inContact

inContact Workforce Optimization Reporting Manual, 16.2

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Premises

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- **Version** — 16.2
- **Revision** — June 2016
- **About inContact** — inContact (NASDAQ: SAAS) is leader in cloud contact center software, helping organizations around the globe create customer and contact center employee experiences that are more personalized, more empowering and more engaging today, tomorrow and in the future. inContact focuses on continuous innovation and is the only provider to offer core contact center infrastructure, workforce optimization plus an enterprise-class telecommunications network for the most complete customer journey management. inContact offers customers a choice of deployment options. To learn more, visit www.inContact.com.
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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 (help.incontact.com/WFO/prem/help.htm) 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 Quality Assurance Report Types.
- 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 Completed QA Form.

Reporting Basics

Common Report Criteria Overview

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

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

Start Date

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

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

End Date

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

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

Group

To narrow the scope of the report to one or more 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 **All**) in the list.

Report Type

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

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

Section

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

- Click one section (or **All**) in the list.

Failure Type

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

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

Month

To select the starting month for your report:

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

Periods

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

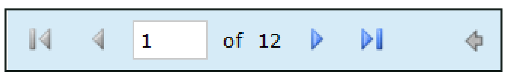
- Click the number of months you want to include in the report (1-12) in the drop-down list.

Common Report Tasks

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

Navigate Report Pages

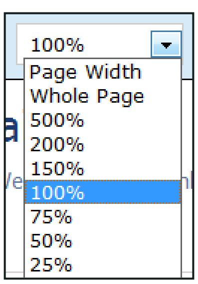
Once you have generated a report, you can use the navigation bar to move back and forth across appropriate report pages. The single arrow to the right takes you forward one page and the single arrow to the left takes you back one page. The arrow/line to the right takes you to the last page of your report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

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

Search within a Report

To find specific text or values within the report:

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

Refresh the Report Display

To reload the report display after you make any formatting changes:

- Click the **Refresh** icon.

Print a Report

To bring up Windows print controls with standard print options:

- Click the **Print** icon.

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

Sort Records within a Report

Data records on some printable reports, as well as on simple and summary table ad hoc reports, can be sorted. In the example shown here, the records are sorted by the Phone ID as indicated by the 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.

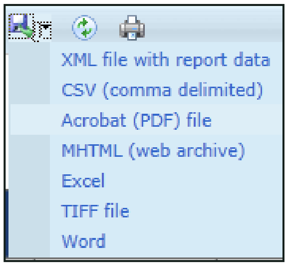
To clear any sorting, Refresh the Report Display.

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



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.

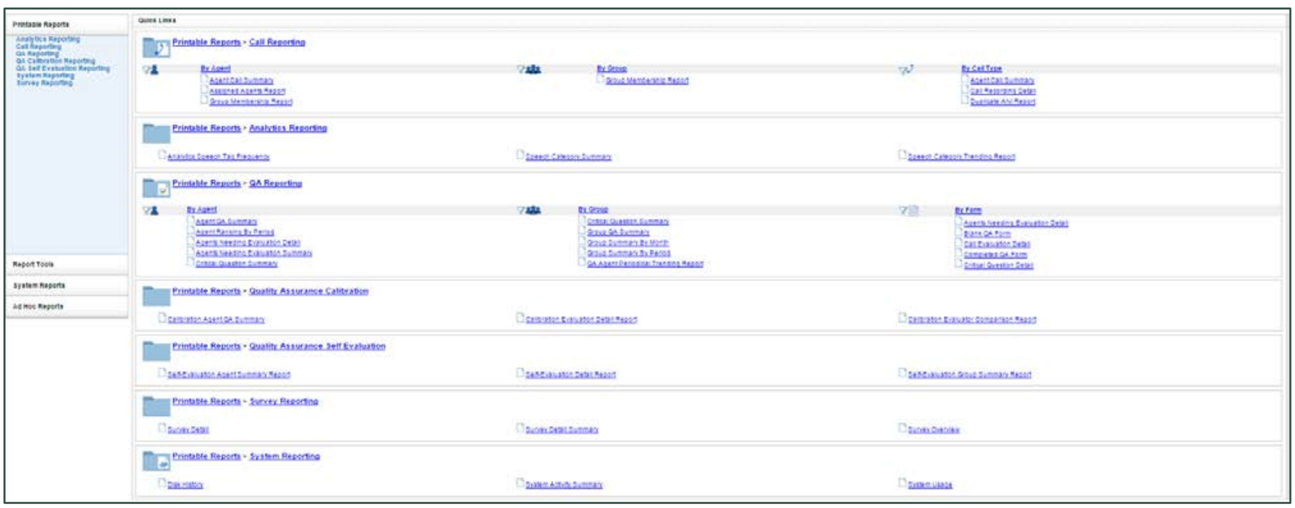
Working with Printable Reports

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.

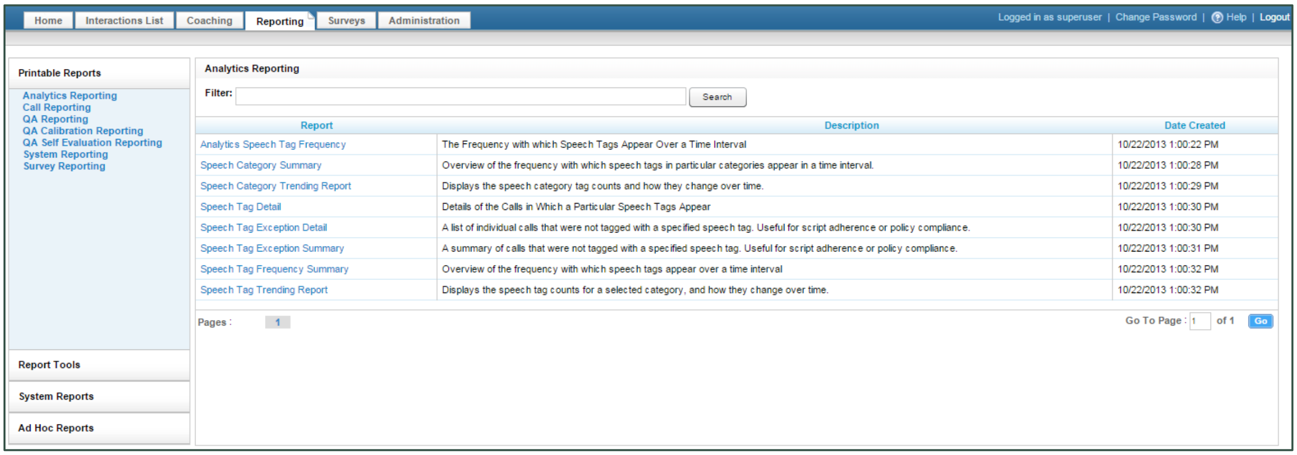
If your Premises deployment includes inContact Speech Analytics, inContact Survey, or both, you will see Printable Reports for those modules; these reports are discussed in their respective administration guides.

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



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

Filter the Printable Report List



The Filter field allows you to search within the displayed category for a particular report based on the name of the report or 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**.

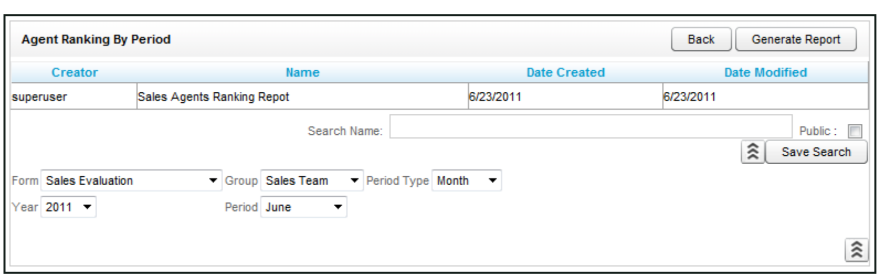
Generate a Printable Report

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 Common Report Criteria Overview) or select a saved criteria set, then click **Generate Report**.

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



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**.

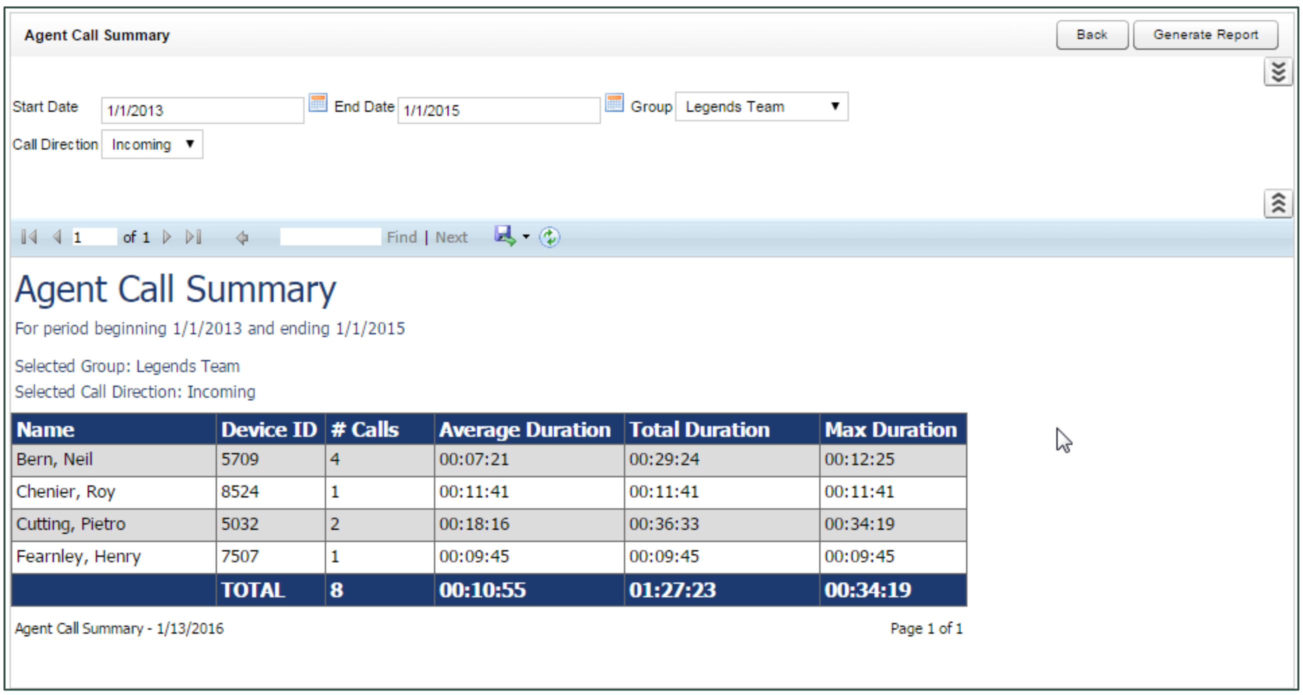
Saved criteria sets can be accessed from the associated report when you generate it. You can also access report criteria from the Report Library (see Report Library Overview).

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 Generate a Printable Report.

Agent Call Summary

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


Agent Call Summary

Back | Generate Report

Start Date 1/1/2013 End Date 1/1/2015 Group Legends Team

Call Direction Incoming

1 of 1 Find | Next

Agent Call Summary

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

Selected Group: Legends Team

Selected Call Direction: Incoming

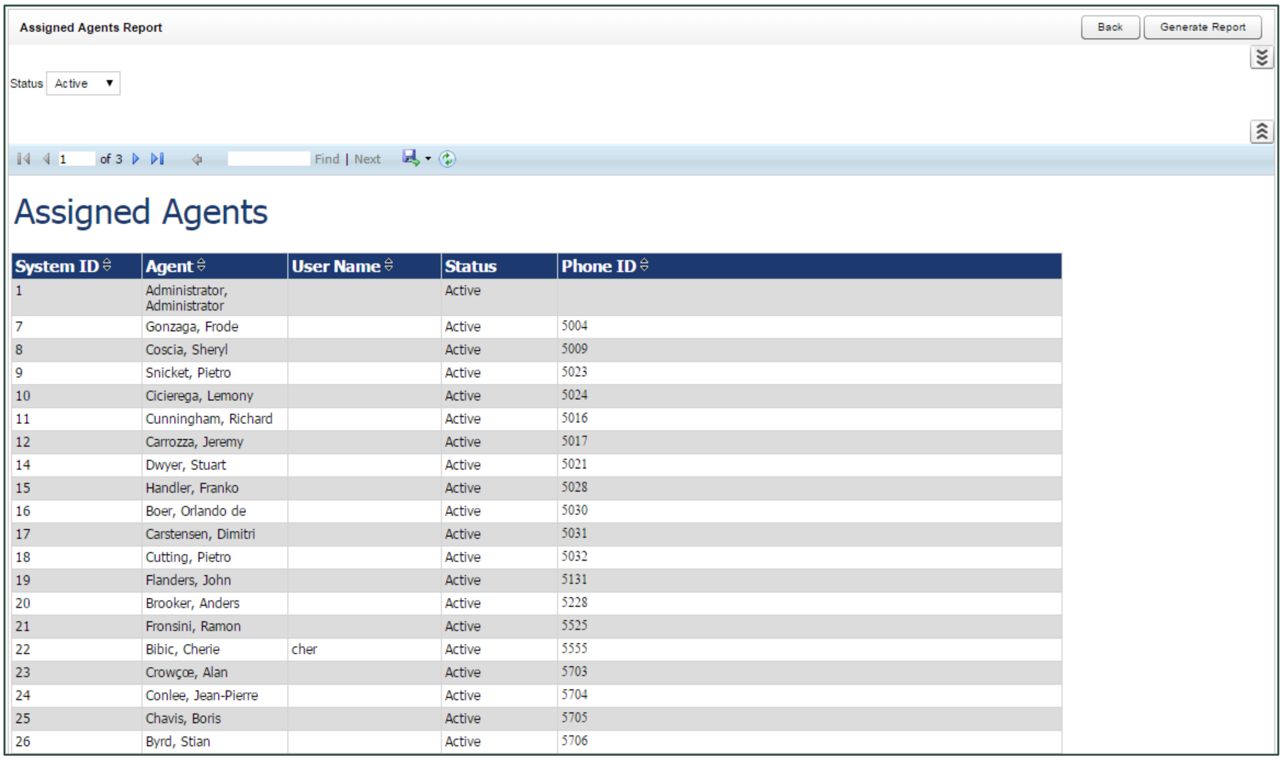
Name	Device ID	# Calls	Average Duration	Total Duration	Max Duration
Bern, Neil	5709	4	00:07:21	00:29:24	00:12:25
Chenier, Roy	8524	1	00:11:41	00:11:41	00:11:41
Cutting, Pietro	5032	2	00:18:16	00:36:33	00:34:19
Fearnley, Henry	7507	1	00:09:45	00:09:45	00:09:45
	TOTAL	8	00:10:55	01:27:23	00:34:19

Agent Call Summary - 1/13/2016 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.

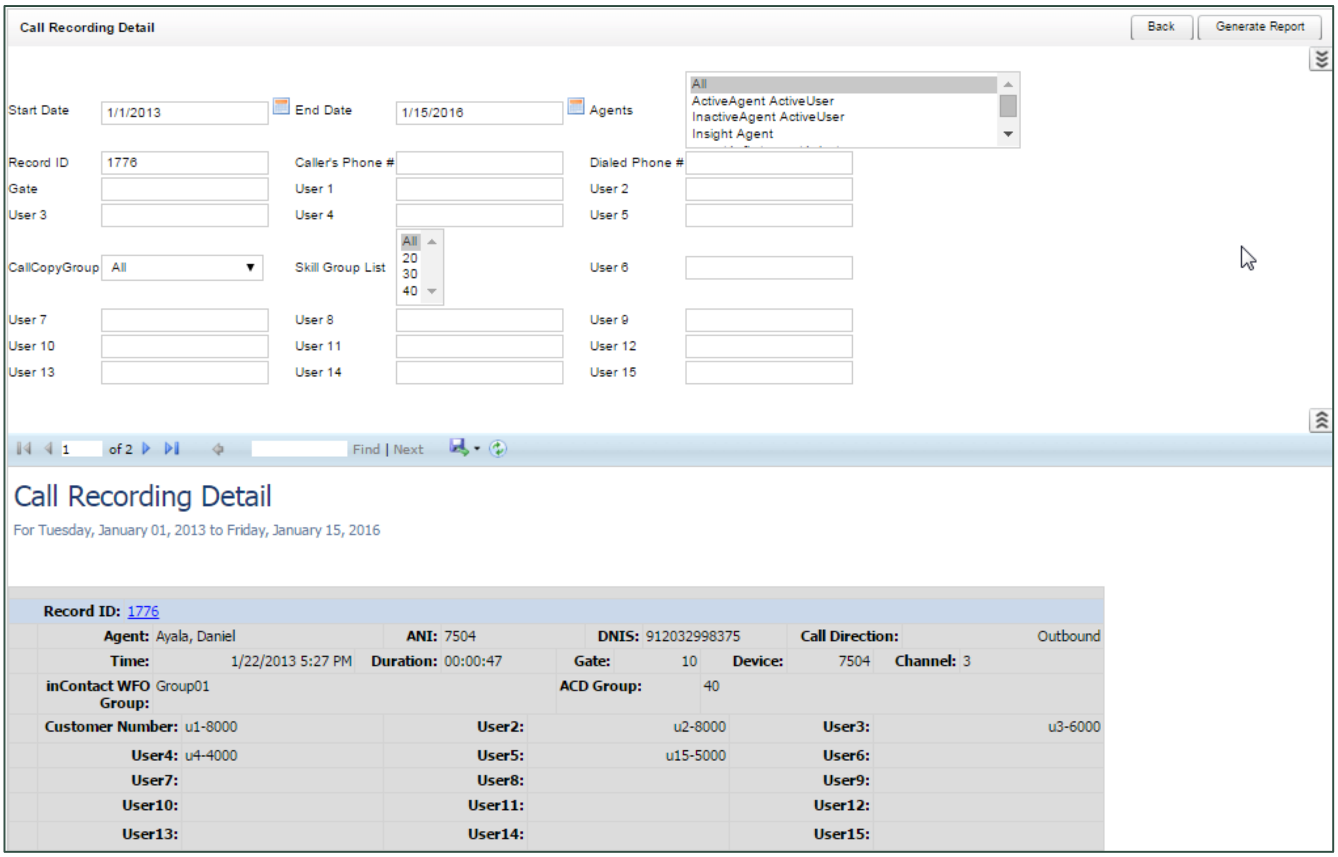
Ability to view agent information other than your own is limited to permissioned users. Ask your inContact WFO administrator if you need to view information for other agents and are unable to do so.



System ID	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	Crowçoe, Alan		Active	5703
24	Conlee, Jean-Pierre		Active	5704
25	Chavis, Boris		Active	5705
26	Byrd, Stian		Active	5706

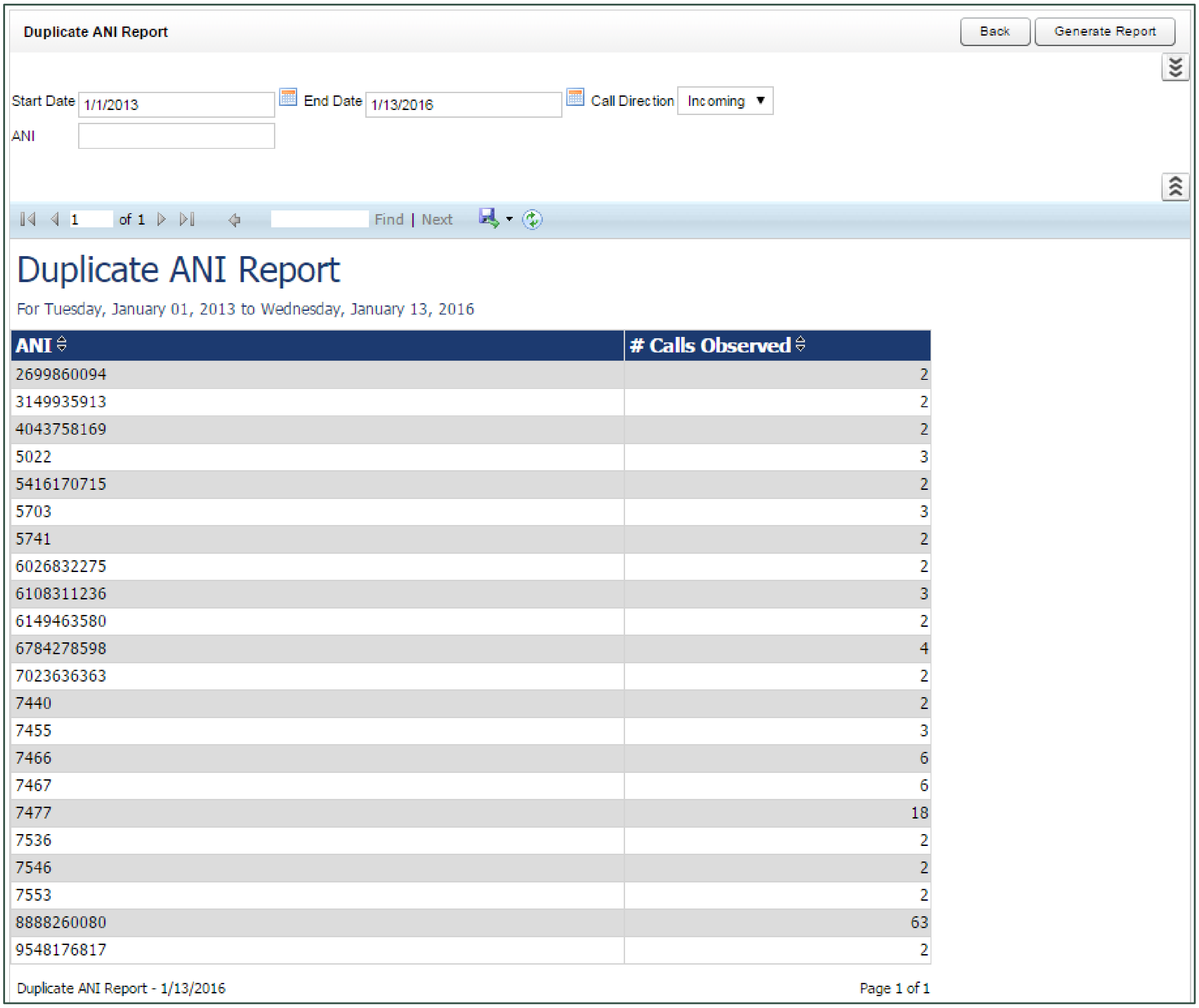
Call Recording Detail

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.



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

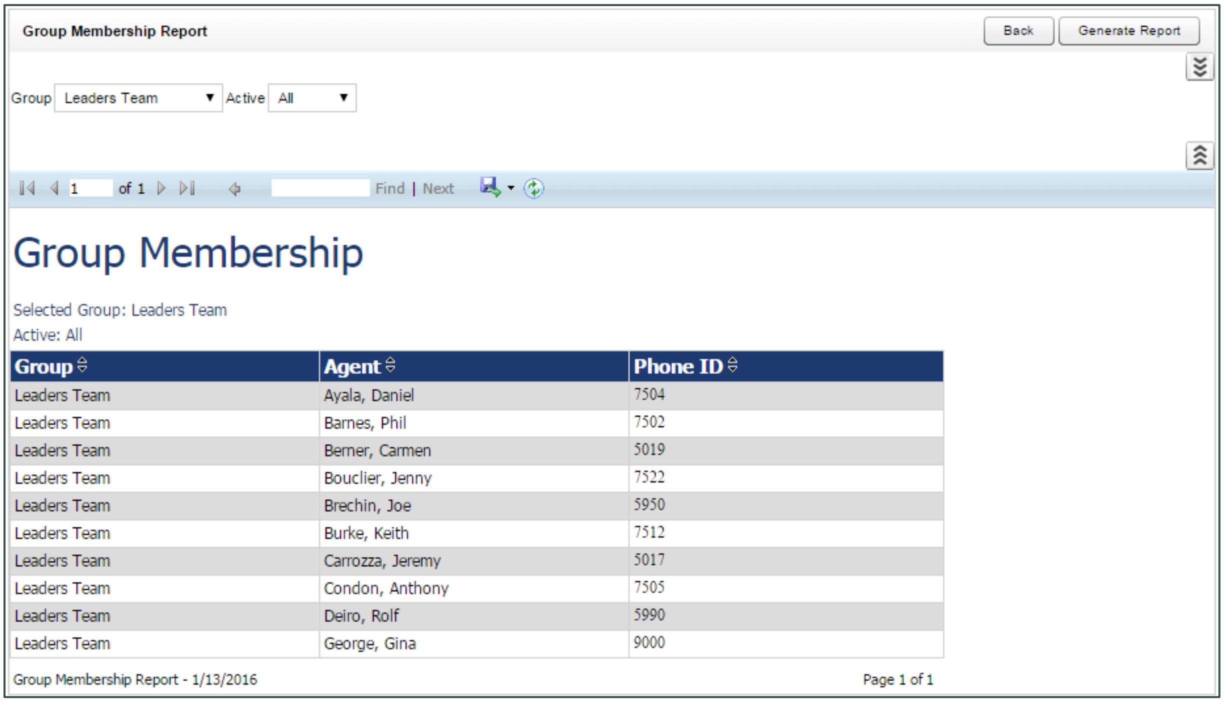
For Tuesday, January 01, 2013 to Wednesday, January 13, 2016

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

Selected Group: Leaders Team
Active: All

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

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

QA Reporting Reports 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.

