50850		
Total:		1569		175590		
QA Summary By Form -	1/15/2016	2,503	101001	1,5550	Page 1 of 1	
Constraint of Forms	1222010				1 age 1 01 1	



QA Summary by Question

The **QA Summary by Question** report displays performance on a QA evaluation form's individual questions over a period of time. Information is shown in graphical and text format.

QA Summary By	Question									
	Question								B	ack Generate I
		_								
tart Date	12/15/2015	End Date 1/15/2	016		Date Type	Call Dat	e .	'		
ctive/Deleted Form	s Active 🔻		- Location A		Forms	All Admissio		<u>^</u>		
enverbeieteur om		Billing) - Location B prate Account Recor			Case Au Custome		Evaluation 👻		
	All	All		*						
gents	Uptivity Administrator Germaine Ahner		Capote ia Zahm		Report Type	e Form	•			
	Barry Aman 👻	Alesia	a Cravey	-						
🛛 🖣 1 of 3	3 🕨 🕅 💠	Find Next	L • 🕲							
-	Performance Sur		ort							
For Tuesday, Dec	cember 15, 2015 to Friday, J	anuary 15, 2016								
Selected Forms: C	Customer Service Evaluation									
			Questio	n Summa	v					
										Score
eting		Did Agent sta	ite company nan	ne?						
Gree		Did Agent	state his/her nam	ne?						
Cuestions Customer Service Evaluation ۲ – Use of Tools ۲ – Soft Skills – I Greeting 1	Did Agent use	courtesy stateme	nts as appropria	te?					-	
Skills	Did	Agent demonstrat	te Active Listenir	na?						
Soft		-		-						
in T	Die	d Agent use prope	r hold procedure	es?						
itions ols – E	Did Agent	find record in CRM	∕l in timely mann	er?						
of To	Did agent navigate ki	nowledgebase eff	iciently (if neede	d)?						
omer Use	Did Ag	ent use correct clo	sing code in CR	M2						
⊂ ust	-		-							
-	Did Agent r	resolve call within s	support guideline	es?						
sing-	Did	Agent probe for a	dditional concerr	ıs?						
Closing-	[Did Agent thank cu	ustomer for callir	ng?						
	Did Agent off	er to transfer to cu	istomer sat sunv	av2						
LL	Did Agent off	er to transfer to cu	storner sat surve	sy i						
				0	20	40	60	80	100	
Form: Custon	ner Service Evaluatior	n	8	91 F <u>orm</u>	s Scored				Grade:	93.1%
Section: G	reeting								Grade:	97.1%
-	t state company name?						to-Fail	Value	Grade:	100.0%
Yes			8	91 (100%)		No		10 of 10		
Did Agent Yes	t state his/her name?			39 (94%)		Au No	to-Fail	Value 10 of 10	Grade:	94.2%
No				2 (6%)			tion	0 of 10		
Section: So	oft Skills					I			Grade:	84.8%
Section, St	t use courtesy statements	as appropriate?				Au	to-Fail	Value	Grade:	76.5%
	e abe courtes, statements									
	•		3	51 (39%)		No	ne	10 of 10		



QA Summary by Section

🜔 inContact.

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

QA Summary By S	Section						Back	Generate Report
Start Date	12/15/2015	End Date 1/15/2	016		Call Date 🔻			
Active/Deleted Forms	Active V	Groups Billing	- Location A - Location B prate Account Records	Forms	All Admissions Case Audit Customer Service Eva	luation -		
Agents	All Uptivity Administrator Germaine Ahner Barry Aman	Users Aleshi	apote ia Zahm Cravey v	Report Type	Form v			
								*
[4 4 1 of 1		Find Next	- , • 🕲					
For Tuesday, Dece	erformance Sum ember 15, 2015 to Friday, 1 ustomer Service Evaluation	January 15, 2016	t					
		Section S	ummary					
	7				Score			
_								
L Use	of Tools –							
Forms Customer Service Evaluation S	oft Skills –							
For mer Sen	Greeting -							
L Custo	Closing –							
	0% 10% 20	% 30% 40% 5	0% 60% 70% 8	0% 90% 100%				
		Averag	ge Score					
Form		# Evaluations	Score	Possible Score	Percentage			
Customer Service	Evaluation	891	. 113051	12474	0 90.6%			
Greeting			16260	1782	0 91.2%			
Soft Skills			21896	2673				
Use of Tools			23080	2673				
Closing			51815	5346	0 96.9%			
QA Summary By Sec	tion - 1/15/2016				Page 1 of 1			



Quality Assurance Detail

The **Quality Assurance Detail** report shows completed QA evaluations that meet the criteria you provide. The specific call graded in the evaluation can be played back by clicking on the Call ID hyperlink. This hyperlink functionality will not work in exported versions of the report.

uality Assurance Detail						Back Generate Reg
	_		_			
t Date 1/1	/2016	End Date 1/15/2016		Date Type	Evaluation Date <	
nt Al	•	Evaluator All	•	Form	Customer Service Evaluation V	
ve/Deleted Evaluations Ac	tive v	Group All		 Question 	Any	•
ponse Ar	ny 🔻					
	i 💠 Fi	nd Next - 🛃 • 🎲				
4 I 01 330 P P	1 49 FI	na i wext 🧠 🐨				
Duality Assu	Irance Detail					
(,						
ected Form: Customer Se	ervice Evaluation					
jent: Administrato	r, Uptivity					
Form Name		Call ID	Evaluated By	Complete	e Date	
Customer Service Eva	luation	477	O Your Uptivity Administrator	1/10/2016		
Section Name: (Greeting					
Question		Evaluation		Score		
Did Agent state	e company name?	Yes		10.00 of 10	0.00 (100.0%)	
Did Agent state	his/her name?	Yes		10.00 of 1	0.00 (100.0%)	
		Subtotal:		20.00 of 2	20.00 (100%)	
Section Name: S	oft Skills					
Question		Evaluation		Score		
Did Agent use appropriate?	courtesy statements as	Excellent		10.00 of 10	0.00 (100.0%)	
Did Agent dem	onstrate Active Listening?	Excellent		10.00 of 1	0.00 (100.0%)	
	proper hold procedures?	Yes			0.00 (100.0%)	
Notes		Great tone of voice!		N/A		
Section Name: I	les of Tools	Subtotal:		30.00 of 3	30.00 (100%)	
		Evaluation		Score		
Question	record in CRM in timely	Yes			0.00(100.0%)	
manner?	record in CRM in timely	Tes		10.00 01 10	0.00 (100.0%)	
Did agent navig efficiently (if ne	gate knowledgebase eeded)?	Yes		10.00 of 10	0.00 (100.0%)	
Did Agent use CRM?	correct closing code in	Yes		10.00 of 10	0.00 (100.0%)	
		Subtotal:		30.00 of 3	30.00 (100%)	
Section Name: (Closing					
Question		Evaluation		Score		
Did Agent reso guidelines?	lve call within support	Yes		30.00 of 3	0.00 (100.0%)	
Did Agent prob	e for additional concerns?	Yes		10.00 of 10	0.00 (100.0%)	
Did Agent than	k customer for calling?	Yes		5.00 of 5.0	0 (100.0%)	
Did Agent offer survey?	to transfer to customer sa	at Yes		15.00 of 1	5.00 (100.0%)	
Survey.		Subtotal:		60.00 of (50.00 (100%)	
Section Name: I	Notes					
Question		Evaluation		Score		
	5	You are a superstar	1	N/A		
Reviewer Note		-	•		00 (00)	
Reviewer Note		Subtotal:		0.00 of 0.	00(0%)	
Reviewer Note		Subtotal: Total:		0.00 of 0.	00 (0%)	



Weighted QA Group Periodical Trending Report

The **Weighted QA Group Periodical Trending Report** displays group-by-group comparisons of quality results at the section level of a form over a period of time. This time period begins with the date or period selected in the **Period Name** field and looks backward over the specified number of periods. The reporting period can be daily, weekly, monthly, quarterly or yearly. Data is broken down section by section.