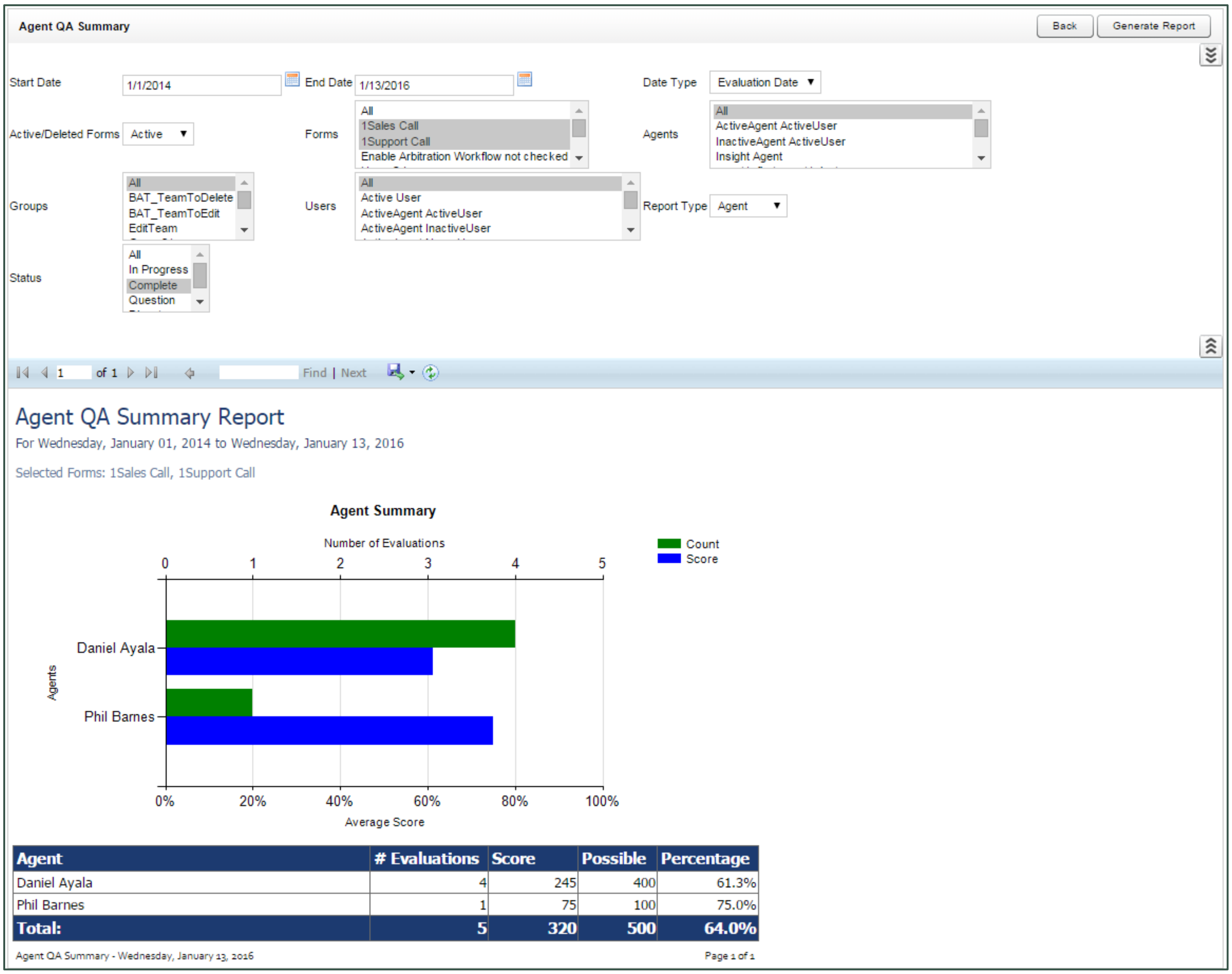
This section provides a description and example of each printable report in the QA Reporting category. For more information on running any of these reports, see Generate a Printable Report.

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.

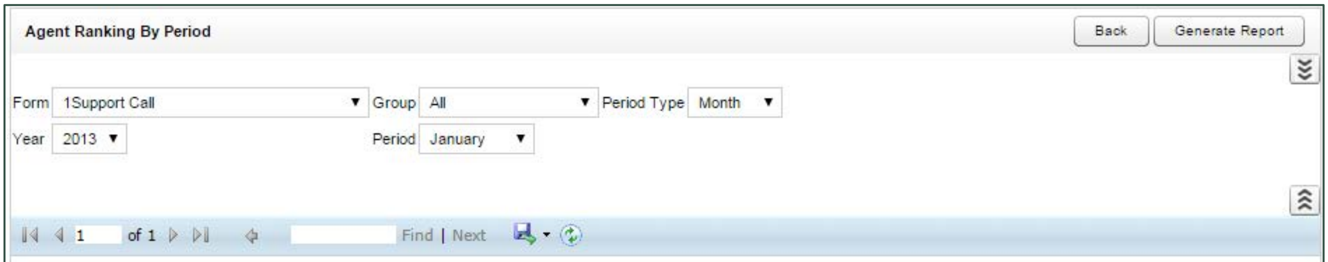
In the example below, **Report Type** was set to **Agent**, and you can drill down to **Section**-level or **Question**-level results by clicking the agent's name. Report results are limited to groups to which you have access, even if you select **All**.



Agent	# Evaluations	Score	Possible	Percentage
Daniel Ayala	4	245	400	61.3%
Phil Barnes	1	75	100	75.0%
Total:	**5**	**320**	**500**	**64.0%**

Agent Ranking by Period

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



Agent Ranking by Month

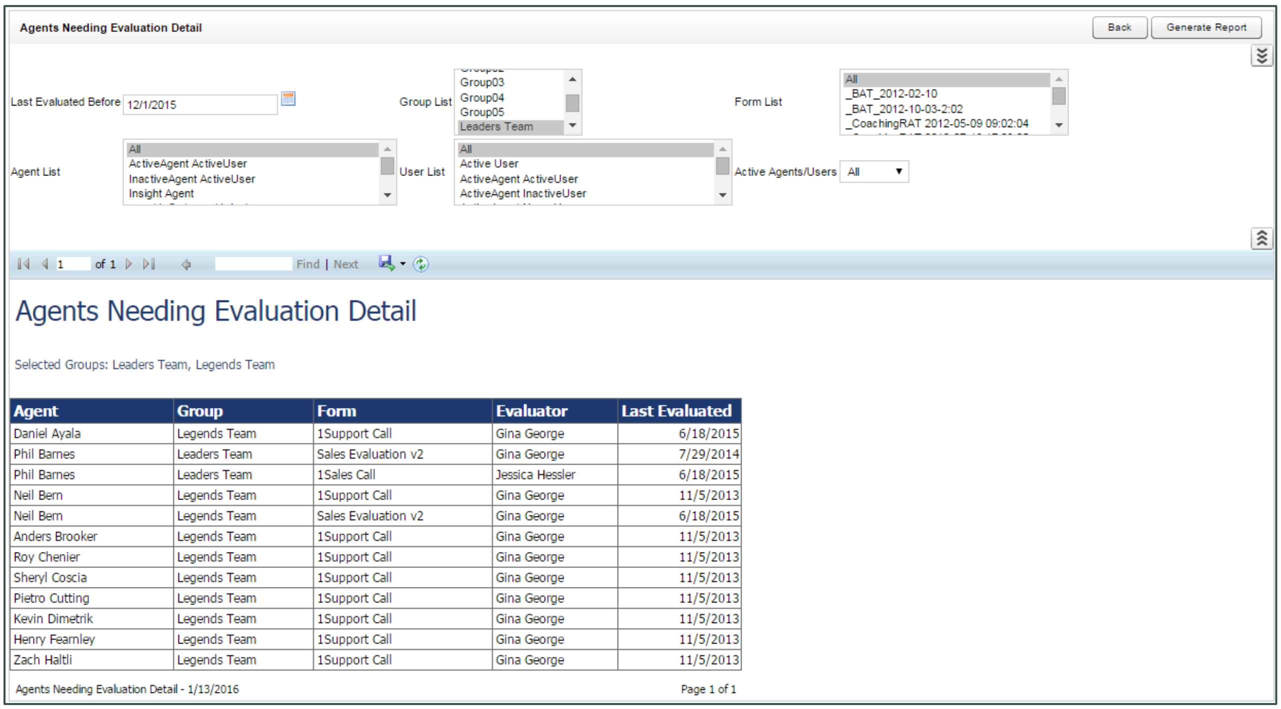
For period beginning 1/1/2013 and ending 1/31/2013

Selected Form: 1Support Call

Agent Name	Selected Month Score	Prior Month Score	Rank
JIMENEZ, JUNE	1307 of 1355 (96.5%)	3538 of 3970 (89.1%)	1 (+36)
FISCHER, HOWARD	1287 of 1335 (96.4%)	5428 of 5820 (93.3%)	2 (+6)
DELACRUZ, BARRY	1831 of 1935 (94.6%)	3875 of 4195 (92.4%)	3 (+8)
PECK, LUPE	1333 of 1420 (93.9%)	3383 of 3720 (90.9%)	4 (+24)
BELL, ESTER	1067 of 1140 (93.6%)	3481 of 3840 (90.7%)	5 (+26)
HOOPER, LARRY	995 of 1065 (93.4%)	3226 of 3495 (92.3%)	6 (+7)
JONES, MARVIN	984 of 1055 (93.3%)	3388 of 3685 (91.9%)	7 (+10)
HORN, ERIK	1804 of 1935 (93.2%)	4159 of 4495 (92.5%)	8 (+2)
ASHLEY, RUBEN	1981 of 2140 (92.6%)	1948 of 2205 (88.3%)	9 (+29)
SOLOMON, DUANE	784 of 850 (92.2%)	2892 of 3065 (94.4%)	10 (-8)
BAUER, ALBERT	2361 of 2560 (92.2%)	3857 of 4290 (89.9%)	11 (+22)
HOLDEN, ANTHONY	1516 of 1645 (92.2%)	4423 of 4860 (91%)	12 (+14)
JENNINGS, TABITHA	1854 of 2020 (91.8%)	4114 of 4365 (94.2%)	13 (-10)
SLOAN, SHAWN	2286 of 2515 (90.9%)	2802 of 2990 (93.7%)	14 (-9)
EWING, WILLA	2511 of 2765 (90.8%)	4700 of 5095 (92.2%)	15 (0)
SAMPSON, THERESA	3561 of 3925 (90.7%)	3265 of 3580 (91.2%)	16 (+9)
FOSTER, HAROLD	771 of 850 (90.7%)	3061 of 3430 (89.2%)	17 (+18)
OCHOA, YOUNG	906 of 1000 (90.6%)	4406 of 4860 (90.7%)	18 (+12)
CANTRELL, MADELEINE	1286 of 1420 (90.6%)	3435 of 3720 (92.3%)	19 (-7)
FARRELL, HALEY	2100 of 2325 (90.3%)	4098 of 4505 (91%)	20 (+7)

Agents Needing Evaluation Detail

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



Agents Needing Evaluation Detail

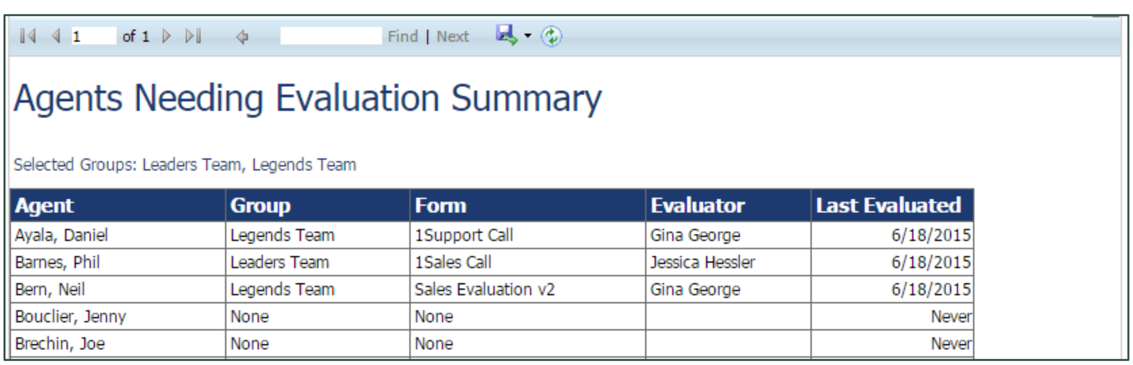
Selected Groups: Leaders Team, Legends Team

Agent	Group	Form	Evaluator	Last Evaluated
Daniel Ayala	Legends Team	1Support Call	Gina George	6/18/2015
Phil Barnes	Leaders Team	Sales Evaluation v2	Gina George	7/29/2014
Phil Barnes	Leaders Team	1Sales Call	Jessica Hessler	6/18/2015
Neil Bern	Legends Team	1Support Call	Gina George	11/5/2013
Neil Bern	Legends Team	Sales Evaluation v2	Gina George	6/18/2015
Anders Brooker	Legends Team	1Support Call	Gina George	11/5/2013
Roy Chenier	Legends Team	1Support Call	Gina George	11/5/2013
Sheryl Coscia	Legends Team	1Support Call	Gina George	11/5/2013
Pietro Cutting	Legends Team	1Support Call	Gina George	11/5/2013
Kevin Dimetrik	Legends Team	1Support Call	Gina George	11/5/2013
Henry Fearnley	Legends Team	1Support Call	Gina George	11/5/2013
Zach Haltli	Legends Team	1Support Call	Gina George	11/5/2013

Agents Needing Evaluation Detail - 1/13/2016 Page 1 of 1

Agents Needing Evaluation Summary

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



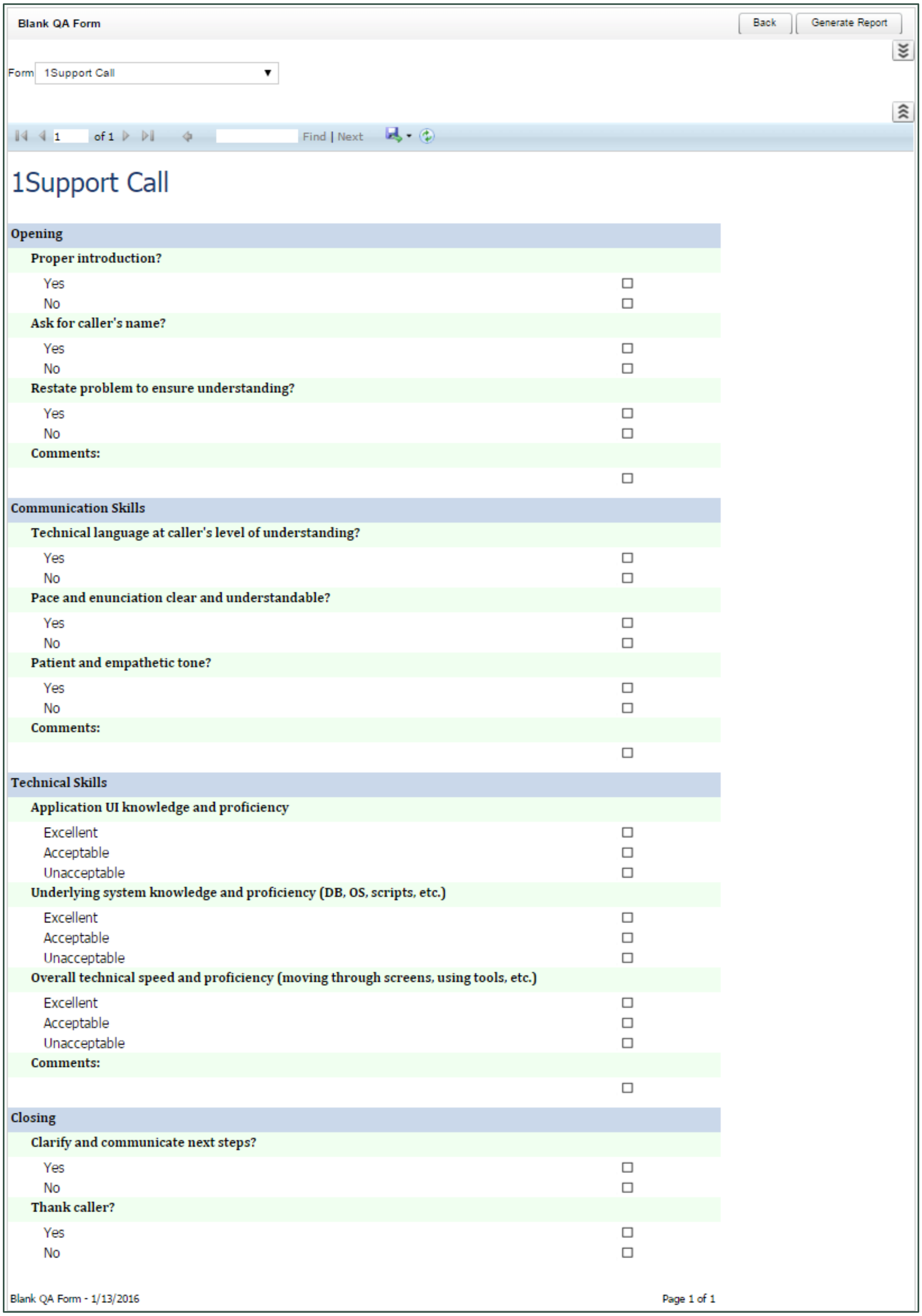
Agents Needing Evaluation Summary

Selected Groups: Leaders 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

1 of 1 | Find | Next

1Support Call

Opening

Proper introduction?
Yes ☐
No ☐

Ask for caller's name?
Yes ☐
No ☐

Restate problem to ensure understanding?
Yes ☐
No ☐

Comments:
☐

Communication Skills

Technical language at caller's level of understanding?
Yes ☐
No ☐

Pace and enunciation clear and understandable?
Yes ☐
No ☐

Patient and empathetic tone?
Yes ☐
No ☐

Comments:
☐

Technical Skills

Application UI knowledge and proficiency
Excellent ☐
Acceptable ☐
Unacceptable ☐

Underlying system knowledge and proficiency (DB, OS, scripts, etc.)
Excellent ☐
Acceptable ☐
Unacceptable ☐

Overall technical speed and proficiency (moving through screens, using tools, etc.)
Excellent ☐
Acceptable ☐
Unacceptable ☐

Comments:
☐

Closing

Clarify and communicate next steps?
Yes ☐
No ☐

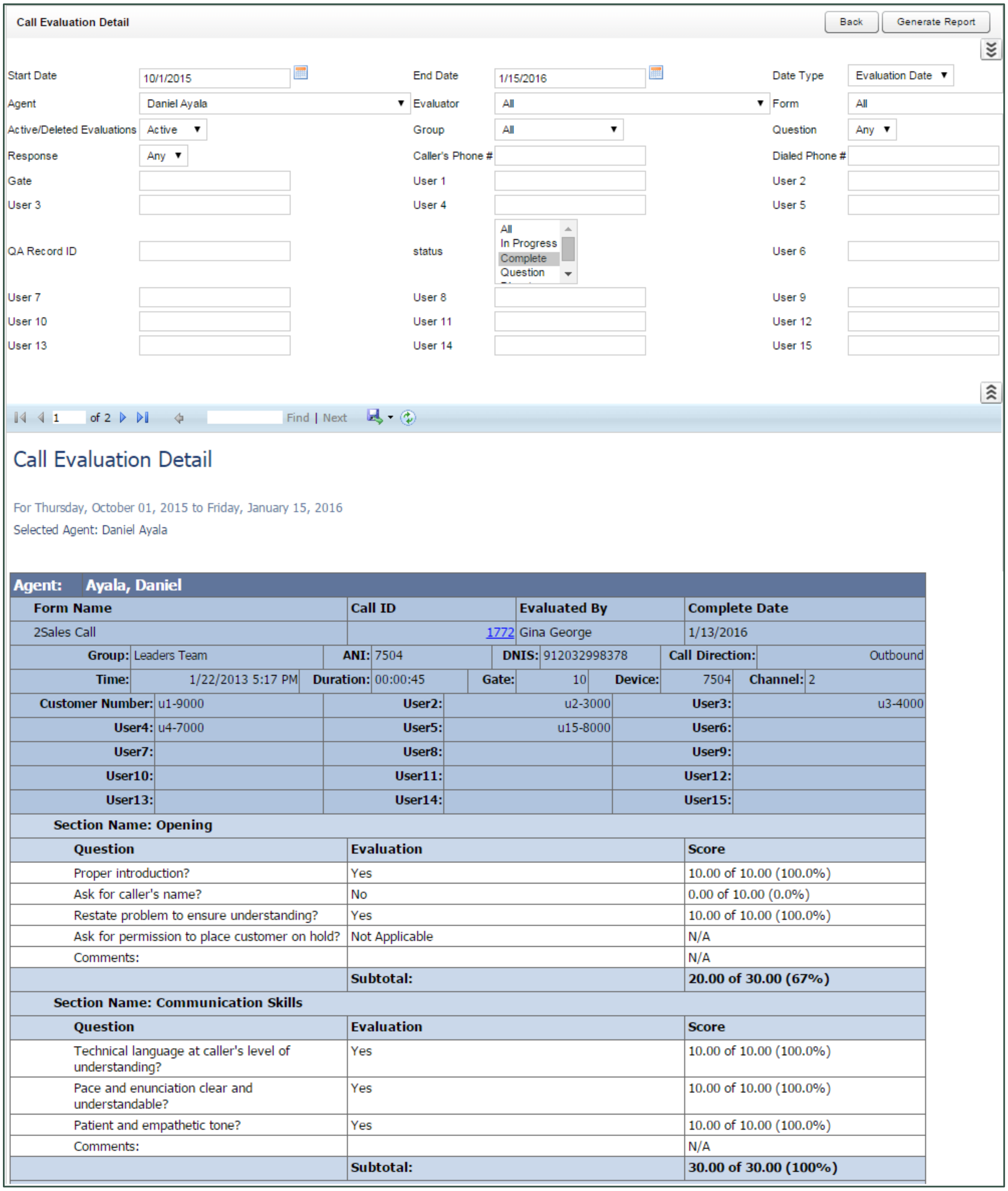
Thank caller?
Yes ☐
No ☐

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

Call Evaluation Detail

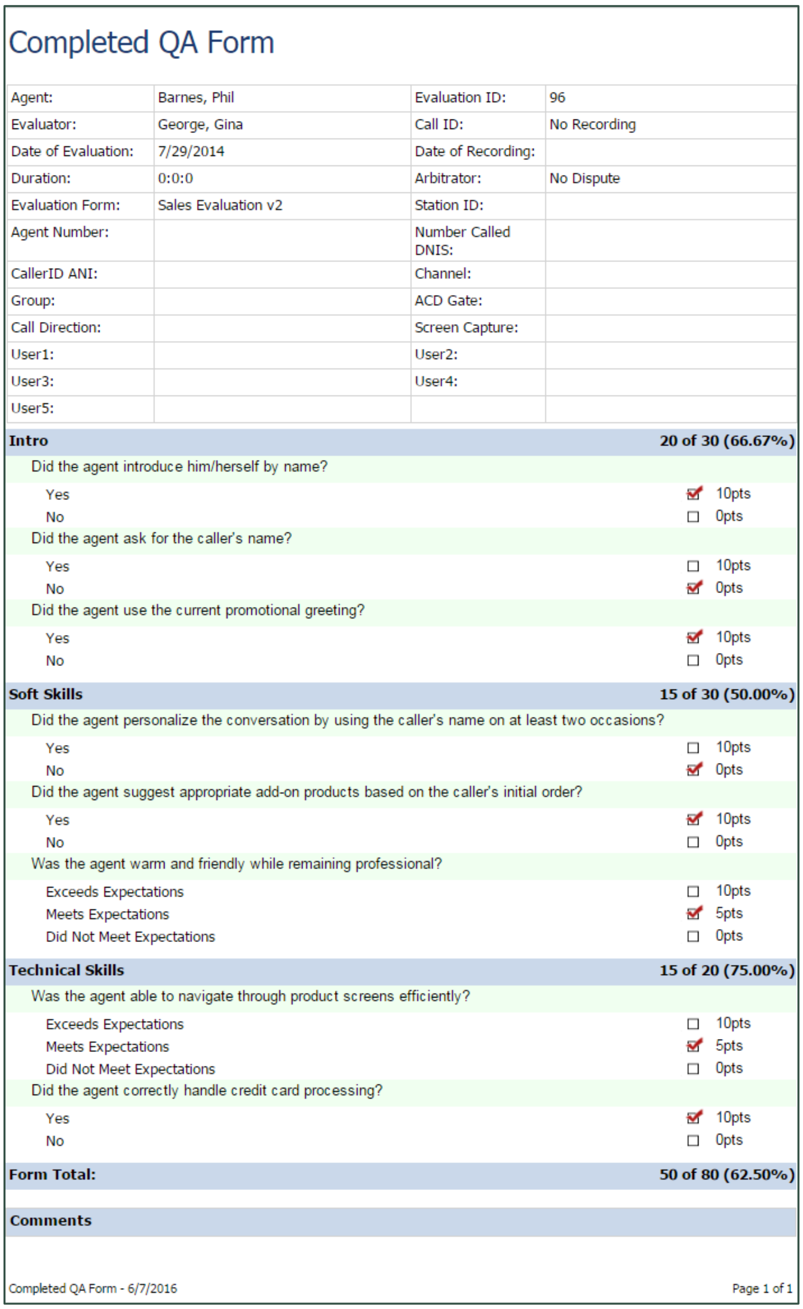
The **Call Evaluation Detail** report shows detailed results on a completed QA evaluation based on your selection criteria. Metadata information is shown at the top, followed by a section- and question-level breakdown of the form with individual responses. Report results are limited to groups to which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

You must select a Status to run this report.



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:	96
Evaluator:	George, Gina	Call ID:	No Recording
Date of Evaluation:	7/29/2014	Date of Recording:	
Duration:	0:0:0	Arbitrator:	No Dispute
Evaluation Form:	Sales Evaluation v2	Station ID:	
Agent Number:		Number Called DNIS:	
CallerID ANI:		Channel:	
Group:		ACD Gate:	
Call Direction:		Screen Capture:	
User1:		User2:	
User3:		User4:	
User5:			

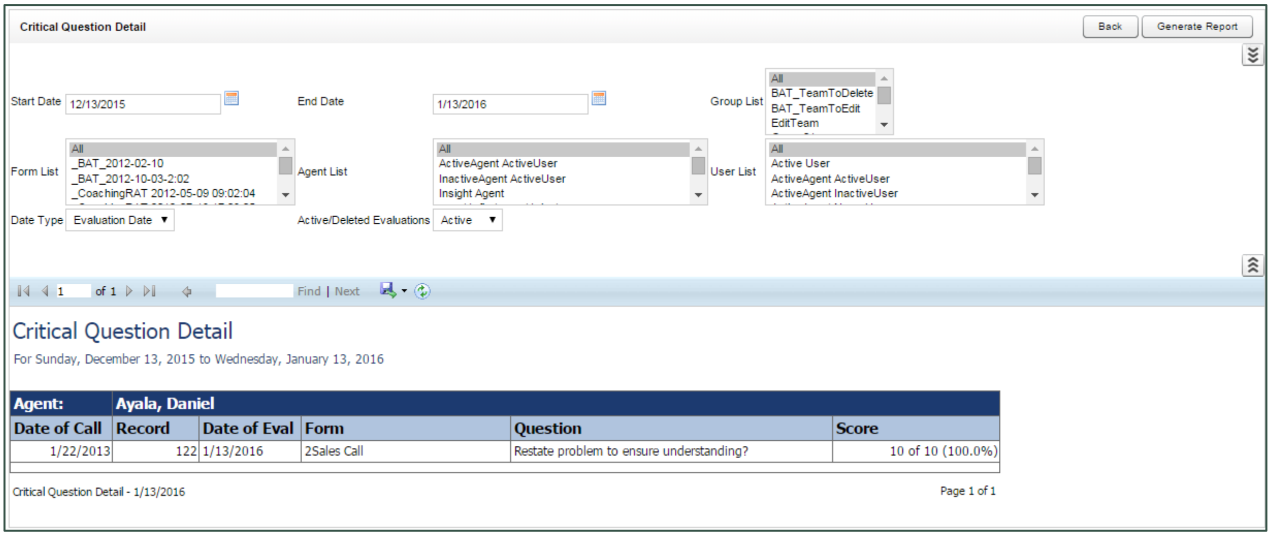
Intro		**20 of 30 (66.67%)**
Did the agent introduce him/herself by name?		
Yes	☑	10pts
No	☐	0pts
Did the agent ask for the caller's name?		
Yes	☐	10pts
No	☑	0pts
Did the agent use the current promotional greeting?		
Yes	☑	10pts
No	☐	0pts
Soft Skills		**15 of 30 (50.00%)**
Did the agent personalize the conversation by using the caller's name on at least two occasions?		
Yes	☐	10pts
No	☑	0pts
Did the agent suggest appropriate add-on products based on the caller's initial order?		
Yes	☑	10pts
No	☐	0pts
Was the agent warm and friendly while remaining professional?		
Exceeds Expectations	☐	10pts
Meets Expectations	☑	5pts
Did Not Meet Expectations	☐	0pts
Technical Skills		**15 of 20 (75.00%)**
Was the agent able to navigate through product screens efficiently?		
Exceeds Expectations	☐	10pts
Meets Expectations	☑	5pts
Did Not Meet Expectations	☐	0pts
Did the agent correctly handle credit card processing?		
Yes	☑	10pts
No	☐	0pts
Form Total:		**50 of 80 (62.50%)**

Comments

Completed QA Form - 6/7/2016 Page 1 of 1

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**.

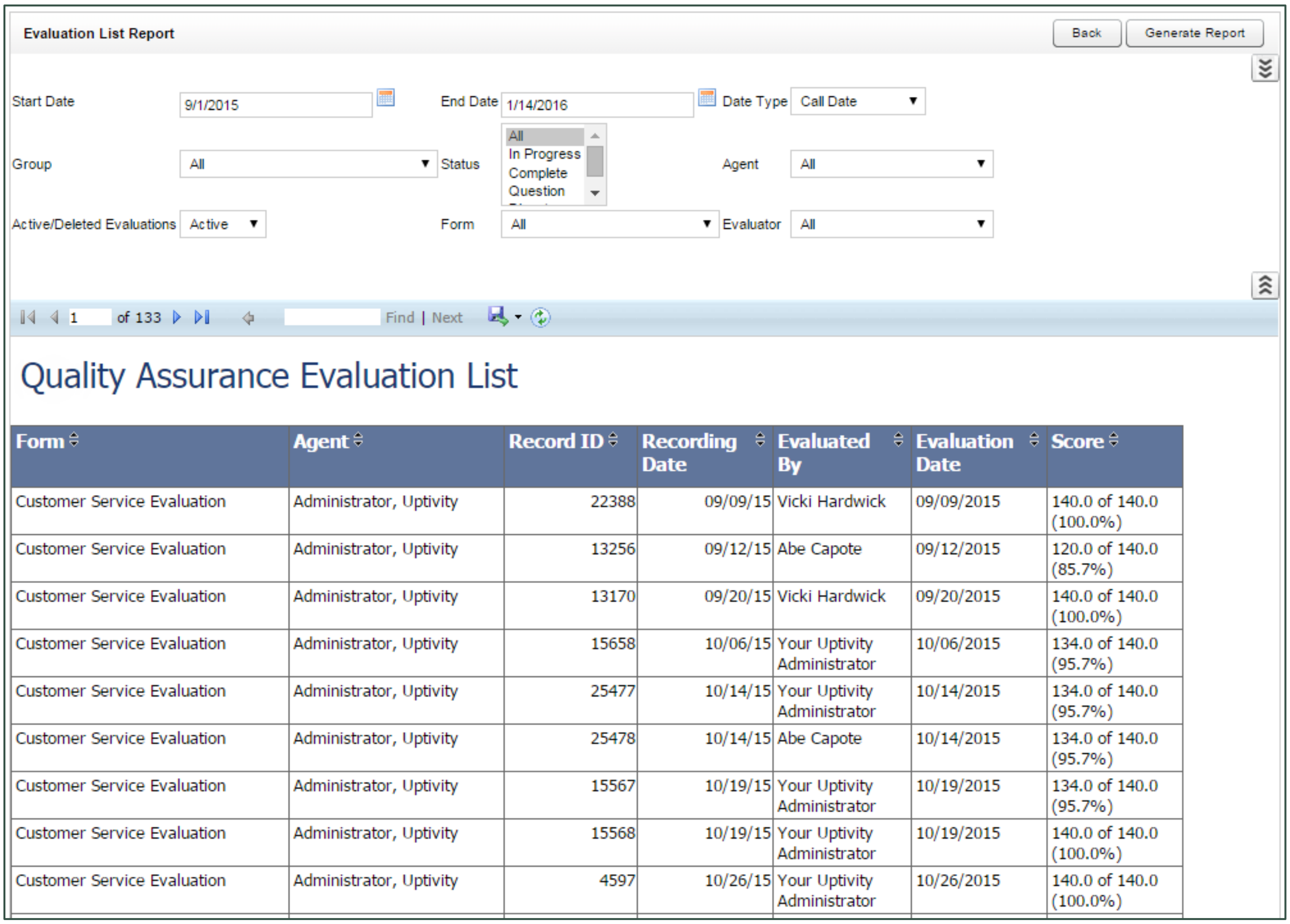


Critical Question Summary

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**.



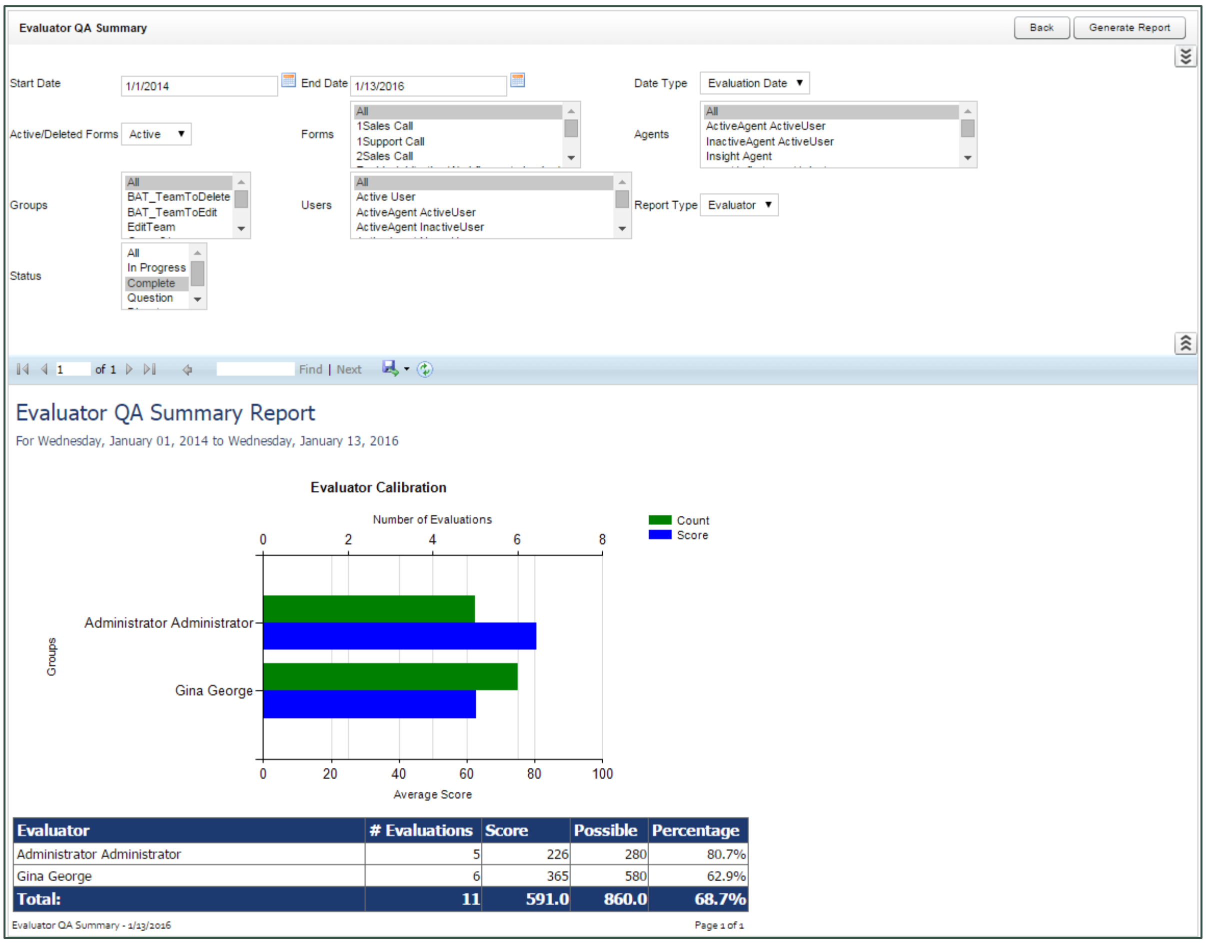
Form	Agent	Record ID	Recording Date	Evaluated By	Evaluation Date	Score
Customer Service Evaluation	Administrator, Uptivity	22388	09/09/15	Vicki Hardwick	09/09/2015	140.0 of 140.0 (100.0%)
Customer Service Evaluation	Administrator, Uptivity	13256	09/12/15	Abe Capote	09/12/2015	120.0 of 140.0 (85.7%)
Customer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

Evaluator QA Summary

The **Evaluator QA Summary** displays results of one or more evaluator's QA performance over a selected period of time. It can be used to 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.

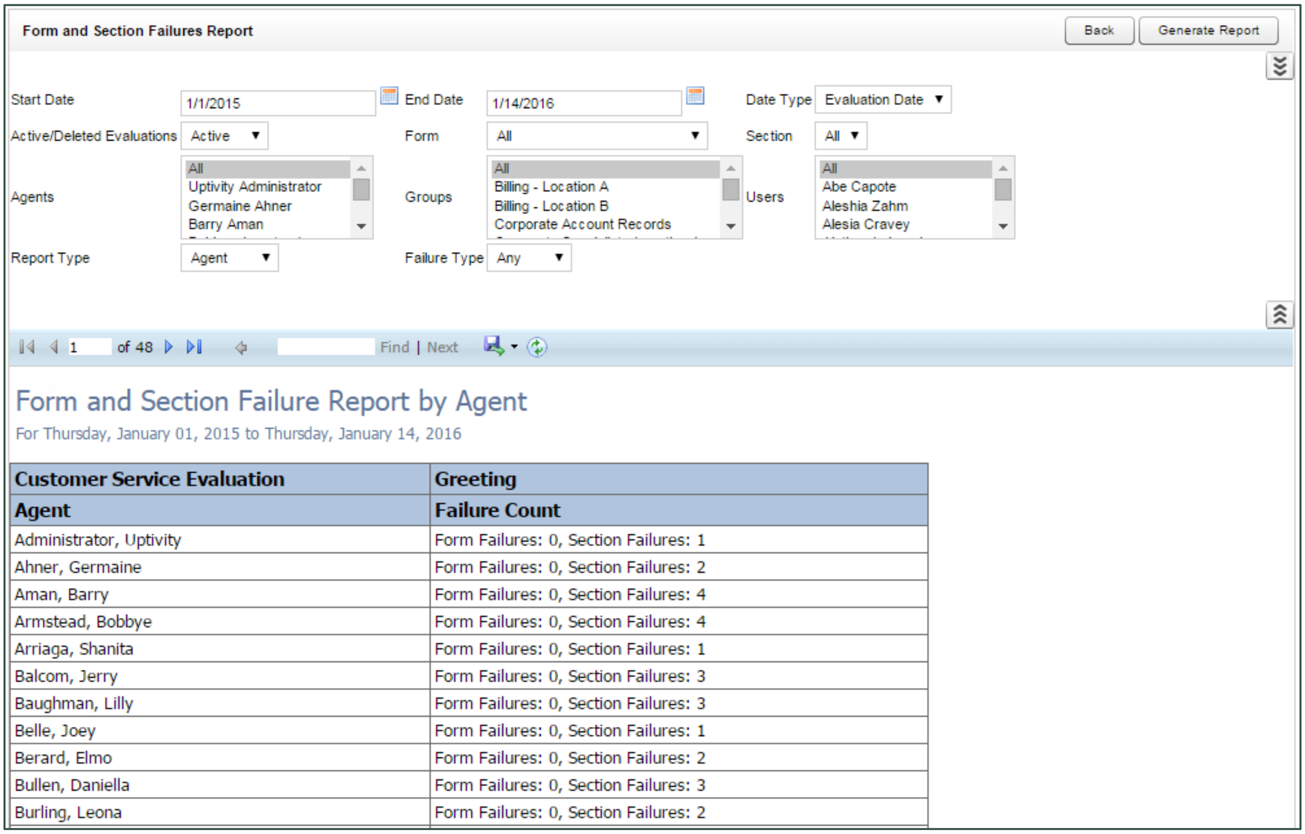
Report results are limited to groups to which you have access, even if you select **All**.



Evaluator	# Evaluations	Score	Possible	Percentage
Administrator Administrator	5	226	280	80.7%
Gina George	6	365	580	62.9%
Total:	**11**	**591.0**	**860.0**	**68.7%**

Form and Section Failures Report

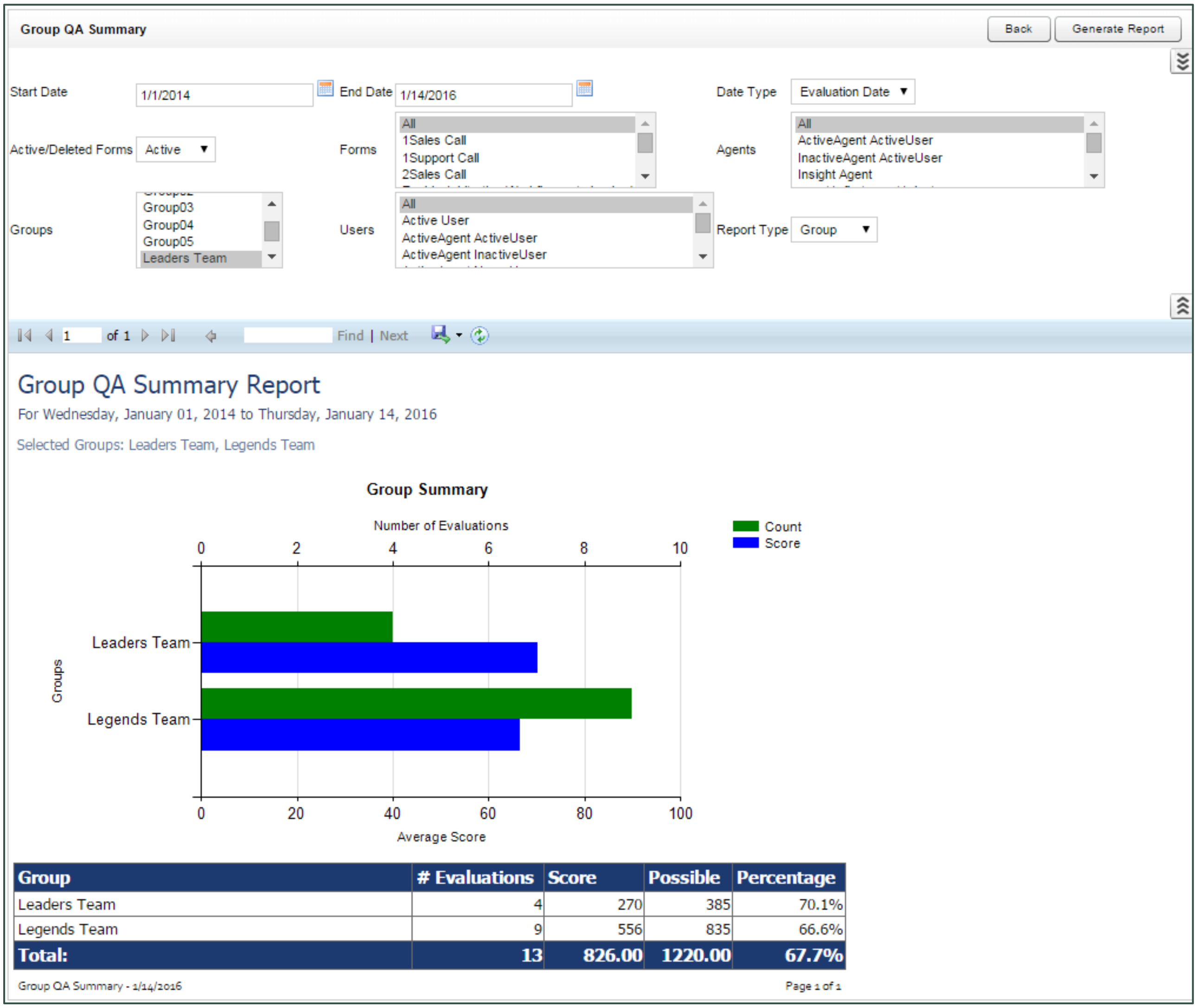
The **Form and Section Failures Report** displays failure points in one or more forms over a selected period of time. The top section shows a summary of the total number of form and/or section failures per agent; the lower section supplies the detail of the failure(s). Report results are limited to groups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



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

Group QA Summary

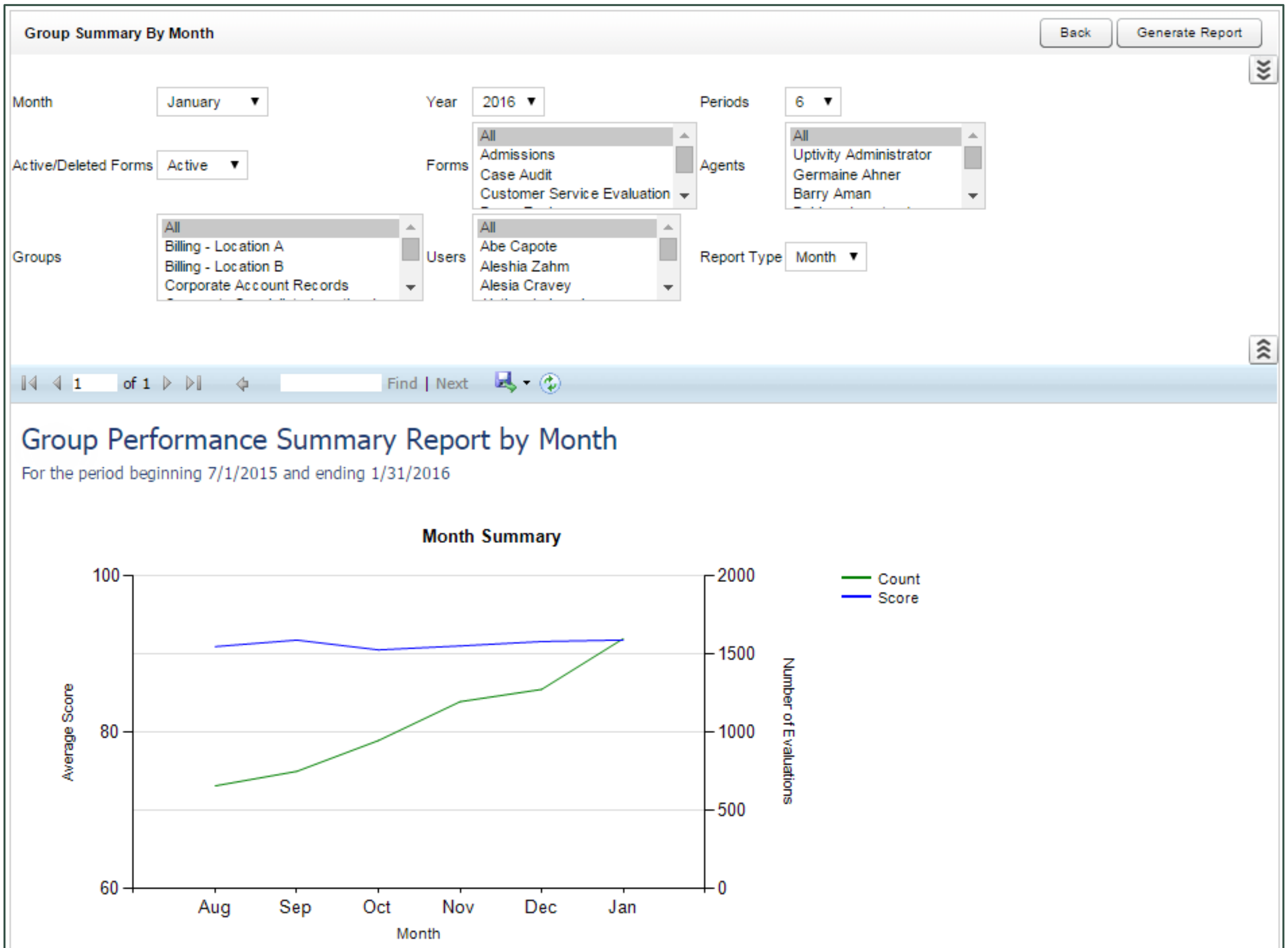
The **Group QA Summary** displays performance of one or more group(s) on one or more form(s) over a period of time. You can drill down for more granular data on Report Type (Group, Form, Section, and Question). Report results are limited to groups to which you have access, even if you select **All**.



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

Group 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**.