Weighted Q									
	A Group Periodical Trending	Report						Back General	te Report
Report Type	Monthly T	Year	2016 🔻		Period Name	January V			>>>
Periods	6 ▼	Active/Completed Forms	Active v		Groups	All Billing - Location Billing - Location Corporate Accou	в	· ·	
Forms	All Admissions Case Audit Customer Service Evaluation	Agents	All Uptivity Adn Germaine A Barry Aman	ninistrator hner	Evaluators	All Abe Capote Aleshia Zahm Alesia Cravey	- - -		
Date Type	Recording Date 🔻								
									**
	of 3 🕨 🕅 💠	Find Next	🛃 र 🚯						
Monthl	ly QA Group Trei	nding Report							
For the perio	od beginning 7/1/2015 and	ending 1/31/2016							
			Mont	thly QA Gro	up Trending				
	100%						_	Front Line - Location A score	
	95%						_	 Front Line - Location B score New Hires score Schedule Coordinators - Location 	
	90%							A score Schedule Coordinators - Location	
age	85% -							B score Verification - Location A	
Percentage	80%							Score Verification - Location B score	
۵.	75%								
	70% -								
							_		
	65%								
	65%	Sep Oct		Nov	Dec	;	Jan		
C	Aug		Month				Jan		
	Aug				Nov De		Jan		
C Greeting Soft Skill	Aug S Customer Service Evalua	tion Aug	Month Sep	Oct	Nov De 87.9% 89	c Jan	Jan		
Greeting	Aug S Customer Service Evalua J	tion Aug 89.5%	Month Sep 92.2%	Oct 86.2%	Nov De 87.9% 89 80.3% 80	c Jan .9% 91.0%	Jan		
Greeting Soft Skill	Aug S Customer Service Evalua J	tion Aug 89.5% 79.6% 83.0% 94.8%	Month Sep 92.2% 82.4% 86.2% 98.1%	Oct 86.2% 80.5% 82.4% 96.2%	Nov De 87.9% 89 80.3% 80 83.3% 84 95.5% 95	c Jan .9% 91.0% .2% 81.7% .3% 85.8% .8% 96.6%	Jan		
Greeting Soft Skill Use of T	Aug S Customer Service Evalua J	tion Aug 89.5% 79.6% 83.0%	Month Sep 92.2% 82.4% 86.2%	Oct 86.2% 80.5% 82.4%	Nov De 87.9% 89 80.3% 80 83.3% 84 95.5% 95	c Jan 1.9% 91.0% 1.2% 81.7% 1.3% 85.8%	Jan		
Greeting Soft Skill Use of T Closing	Aug S Customer Service Evalua J	tion Aug 89.5% 79.6% 83.0% 94.8%	Month Sep 92.2% 82.4% 86.2% 98.1%	Oct 86.2% 80.5% 82.4% 96.2% 0.0%	Nov De 87.9% 89 80.3% 80 83.3% 84 95.5% 95	c Jan 19% 91.0% 12% 81.7% 13% 85.8% 18% 96.6% 1.0% 0.0%	Jan		
Greeting Soft Skill Use of T Closing	Aug S Customer Service Evalua Is Tools Sales Evaluation	tion Aug 89.5% 79.6% 83.0% 94.8% 0.0%	Month Sep 92.2% 82.4% 86.2% 98.1% 0.0% Sep	Oct 86.2% 80.5% 82.4% 96.2% 0.0%	Nov De 87.9% 88 80.3% 80 83.3% 84 95.5% 96 0.0% 0 Nov De	c Jan 19% 91.0% 12% 81.7% 13% 85.8% 18% 96.6% 1.0% 0.0%	Jan		
Greeting Soft Skill Use of T Closing Notes	Aug S Customer Service Evalua Is Fools Sales Evaluation I	tion Aug 89.5% 79.6% 83.0% 94.8% 0.0% Aug 91.6% 80.4%	Month Sep 92.2% 82.4% 86.2% 98.1% 0.0% Sep 89.3% 75.0%	Oct 86.2% 80.5% 82.4% 96.2% 0.0% Oct 89.6% 75.0%	Nov De 87.9% 88 80.3% 80 95.5% 95 0.0% 0 Nov De 92.4% 91 75.6% 73	Jan 1.9% 91.0% 1.2% 81.7% 3% 85.8% 96.6% 0.0% c Jan .4% 93.6% .9% 77.6%	Jan		
Greeting Soft Skill Use of T Closing Notes Greeting	Aug S Customer Service Evalua ls Fools Sales Evaluation	tion Aug 89.5% 79.6% 83.0% 94.8% 0.0% Aug 91.6%	Month Sep 92.2% 82.4% 86.2% 98.1% 0.0% Sep 89.3%	Oct 86.2% 80.5% 82.4% 96.2% 0.0% Oct 89.6%	Nov De 87.9% 88 80.3% 80 95.5% 95 0.0% 0 Nov De 92.4% 91 75.6% 73	c Jan 1.9% 91.0% 1.2% 81.7% .3% 85.8% .96.6% 0.0% .0% 0.0% c Jan .4% 93.6%	Jan		
Greeting Soft Skill Use of T Closing Notes Greeting Sales Sk Docume	Aug S Customer Service Evalua Is Tools Sales Evaluation Sales Evaluation Greeting	tion Aug 89.5% 79.6% 83.0% 94.8% 0.0% Aug 91.6% 80.4% 67.2% Aug	Month Sep 92.2% 82.4% 86.2% 98.1% 0.0% Sep 89.3% 75.0% 73.6%	Oct 86.2% 80.5% 82.4% 96.2% 0.0% Oct 89.6% 75.0% 70.2%	Nov De 87.9% 89 80.3% 80 83.3% 84 95.5% 96 0.0% 0 Nov De Nov De	c Jan .9% 91.0% .2% 81.7% .3% 85.8% .8% 96.6% .0% 0.0% c Jan .2% 73.8%	Jan		
Greeting Soft Skill Use of T Closing Notes Greeting Sales Sk Documen Front Lind	Aug S Customer Service Evalua Is Tools Sales Evaluation It	tion Aug 89.5% 79.6% 83.0% 94.8% 0.0% Aug 91.6% 80.4% 67.2% Aug 85.5%	Month Sep 92.2% 82.4% 88.2% 98.1% 0.0% Sep 93.3% 75.0% 73.6% Sep 97.4%	Oct 86.2% 80.5% 82.4% 96.2% 0.0% Oct 75.0% 75.0% 75.0% 70.2%	Nov De 87.9% 85 80.3% 84 95.5% 95 0.0% 0 Nov De 92.4% 91 75.6% 73 69.6% 73 Nov De 89.8% 90	c Jan .9% 91.0% .2% 81.7% .3% 85.8% .8% 96.6% .0% 0.0% c Jan .4% 93.6% .9% 77.8% .2% T3.8%	Jan		
Greeting Soft Skill Use of T Closing Notes Greeting Sales Sk Documer Front Line Front Line	Aug S Customer Service Evalua J Is Tools Sales Evaluation J It Is	tion Aug 89.5% 79.6% 94.8% 0.0% Aug 91.6% 80.4% 67.2% Aug 85.5% 88.2%	Month Sep 92.2% 82.4% 86.2% 98.1% 0.0% Sep 89.3% 75.0% 75.0% 75.0% 75.0% 75.0% 97.4% 92.3%	Oct 86.2% 80.5% 82.4% 96.2% 0.0% Oct 89.6% 75.0% 70.2% Oct 77.7% 84.5%	Nov De 87.9% 88 80.3% 86 95.5% 95 0.0% 00 Nov De 92.4% 91 75.6% 73 69.6% 73 89.8% 90 85.7% 91	c Jan 1.9% 91.0% 1.2% 81.7% .3% 85.8% .8% 96.6% .0% 0.0% c Jan .2% 77.6% .2% 73.8% .7% 92.7% .2% 96.4%	Jan		
Greeting Soft Skill Use of T Closing Notes Greeting Sales Sk Documer Front Lin Front Lin New Hire	Aug S Customer Service Evalua J Is Tools Sales Evaluation J It Is	tion Aug 89.5% 79.6% 83.0% 94.8% 0.0% Aug 91.6% 80.4% 67.2% Aug 85.5% 88.2% 88.0%	Month Sep 92.2% 82.4% 98.4% 98.4% 98.4% 98.4% 89.3% 75.0% 73.6% 97.4% 92.3% 88.1%	Oct 86.2% 80.5% 96.2% 96.2% 96.2% 0.0% 96.2% 70.0% 97.0% 70.2% 97.7% 84.5% 91.8%	Nov De 87.9% 88 80.3% 80 83.3% 80 95.5% 95 0.0% 00 92.4% 91 75.6% 73 69.6% 73 89.8% 90 85.7% 91 79.1% 88	c Jan 1.9% 91.0% 1.2% 81.7% .3% 85.8% .8% 96.6% .0% 0.0% c Jan .2% 77.6% .2% 92.7% .2% 92.7% .2% 96.4% .9% 88.0%	Jan		
Greeting Soft Skill Use of T Closing Notes Greeting Sales Sk Documer Front Lin Front Lin Front Lin New Hire Schedule	Aug S Customer Service Evalua J Is Tools Sales Evaluation J It Is	tion Aug 89.5% 79.6% 94.8% 0.0% Aug 91.6% 80.4% 67.2% Aug 85.5% 88.2%	Month Sep 92.2% 82.4% 86.2% 98.1% 0.0% Sep 89.3% 75.0% 75.0% 75.0% 75.0% 75.0% 97.4% 92.3%	Oct 86.2% 80.5% 82.4% 96.2% 0.0% Oct 89.6% 75.0% 70.2% Oct 77.7% 84.5%	Nov De 87.9% 88 80.3% 80 95.5% 95 0.0% 00 92.4% 91 75.6% 75 69.6% 73 89.8% 90 85.7% 91 79.1% 88 89.1% 93	c Jan 1.9% 91.0% 1.2% 81.7% .3% 85.8% .8% 96.6% .0% 0.0% c Jan .2% 77.6% .2% 73.8% .7% 92.7% .2% 96.4%	Jan		
Greeting Soft Skill Use of T Closing Notes Greeting Sales Sk Documel Front Lin Front Lin New Hire Schedule	Aug S Customer Service Evalua I Is Tools Sales Evaluation I Intation Greeting Ie - Location A Ie - Location A Ie - Location A Ie - Coordinators - Cocation A Ie - Cocat	tion Aug 89.5% 79.6% 83.0% 94.8% 0.0% Aug 91.6% 80.4% 67.2% Aug 85.5% 88.2% 88.0% 91.2%	Month Sep 92.2% 82.4% 86.2% 98.1% 0.0% Sep 89.3% 75.0% 73.6% Sep 97.4% 92.3% 88.1% 96.1%	Oct 86.2% 80.5% 82.4% 96.2% 0.0% Oct 89.6% 75.0% 70.2% Oct 84.5% 91.8% 97.5%	Nov De 87.9% 88 80.3% 80 83.3% 84 95.5% 95 0.0% 0 Nov De 92.4% 91 75.6% 73 69.6% 73 Nov De 89.8% 90 79.1% 88 89.1% 93 84.5% 96	c Jan 1.9% 91.0% 1.2% 81.7% .3% 85.8% .8% 96.6% .0% 0.0% c Jan .4% 93.6% .9% 77.6% .2% 73.8% c Jan .7% 92.7% .2% 96.4% .9% 88.0% .2% 90.7%	Jan		



QA Calibration Reporting Reports Overview

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

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

- <u>Agent QA Summary</u> calibration-specific version
- Evaluator QA Summary calibration-specific version
- Group QA Summary calibration-specific version
- Calibration Report lets you view the details of one or more completed calibration evaluations. It is the calibration-specific equivalent of the <u>Call Evaluation Detail</u> report.
- <u>Calibration Evaluator Comparison Report</u> allows you to see how each participating evaluator scored the designated call
- <u>OA Calibration Trending Report</u> details performance of one or more evaluators on one or more QA evaluation forms over a period of time

For more information on running any of these reports, see Generate a Printable Report.