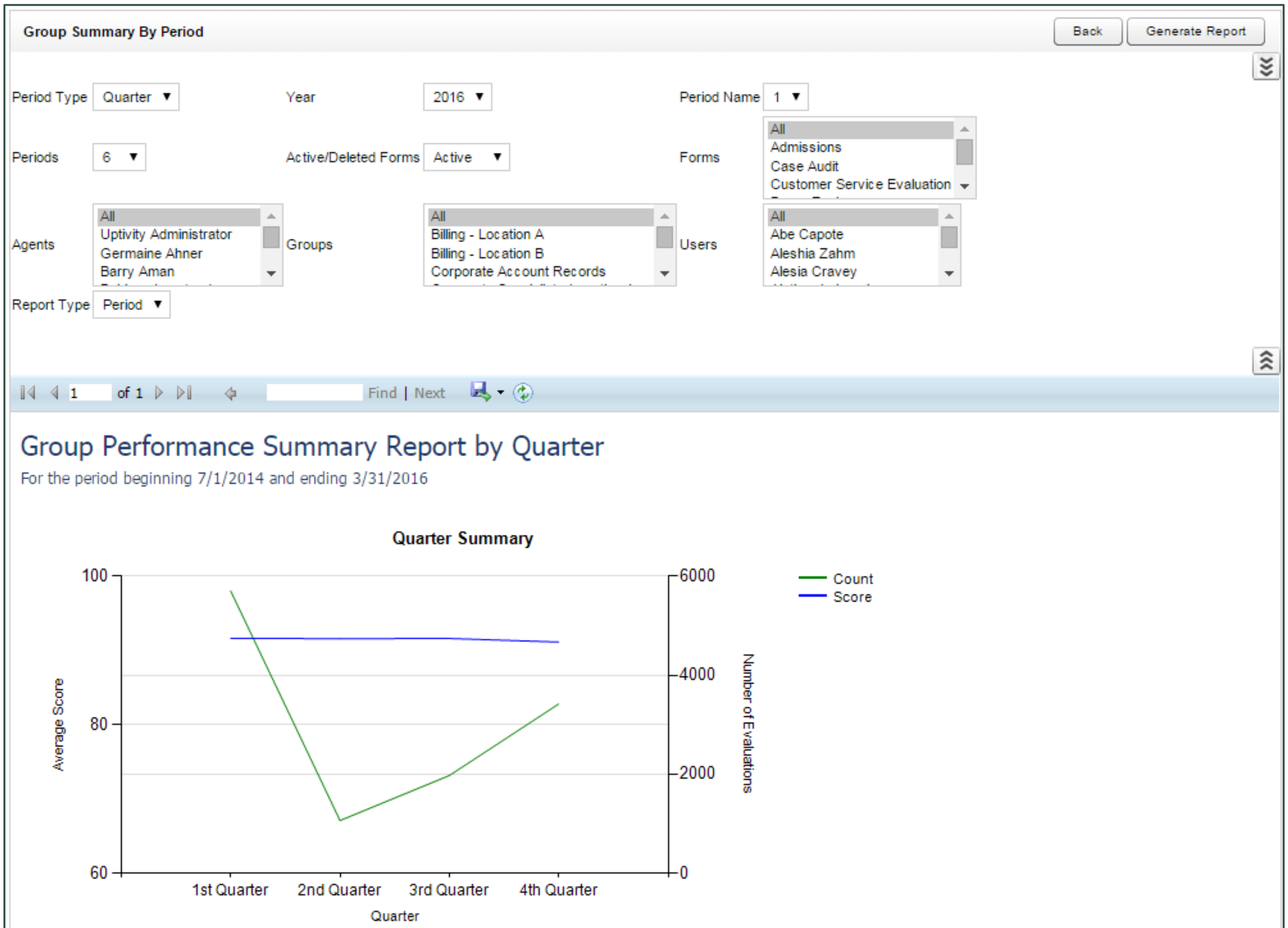


Month	# Evaluations	Score	Possible Score	Percentage
August	656	66470	73055	91.0%
September	749	77477	84385	91.8%
October	947	95879	105865	90.6%
November	1196	123774	135915	91.1%
December	1275	131287	143270	91.6%
January	1600	164565	179215	91.8%
Total:	**6423**	**659452.00**	**721705.00**	**91.4%**

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

Group Summary by Period

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

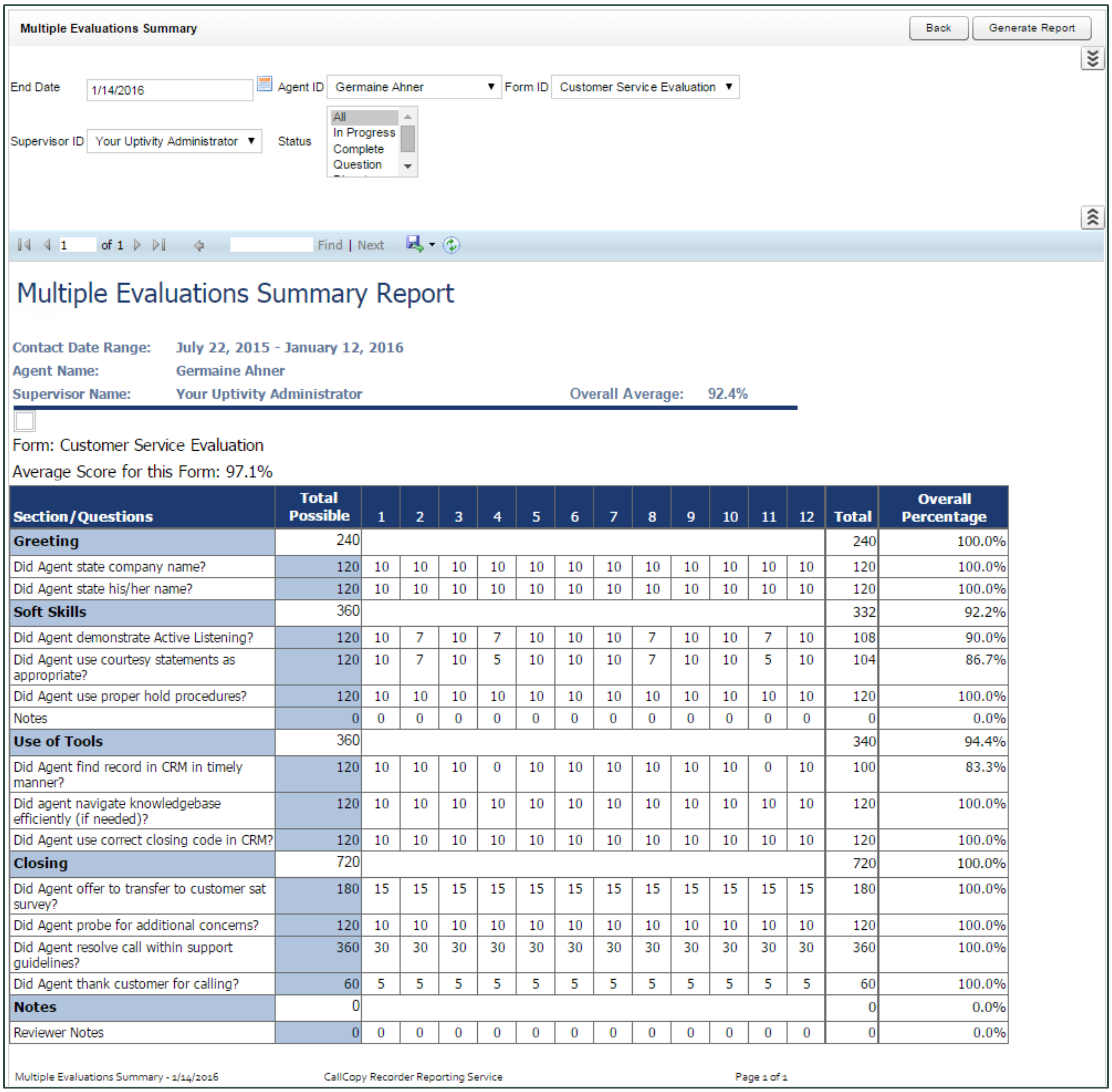


Quarter	Year	# Evaluations	Score	Possible Score	Percentage
1st Quarter	2015	5704	585521	638950	91.6%
2nd Quarter	2015	1059	109909	119985	91.6%
3rd Quarter	2015	1971	203448	222055	91.6%
4th Quarter	2015	3418	350940	385050	91.1%
Total:		**12152**	**1249818.00**	**1366040.00**	**91.5%**

Multiple Evaluations Summary

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

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


Multiple Evaluations Summary
Back | Generate Report
End Date 1/14/2016 | Agent ID Germaine Ahner | Form ID Customer Service Evaluation
Supervisor ID Your Uptivity Administrator | Status All, In Progress, Complete, Question
1 of 1 Find | Next

Multiple Evaluations Summary Report

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

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

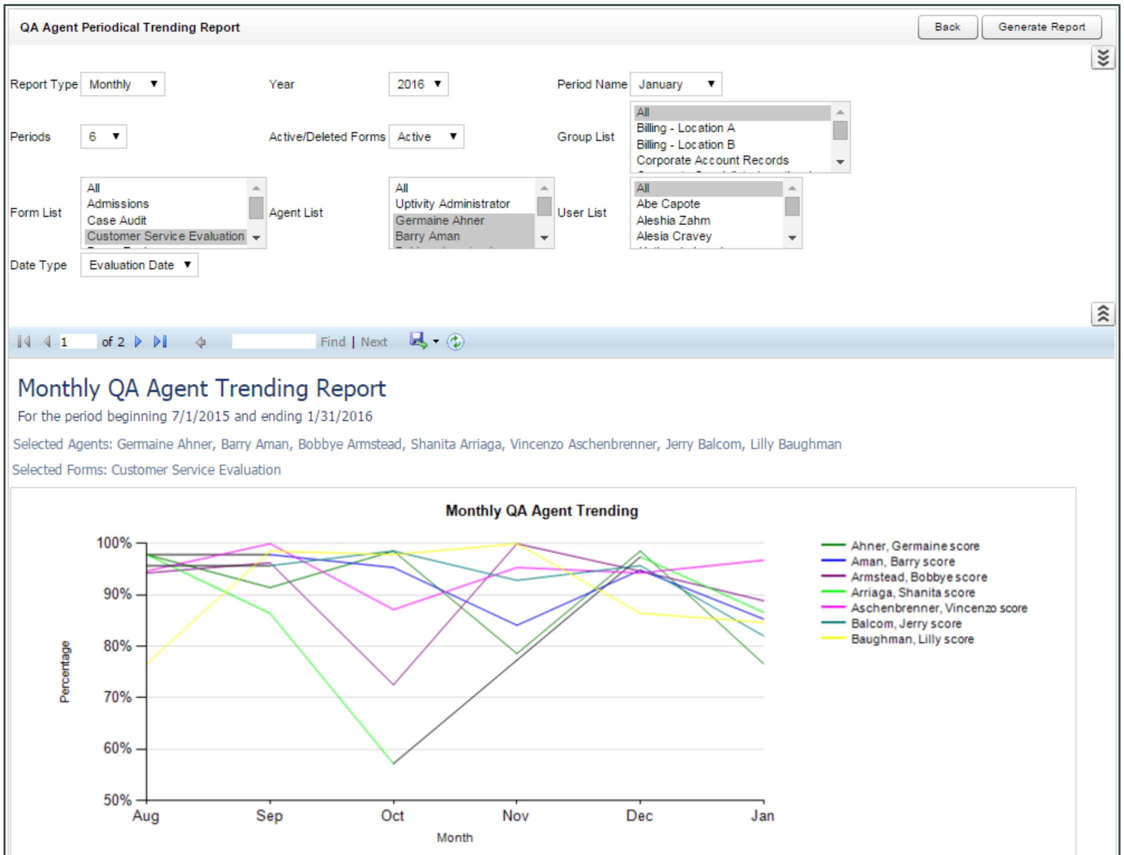
Section/Questions	Total Possible	1	2	3	4	5	6	7	8	9	10	11	12	Total	Overall Percentage
Greeting	240													240	100.0%
Did Agent state company name?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did Agent state his/her name?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Soft Skills	360													332	92.2%
Did Agent demonstrate Active Listening?	120	10	7	10	7	10	10	10	7	10	10	7	10	108	90.0%
Did Agent use courtesy statements as appropriate?	120	10	7	10	5	10	10	10	7	10	10	5	10	104	86.7%
Did Agent use proper hold procedures?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Notes	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%
Use of Tools	360													340	94.4%
Did Agent find record in CRM in timely manner?	120	10	10	10	0	10	10	10	10	10	10	0	10	100	83.3%
Did agent navigate knowledgebase efficiently (if needed)?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did Agent use correct closing code in CRM?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Closing	720													720	100.0%
Did Agent offer to transfer to customer sat survey?	180	15	15	15	15	15	15	15	15	15	15	15	15	180	100.0%
Did Agent probe for additional concerns?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did Agent resolve call within support guidelines?	360	30	30	30	30	30	30	30	30	30	30	30	30	360	100.0%
Did Agent thank customer for calling?	60	5	5	5	5	5	5	5	5	5	5	5	5	60	100.0%
Notes	0													0	0.0%
Reviewer Notes	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%

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

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**.



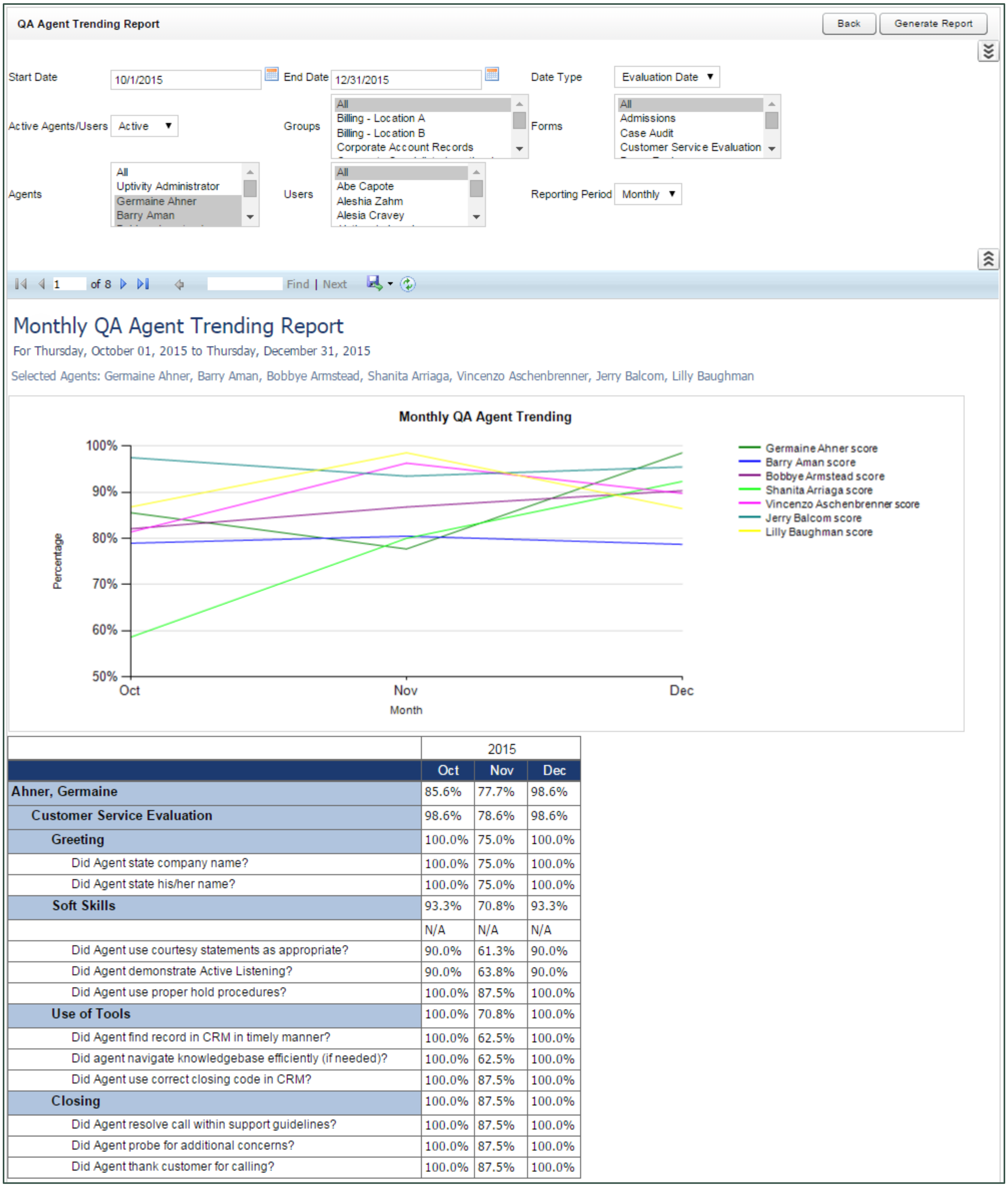
Customer Service Evaluation	Aug	Sep	Oct	Nov	Dec	Jan
Greeting	96.0%	95.2%	88.1%	91.1%	96.4%	81.8%
Soft Skills	84.3%	88.8%	77.8%	85.9%	85.2%	77.9%
Use of Tools	90.1%	92.7%	79.0%	86.8%	92.4%	78.6%
Closing	96.0%	99.6%	94.6%	97.5%	99.7%	94.8%
Notes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Greeting	Aug	Sep	Oct	Nov	Dec	Jan
Ahner, Germaine	100.0%	100.0%	100.0%	75.0%	100.0%	80.0%
Aman, Barry		100.0%	100.0%	71.4%	100.0%	71.4%
Armstead, Bobbye	100.0%	100.0%	50.0%	100.0%	100.0%	91.7%
Arriaga, Shanita	100.0%	66.7%	66.7%		100.0%	75.0%
Aschenbrenner, Vincenzo	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Balcom, Jerry		100.0%	100.0%	100.0%	100.0%	66.7%
Baughman, Lilly	80.0%	100.0%	100.0%	100.0%	75.0%	87.5%

Soft Skills	Aug	Sep	Oct	Nov	Dec	Jan
Ahner, Germaine	90.0%	82.2%	93.3%	70.8%	93.3%	70.7%
Aman, Barry		90.0%	86.7%	78.1%	82.7%	79.0%
Armstead, Bobbye	87.6%	89.3%	63.3%	100.0%	79.2%	74.4%

QA Agent Trending Report

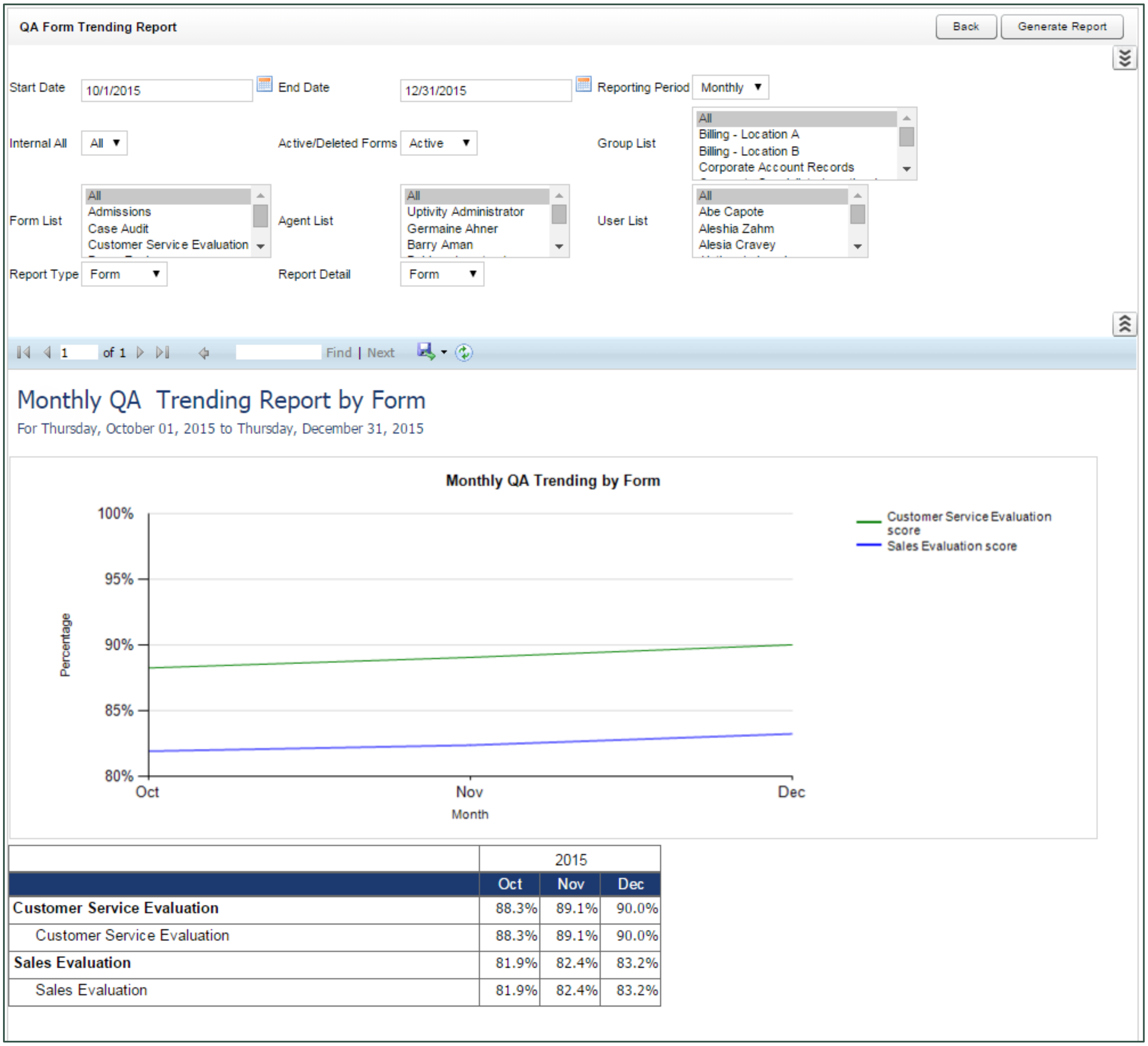
The **QA Agent Trending Report** summarizes an agent's performance on a particular form over a period of time. Performance can be broken down on a section-by-section, and question-by-question basis, depending on how the QA evaluation form was created. Report results are limited to groups to which you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



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

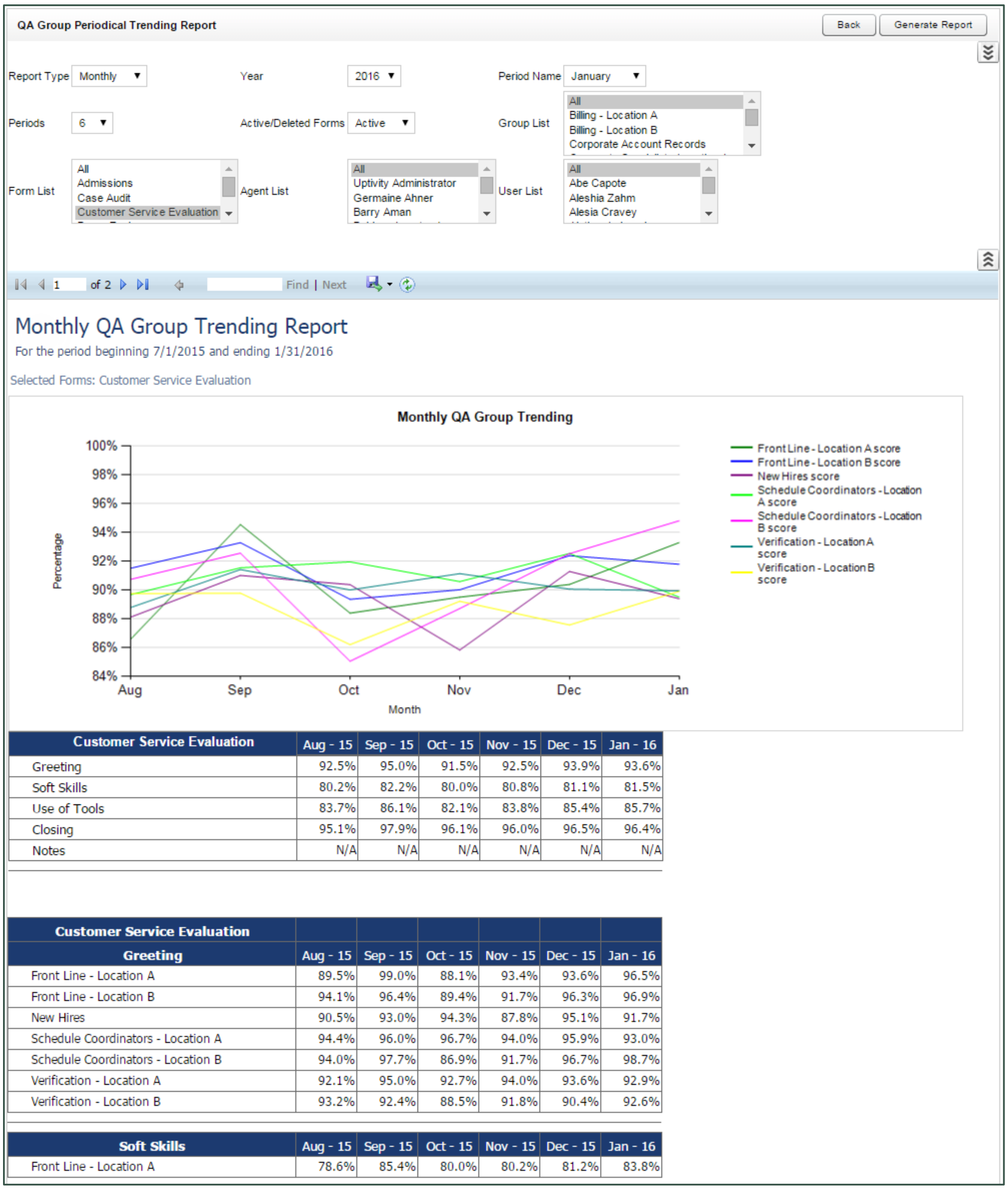
QA Form Trending Report

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



QA 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.



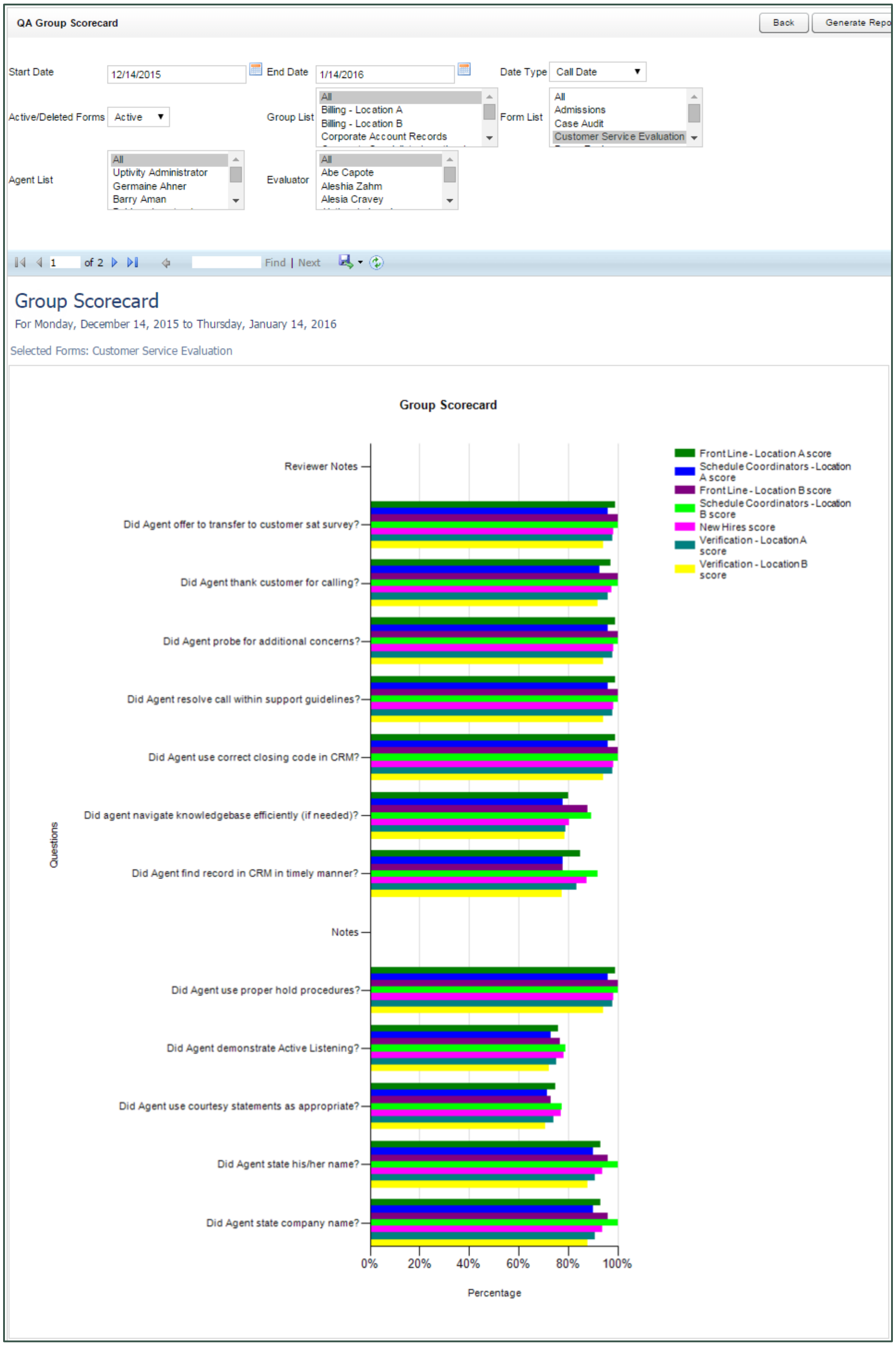
Customer Service Evaluation	Aug - 15	Sep - 15	Oct - 15	Nov - 15	Dec - 15	Jan - 16
Greeting	92.5%	95.0%	91.5%	92.5%	93.9%	93.6%
Soft Skills	80.2%	82.2%	80.0%	80.8%	81.1%	81.5%
Use of Tools	83.7%	86.1%	82.1%	83.8%	85.4%	85.7%
Closing	95.1%	97.9%	96.1%	96.0%	96.5%	96.4%
Notes	N/A	N/A	N/A	N/A	N/A	N/A

Customer Service Evaluation						
Greeting	**Aug - 15**	**Sep - 15**	**Oct - 15**	**Nov - 15**	**Dec - 15**	**Jan - 16**
Front Line - Location A	89.5%	99.0%	88.1%	93.4%	93.6%	96.5%
Front Line - Location B	94.1%	96.4%	89.4%	91.7%	96.3%	96.9%
New Hires	90.5%	93.0%	94.3%	87.8%	95.1%	91.7%
Schedule Coordinators - Location A	94.4%	96.0%	96.7%	94.0%	95.9%	93.0%
Schedule Coordinators - Location B	94.0%	97.7%	86.9%	91.7%	96.7%	98.7%
Verification - Location A	92.1%	95.0%	92.7%	94.0%	93.6%	92.9%
Verification - Location B	93.2%	92.4%	88.5%	91.8%	90.4%	92.6%

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

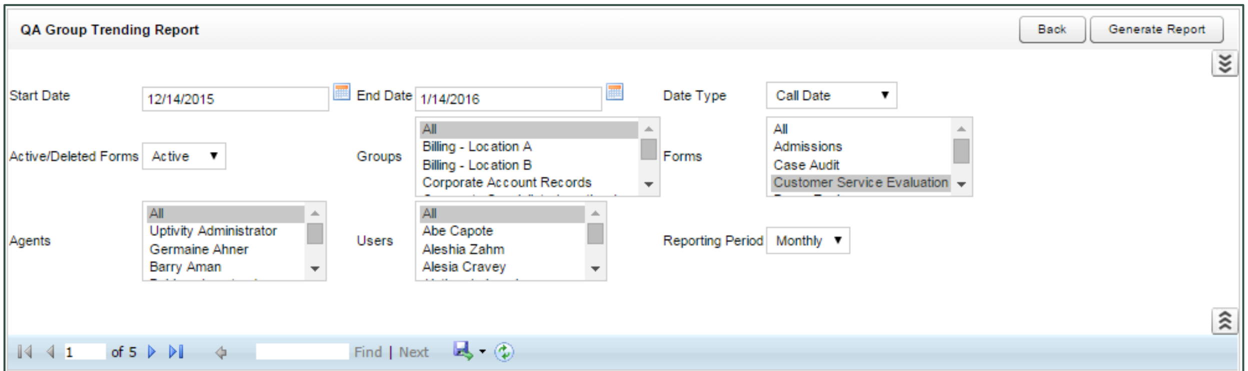
QA Group Scorecard

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



QA Group Trending Report

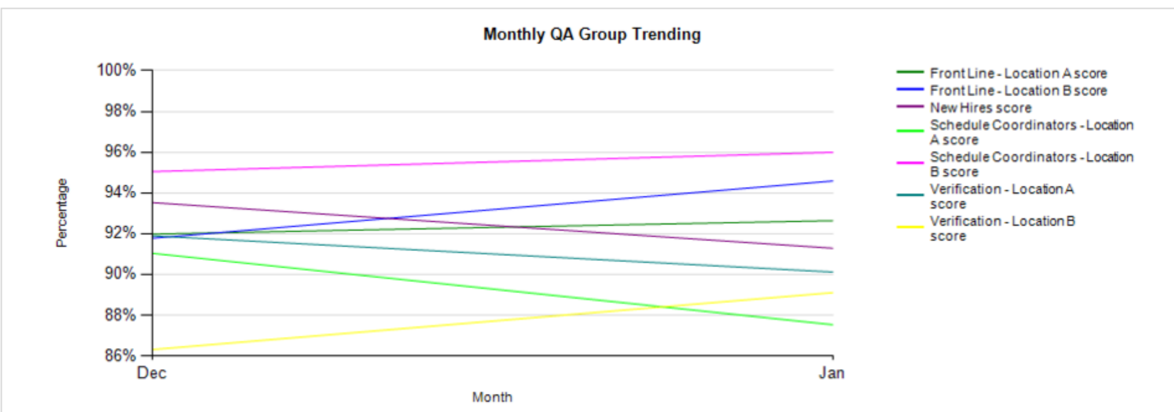
The **QA Group Trending Report** displays a group-by-group comparison of results for a QA form, at a per-question level. Data is compared daily, weekly, monthly, or yearly based on your selections for a specific period of time.



Monthly QA Group Trending Report

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

Selected Forms: Customer Service Evaluation

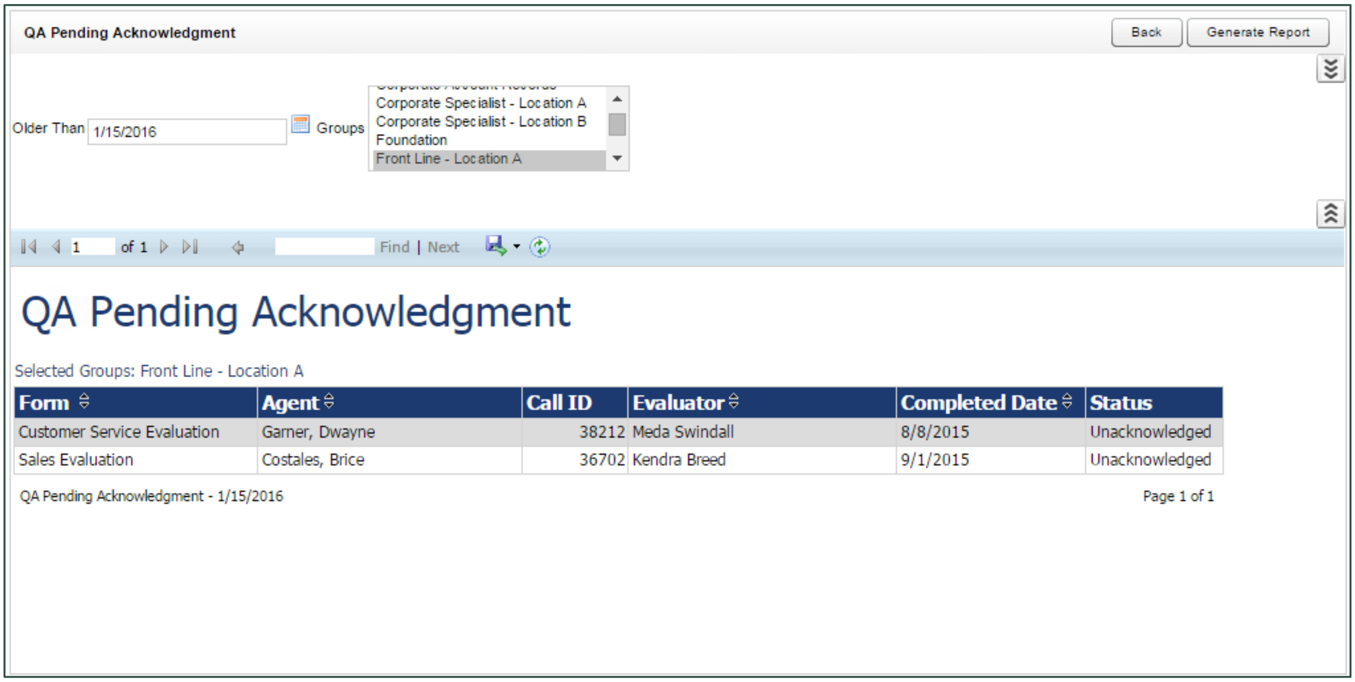


	2015	2016
	Dec	Jan
Front Line - Location A	93.7%	93.3%
Customer Service Evaluation	93.7%	93.3%
Greeting	98.9%	95.4%
Did Agent state company name?	100.0%	100.0%
Did Agent state his/her name?	97.8%	90.7%
Soft Skills	84.6%	83.8%
Did Agent use courtesy statements as appropriate?	76.1%	75.4%
Did Agent demonstrate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

QA Pending Acknowledgment

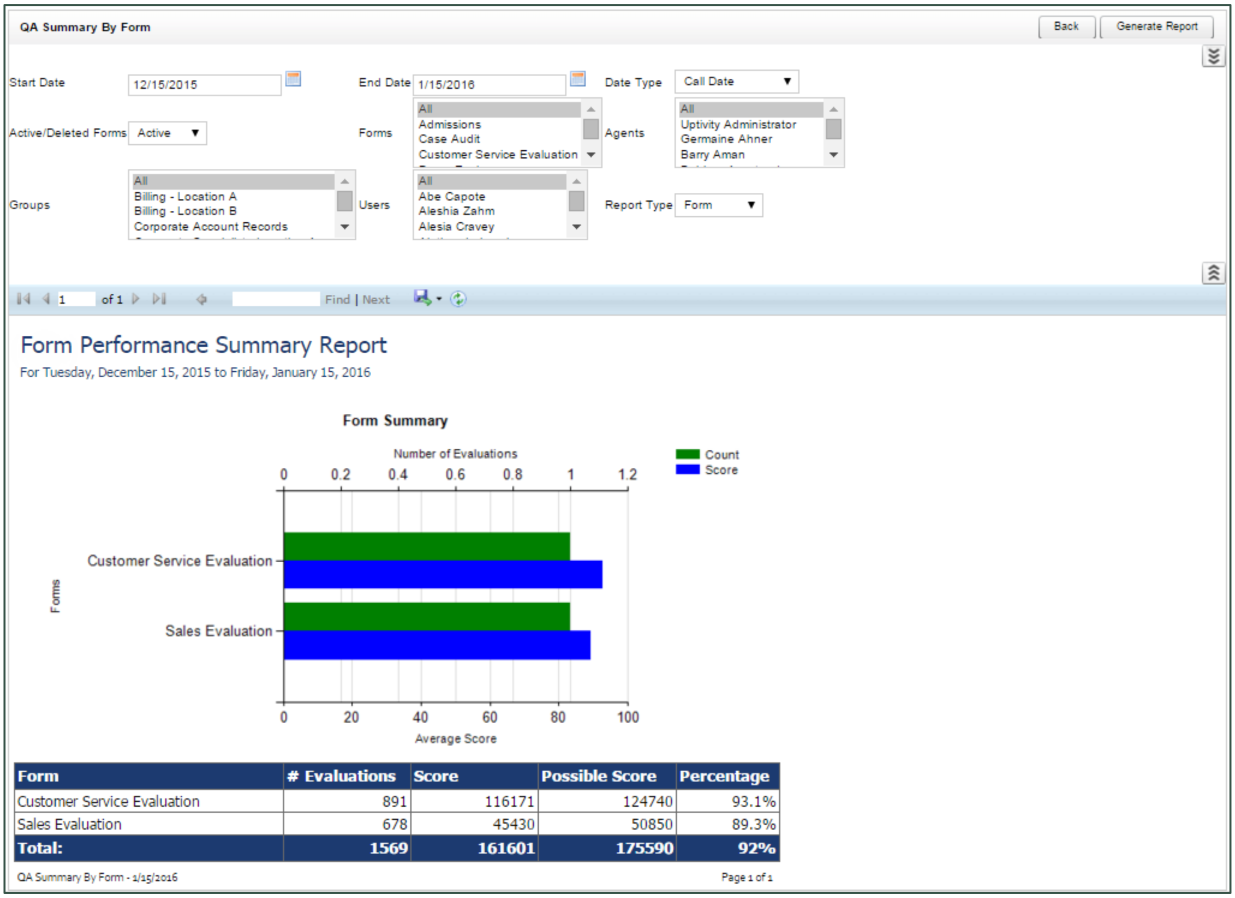
The **QA Pending Acknowledgment** report displays a list of unacknowledged QA evaluations on an agent-by-agent and form-by-form basis. This report is only needed if you use the acknowledgment-only or acknowledgment and arbitration workflows. For more information, see the *inContact WFO QM Manual* or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

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



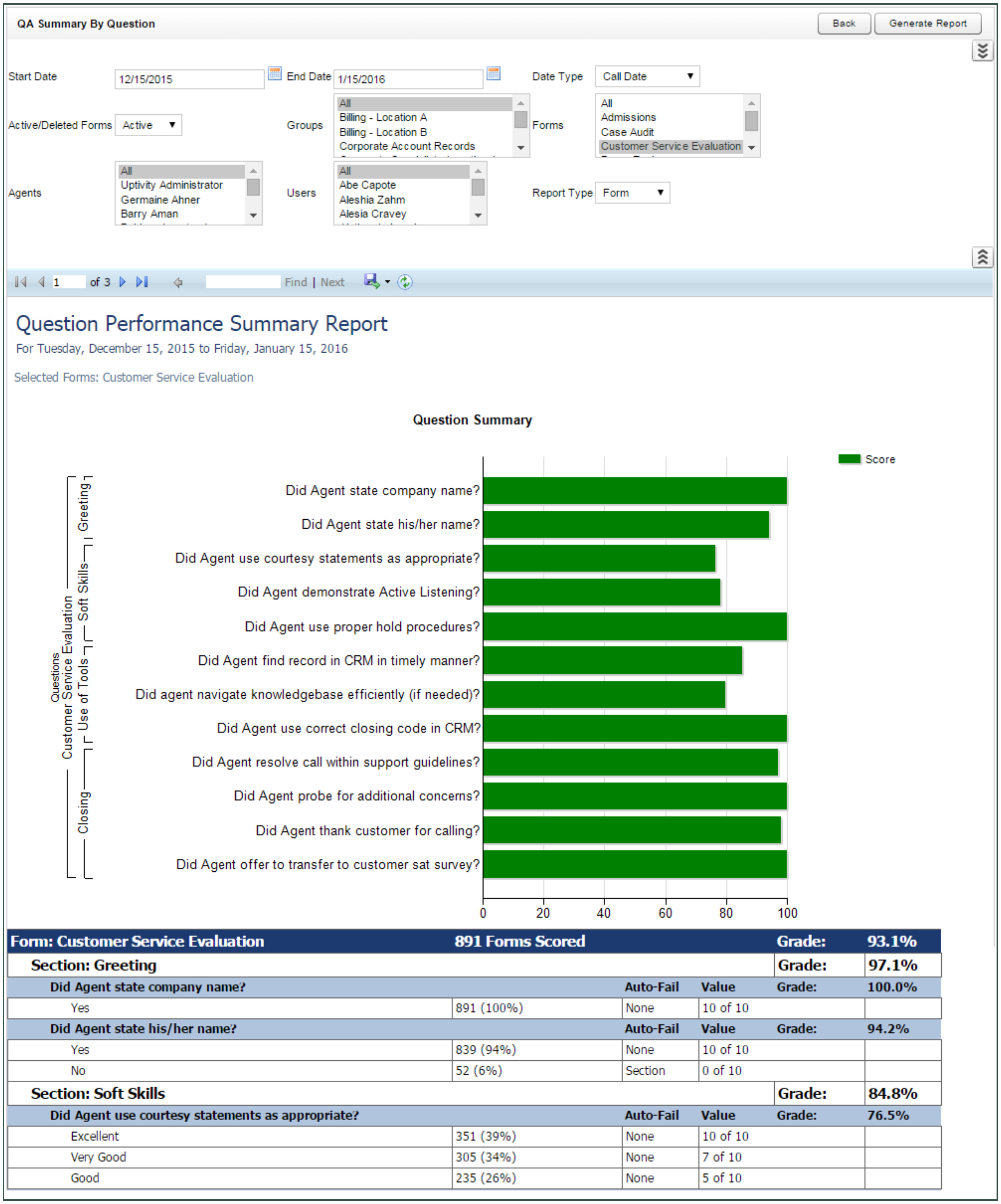
QA Summary by Form

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



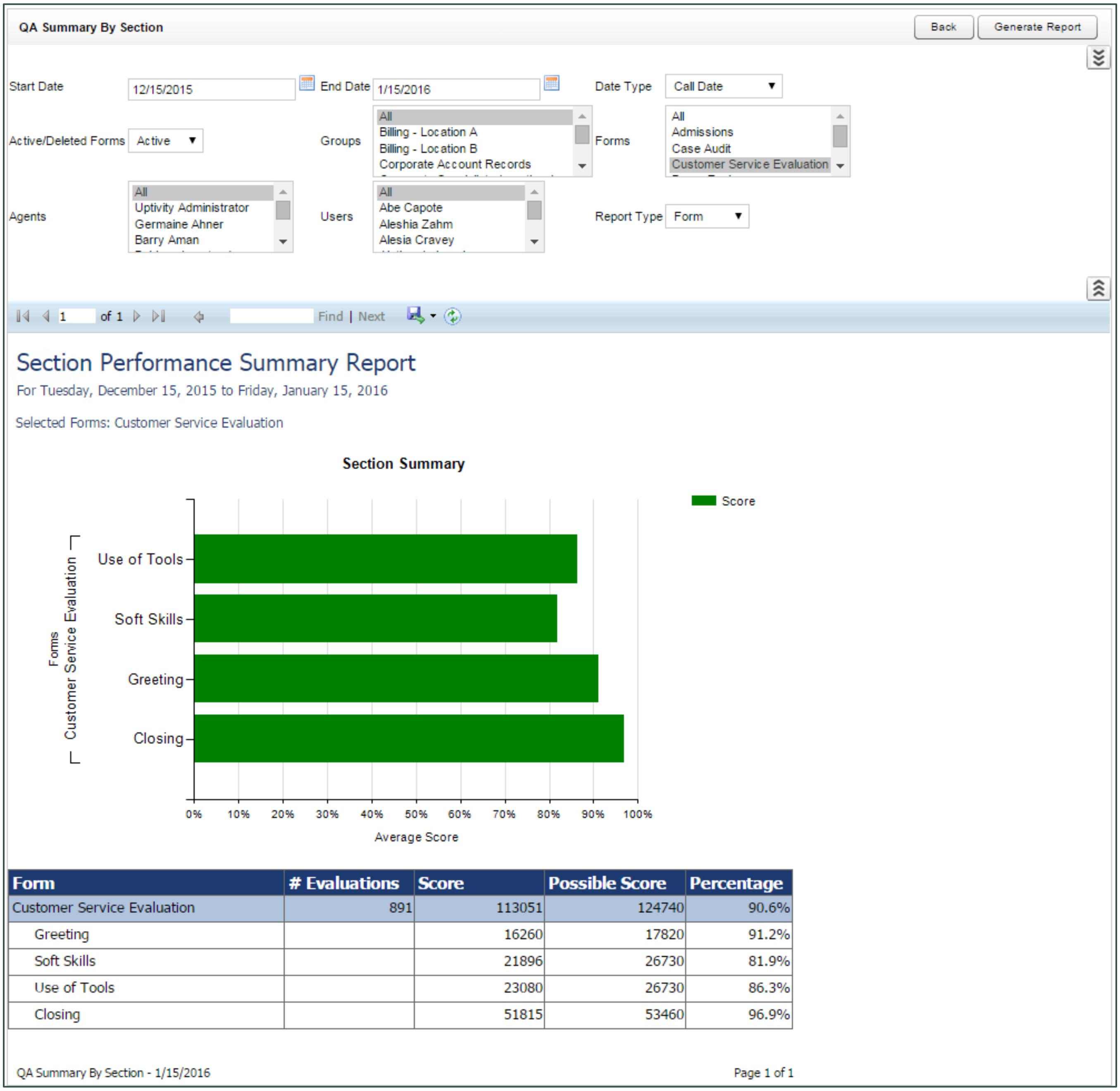
QA Summary by Question

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



QA Summary by Section

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

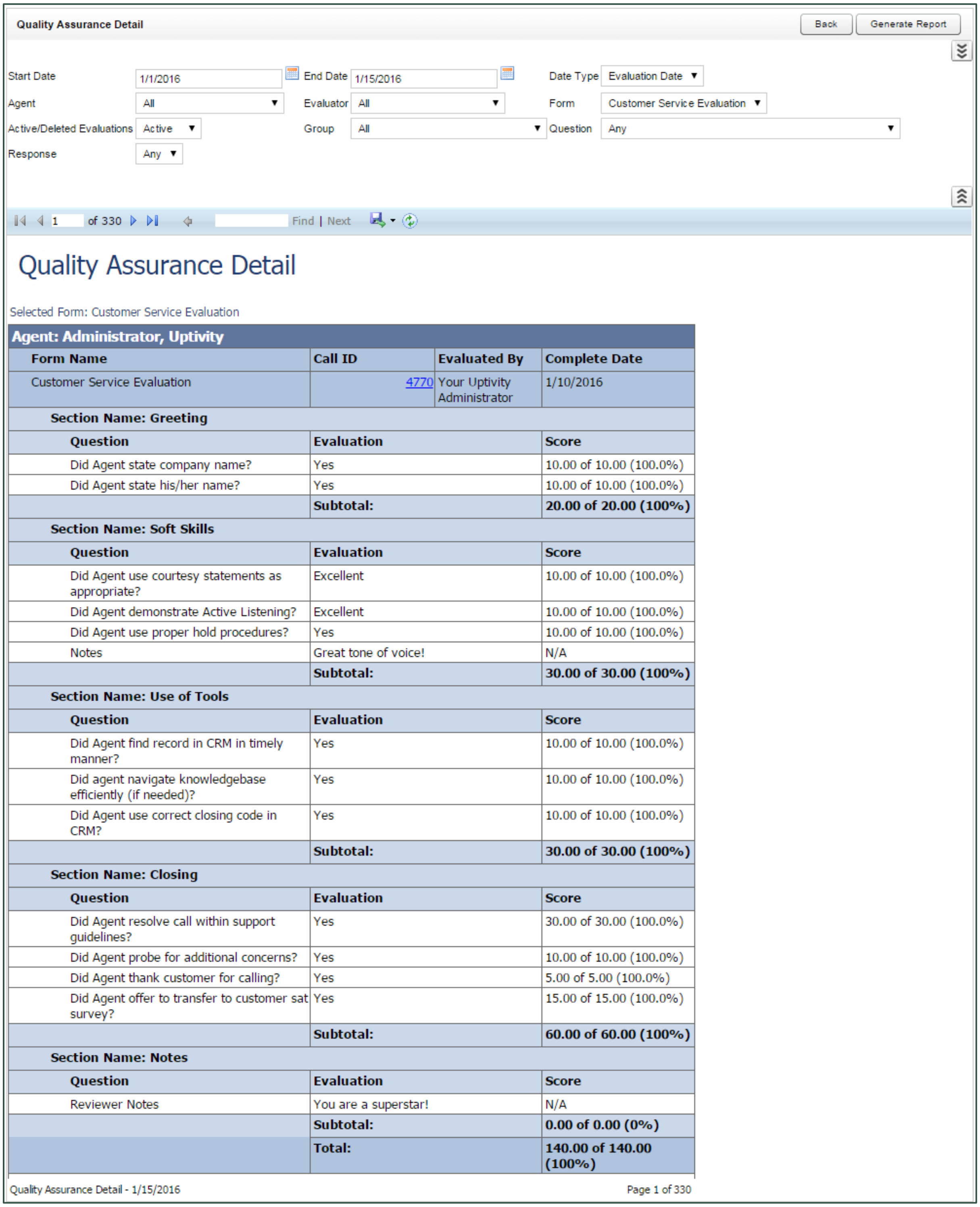


Form	# Evaluations	Score	Possible Score	Percentage
Customer Service Evaluation	891	113051	124740	90.6%
Greeting		16260	17820	91.2%
Soft Skills		21896	26730	81.9%
Use of Tools		23080	26730	86.3%
Closing		51815	53460	96.9%