Calibration Evaluator Comparison Report

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

You must complete all fields to run this report.

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

inContact.

alibration Evalua									J
Record Id	1825	Fo	rm Id 49	Evaluat	ion Start Date 4/1/	2015			
aluation End Date	4/30/2015								
¶ ¶ 1 of 3		Fi	nd Next 🛛 🔍 🔹 😨						
alibration	Evaluato	or Comparis	on Report						
gent:	Bern,	Neil		Ca	II ID: <u>1</u>	.825			
gent Id:	28			Ca	l Date: 1	/23/2013			
aluation Date R	ange: Wedr	nesday, April 01, 2	015 to Thursday, April 30						
valuator		Evaluation ID	Points		Possible Point				
ddy, Cheryl		107		85.00	100.0	0	85.00%		
eorge, Gina		105		75.00	100.0	0	75.00%		
essler, Jessica		108		85.00	100.0	0	85.00%		
ard, Rae		106		75.00	100.0	0	75.00%		
1Support Call						·			
Opening									
Proper introdu	iction?				Possible Point	ts: #	10.00		
Evaluation ID	Evaluator		Response						
107	Eddy, Chery	I	Yes				10.00		
	George, Gina		Yes				10.00		
	Hessler, Jes	sica	Yes				10.00		
	Ward, Rae		Yes				10.00		
Ask for caller's			_		Possible Point	ts: #	10.00		
Evaluation ID	Evaluator		Response						
	Eddy, Chery		Yes				10.00		
	George, Gina		Yes				10.00		
	Hessler, Jes Ward, Rae	sica	Yes Yes				10.00		
		understanding?	165		Possible Point	e• #	10.00		
Evaluation ID	Evaluator	understanding:	Response		rossible rollin	.5. π	10.00		
	Eddy, Chery	1	Yes				10.00		
	George, Gina		No				0.00		
	Hessler, Jes		No				0.00		
106	Ward, Rae		Yes				10.00		
Comments:					Possible Point	ts: #	0.00		
Evaluation ID	Evaluator		Response						
107	Eddy, Chery						0.00		
105	George, Gina	a	Restated but missed	part of issue			0.00		
108	Hessler, Jes	sica					0.00		
	Ward, Rae						0.00		
Communicatio		aria loval af			Dessible Det		40.00		
Technical lang understanding	?	er s lever of			Possible Point	.5. #	10.00		
	Evaluator	1	Response				40.00		
	Eddy, Chery		Yes				10.00		
	George, Gina		Yes				10.00		
	Hessler, Jes Ward, Rae	sica	Yes				10.00		
Pace and enur		rand	Yes		Possible Point	e• #	10.00 10.00		
understandabl		anu			r ossible Polnt	.5. #	10.00		
	Evaluator		Response						
107	Eddy, Chery	I	Yes				10.00		

Page 1 of 3



QA Calibration Trending Report

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

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

QA Calibra	ition Tre	nding Report										Back	Generat	te Report
			_			_								**
Start Date		6/1/2015	End Date	12/31/2015			Date Typ	be	Evaluation I	Date 🔻				
Active/Deleted	d Forms	Active T	Groups	All Billing - Location Billing - Location Corporate Acco	В	is .	Forms		All Admissions Case Audit Customer S	ervice Eva	≜ Iluation →			
Agents		All Uptivity Administrator Germaine Ahner Barry Aman	Users	All Abe Capote Aleshia Zahm Alesia Cravey		•	Reportin	g Period	Monthly V					
Status		All ▲ In Progress Complete Question ▼												
4 4 1	of 5	¢ 14 4	Find Ne	ext 🛛 🔍 🗸 🌍										*
((())) Selected For	For M	nthly QA Calib Ionday, June 01, 2015 to tomer Service Evaluation		-										
				Monthly	QA Eval	uator Sc	ore Tren	ding						
	100%]									=	Abe Capote sco Karren Wolters		
	80%										=	Meda Swindall	score	
											_	Vicki Hardwick	score	
8	60%	-										Your Uptivity Ad score	iministrator	
Percentage	40%	-												
Per	20%													
	2070													
	0%													
	-20%													
		Jun Jul	Aug	Se Mo		Oct		Nov		Dec				
								2015				7		
					Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Abe Capor					92.0%	93.9%	94.3%	93.0%	93.7%	93.9%	94.4%	_		
		vice Evaluation			92.0%	93.9%	94.3%	93.0%	93.7%	93.9%	94.4%	_		
	eting	at atata ao mao ny nome0			97.7%	98.5%	98.6%	98.8%	98.0%	96.9%	98.5%	_		
		nt state company name? nt state his/her name?			97.7% 97.7%	98.5% 98.5%	98.6% 98.6%	98.8% 98.8%	98.0%	96.9% 96.9%	98.5% 98.5%	-		
	t Skills				81.2%	83.4%	84.3%	81.3%	83.1%	85.6%	85.3%	-		
		nt use courtesy statement	ts as appropriat	e?	72.1%	73.6%	74.9%	70.6%	73.8%	77.8%	77.5%	-		
[Did Age	nt demonstrate Active Lis	tening?		74.0%	76.6%	78.1%	73.5%	75.6%	79.7%	79.2%	-		
		nt use proper hold proced	dures?		97.7%	100.0%	100.0%	100.0%	6 100.0%	99.2%	99.2%			
	Notes				N/A	N/A	N/A	N/A	N/A	N/A	N/A			
	e of Too				87.6%	89.1%	90.3%	86.9%	88.8%	89.9%	91.2%	4		
		nt find record in CRM in ti		peeded)2	88.4%	83.6%	81.2%	83.3%	87.8%	86.8%	90.2%	-		
	-	nt navigate knowledgeba nt use correct closing cod		needed)?	76.7%	83.6% 100.0%	89.9% 100.0%	77.4%	78.6% 5 100.0%	83.7% 99.2%	84.1% 99.2%	-		
	sing	and concercioning COU			97.7%	100.0%	99.9%	99.9%	99.9%	99.2%	99.2%	-		
		nt resolve call within supp	ort guidelines?)	97.7%	100.0%	100.0%	100.0%		99.2%	99.2%	-		
		nt probe for additional co			97.7%	100.0%	100.0%	100.0%	-	99.2%	99.2%	1		
		nt thank customer for calli			97.7%	100.0%	98.6%	98.8%	99.0%	98.4%	99.2%	1		
L		Report - 1/15/2016		Cal	ICopy Record	der Reportin	g Service					-	Page	eiof5



QA Self-Evaluation Reports Overview

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

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

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

For more information on running any of these reports, see Generate a Printable Report.



Self-Evaluator Comparison Report

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

You must complete all fields to run this report.

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

-					
Self-Evaluator Co	mparison Report				
rm	All	 Call Record ID 1747 	Eva	luation Start Dat	e 1/1/2016
aluation End Date	2/4/2016				
∢ ∢ 1 of 2	2 🕨 🕅 💠 🛛 F	ind Next 🛛 🔍 🔻 🚯			
elf-Evalua	ator Comparison Re	port			
gent:	Ayala, Daniel		Call ID:	1747	
gent Id:	34		Call Date:	1/22/2013	
valuation Date F		16 to Thursday, February 04, 2		1/22/2015	
valuator	-	Points	Possible Po	oints %	
Opening					
Opening Deeper introd	untion?		Possible Po	into #	10.00
Proper introd Evaluation ID	Evaluator	Response	Possible Po	onnes: #	10.00
	3 Administrator, Administrator	Yes			10.00
Ask for caller	1	Tes	Possible Po	into #	10.00
Evaluation ID	Evaluator	Response	FOSSIBLE FO	Jints. #	10.00
	3 Administrator, Administrator	No			0.00
			Possible Po	inter #	10.00
Evaluation ID	em to ensure understanding? Evaluator	Response	Possible Po	oints: #	10.00
					0.00
	3 Administrator, Administrator	No	Dessible De	1-1-1	0.00
Comments:	Forderstein		Possible Po	oints: #	0.00
Evaluation ID	Evaluator	Response			0.00
12.	3 Administrator, Administrator	Saying, "I understand the p as restating the problem.	problem" is not the s	ame	0.00
Communicati	on Skills				
	guage at caller's level of		Possible Po	oints: #	10.00
understandin Evaluation ID	g? Evaluator	Response			
	3 Administrator, Administrator	Yes			10.00
	nciation clear and	tes	Possible Po	· · · · · · #	10.00
understandab			Possible Po	oints: #	10.00
Evaluation ID	Evaluator	Response			
123	3 Administrator, Administrator	Yes			10.00
Patient and en	mpathetic tone?		Possible Po	oints: #	10.00
Evaluation ID	Evaluator	Response			
123	3 Administrator, Administrator	No			0.00
Comments:			Possible Po	oints: #	0.00

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Self-Evaluation Trending Report

The **Self-Evaluation Trending Report** details how agents have scored themselves on one or more self-evaluation forms over a period of time. The report is organized by agent and then by form. Performance can be further broken down on a section-by-section, and question-by-question basis, depending on how the QA form was created.