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

Quality Assurance Detail

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


Quality Assurance Detail

Back | Generate Report

Start Date 1/1/2016 | End Date 1/15/2016 | Date Type Evaluation Date
Agent All | Evaluator All | Form Customer Service Evaluation
Active/Deleted Evaluations Active | Group All | Question Any
Response Any

1 of 330 Find | Next

Quality Assurance Detail

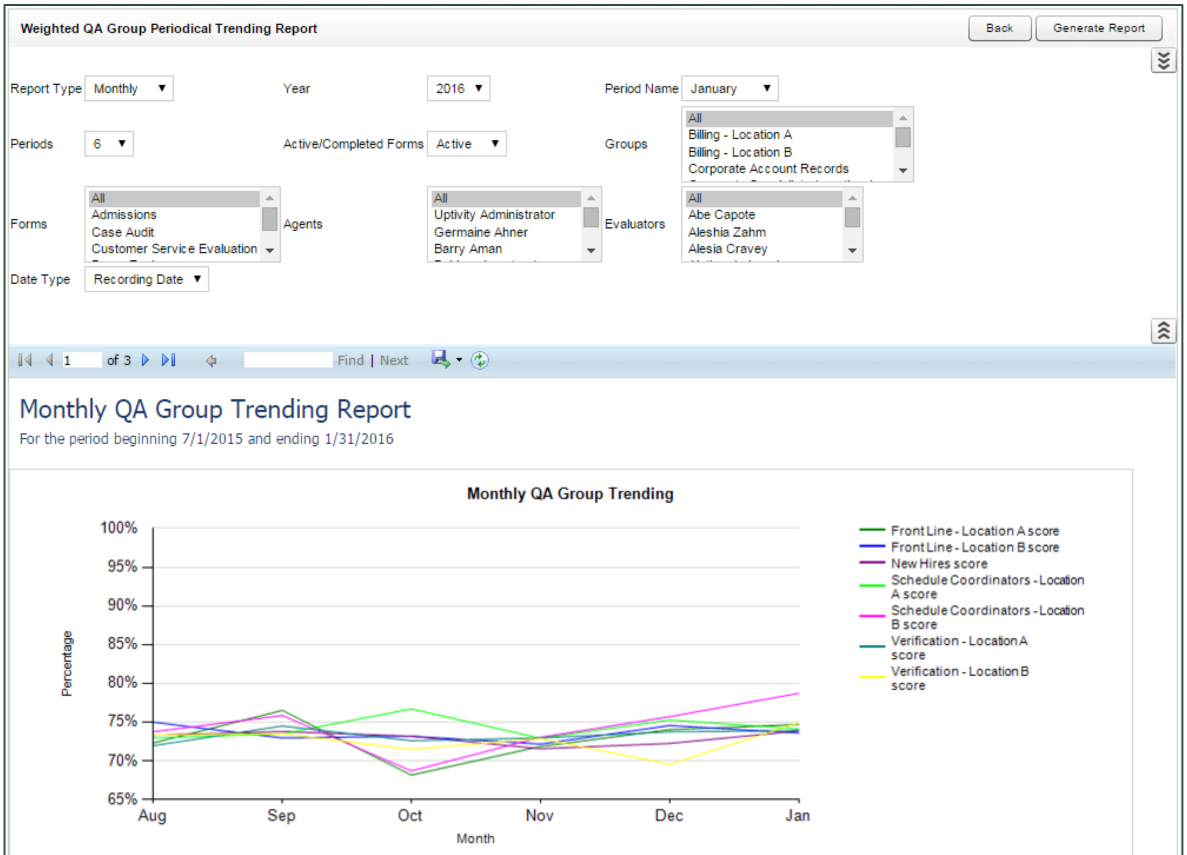
Selected Form: Customer Service Evaluation

Agent: Administrator, Uptivity			
Form Name	**Call ID**	**Evaluated By**	**Complete Date**
Customer Service Evaluation	4770	Your Uptivity Administrator	1/10/2016
Section Name: Greeting			
Question	**Evaluation**		**Score**
Did Agent state company name?	Yes		10.00 of 10.00 (100.0%)
Did Agent state his/her name?	Yes		10.00 of 10.00 (100.0%)
	Subtotal:		**20.00 of 20.00 (100%)**
Section Name: Soft Skills			
Question	**Evaluation**		**Score**
Did Agent use courtesy statements as appropriate?	Excellent		10.00 of 10.00 (100.0%)
Did Agent demonstrate Active Listening?	Excellent		10.00 of 10.00 (100.0%)
Did Agent use proper hold procedures?	Yes		10.00 of 10.00 (100.0%)
Notes	Great tone of voice!		N/A
	Subtotal:		**30.00 of 30.00 (100%)**
Section Name: Use of Tools			
Question	**Evaluation**		**Score**
Did Agent find record in CRM in timely manner?	Yes		10.00 of 10.00 (100.0%)
Did agent navigate knowledgebase efficiently (if needed)?	Yes		10.00 of 10.00 (100.0%)
Did Agent use correct closing code in CRM?	Yes		10.00 of 10.00 (100.0%)
	Subtotal:		**30.00 of 30.00 (100%)**
Section Name: Closing			
Question	**Evaluation**		**Score**
Did Agent resolve call within support guidelines?	Yes		30.00 of 30.00 (100.0%)
Did Agent probe for additional concerns?	Yes		10.00 of 10.00 (100.0%)
Did Agent thank customer for calling?	Yes		5.00 of 5.00 (100.0%)
Did Agent offer to transfer to customer sat survey?	Yes		15.00 of 15.00 (100.0%)
	Subtotal:		**60.00 of 60.00 (100%)**
Section Name: Notes			
Question	**Evaluation**		**Score**
Reviewer Notes	You are a superstar!		N/A
	Subtotal:		**0.00 of 0.00 (0%)**
	Total:		**140.00 of 140.00 (100%)**

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

Weighted QA Group Periodical Trending Report

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



Customer Service Evaluation	Aug	Sep	Oct	Nov	Dec	Jan
Greeting	89.5%	92.2%	86.2%	87.9%	89.9%	91.0%
Soft Skills	79.6%	82.4%	80.5%	80.3%	80.2%	81.7%
Use of Tools	83.0%	86.2%	82.4%	83.3%	84.3%	85.8%
Closing	94.8%	98.1%	96.2%	95.5%	95.8%	96.6%
Notes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Sales Evaluation	Aug	Sep	Oct	Nov	Dec	Jan
Greeting	91.6%	89.3%	89.6%	92.4%	91.4%	93.6%
Sales Skills	80.4%	75.0%	75.0%	75.6%	73.9%	77.6%
Documentation	67.2%	73.6%	70.2%	69.6%	73.2%	73.8%

Greeting	Aug	Sep	Oct	Nov	Dec	Jan
Front Line - Location A	85.5%	97.4%	77.7%	89.8%	90.7%	92.7%
Front Line - Location B	88.2%	92.3%	84.5%	85.7%	91.2%	96.4%
New Hires	88.0%	88.1%	91.8%	79.1%	89.9%	88.0%
Schedule Coordinators - Location A	91.2%	96.1%	97.5%	89.1%	93.2%	90.7%
Schedule Coordinators - Location B	95.2%	97.4%	83.3%	84.5%	96.3%	97.2%
Verification - Location A	88.6%	91.4%	85.5%	89.8%	90.7%	89.4%
Verification - Location B	90.3%	88.3%	82.4%	90.9%	82.6%	90.0%

Weighted QA Group Periodical Trending Report - 1/15/2016 Page 1 of 3

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:

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

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-by-section and question-by-question basis, how each participating evaluator scored the designated call. Depending on the number of questions on the form, and the number of evaluators, this report may run to several pages in length for a single calibration.

You must complete all fields to run this report.

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

Calibration Evaluator Comparison Report

Back | Generate Report

Call Record Id 1825 | Form Id 49 | Evaluation Start Date 4/1/2015

Evaluation End Date 4/30/2015

1 of 3 | Find | Next

Calibration Evaluator Comparison Report

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

Evaluator	Evaluation ID	Points	Possible Points	%
Eddy, Cheryl	107	85.00	100.00	85.00%
George, Gina	105	75.00	100.00	75.00%
Hessler, Jessica	108	85.00	100.00	85.00%
Ward, Rae	106	75.00	100.00	75.00%

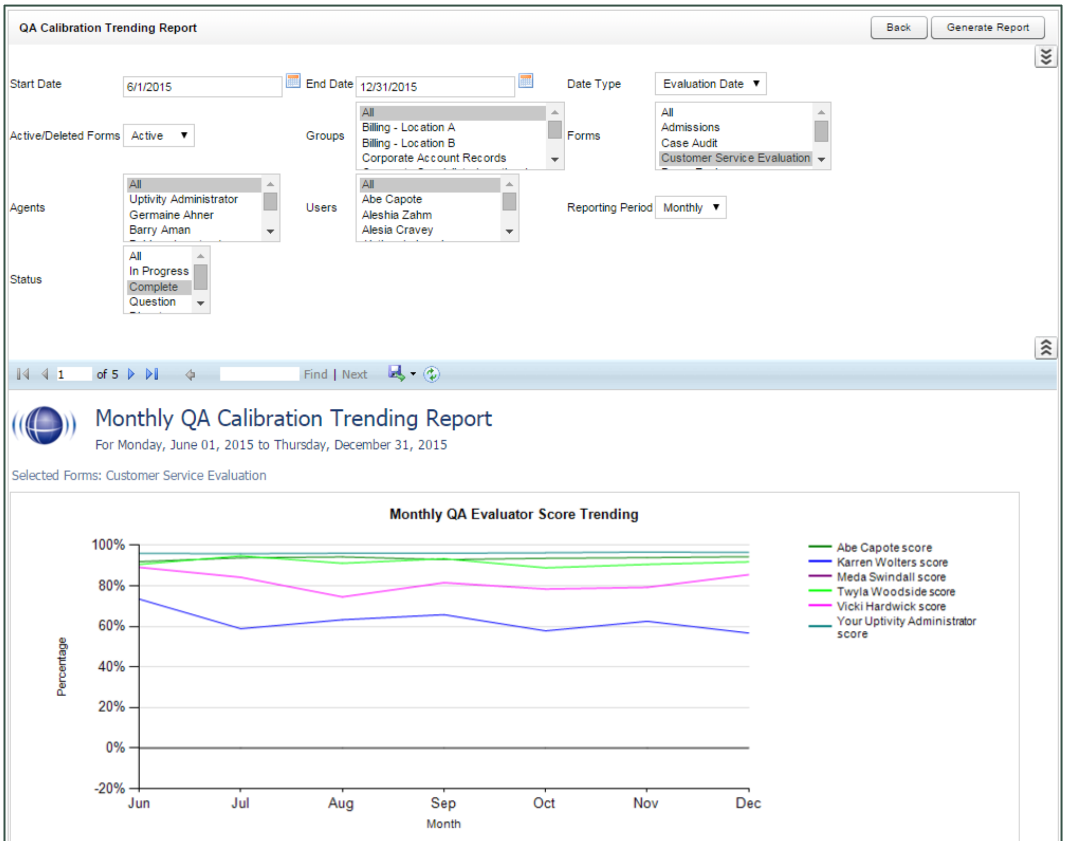
1Support Call			
Opening			
Proper introduction?		**Possible Points: #**	**10.00**
Evaluation ID	**Evaluator**	**Response**	
107	Eddy, Cheryl	Yes	10.00
105	George, Gina	Yes	10.00
108	Hessler, Jessica	Yes	10.00
106	Ward, Rae	Yes	10.00
Ask for caller's name?		**Possible Points: #**	**10.00**
Evaluation ID	**Evaluator**	**Response**	
107	Eddy, Cheryl	Yes	10.00
105	George, Gina	Yes	10.00
108	Hessler, Jessica	Yes	10.00
106	Ward, Rae	Yes	10.00
Restate problem to ensure understanding?		**Possible Points: #**	**10.00**
Evaluation ID	**Evaluator**	**Response**	
107	Eddy, Cheryl	Yes	10.00
105	George, Gina	No	0.00
108	Hessler, Jessica	No	0.00
106	Ward, Rae	Yes	10.00
Comments:		**Possible Points: #**	**0.00**
Evaluation ID	**Evaluator**	**Response**	
107	Eddy, Cheryl		0.00
105	George, Gina	Restated but missed part of issue.	0.00
108	Hessler, Jessica		0.00
106	Ward, Rae		0.00
Communication Skills			
Technical language at caller's level of understanding?		**Possible Points: #**	**10.00**
Evaluation ID	**Evaluator**	**Response**	
107	Eddy, Cheryl	Yes	10.00
105	George, Gina	Yes	10.00
108	Hessler, Jessica	Yes	10.00
106	Ward, Rae	Yes	10.00
Pace and enunciation clear and understandable?		**Possible Points: #**	**10.00**
Evaluation ID	**Evaluator**	**Response**	
107	Eddy, Cheryl	Yes	10.00

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

QA Calibration Trending Report

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

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



	2015						
	Jun	**Jul**	**Aug**	**Sep**	**Oct**	**Nov**	**Dec**
Abe Capote	92.0%	93.9%	94.3%	93.0%	93.7%	93.9%	94.4%
Customer Service Evaluation	92.0%	93.9%	94.3%	93.0%	93.7%	93.9%	94.4%
Greeting	97.7%	98.5%	98.6%	98.8%	98.0%	96.9%	98.5%
Did Agent state company name?	97.7%	98.5%	98.6%	98.8%	98.0%	96.9%	98.5%
Did Agent state his/her name?	97.7%	98.5%	98.6%	98.8%	98.0%	96.9%	98.5%
Soft Skills	81.2%	83.4%	84.3%	81.3%	83.1%	85.6%	85.3%
Did Agent use courtesy statements as appropriate?	72.1%	73.6%	74.9%	70.6%	73.8%	77.8%	77.5%
Did Agent demonstrate Active Listening?	74.0%	76.6%	78.1%	73.5%	75.6%	79.7%	79.2%
Did Agent use proper hold procedures?	97.7%	100.0%	100.0%	100.0%	100.0%	99.2%	99.2%
Notes	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Use of Tools	87.6%	89.1%	90.3%	86.9%	88.8%	89.9%	91.2%
Did Agent find record in CRM in timely manner?	88.4%	83.6%	81.2%	83.3%	87.8%	86.8%	90.2%
Did agent navigate knowledgebase efficiently (if needed)?	76.7%	83.6%	89.9%	77.4%	78.6%	83.7%	84.1%
Did Agent use correct closing code in CRM?	97.7%	100.0%	100.0%	100.0%	100.0%	99.2%	99.2%
Closing	97.7%	100.0%	99.9%	99.9%	99.9%	99.2%	99.2%
Did Agent resolve call within support guidelines?	97.7%	100.0%	100.0%	100.0%	100.0%	99.2%	99.2%
Did Agent probe for additional concerns?	97.7%	100.0%	100.0%	100.0%	100.0%	99.2%	99.2%
Did Agent thank customer for calling?	97.7%	100.0%	98.6%	98.8%	99.0%	98.4%	99.2%

QA Calibration Trending Report - 1/15/2016 CallCopy Recorder Reporting Service Page 1 of 5

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 Call Evaluation Detail report.
- Self-Evaluator Comparison Report — allows managers to compare self-evaluations and standard evaluations for the same recorded interaction.
- Self-Evaluation Trending Report — details how agents have scored themselves on one or more self-evaluation forms over a period of time.

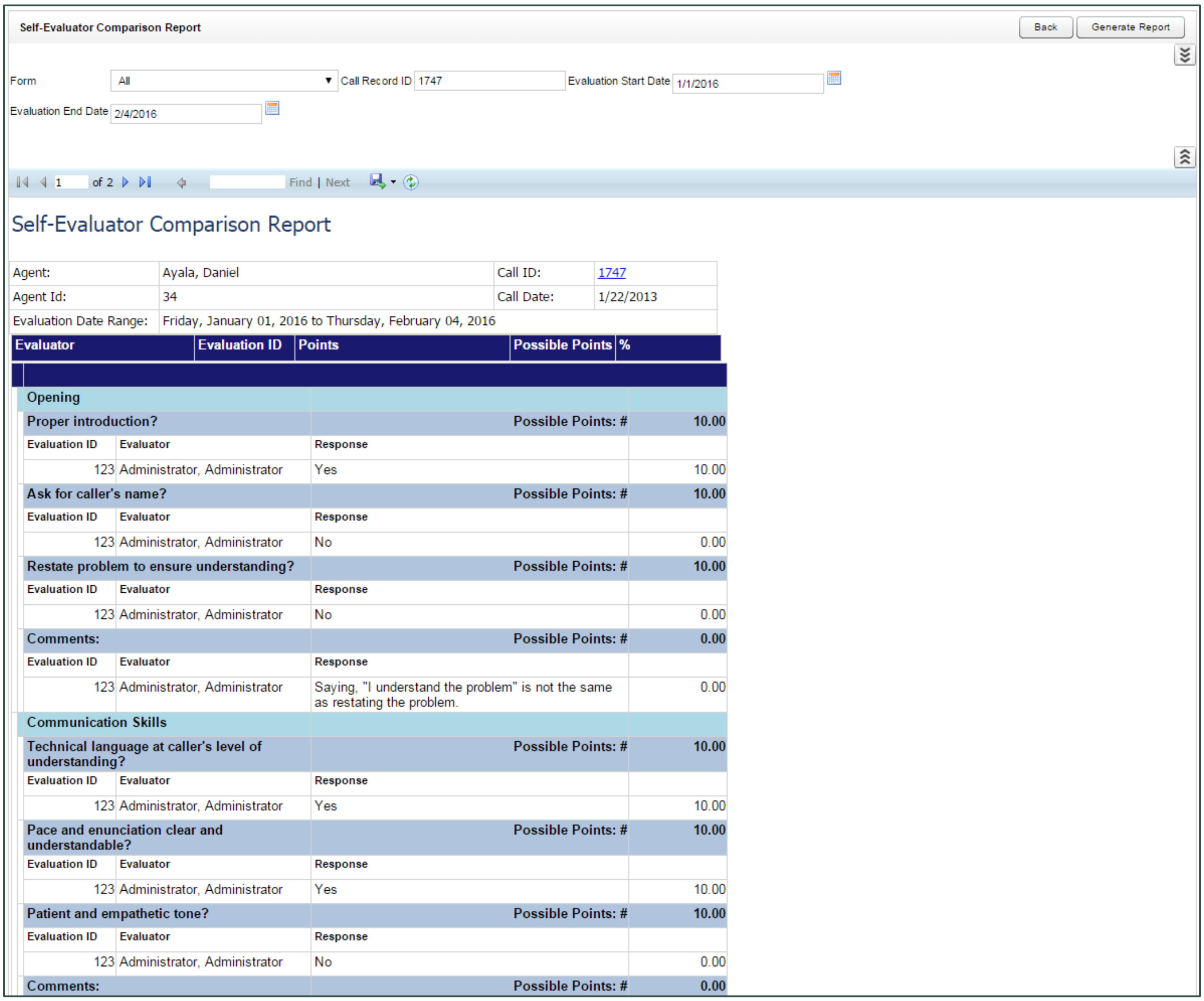
For more information on running any of these reports, see Generate a Printable Report.