This report can be used to monitor how agents score themselves on calls over time, and can be especially valuable to review trends before and after coaching sessions. Because the report can include all evaluations, it can also be used to compare self-evaluation scores to regular QA scores for the same agent.

Self-Evaluation Trending Report					Back Generate Report
Start Date 12/13/2015 End D	ate 1/13/2016		Date Type	Evaluation Date	
Active/Deleted Forms Active	EditTeam	nToEdit	Forms	All Leaders SelfEval Leaders SelfEval v2 LeadersEval	
Agents ActiveAgent ActiveUser InschiveAgent ActiveUser Insight Agent	All agent1_first agent1_first agent10_first	st04 agent1_last04 st58 agent1_last58 rst58 agent10_last58	Reporting Period	Weekly	
All In Progress Complete					
i4 4 1 of 2 ▷ ▷i 4 Find Next 🔍 - ③					
Weekly Self-Evaluation Trending Report For Sunday, December 13, 2015 to Wednesday, January 13, 2016 Selected Evaluators: Daniel Ayala					
	elf-Evaluatio	on Trending Report			
100%				Daniel Ayala score	
95% —					
8 90% - 5 2 2 85% -					
دًة 85% –					
80%					
75%	eek of Year		3		
	2016				
		3			
Daniel Ayala		.9%			
Leaders SelfEval		0.0%			
Greeting Was my greeting friendly and professional?		0.0%			
LeadersEval	N/A 100 80.0% N/A	0.0%			
Call Opening	100.0% N/A				
Did the agent introduce themselves by name?	100.0% N/A				
Did the agent ask for the caller's name?	100.0% N/A	A			
Call Handling	75.0% N/A	A			
Did the agent restate the caller's issue to ensure understanding?	100.0% N/A				
On a scale of 1-5, with 5 being best and 1 being worst, rate the agent's proficiency in using onscreen tools to resolve the caller's issue.	50.0% N/A	Α			
Call Quality	100.0% N/A	A			
Did the agent maintain a friendly yet professional attitude?	100.0% N/A				
Did the agent display empathy for the caller? Call Closing	100.0% N/A 50.0% N/A				
Call Closing Did the agent confirm that the caller's issue was resolved to their satisfaction?	0.0% N/A				
If FCR was not achieved, briefly note the disposition of the call.	N/A N/A	A			
Did the agent thank the caller for their business?	100.0% N/A				
Self-Evaluation Trending Report - 1/13/2016				Page 1 of 2	



Working with System Reports

System Reports Overview

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

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

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

Printinge Reports	IP Phone Status									
Report Tools	This page automatically refreshes every 5 seconda. Last Refresh Time: 10/23/2013 9/24/01 AM									
System Reports	IP Phone Information									
IP Phone Status License Info	Q_Voice Port +	Q_Device Alias	IP Address	Board	Confidence	Last Update				
System Status				-1	(5)Static Entry	10/22/2013 12:14:10 PM				
Transcoder Status Audit Report	1000		10.100.10.515	-1	(5)Static Entry	10/22/2013 12:14:10 PM				
	1001		10.100.10.516	-1	(5)Static Entry	10/22/2013 12:14:10 PM				
	1002		10.100.10.517	-1	(5)Static Entry	10/22/2013 12:14:10 PM				
	3601		10.100.5.89	1	(3)Parsed	10/16/2013 5:54:49 PM				
	3602		10.100.5.59	1	(3)Parsed	10/11/2013 8:26:58 AM				
	3604		10.100.6.34	1	(3)Parsed	10/9/2013 12:58:02 PM				

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



Disk History

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

Disk His	tory							
Start Date	1/4/201	6	En e	d Date 1/15/2	016			
14 4 1	-		A	c.d.	Next 🔍 - (•		
			\$	Find	Next 🔜 🔸	Ð		
Dis	k Us	sage ⊦	listory					
		-	-	2016 and o	ndina Eriday, Jan	uppy 15, 2016		
For pen	ou begi	mining Monua	ay, January 04,	2010 and e	nding Friday, Jar	iuary 15, 2010		
				Dis	k Usage Over ⊺	lime		
	800 -							- C Drive
	600 -			/	\sim			
(B)	000 -	\sim	\sim					
Memory (MB)	400 -							
Mem	000							
	200 -							
	0 -							
	1/4/2	2016 1	/6/2016	1/8/2016	1/10/2016	1/12/2016	1/14/2016	
					Date			
Date	1	уре	Drive	Disk U	lsage			
01/04/	2016 A	udio	С					66.22 ME
01/04/	2016 V	'ideo	С					500.21 ME
01/05/	2016 A	udio	С					52.91 ME
01/05/	2016 V	'ideo	С					447.86 ME
01/06/			С					61.75 M
01/06/			С					508.44 M
01/07/			С					57.80 M
01/07/			С					426.55 M
01/08/			С					54.26 M
01/08/			C					415.05 M
01/09/			C					77.71 M
	2016 V		С					637.25 M
01/10/			c					70.39 M
	2016 V		C					537.58 M
01/11/			C					67.68 M
01/11/			С					499.60 M
	2010 A		С					59.80 M 482.70 M
01/12/	2016	ideo	C					402.70 M
01/12/			С					
01/12/ 01/13/	2016 A	udio	С					68.03 M
01/12/ 01/13/ 01/13/	2016 A 2016 V	udio 'ideo	c c					68.03 M 509.48 M
01/12/ 01/13/ 01/13/ 01/14/	2016 A 2016 V 2016 A	udio 'ideo udio	c c c					68.03 M 509.48 M 81.47 M
01/12/ 01/13/ 01/13/	2016 A 2016 V 2016 A 2016 V	udio 'ideo udio 'ideo	c c					68.03 ME 509.48 ME 81.47 ME 568.19 ME 79.24 ME

System Activity Summary

The **System Activity Summary** displays the actions performed in inContact WFO by one or more specified users during a given date range. The report is separated into different sections for each date in the range that has activity. Actions such as login/logout, call playback, call deletions, and QA functions are all tracked with this report.

inContact.

System Activity	Summary				Back	Generate Report
Start Date 12/15/20	015 End Date 1/15	5/2016	User All	¥		
						3
[4 4 1 of	4 🕨 🕅 💠 🕴 Fin	id Next 🛛 🔍 🕶 🤅				
System	Activity Summar	v				
For period begin	ing Tuesday, December 15, 2015 an	d ending Friday, Jai	nuary 15, 2016			
Date	User	Count	Event			
12/15/2015	USCI		Logout			
12/15/2015			System Start			
	Administrator Administrator		Login			
12/15/2015	Administrator Administrator	6	Logout			
12/15/2015	Administrator Administrator	3	Playbacks Call			
Date	User	Count	Event			
12/16/2015	USCI .		Failed Login Attempt			
12/16/2015			Logout			
12/16/2015		3	System Start			
12/16/2015	Administrator Administrator	17	Login			
12/16/2015	Administrator Administrator	11	Logout			
12/16/2015	Administrator Administrator	11	Playbacks Call			
12/16/2015	Administrator Administrator	1	User Created			
12/16/2015	callcopy admin	1	Login			
12/16/2015	callcopy admin	8	Playbacks Call			



System Usage

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

System Usage			Back	Generate Report	
Start Date 12/15/2015 End Date 1/15/2016 User All		¥			>>>
					~
🛿 🖣 1 of 3 🕨 🕅 💠 👘 Find Next 🔍 🕶 🛞					
System Usage					
For period beginning Tuesday, December 15, 2015 and ending Friday, January 15, 2016					
Date User	Time In System				
12/15/2015 Administrator Administrator	06:29:03				
12/16/2015 Administrator Administrator	23:23:23				
12/16/2015 callcopy admin	03:19:23				
Total:	26:42:46				
12/17/2015 Administrator Administrator	24:00:00				
12/17/2015 callcopy admin	24:00:00				
Total:	48:00:00				
12/18/2015 Administrator Administrator	24:00:00				
12/18/2015 callcopy admin	24:00:00				
Total:	48:00:00				
12/19/2015 Administrator Administrator	24:00:00				
12/19/2015 callcopy admin	24:00:00				
Total:	48:00:00				
12/20/2015 Administrator Administrator	24:00:00				
12/20/2015 callcopy admin	24:00:00				
Total:	48:00:00				



IP Phone Status

The **IP Phone Status** report shows the status of all IP phones detected on the network for passive VoIP integrations. The report shows the device extension number, the device IP address, the voice board number the device was detected by, the confidence level of the detection, and the date/time the device was detected on the network.