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 Comparison Report

Back | Generate Report

Form: All | Call Record ID: 1747 | Evaluation Start Date: 1/1/2016

Evaluation End Date: 2/4/2016

1 of 2 | Find | Next

Self-Evaluator Comparison Report

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

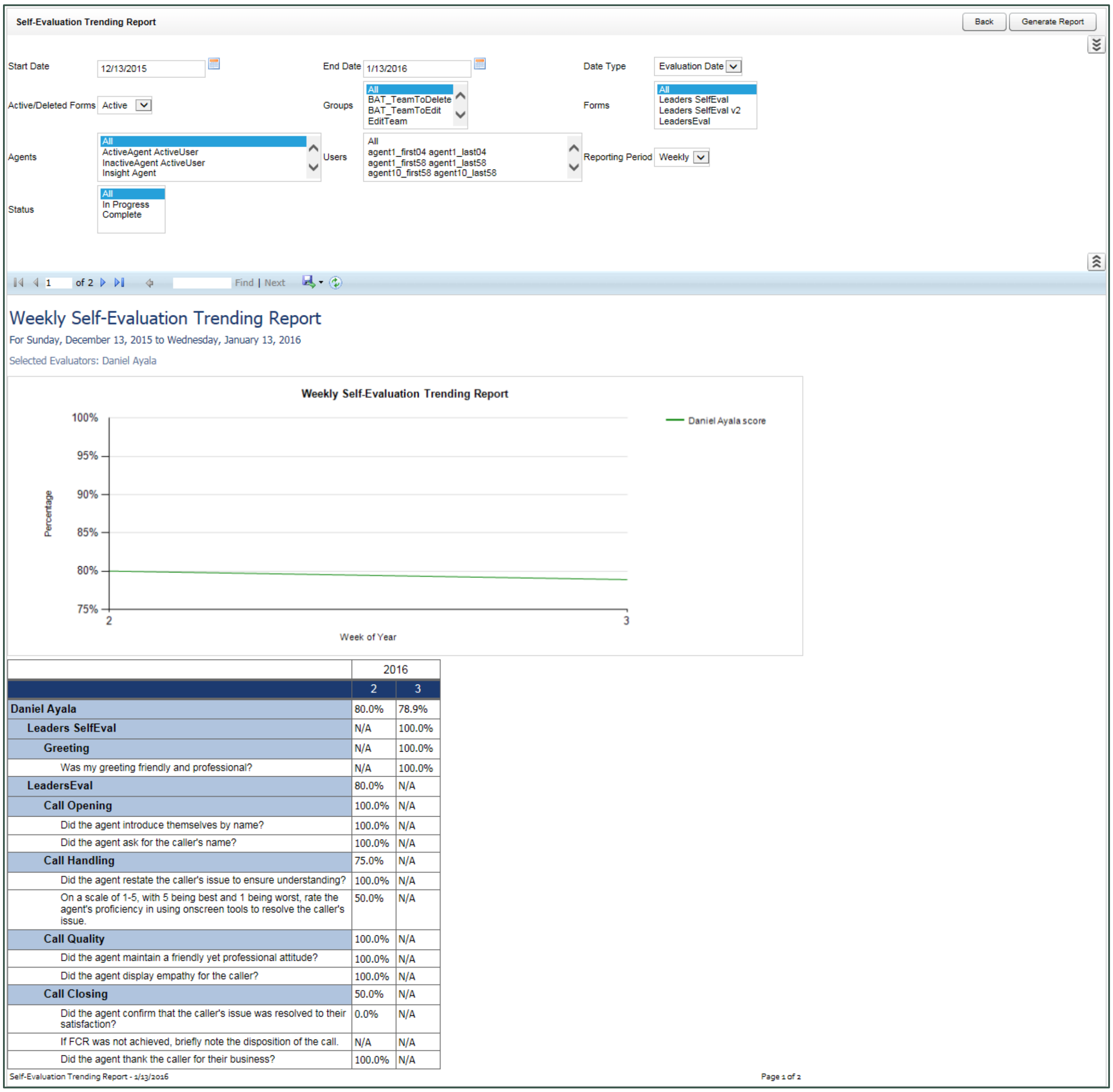
Evaluator	Evaluation ID	Points	Possible Points	%

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

Self-Evaluation Trending Report

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

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

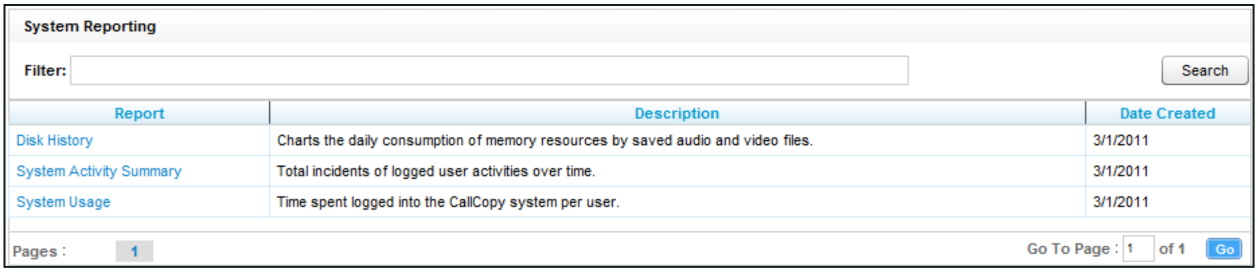


	2016	
	2	3
Daniel Ayala	80.0%	78.9%
Leaders SelfEval	N/A	100.0%
Greeting	N/A	100.0%
Was my greeting friendly and professional?	N/A	100.0%
LeadersEval	80.0%	N/A
Call Opening	100.0%	N/A
Did the agent introduce themselves by name?	100.0%	N/A
Did the agent ask for the caller's name?	100.0%	N/A
Call Handling	75.0%	N/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
Call Quality	100.0%	N/A
Did the agent maintain a friendly yet professional attitude?	100.0%	N/A
Did the agent display empathy for the caller?	100.0%	N/A
Call Closing	50.0%	N/A
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
Did the agent thank the caller for their business?	100.0%	N/A

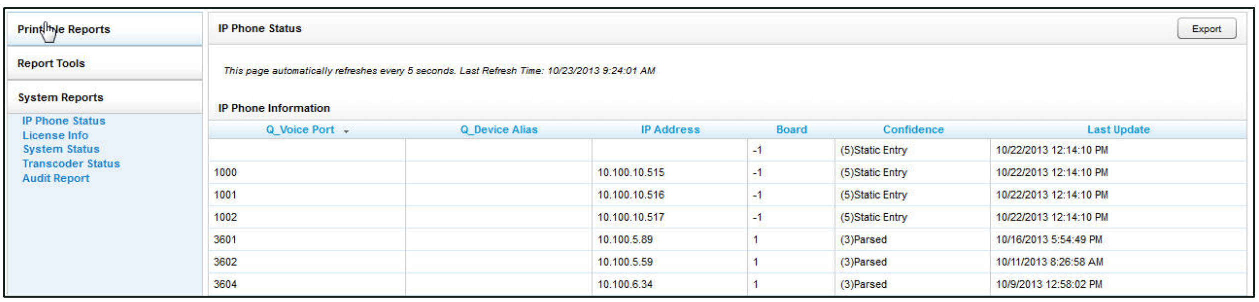
Working with System Reports

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.



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



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

Disk History

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

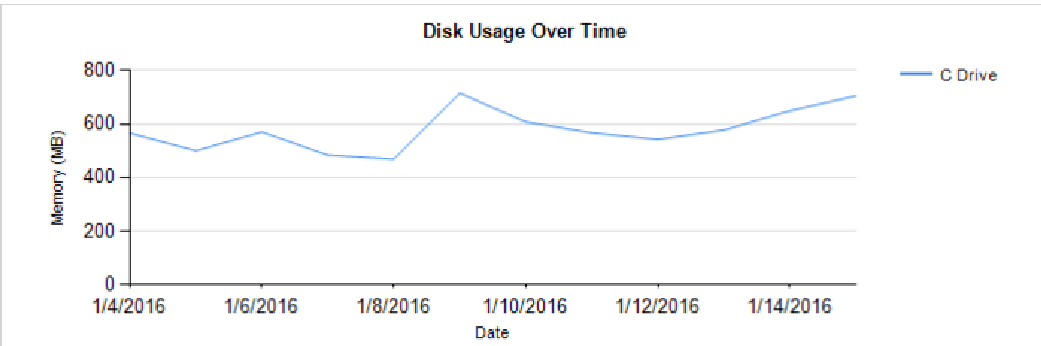
Disk History

Start Date 1/4/2016 End Date 1/15/2016

1 of 1 Find | Next

Disk Usage History

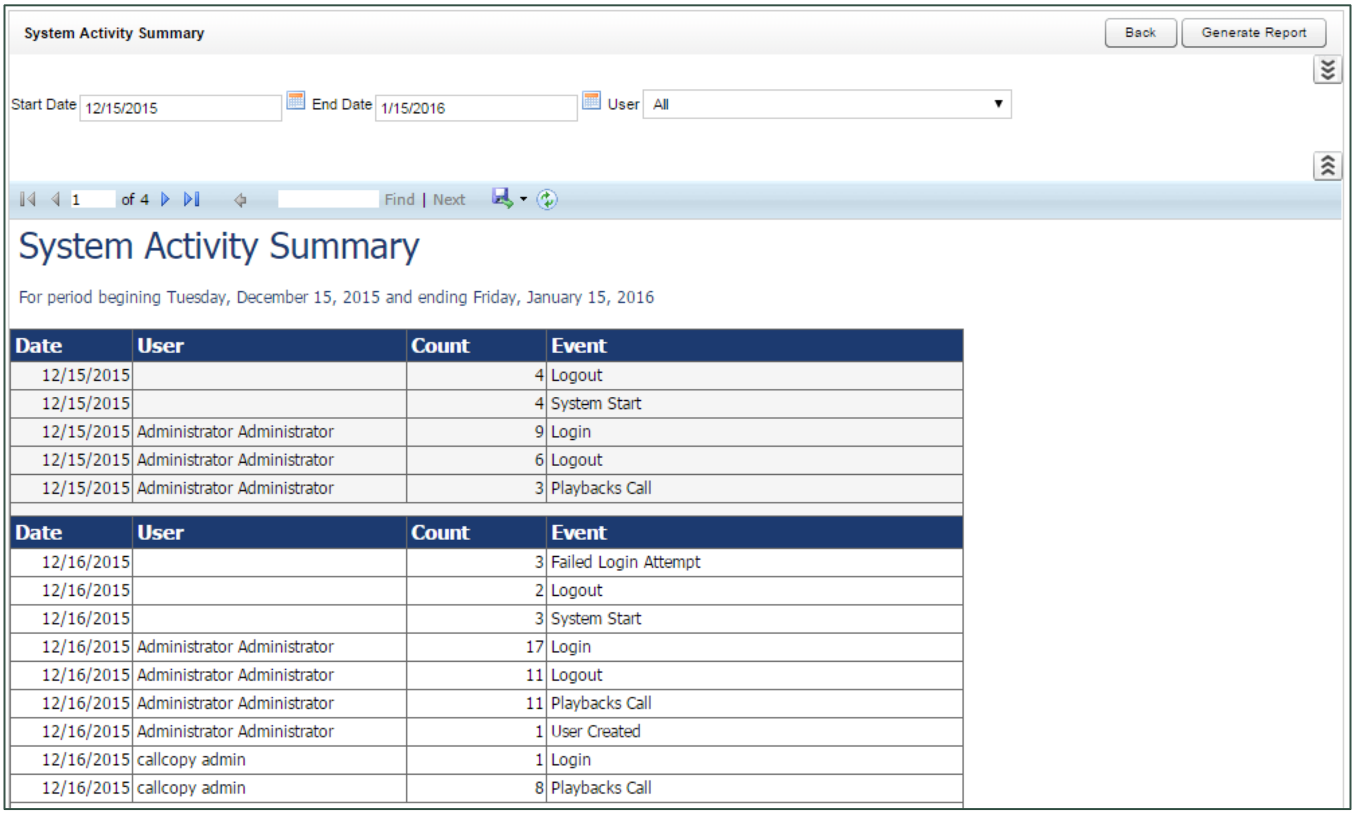
For period beginning Monday, January 04, 2016 and ending Friday, January 15, 2016



Date	Type	Drive	Disk Usage
01/04/2016	Audio	C	66.22 MB
01/04/2016	Video	C	500.21 MB
01/05/2016	Audio	C	52.91 MB
01/05/2016	Video	C	447.86 MB
01/06/2016	Audio	C	61.75 MB
01/06/2016	Video	C	508.44 MB
01/07/2016	Audio	C	57.80 MB
01/07/2016	Video	C	426.55 MB
01/08/2016	Audio	C	54.26 MB
01/08/2016	Video	C	415.05 MB
01/09/2016	Audio	C	77.71 MB
01/09/2016	Video	C	637.25 MB
01/10/2016	Audio	C	70.39 MB
01/10/2016	Video	C	537.58 MB
01/11/2016	Audio	C	67.68 MB
01/11/2016	Video	C	499.60 MB
01/12/2016	Audio	C	59.80 MB
01/12/2016	Video	C	482.70 MB
01/13/2016	Audio	C	68.03 MB
01/13/2016	Video	C	509.48 MB
01/14/2016	Audio	C	81.47 MB
01/14/2016	Video	C	568.19 MB
01/15/2016	Audio	C	79.24 MB
01/15/2016	Video	C	625.90 MB

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.

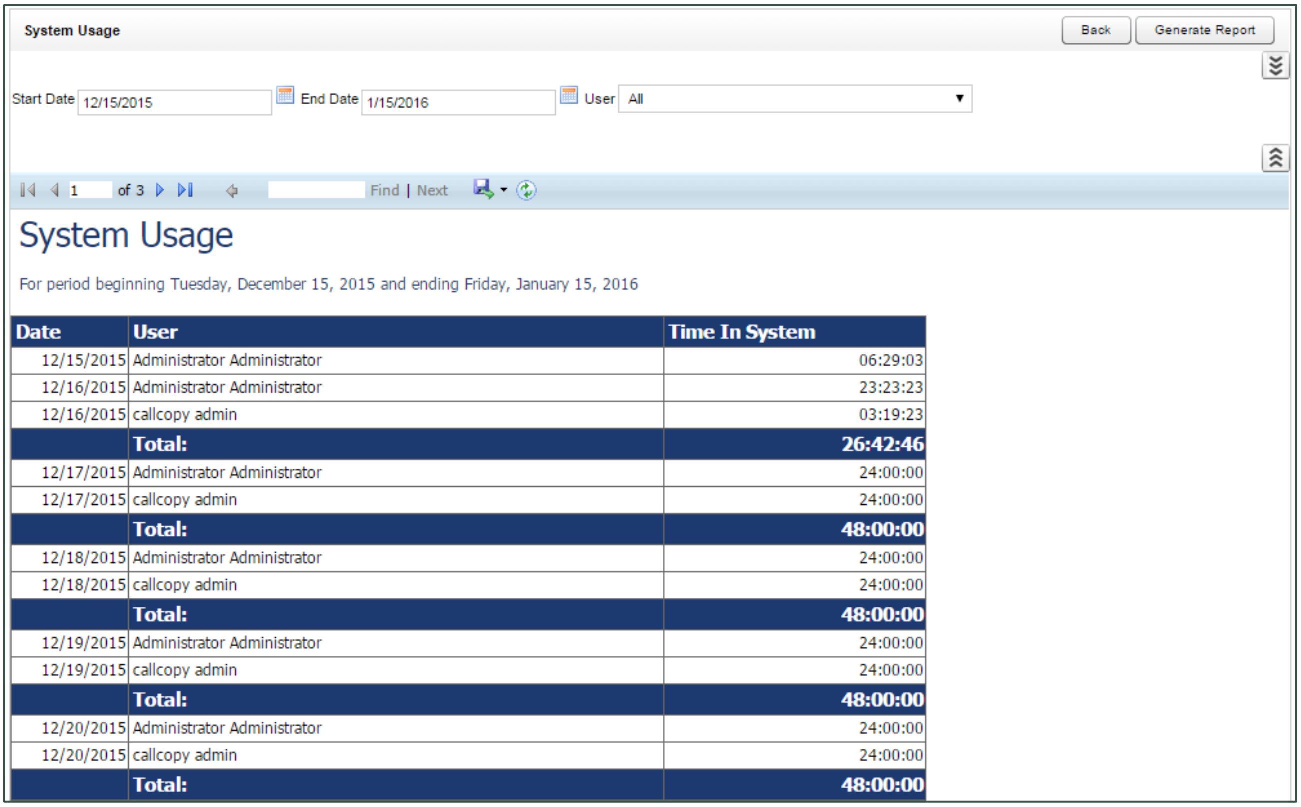


Date	User	Count	Event
12/15/2015		4	Logout
12/15/2015		4	System Start
12/15/2015	Administrator Administrator	9	Login
12/15/2015	Administrator Administrator	6	Logout
12/15/2015	Administrator Administrator	3	Playbacks Call

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

System Usage

The **System Usage** report displays 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

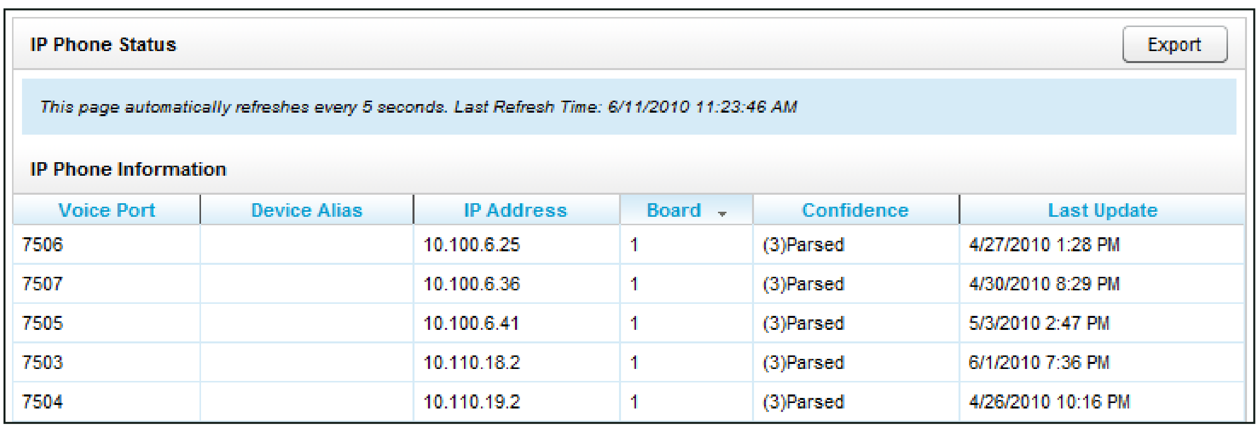
Date	User	Time In System
12/15/2015	Administrator Administrator	06:29:03
12/16/2015	Administrator Administrator	23:23:23
12/16/2015	callcopy admin	03:19:23
	Total:	**26:42:46**
12/17/2015	Administrator Administrator	24:00:00
12/17/2015	callcopy admin	24:00:00
	Total:	**48:00:00**
12/18/2015	Administrator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

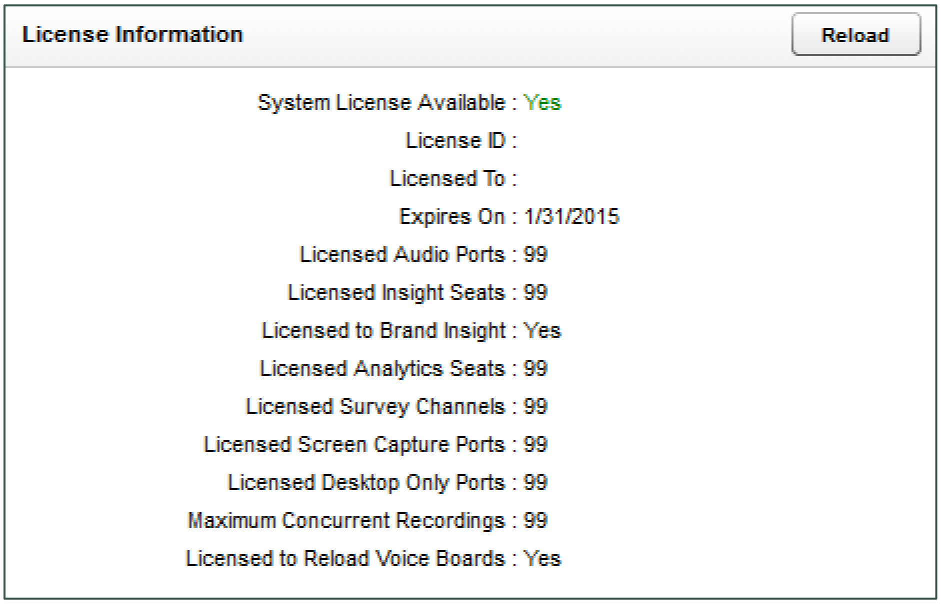
The **IP Phone Status** report shows the status of all IP phones detected on the network for passive VoIP integrations. The report shows the device extension number, the device IP address, the voice board number the device was detected by, the confidence level of the detection, and the date/time the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



License Information

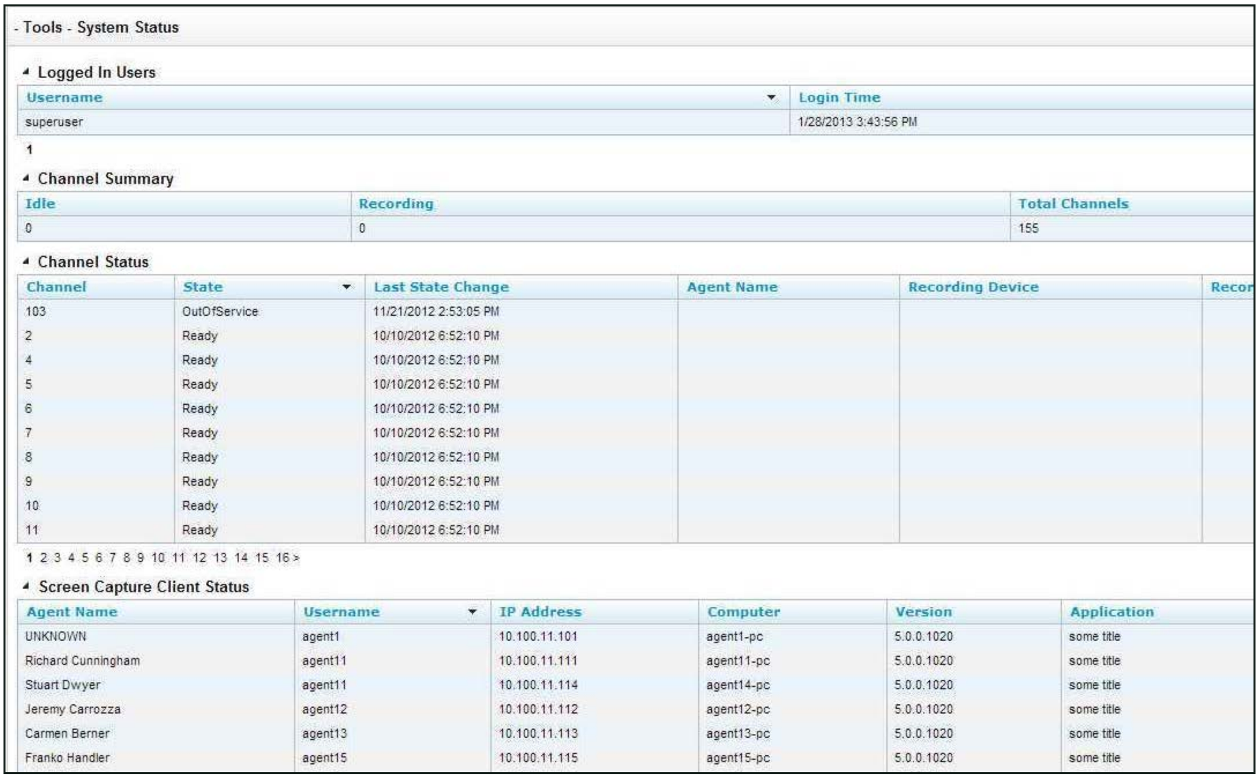


The **License Information** report shows in real time whether the system is currently licensed for recording and other features. It displays the License ID number, the expiration date (if applicable), and the number of channels for which the system is licensed for each feature.

> 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



- Tools - System Status

Logged In Users

Username	Login Time
superuser	1/28/2013 3:43:56 PM

1

Channel Summary

Idle	Recording	Total Channels
0	0	155

Channel Status

Channel	State	Last State Change	Agent Name	Recording Device	Recor
103	OutOfService	11/21/2012 2:53:05 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			

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 >

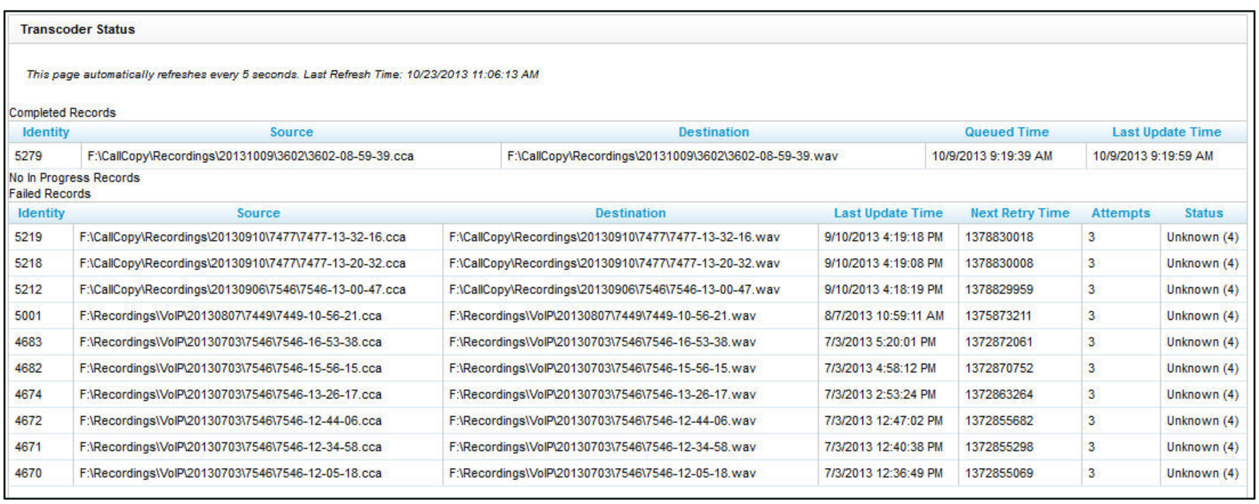
Screen Capture Client Status

Agent Name	Username	IP Address	Computer	Version	Application
UNKNOWN	agent1	10.100.11.101	agent1-pc	5.0.0.1020	some title
Richard Cunningham	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	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.