This report is useful when verifying that all phones are ready to be recorded on the network. The report automatically updates the list every 5 seconds. It can also be exported into a CSV file by clicking the **Export** button at the top-right corner of the report. Confidence indicates inContact WFO's certainty that the voice port is actually assigned to the IP address. Confidence can be:

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

IP Phone Status					Export	
This page automatic	ally refreshes every 5 sec	onds. Last Refresh Time:	6/11/2010 11:23:	46 AM		
IP Phone Informat	IP Phone Information					
Voice Port	Device Alias	IP Address	Board 🚽	Confidence	Last Update	
7506		10.100.6.25	1	(3)Parsed	4/27/2010 1:28 PM	
7507		10.100.6.36	1	(3)Parsed	4/30/2010 8:29 PM	
7505		10.100.6.41	1	(3)Parsed	5/3/2010 2:47 PM	
7503		10.110.18.2	1	(3)Parsed	6/1/2010 7:36 PM	
7504		10.110.19.2	1	(3)Parsed	4/26/2010 10:16 PM	

License Information

inContact.

License Information	Reload
System License Available : Yes	
License ID :	
Licensed To :	
Expires On : 1/31/2015	
Licensed Audio Ports : 99	
Licensed Insight Seats : 99	
Licensed to Brand Insight : Yes	
Licensed Analytics Seats : 99	
Licensed Survey Channels : 99	
Licensed Screen Capture Ports : 99	
Licensed Desktop Only Ports : 99	
Maximum Concurrent Recordings : 99	
Licensed to Reload Voice Boards : Yes	

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

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

This report shows licenses for the server that hosts the Web Portal. If you have other recording cores on different servers, those licenses will not be checked or included in this report.



System Status

Logged In Us	sers								
Username					•	Login Time			
superuser						1/28/2013 3:43:56 PM			
1									
Channel Sun	nmary								
Idle			Recording				Total Channels		
0			0				155		
Channel Stat	tus								
Channel	State		Last State Chan	ige	Agent Name	Recording	Device	Reco	
103	OutOfService		11/21/2012 2:53:05 F	PM					
2	Ready		10/10/2012 6:52:10 PM						
4	Ready		10/10/2012 6:52:10 PM						
5	Ready		10/10/2012 6:52:10 PM						
6	Ready		10/10/2012 6:52:10 PM						
7	Ready		10/10/2012 6:52:10 PM						
8	Ready		10/10/2012 6:52:10 PM						
9	Ready		10/10/2012 6:52:10 PM						
10	Ready		10/10/2012 6:52:10 PM						
11	Ready		10/10/2012 6:52:10 PM						
12345678	9 10 11 12 13 14 1	5 16 >							
Screen Capture	ure Client Status								
Agent Name Userna		Usernai	me 🔻	IP Address	Computer	Version	Application		
UNKNOWN agent1		agent1		10.100.11.101	agent1-pc	5.0.0.1020	some title		
Richard Cunningham agent11		agent11		10.100.11.111	agent11-pc	5.0.0.1020	some title		
Stuart Dwyer agent11			10.100.11.114	agent14-pc	5.0.0.1020	some title			
Jeremy Carrozza agent12				10.100.11.112	agent12-pc	5.0.0.1020	some title		
Carmen Berner agent13		agent13		10.100.11.113	agent13-pc	5.0.0.1020	some title		
Franko Handler		agent15		10.100.11.115	agent15-pc	5.0.0.1020	some title		

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

1 In some cases, a user may log in on multiple computers or browsers, and then log out of one session while still working in the other. The Logged In Users table may not correctly reflect each of these logins/logouts.

Transcoder Status

This pay	ge automatically refreshes every 5 seconds. Last Refresh Time: 10/2 Records	23/2013 11:06	13 AM				
Identity	Source		Destination		Queued Time	Last Up	odate Time
5279	F:\CallCopy\Recordings\20131009\3602\3602-08-59-39.cca		F:\CallCopy\Recordings\20131009\3602\3602-08-59-3	9.wav	0/9/2013 9:19:39 AM	10/9/2013 9:19:59 AM	
No In Progr Failed Reco	ress Records ords						
Identity	Source		Destination	Last Update Tim	e Next Retry Time	Attempts	Status
5219	F:\CallCopy\Recordings\20130910\7477\7477-13-32-16.cca	F:\CallCop	y\Recordings\20130910\7477\7477-13-32-16.wav	9/10/2013 4:19:18 P	M 1378830018	3	Unknown (4
5218	F:\CallCopy\Recordings\20130910\7477\7477-13-20-32.cca	F:\CallCop	y\Recordings\20130910\7477\7477-13-20-32.wav	9/10/2013 4:19:08 P	M 1378830008	3	Unknown (4
5212	F:\CallCopy\Recordings\20130906\7546\7546-13-00-47.cca	F:\CallCop	y\Recordings\20130906\7546\7546-13-00-47.wav	9/10/2013 4:18:19 P	M 1378829959	3	Unknown (4
5001	F:\Recordings\VolP\20130807\7449\7449-10-56-21.cca	F:\Record	ings\VoIP\20130807\7449\7449-10-56-21.wav	8/7/2013 10:59:11 A	M 1375873211	3	Unknown (4
4683	F:\Recordings\VolP\20130703\7546\7546-16-53-38.cca	F:\Record	ings\VolP\20130703\7546\7546-16-53-38.wav	7/3/2013 5:20:01 PM	1372872061	3	Unknown (4
4682	F:\Recordings\VolP\20130703\7546\7546-15-56-15.cca	F:\Record	ings\VoIP\20130703\7546\7546-15-56-15.wav	7/3/2013 4:58:12 PM	1372870752	3	Unknown (4
4674	F:\Recordings\VolP\20130703\7546\7546-13-26-17.cca	F:\Record	ings\VolP\20130703\7546\7546-13-26-17.wav	7/3/2013 2:53:24 PM	1372863264	3	Unknown (4
4672	F:\Recordings\VolP\20130703\7546\7546-12-44-06.cca	F:\Record	ings\VolP\20130703\7546\7546-12-44-06.wav	7/3/2013 12:47:02 P	M 1372855682	3	Unknown (4
4671	F:\Recordings\VolP\20130703\7546\7546-12-34-58.cca	F:\Record	ings\VolP\20130703\7546\7546-12-34-58.wav	7/3/2013 12:40:38 P	M 1372855298	3	Unknown (4
4670	F:\Recordings\VolP\20130703\7546\7546-12-05-18.cca	F:\Record	ings\VolP\20130703\7546\7546-12-05-18.wav	7/3/2013 12:36:49 P	M 1372855069	3	Unknown (4

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The **Transcoder Status** report gives a near real-time display of what audio files are being processed by the Transcoder module. This is useful in verifying the proper operation of the Transcoder. The list displays the last 10 Completed Records, In-Progress Records and Failed Records in separate sections. The list automatically refreshes every five seconds

For both completed and failed records, the Source column displays the names of the raw audio files, and the Destination column lists names of the files that have been successfully transcoded. For Failed Records, the report also shows the date/time of the last transcoding attempt, when the next attempt will take place, the number of attempts that have been made, and the current status of the process.

Audit Report

	70.411			
Time Logged 🔻	IP Address	Associated Username	Message	Component
03/12/2012 13:55:54	10.100.5.131	Unknown Unknown	User "Unknown Unknown" (-1) tried to access URL "/Home/Default.aspx".	OnAuthorize
03/12/2012 13:56:02	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged in.	/Login?ReturnUrl=%2fAdministration% 2fPermissions%2fUserEdit%2f84
03/12/2012 13:56:02	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged in.	/Login?ReturnUrl=%2fAdministration% 2fPermissions%2fUserEdit%2f84
03/12/2012 13:56:02	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged out.	/Login?ReturnUrl=%2fAdministration% 2fPermissions%2fUserEdit%2f84
03/12/2012 13:57:23	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) changed user "84" ().	/Administration/Permissions/UserEdit/84
03/12/2012 13:57:23	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) created superuser "84" ().	/Administration/Permissions/UserEdit/84
03/12/2012 13:57:27	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged out.	/Logout
03/12/2012 13:57:27	10.100.5.131	Unknown Unknown	User "Unknown Unknown" (-1) tried to access URL "/Home/Default.aspx".	OnAuthorize
02/40/0040 42:57:26	40 400 5 424	Manjaha Jagalo	Lines "Manisha Ingala" (24) logged in	/Login?ReturnUrl=%2fAdministration%

The **Audit Report** displays the log of specific actions taken by each user in the system during a specified date range. Auditing is controlled by the system; you cannot change what is audited. Use the Log Type list to search for specific events or actions performed by a user, such as Login, Logout, or Change Password.

Search fields available for customizing the Audit Report include:

- User: Select the desired user from the drop-down list, or choose All.
- Log Type: Select the desired log types from the drop-down list of events that are logged, or choose All.
- **Component or Page:** In the open-entry text box, enter either an inContact WFO component name or HTML page. See examples in the **Component** column of the image in this section.
- **IP Address:** In the open-entry text box, enter the address of the user whose action caused the event.

• **ID of Related Object:** Call records and audio recordings are stored in inContact WFO systems as objects with ID numbers. Some event types (for example, Call Playback) can therefore include this number as a criterion, and you can enter it in the open-entry text box. Other event types (for example, Login or Changed Password) will not have any related objects.

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- Message Text 1/2/3: Enter search criteria in the open-entry text box. Audit messages consist of one to three parts. Each part contains different text. After a list of events is retrieved, review the messages to find which events are useful. Pick the appropriate keywords and type them in the Message Text fields. Determining which words appear in which field involves some trial and error, and it may be helpful to use the Starts with, Ends with, Contains and Does not contain operators when setting up criteria.
- **Start Time/End Time:** Use the date selectors to enter the start and end of the time range for the report. Audit records are written to the database and do not expire. They remain available for reporting for the life of your system (barring any database issues that result in data loss).

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Working with Ad Hoc Reports

Ad Hoc Reports Overview

Ad hoc reporting enables you to analyze data and create custom, reusable reports. Users control what data is included in a report and how that data appears. Up to ten users can simultaneously use the ad hoc reporting feature in inContact WFO.

Benefits of this feature include:

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

By default, the number of data rows returned by any ad hoc report is limited to 30,000. This can be changed by your inContact WFO deployment team or after deployment by inContact WFO Support. A warning message is displayed when results exceed this limit. There is also a 30-second time-out in the report builder.

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

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

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

Procedures for creating ad hoc reports in inContact WFM v1 are different from those in inContact WFO. For information on WFM v1 ad hoc reporting, refer to the *inContact Workforce Management v1 User Manual*.



Ad Hoc Report Builder

Report Builder						Cancel Save
Report Name:	Layout: Summary Table	•	Reporting Format: RDL	•	Description:	
Fields: Drag fields to criteria and report.	Criteria:					
 Agent Discover Group Call Recording Record QA Evaluations Evaluations Completed QA Score QA Possible Score QA % Score Survey Analytics 	Table Chart Type: Im Im Im Summary Columns	Field	Operator Drag and o	Value drop fields here to c	On Report	Action
Report Structure:			Drag and drop	fields here to create	e columns	
Drag and drop fields here to create rows				Report Here		

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

Ad hoc reports are created and edited in the **Ad Hoc Report Builder**, which displays once you have selected the desired report category. This is the core of ad hoc reporting, and allows you to specify a report's custom criteria, display elements, format elements, and layout. These items may differ depending on the report category and layout you select.

The Report Builder collates data that can be used to create multiple instances of a report using different report criteria values (for example, date ranges). It can be used to generate any of the Printable Reports with specific items added or removed. The end results are:

- A collection of RDL/HTML data that defines the report columns, layout, and report criteria parameters.
- Report criteria values data for the report.

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

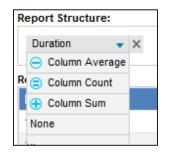
To build a new report, see <u>Create a New Ad Hoc Report</u>. To edit an existing report, see <u>Edit Existing Ad Hoc Reports</u>.

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Ad Hoc Report Structure

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

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



When you see a downward arrow next to a field label in the Report Structure area, there may be additional reporting options for that field. These options vary depending on the data type, but include **Column Average**, **Column Count**, and **Column Sum**. The results are totaled per summary group, and per total of all groups at the bottom. This data is also used to generate charts (for related information, see <u>Chart Types in Ad Hoc Reports</u>).

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

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



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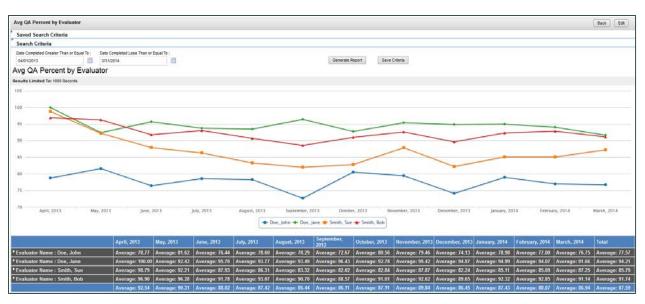
Simple Tables are basic, list-style reports displaying a single row of fields in the Structure area. Columns can be rearranged by dragging fields left and right. Charts are not supported.

eport Structure:									
	Agent v X Answered Calls v X Service Level Calls v X								
Labor Unit X	Agent	Answered Calls	Service Level Calls						
	Labor Unit : Corax - HSI	Labor Unit : Corax - HSI							
	205	28	16						
	205	28	16						
	205	28	16						
	205	28	16						
	205	28	16						
	205	28	16						
	205	28	16						
	205	28	16						
	205	28	16						
	205	28	16						

Summary Tables feature nested, collapsible subcategories/groupings of a grid of fields in the Structure area. Column fields can be dragged left and right to rearrange. Rows can be dragged up and down to regroup data. Lower fields are nested within higher fields. Bar and pie charts are supported.



Report Builder						Generate Report	Preview Cascel	Save As	Save
Report Name:	Layout	Reporting Format:	Description:						
Avg GA Percent by Evaluator	Matrix Table	NTML							
Fields: Drag fields to criteria and report.	Criteria:								
* Evaluator	Table	Field	Operator		Value		On Report	Action	
* Agent ID * Arbitrators	Completed QA Evaluation	Date Completed	Greater than or equal to	8	01/01/2014	m	12	(300±)	
 Call Recording Record CallCopy Group 	Completed QA Evaluation	Date Completed	Less than or equal to	(x]	3/31/2014	100	5	(100)	
GA Evaluation Form GA Evaluation Form Section GA Evaluation Question									
GA Response Ga Response Gongleted GA Evaluation Completed GA Evaluation Completed GA Evaluation Completed Survey Form Completed Survey Form Achievements Achievements Achievement Types	Chart Type:								
	Summary Revaluator Name								
	Columns IZITotal GA % Score Average								
Report Structure:									
	Total QA % Score 😑 🖌 🛪				Date Completed - Marth + X				
Evaluator Name X				January, 2014	February, 2014	March, 2014	To	Total	
	Evaluator Name : Doe, Jane			Average: 85.71	Average: 0.00	Average: 0.00 Average: 87.90		Average: 87.04	
	Evaluator Name : Doe, John			Average: 73.33 Average: 69.33		33 Average: 69.33		Average: 70.66	
	Evaluator Name : Smith, Sue			Average: 87.67	Average: 87.14	Average: 92.8	36 Average: 89.70		
				Average: 81.72	Average: 80.93	Average: 87.8	9 Av	erage: 84.83	

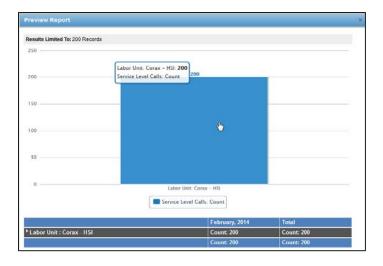


Matrix Tables measure one or more pieces of information across a period of time. Fields controlling the information to be measured and the time range are displayed in the Columns area, and are limited to one field in each area per report. Fields that control grouping of that information are displayed in the Rows area. Multiple fields can be dragged, dropped and rearranged to provide for different logical groupings of the information. Bar, pie and line charts are supported. Line charts illustrating large data sets may become difficult to read and use. This example shows average monthly QA percentage score by evaluator over a one-year period.



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



HTML reports and charts are interactive, allowing information to be displayed on mouseover. Clicking on bars within a chart allows you to drill down into subcategories and see more detailed results. If there are multiple detail levels, clicking through will loop back to the top level. However, this format cannot be exported, does not support pagination, and is limited to displaying only 1000 results. HTML works best as a basic data preview, or for reports that will only be viewed online. Categories and groupings in HTML reports are collapsed by default. **Chart Types in Ad Hoc Reports**

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Report Builder					Preview	Cance	el Save
Report Name:	Layout:		Reporting Format:	Description:	iption:		
	Summary Table	-	RDL	-			
Fields: Drag fields to criteria and report.	Criteria:						
Agent	Table	Field	Operator	Value		On Report A	Action
Agent Name	Call Recording Record	Call Direction	Equal to	Inbound	-		Save Delete
Agent Status						5260	
 CallCopy Group Call Recording Record 							
Recording ID							
CallerID	100 COLOR						
Dialed Number	Chart Type:						
Device ID							
Agent ID	Summary						
Recording Time	Agent Status						
Call Direction	Columns						
Duration -	Duration Average		Agent Status Count				
Report Structure:							
A	gent Name 🔻 🗙 Age	ent Status 🏾 😑	▼ × Duration ⊖ ▼ ×				
Agent Status X Ag	ent Name		Agent Status	Durati	on		
	gent Status : Inactive		45				
			Count: 6	Avera	ge: 00:05:58	2	
►A	gent Status : Active		41	20			
			Count: 4	Avera	ge: 00:03:36		
			Count: 10		- ge: 00:05:01	1	

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

Beneath the icons are fields you can choose to display on the chart, depending on the report layout and data. For summary and matrix table reports, fields in the rows area appear under **Summary**, while choosing **Column Average**, **Count**, or **Sum** for columns displays those values under **Columns**.

For vertical and horizontal bar graphs, you can select multiple data types for both columns and rows. For pie charts and line graphs, you can only select one entity in each of the **Summary** and **Column** areas.

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

inContact Workforce Optimization Reporting Manual, 16.2



Ad Hoc Report List

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

Call Recording							
٩	Go						Create a Report
Report	Description	Status	Saved By	Date Saved	Published By	Date Published	Action
Agent List by Group		Saved	George, Gina	11/4/2013	NA	NA	View Delete
Hold Time Report		Saved	Ward, Rae	11/5/2013	NA	NA	View Delete
Outbound Calls by Agent		Saved	George, Gina	11/5/2013	NA	NA	View Delete
QA vs Survey Score Report		Saved	George, Gina	11/5/2013	NA	NA	View Delete
Survey Scores by Agent		Saved	Ward, Rae	11/5/2013	NA	NA	View Delete
Pages 1			10 💌 Items Pe	er Page			Go to page: 1 of 1 Go

The list is sorted alphabetically by report name. You will be able to see any reports that you've created, whether saved as Public or Private, and any reports created by other users and shared as Public. The **Saved By** column displays the name of the last user to save changes to the report.