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

Transcoder Status



Transcoder Status

This page automatically refreshes every 5 seconds. Last Refresh Time: 10/23/2013 11:06:13 AM

Completed Records

Identity	Source	Destination	Queued Time	Last Update Time
5279	F:\CallCopy\Recordings\20131009\3602\3602-08-59-39.cca	F:\CallCopy\Recordings\20131009\3602\3602-08-59-39.wav	10/9/2013 9:19:39 AM	10/9/2013 9:19:59 AM

No In Progress Records

Failed Records

Identity	Source	Destination	Last Update Time	Next Retry Time	Attempts	Status
5219	F:\CallCopy\Recordings\20130910\7477\7477-13-32-16.cca	F:\CallCopy\Recordings\20130910\7477\7477-13-32-16.wav	9/10/2013 4:19:18 PM	1378830018	3	Unknown (4)
5218	F:\CallCopy\Recordings\20130910\7477\7477-13-20-32.cca	F:\CallCopy\Recordings\20130910\7477\7477-13-20-32.wav	9/10/2013 4:19:08 PM	1378830008	3	Unknown (4)
5212	F:\CallCopy\Recordings\20130906\7546\7546-13-00-47.cca	F:\CallCopy\Recordings\20130906\7546\7546-13-00-47.wav	9/10/2013 4:18:19 PM	1378829959	3	Unknown (4)
5001	F:\Recordings\VoIP\20130807\7449\7449-10-56-21.cca	F:\Recordings\VoIP\20130807\7449\7449-10-56-21.wav	8/7/2013 10:59:11 AM	1375873211	3	Unknown (4)
4683	F:\Recordings\VoIP\20130703\7546\7546-16-53-38.cca	F:\Recordings\VoIP\20130703\7546\7546-16-53-38.wav	7/3/2013 5:20:01 PM	1372872061	3	Unknown (4)
4682	F:\Recordings\VoIP\20130703\7546\7546-15-56-15.cca	F:\Recordings\VoIP\20130703\7546\7546-15-56-15.wav	7/3/2013 4:58:12 PM	1372870752	3	Unknown (4)
4674	F:\Recordings\VoIP\20130703\7546\7546-13-26-17.cca	F:\Recordings\VoIP\20130703\7546\7546-13-26-17.wav	7/3/2013 2:53:24 PM	1372863264	3	Unknown (4)
4672	F:\Recordings\VoIP\20130703\7546\7546-12-44-06.cca	F:\Recordings\VoIP\20130703\7546\7546-12-44-06.wav	7/3/2013 12:47:02 PM	1372855682	3	Unknown (4)
4671	F:\Recordings\VoIP\20130703\7546\7546-12-34-58.cca	F:\Recordings\VoIP\20130703\7546\7546-12-34-58.wav	7/3/2013 12:40:38 PM	1372855298	3	Unknown (4)
4670	F:\Recordings\VoIP\20130703\7546\7546-12-05-18.cca	F:\Recordings\VoIP\20130703\7546\7546-12-05-18.wav	7/3/2013 12:36:49 PM	1372855069	3	Unknown (4)

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

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

Audit Report

Time Logged	IP Address	Associated Username	Message	Component
03/12/2012 13:55:54	10.100.5.131	Unknown Unknown	User "Unknown Unknown" (-1) tried to access URL "/Home/Default.aspx".	OnAuthorize
03/12/2012 13:56:02	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged in.	/Login?ReturnUrl=%2fAdministration%2fPermissions%2fUserEdit%2f84
03/12/2012 13:56:02	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged in.	/Login?ReturnUrl=%2fAdministration%2fPermissions%2fUserEdit%2f84
03/12/2012 13:56:02	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged out.	/Login?ReturnUrl=%2fAdministration%2fPermissions%2fUserEdit%2f84
03/12/2012 13:57:23	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) changed user "84" ().	/Administration/Permissions/UserEdit/84
03/12/2012 13:57:23	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) created superuser "84" ().	/Administration/Permissions/UserEdit/84
03/12/2012 13:57:27	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged out.	/Logout
03/12/2012 13:57:27	10.100.5.131	Unknown Unknown	User "Unknown Unknown" (-1) tried to access URL "/Home/Default.aspx".	OnAuthorize
03/12/2012 13:57:36	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged in.	/Login?ReturnUrl=%2fAdministration%

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

Search fields available for customizing the Audit Report include:

- **User:** Select the desired user from the drop-down list, or choose **All**.
- **Log Type:** Select the desired log types from the drop-down list of events that are logged, or choose **All**.
- **Component or Page:** In the open-entry 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.
- **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).

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.

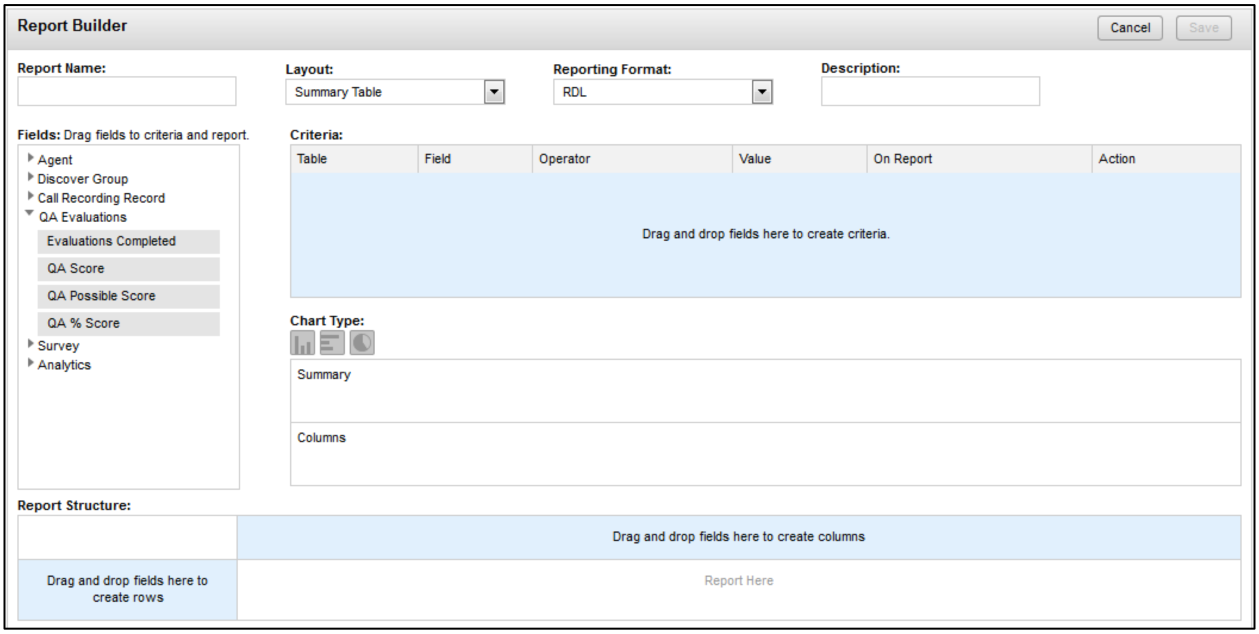
These safeguards prevent you from generating reports that would bog down the system when requesting large amounts of data. If the retrieved information is incomplete, try redefining search criteria or redesigning the report. There is no time-out associated with report rendering.

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



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.

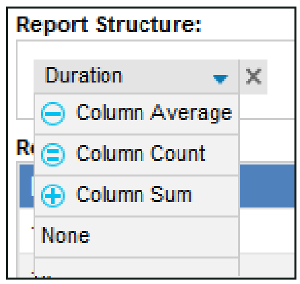
The procedure for building an ad hoc report is the same for each report category. For example, a call recording ad hoc report is built using the same steps as those for creating a QA ad hoc report.

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

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 Chart Types in Ad Hoc Reports).

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

You can rearrange fields by dragging them to a different location within the same area. Fields 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.

Report Structure:

Call Volume Date/T... | Split | Offered Calls | Answered Calls

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

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

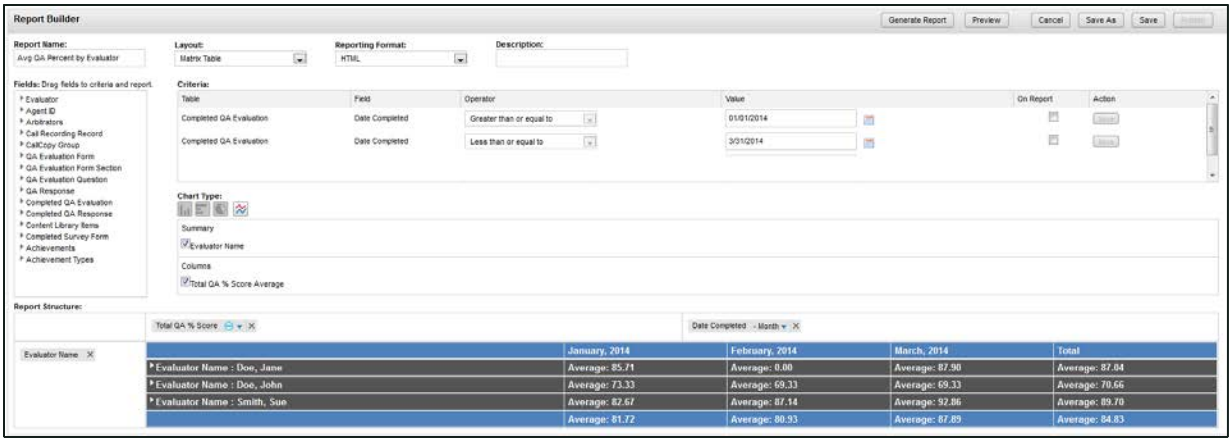
Report Structure:

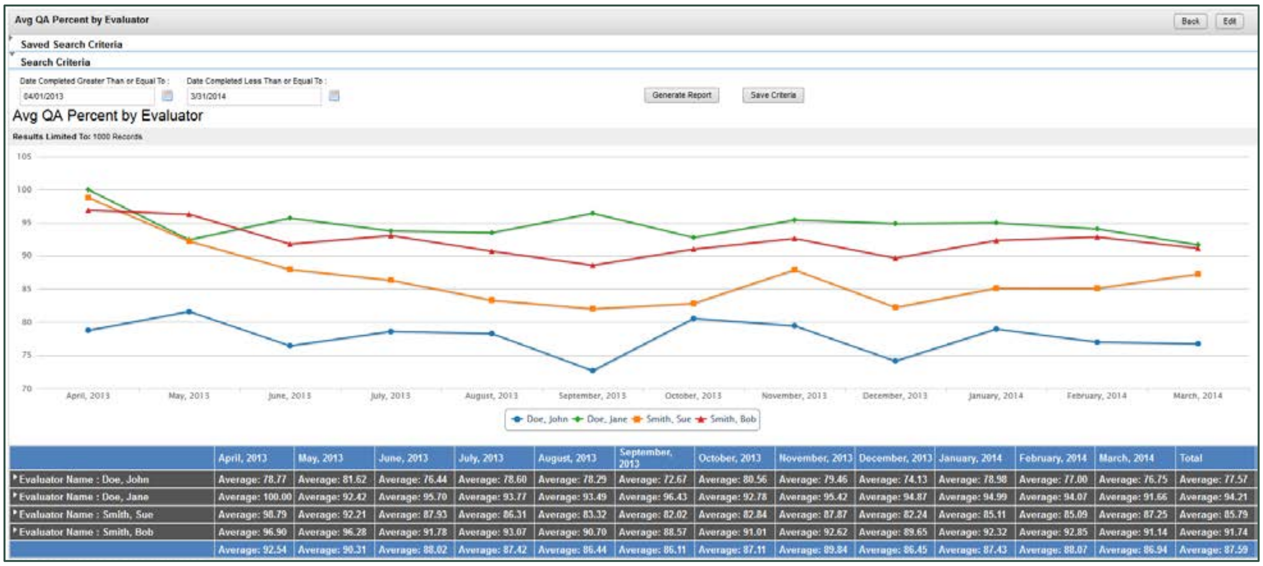
Agent | Answered Calls | Service Level Calls

Labor Unit

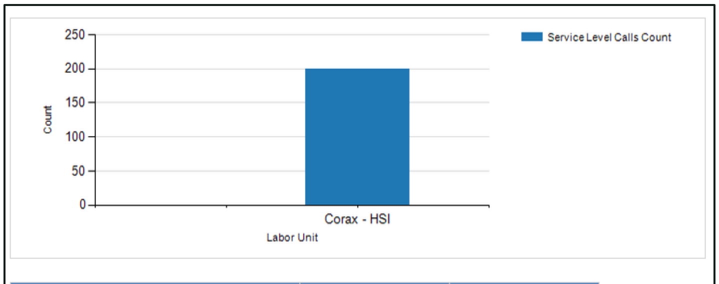
Agent	Answered Calls	Service Level Calls
Labor Unit : Corax - HSI		
205	28	16
205	28	16
205	28	16
205	28	16
205	28	16
205	28	16
205	28	16
205	28	16
205	28	16
205	28	16

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.



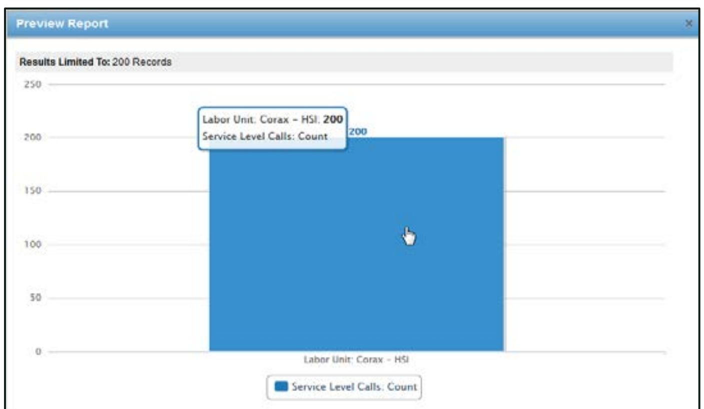


Matrix Tables measure one or more pieces of information across a period of time. Fields controlling the information to be measured and the time range are displayed in the Columns area, and are limited to one field in each area per report. Fields that control grouping of that information are displayed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



	February, 2014	Total
Labor Unit : Corax - HSI	Count: 200	Count: 200
0	165	165
1	9	9
2	7	7
3	4	4
4	1	1

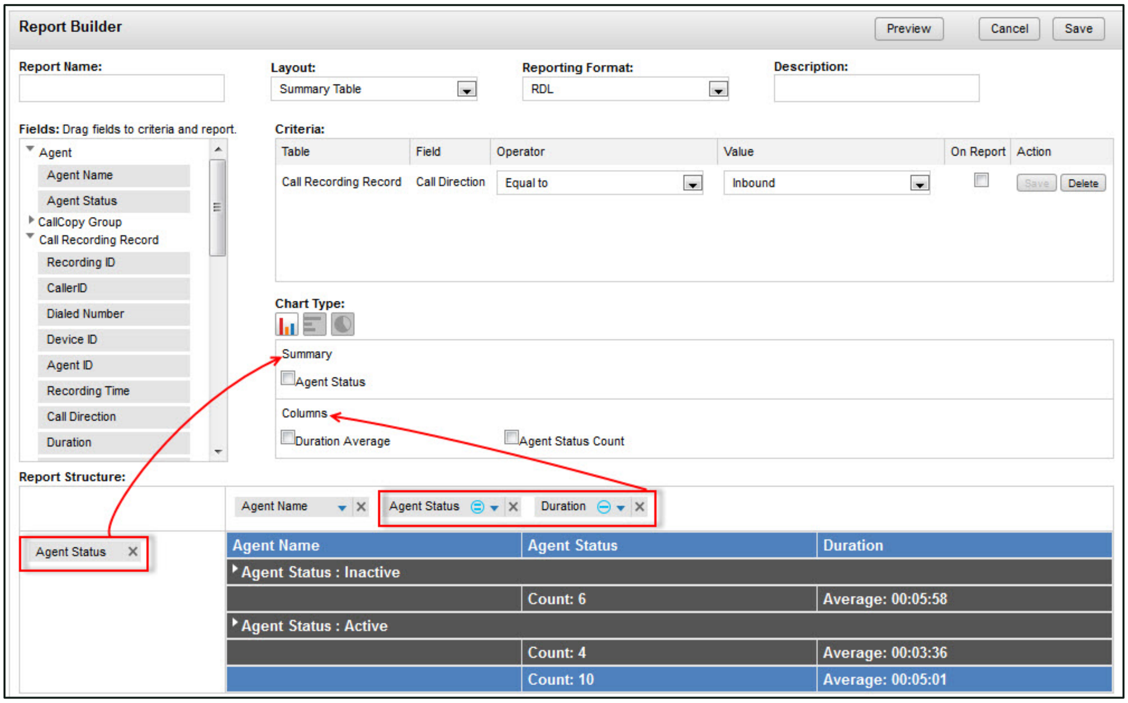
The **RDL** report format works with Microsoft SQL Reporting Services and provides export formats of PDF, Microsoft Word, or Microsoft Excel files. Charts are simply laid out, displaying all the information in a non-interactive way. Large reports with pagination can be created. Categories and groupings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



	February, 2014	Total
Labor Unit : Corax - HSI	Count: 200	Count: 200
	Count: 200	Count: 200

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

Chart Types in Ad Hoc Reports



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

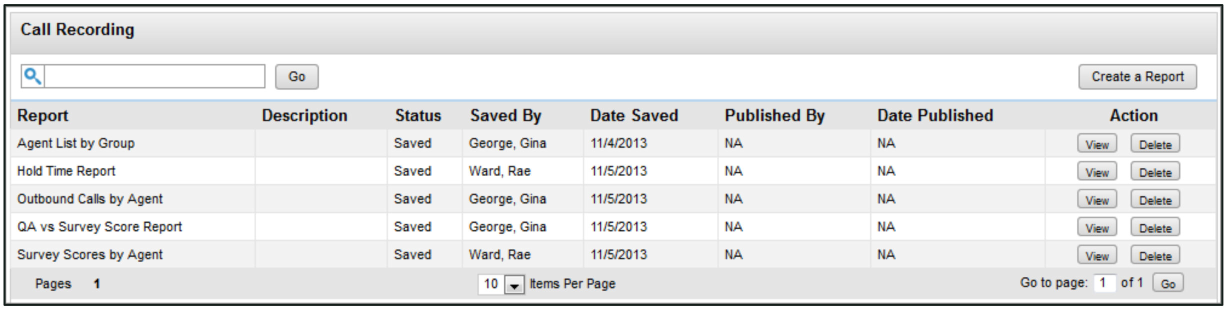
Beneath the icons are fields you can choose to display on the chart, depending on the report layout and data. For summary and matrix table reports, fields in the rows area appear under **Summary**, while choosing **Column Average**, **Count**, or **Sum** for columns displays those values under **Columns**.

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

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

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

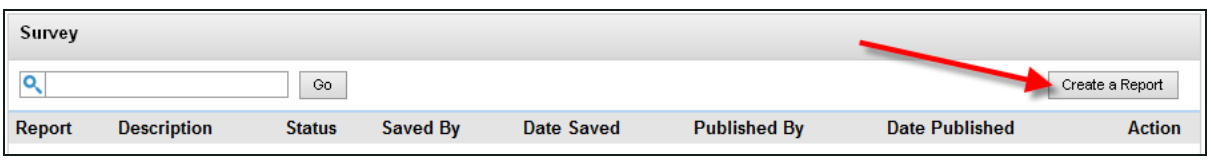
Report	Description	Status	Saved By	Date Saved	Published By	Date Published	Action
Agent List by Group		Saved	George, Gina	11/4/2013	NA	NA	View Delete
Hold Time Report		Saved	Ward, Rae	11/5/2013	NA	NA	View Delete
Outbound Calls by Agent		Saved	George, Gina	11/5/2013	NA	NA	View Delete
QA vs Survey Score 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 Per 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



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

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.

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.

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**.
5. Type your criteria or select an existing set of **Saved Search Criteria** by double-clicking (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 Common Report Tasks.

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 drop-down 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).

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 open-entry text box; numeric values only.
- **Audio Channel:** Allows for speaker separation when audio is provided in separate channel streams. Only available in certain integrations.
- **Confidence:** 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 open-entry 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]”.

- **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.

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

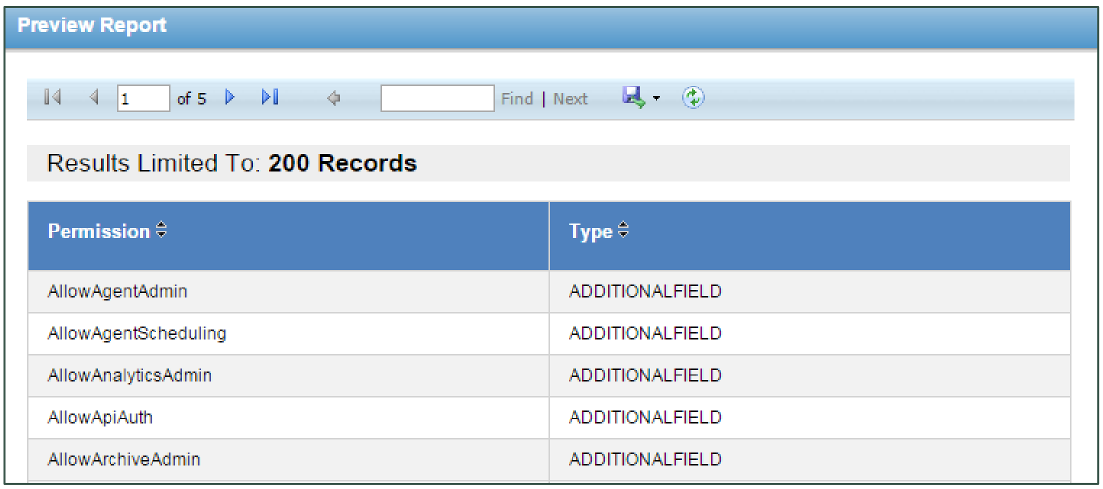
- **Last, First Name:** Type search criteria in the open-entry text box (for example, Pond, Amelia).
- **Username:** Type search criteria in the open-entry text box in the format used in your system (for example, apond).
- **Superuser:** Reports display as Yes or No. Select search criteria from a drop-down 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

- **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

1 of 5 Find | Next

Results Limited To: **200 Records**

Permission	Type
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.

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 open-entry 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.

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.

> 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 open-entry 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.

- **Total Hold Time:** Reports display as HH:MM:SS. Type search criteria in the three provided boxes as hours, minutes, seconds.
- **User1-15:** Names and values of these fields are defined in the Web Portal's **Terminology** page. For more information, see the *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.

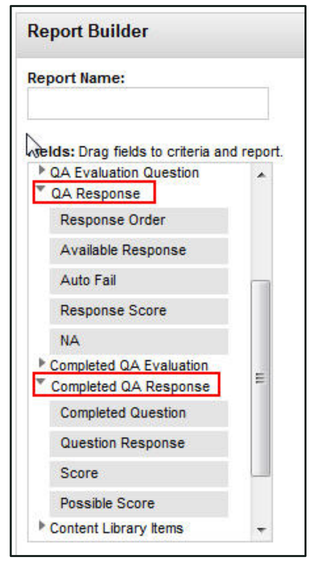
Derived Audio Tags

- **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]”.

- **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.

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 open-entry 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 drop-down list of these choices and All.
- **Disable Date:** Click on calendar icon to enter search criteria using date selector.

QA Evaluation Form Section

- **Section Order:** 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 auto-fail, "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.

- **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).
- **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.

- **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. Survey-call record linking must be configured for the agent and call recording data to appear in the database. If your organization uses custom field names in the Web Portal, those names will be shown instead of default names listed here.

Form

- **Form:** 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.

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 open-entry 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 drop-down 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.

- **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 open-entry 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 open-entry 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 open-entry text box; numeric values only.
- **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.

When considering forecast accuracy, your goal is to come as close to 100% as possible. Therefore, percentages that are significantly higher or significantly lower than 100 are not desirable (for example, 150% is not a good result).

- **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.

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.

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]

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.

Report Subscriptions New

Your installation uses SQL Server Standard Edition

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

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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 Save and Export a Report.

To create a Report Subscription:

1. 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 Set Email Delivery Options or Set Windows File Share Delivery Options, as preferred.
7. Select the option to run the subscription **On a Shared Schedule** or **When the scheduled report run is complete**. If you choose the shared schedule option, you 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.

Set Email Delivery Options

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

To set up email delivery options:

1. In the **To:** box, 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 Create a Report Subscription procedure.

To set up file share delivery options:

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

Set Schedule Options

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

To configure schedule options:

1. Select the frequency at which you want the schedule to run: Hour, Day, Week, Month, or Once.
2. Configure the schedule details in the corresponding box (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**.

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 Set Schedule Options.
5. Click **Save**.

Manage Shared Schedules

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

Sort the Shared Schedules List

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

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

Edit a Shared Schedule's Settings

To edit the settings of a **Shared Schedule**:

1. Click **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 Save Printable Report Criteria).

Report Library

Private Listing

Report	Date Created	Owner
Sales Agent Incoming Call Summary Report	6/23/2011 12:13:19 PM	superuser
Sales Agent Outgoing Call Summary Report	6/23/2011 12:14:03 PM	superuser
Sales Agents Ranking Report	6/23/2011 3:17:45 PM	superuser

Public Listing

Report	Date Created	Owner
Calibration Group QA Summary	6/24/2011 1:56:51 PM	superuser

Load the Report Library

To load the **Report Library** page:

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

Manage the Report Library

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

Execute a Report from the Report Library

To execute a report from the Report Library:

- Load the **Report Library** and click the desired report in the list.

Delete Saved Criteria from the Report Library

To delete saved criteria from the **Report Library**:

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

Document Revision History

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