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

Create a New Ad Hoc Report	

Survey						-	
٩		Go				c	reate a Report
Report	Description	Status	Saved By	Date Saved	Published By	Date Published	Action

To create a new report (see related information in <u>Ad Hoc Report Structure</u> and <u>Chart</u> <u>Types in Ad Hoc Reports</u>):

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



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

Save Ad Hoc Report Criteria

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

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

To save the report criteria:

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

Edit Existing Ad Hoc Reports

Editing a saved ad hoc report can be used to:

- Change a report that is being developed and reviewed.
- Change a report that has been approved and used but requires changes to meet new or different information needs.
- Create a new report from an existing report.
- Publish a saved report, which makes it available for use with Report Subscriptions.

inContact Workforce Optimization Reporting Manual, 16.2

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

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

To edit an ad hoc report:

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

Generate an Ad Hoc Report

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

To generate an ad hoc report:

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

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

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Publish an Ad Hoc Report

Only published reports can be used in Report Subscriptions, but once a report has been published, it can no longer be edited. However, it can be used as the basis for a new report. Clicking the **Edit** button on a published report launches a pop-up warning to this effect.

To publish an ad hoc report:

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

inContact WFO Ad Hoc Reports Reference

Analytics Report Types

The following entities and fields are available for use in **Analytics** ad hoc reports. For more information, refer to the *inContact Speech Analytics Administration Guide*. If your organization uses custom field names in the Web Portal, those names will be shown instead of default names listed here.

Analytic Tag Group

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

Analytic Tag

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

Analytic Speech Tag

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

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Analytic Recording Tags

- **Tag Text:** Type search criteria in the open-entry text box.
- Seconds from Start: Indicates when a text tag starts. Type search criteria in the open-entry text box; numeric values only.
- Seconds from End: Indicates when a text tag ends. Type search criteria in the openentry text box; numeric values only.
- **Audio Channel:** Allows for speaker separation when audio is provided in separate channel streams. Only available in certain integrations.
- **Confidence:** Type search criteria in the open-entry text box; numeric values up to two decimal places (for example, 75.36).
- Date Recorded: Click on calendar icon to enter search criteria using date selector.
- Date Tagged: Click on calendar icon to enter search criteria using date selector.

Call Recording

- Call Recording ID: Type numeric values as search criteria in the open-entry text box.
- **Caller ID:** This is an inbound caller's number (ANI). Type search criteria in the openentry text box.
- **Called Number:** This is the outbound called number (DNIS). Type search criteria in the open-entry text box.
- **Device/Port ID:** This is the physical device. Type search criteria in the open-entry text box.
- Agent Number (Device Alias): This number is always associated with the agent, no matter what physical device he/she uses. Type search criteria in the open-entry text box.
- **Recording Time:** This is the date/time the recording occurred. Click on calendar icon to enter search criteria using date selector. Can be used as a Date field in Matrix Table reports.
- **Call Direction:** Reports display as Inbound or Outbound. Select search criteria from the drop-down list of these choices and Unknown.
- **Duration:** Reports display as HH: MM: SS. Enter search criteria in the three provided boxes as hours, minutes, seconds.



- **Group:** This is the ACD/Switch group. Type search criteria in the open-entry text box.
- **ACD Gate:** This is populated from the ACD with information known by various names (Gate, VDN, Queue, Call Type, and so forth). Type search criteria in the open-entry text box.

Agent

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

Audio Information

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

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

Derived Audio Tags

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

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

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

Audit Report Types

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

- If a **Role** is not assigned to any **Users**, it will not appear in a report showing user/role assignments.
- Auditing is controlled by the system; users cannot change what is audited.
- Audit records are written to the database and do not expire. They remain available for reporting for the life of your system (barring database issues that result in data loss).

User

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

Role

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

Permission

To see a complete list of possible values for either of the fields in this section, drag the **Permission** and **Type** fields to the Report Structure area and click **Preview**. Some of the available values are self-explanatory; others are less so.

Preview Report						
I4 4 1 of 5 ▶ ▶I 4 Find Next 🖳 🗸 ③						
Results Limited To: 200 Records						
Permission ≑	Туре ≑					
AllowAgentAdmin	ADDITIONALFIELD					
AllowAgentScheduling	ADDITIONALFIELD					
AllowAnalyticsAdmin	ADDITIONALFIELD					
AllowApiAuth	ADDITIONALFIELD					
AllowArchiveAdmin	ADDITIONALFIELD					

For a more detailed explanation of permissions, refer to the "Roles and Permissions" sections in the *inContact WFO Administration Manual* or the online help for inContact WFO.

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

Group

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

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Audit Trail

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

Audit messages consist of one to three parts. Each part contains different text. After a list of events is retrieved, review the messages to find which events are useful. Pick the appropriate keywords and enter them in the Message Text fields. Determining which words appear in which field involves some trial and error, and it may be helpful to use the **Starts with**, **Ends with**, **Contains** and **Does not contain** operators when setting up criteria.

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Call Recording Report Types

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

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

Agent ID

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

Group

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

Call Recording Record

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

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• **Total Hold Time:** Reports display as HH: MM: SS. Type search criteria in the three provided boxes as hours, minutes, seconds.

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• User1-15: Names and values of these fields are defined in the Web Portal's **Terminology** page. For more information, see the *inContact Workforce Optimization Administration Manual* or the online help for inContact WFO.

QA Evaluations

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

Survey

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

Analytics

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

Derived Audio Tags

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

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

Quality Assurance Report Types

Quality Assurance (QA) data available for ad hoc reporting includes both QA Form data

and Completed QA data. It is important **NOT** to mix these data types. Mixing them can yield inaccurate, inconsistent or unexpected results. In general, QA reporting can serve two purposes:

- Reporting on available QA Forms (QA Form, Sections, Questions and available responses).
- Reporting on Completed QA Evaluations, which is what the vast majority of our existing reports provide.

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

• Categories beginning with "QA" are meant to be used when

reporting on available QA forms (for example, a listing of forms that include a specific question).

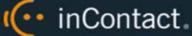
 Categories beginning with "Completed QA" are meant to be used when reporting on QA evaluations (for example, a listing of evaluations that received a specific response to a specific question).

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

Evaluator

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

Report Builder	
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QA Evaluation Question QA Response	^
Response Order	
Available Response	
Auto Fail	
Response Score	
NA	
Completed QA Evaluation Completed QA Response	Ш
Completed Question	
Question Response	
Score	
Possible Score	
Content Library Items	



Agent

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

Arbitrator

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

Call Recording Record

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

Group

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

QA Evaluation Form

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

QA Evaluation Form Section

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



QA Evaluation Question

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

QA Response

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

Completed QA Evaluation

- Evaluation ID: Type search criteria in the open-entry text box; numeric values only.
- Date Completed: Click on calendar icon to enter search criteria using date selector.
- **Total Form Possible Score:** Type search criteria in the open-entry text box; numeric values only.
- **Total Actual Score:** This field contains the score as it is displayed on the evaluation, based on your organization's preferred settings. Type search criteria in the open-entry text box; numeric values only.
- Total Actual Score (Minimum Zero): This field contains the score as it would appear if your organization chooses not to allow negative scores (regardless of your preferred settings). This allows for creating "what if" reports that can help you evaluate the ramifications of those settings preferences. Type search criteria in the open-entry text box; numeric values only.
- Total Actual Score (Allow Negative): This field contains the actual score as it would appear if your organization chooses to allow negative scores (regardless of your preferred settings). This allows for creating "what if" reports that can help you evaluate the ramifications of those settings preferences. Type search criteria in the open-entry text box; numeric values only.

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

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- Acknowledgment Status: Reports display as Unacknowledged or Acknowledged. Select search criteria from the drop-down list of these choices and All.
- Notes: Type search criteria in the open-entry text box.
- **Score Changes:** This is the number of times an evaluation score has been changed. Type search criteria in the open-entry text box; whole numbers only.
- **QA Status:** Reports display as Self-Evaluation, Self-Evaluation In Progress, Calibration, Calibration In Progress, Completed, In Progress, Question or Dispute. Select search criteria from the drop-down list of these choices and All.
- **Start Date:** This is the date a completed or in-progress evaluation was started. Click on calendar icon to enter search criteria using date selector.
- **QA Active/Deleted:** Reports display as Active or Deleted. Select search criteria from the drop-down list of these choices and All.
- **Disputed Count:** This is the number of times an agent disputed an evaluation comment or score. Type search criteria in the open-entry text box; numeric values only.
- **Questioned Count:** This is the number of times an agent questioned an evaluation comment or score. Type search criteria in the open-entry text box; numeric values only.

Completed QA Response

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

Content Library Items

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

Completed Survey Form

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

• Survey Name: Type search criteria in the open-entry text box.

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- **Status:** Reports display as Not Started, Complete, Incomplete or Taken. Select search criteria from the drop-down list of these choices and All.
- **Completed Survey ID:** Type search criteria in the open-entry text box; numeric values only.
- **Survey Possible Value:** Type search criteria in the open-entry text box; numeric values only.
- **Survey Value:** Type search criteria in the open-entry text box; numeric values only.
- **Survey % Score:** Reports display scores calculated from Survey Score/Survey Possible Score. Type search criteria in the open-entry text box; numeric values up to two decimal places (for example, 75.36).

Achievements

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

Achievement Types

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



Survey Report Types

The following entities and fields are available for use in **Survey** ad hoc reports. Surveycall record linking must be configured for the agent and call recording data to appear in the database. If your organization uses custom field names in the Web Portal, those names will be shown instead of default names listed here.

Form

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

Question

- **Question:** Type search criteria in the open-entry text box.
- **Question Type:** Reports display Present Question and Wait for Result, Collect Customer Information, Collect Digits, End Survey, Transfer, or Skip. Select search criteria from the drop-down list of these choices and All.
- **Hide No-Data Response:** Reports display as Yes or No. Select search criteria from the drop-down list of these choices and All.
- Possible Score: Type search criteria in the open-entry text box; numeric values only.

Response

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

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Completed Survey

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

Call Recording

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

Agent

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

inContact Workforce Management v1 Ad Hoc Reports Reference



ACD Call and Agent Data Report Types

These entities and fields are used for inContact WFM v1 **ACD Call and Agent Data** Ad Hoc Reports.

ACD Split Call Data

- Call Volume Date/Time: Click on calendar icon to enter search criteria using date selector.
- **Split:** Type search criteria in the open-entry text box.
- **Device:** Type search criteria in the open-entry text box.
- Interval Seconds: This is the time interval for which data should be pulled. Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).
- Offered Calls: Type search criteria in the open-entry text box; whole number values only.
- **Answered Calls:** Type search criteria in the open-entry text box; whole number values only.
- Service Level Calls: Type search criteria in the open-entry text box; whole number values only.
- **Abandoned Calls:** Type search criteria in the open-entry text box; whole number values only.
- Abandon Seconds: This is the total time in seconds that abandoned calls were on hold before caller hung up. Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).

ACD Agent/Split Call Data

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

- Split: Type search criteria in the open-entry text box.
- **Call Volume Date/Time:** Click on calendar icon to enter search criteria using date selector.
- Interval Seconds: This is the time interval for which data should be pulled. Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).
- **Answered Calls:** Type search criteria in the open-entry text box; whole number values only.
- Hold Calls: This is the number of calls that were placed on hold one or more times. Type search criteria in the open-entry text box; whole number values only.

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 - **Ring Calls:** Type search criteria in the open-entry text box; whole number values only.
 - **Customer Seconds:** This is the talk time in seconds. Type search criteria in the openentry text box as seconds (for example, 3600 seconds = 1 hour).
 - Hold Seconds: Type search criteria in the open-entry text box as seconds (for example, 3600 seconds = 1 hour).
 - **ACW Seconds:** This is time spent on after-call work. Type search criteria in the openentry text box as seconds (for example, 3600 seconds = 1 hour).

ACD Agent Data

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

Skill

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

Labor Unit

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

User

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

Team

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

Service Level

• **SL Waiting Time:** This is the Service Level goal for "Waiting Time" as set by your inContact Workforce Management v1 administrator. Type search criteria in the openentry text box; numeric values only.

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• **SL Percent Calls Answered:** This is the Service Level goal for "Percent Answered" as set by your inContact Workforce Management v1 administrator. Type search criteria in the open-entry text box; numeric values only.

Forecast Call Data

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

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

Agent Leave/PTO Report Types

These entities and fields are used for inContact Workforce Management v1 **Agent Leave/PTO** ad hoc reports.

Leave Requests

- Leave Type: Type search criteria in the open-entry text box.
- Date Created: Click on calendar icon to enter search criteria using date selector.
- Start Date: Click on calendar icon to enter search criteria using date selector.
- End Date: Click on calendar icon to enter search criteria using date selector.
- Leave Duration: Reports display as HH: MM: SS. Type search criteria in the three provided boxes as hours, minutes, seconds.
- **Comment:** Type search criteria in the open-entry text box.

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

Agent

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

Team

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

Labor Unit

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

Skill

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

Shift Report Types

These entities and fields are used for inContact Workforce Management v1 **Shift** ad hoc reports.

Shift

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

• Late Threshold: Type search criteria in the open-entry text box; numeric values only.

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Labor Unit

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

Skill

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

Team

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

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Sample Ad Hoc Reports

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

Audit Report > Superuser

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

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

Audit Report > Modified Users

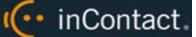
This report lists which users have been modified in the last 24 hours. Use the Simple Table Report Layout.

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

Audit > Group Membership

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

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



Audit > User Role Assignments

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

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

Audit > Role: Permissions

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

- Column Fields: Permission
- Row Fields: Role Name

Call Recordings > User Fields

If your organization places information in custom user fields (for example, order numbers or account numbers), this report will relate that data to specific call records. Filters can be added to limit results. This type of report may be useful in environments using inContact Desktop Analytics. Use the Simple Table Report Layout.

• Column Fields: Recording ID; [custom user field]

Call Recordings > Total Hold Time

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

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

Call Recordings > Calls from Particular Area Codes

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

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

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Quality Assurance > Agent QA Summary

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

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

Quality Assurance > QA Score and Survey Score Comparison

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

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

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

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

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

Survey > Call Recording/Agent/Survey Score

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

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



Working with Report Tools

Report Subscriptions Overview

Report subscriptions allow you to pre-schedule specific reports and provide the results to multiple users. They are managed from the Report Subscriptions page in your inContact WFO or inContact WFM v1 Web Portal.

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

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

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

The Report Subscriptions page header identifies your version of SQL.

You cannot use HTML reports with subscriptions.

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

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



Subscription Delivery Methods

Reports can be delivered in one of two ways:

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

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

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

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

To deliver reports via file share delivery, you will need to provide the application with a full UNC path to the network share, as well as credentials to write to that location. If inContact WFO (or inContact WFM v1) cannot save the report, you will see "File share write failure" as that report's Execution Status.

Load the Report Subscriptions Page

To load the **Report Subscriptions** page in the inContact WFO Web Portal:

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

To load the **Report Subscriptions** page in the inContact WFM v1 Web Portal:

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



Create a Report Subscription

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

To create a Report Subscription:

- Load the Report Subscriptions page in either the inContact WFO or inContact WFM v1 Web Portal.
- 2. Click **New** at the top-right corner of the page.
- 3. Choose a report from the **Select a Report** drop-down list.
- 4. Type a custom title for your subscription in the **Description** field (required).
- 5. Select a delivery method from the **Delivered by** drop-down list.
- 6. Follow the procedure to <u>Set Email Delivery Options</u> or <u>Set Windows File Share Delivery</u> <u>Options</u>, as preferred.
- Select the option to run the subscription On a Shared Schedule or When the scheduled report run is complete. If you choose the shared schedule option, you must also select the desired schedule from the drop-down list.
- 8. Follow the procedure to Set Schedule Options.
- 9. Set the report parameter values if needed and then click **Save**. Refer to the specific report description for more information on parameters associated with that report.

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

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Set Email Delivery Options

Options for delivering reports via email are configured as a sub-task of the procedure for creating a report subscription. After following these steps, you will need to complete the <u>Create a Report Subscription</u> procedure.

To set up email delivery options:

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

Set Windows File Share Delivery Options

Options for delivering reports via Windows file share are configured as a sub-task of the procedure for creating a report subscription. After following these steps, you will need to complete the <u>Create a Report Subscription</u> procedure.

To set up file share delivery options:

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

inContact Workforce Optimization Reporting Manual, 16.2



Set Schedule Options

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

To configure schedule options:

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

Manage Report Subscriptions

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

Sort the Report Subscriptions List

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

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

Edit Report Subscriptions Settings

To edit the settings of a subscription:

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

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Delete Report Subscriptions

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

To delete an existing subscription:

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

Shared Schedules Overview

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

Load the Shared Schedules Page

To load the Shared Schedules page in the inContact WFO Web Portal:

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

To load the **Shared Schedules** page in the inContact WFM v1 Web Portal:

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

Create a New Shared Schedule

To create a new Shared Schedule:

- 1. Load the **Shared Schedules** page in the inContact WFO or inContact WFM v1 Web Portal.
- 2. Click **New** at the top-right corner of the page.
- 3. Type a **Schedule Name** (up to 100 characters) as you want it to appear in the listing of shared schedules.
- 4. Set the individual schedule details. For related information, see <u>Set Schedule Options</u>.
- 5. Click Save.



Manage Shared Schedules

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

Sort the Shared Schedules List

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

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

Edit a Shared Schedule's Settings

To edit the settings of a Shared Schedule:

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

Delete Shared Schedules

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

To delete an existing Shared Schedule:

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

Pause/Resume a Shared Schedule

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

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

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

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



Report Library Overview

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

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

Private Listing			
Report	Date Created	Owner	
Sales Agent Incoming Call Summary Report	6/23/2011 12:13:19 PM	superuser	3
Sales Agent Outgoing Call Summary Report	6/23/2011 12:14:03 PM	superuser	3
Sales Agents Ranking Report	6/23/2011 3:17:45 PM	superuser	3
Public Listing			
Report	Date Created	Owner	
Calibration Group QA Summary	0/24/2011 1:56:51 PM	Superuser	

Load the Report Library

To load the **Report Library** page:

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

Manage the Report Library

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

Execute a Report from the Report Library

To execute a report from the Report Library:

• Load the Report Library and click the desired report in the list.

Delete Saved Criteria from the Report Library

To delete saved criteria from the Report Library:

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



Document Revision History

Revision	Change Description	Effective Date
0	Initial version for this release	2016-06-14