



Performance Management Guide

Data Discovery & Analytics for Contact Centers

March 2017

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NICE Uptivity Performance Management Guide

Version: This guide should be used with NICE Uptivity (formerly inContact WFO Premise) 17.1 and later.

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

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Introduction

Audience

This document is written for administrators and users of NICE Uptivity Performance Management. Readers should have a high level of familiarity with usage of a PC and its peripherals, the Windows operating system, their organization's ACD/PBX, and the business rules that affect both how NICE Uptivity will be initially set up and how it will be used on a daily basis.

Goals

The goal of this document is to provide knowledge, reference, and how-to information necessary to configure and use the Performance Management feature of NICE Uptivity.

This document is NOT intended as a specific system or network design document. If further clarification is needed, consult your NICE Uptivity installation or project team.

Assumptions

This document assumes the NICE Uptivity team has:

- Installed NICE Uptivity correctly and configured the software for your environment.
- Obtained information regarding any other data sources to be used with Performance Management.

Need-to-Knows

NICE Uptivity Performance Management was previously branded as VPI Business Intelligence. Screenshots, images, and names of some components referred to in this manual may reflect that branding.

Related Documentation

The *NICE Uptivity Performance Management Dashboard and Reports Guide* may prove helpful. In addition, online help for NICE Uptivity can provide information on components that can serve as data sources.

Introducing Performance Management

Data is at the heart of every contact center operation. Lots of contact centers are awash in data, yet struggling to make smart and timely decisions. By the time data is located, shared, and digested, critical decision points may have passed.

Your success depends on timely access to data that is current, easy to share with others, and available for deeper analysis in different ways.

Measure and Manage Contact Center Performance

Collect and process data	Analyze and discover	Share what you find
<ul style="list-style-type: none">• Data Collectors collect and process data from any source for consolidated Business Intelligence in one place – like a command center for your Contact Center.	<ul style="list-style-type: none">• Set of discovery tools for exploring KPIs at multiple levels, including different grids, the flexibility to switch without losing changes, and options to export your data.	<ul style="list-style-type: none">• A variety of ways for you to visually share information and impactfully communicate data insights throughout your Contact Center.

NICE Uptivity Performance Management breaks down the barriers around accessing, exploring, analyzing, and sharing business intelligence within the contact center.

Collect and Process Data from Any Source

Performance Management collects data from your licensed NICE Uptivity components to process real-time and historical data about contact center activity.

The feature also offers a variety of data collectors to collect and process data from any source for consolidated business intelligence in one place – like a command console for your contact center.

By integrating Performance Management with your contact center systems, ACD, telephony devices, and other data sources, you have additional data consolidated for analyzing, reporting, and optimizing many aspects of your operation. Custom data collectors are available through NICE Uptivity Professional Services.

Introducing Performance Management

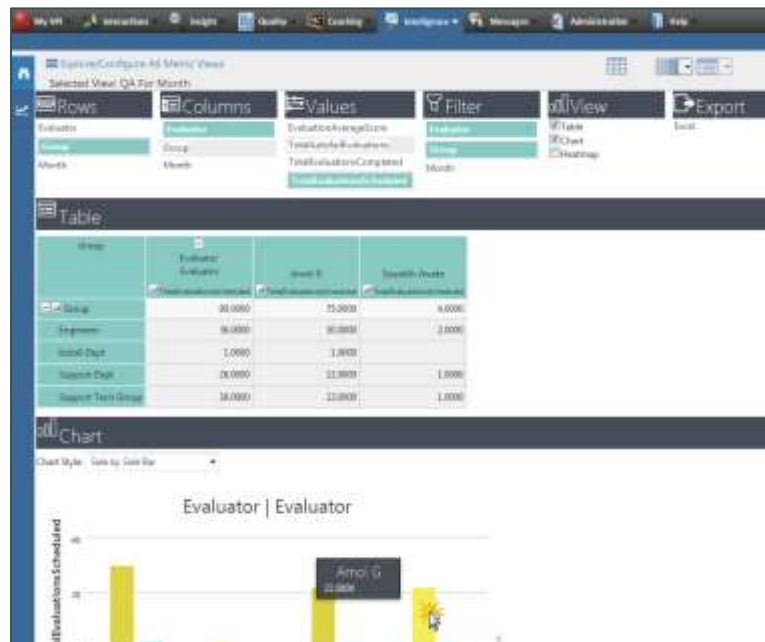
NICE Uptivity Performance Management processes and stores data about contact center activity as metrics. The metrics available are dependent on your licensed NICE Uptivity components and integrated data sources.

Of the many metrics collected in your system, the metrics on which you choose to focus are your key performance indicators (KPIs).

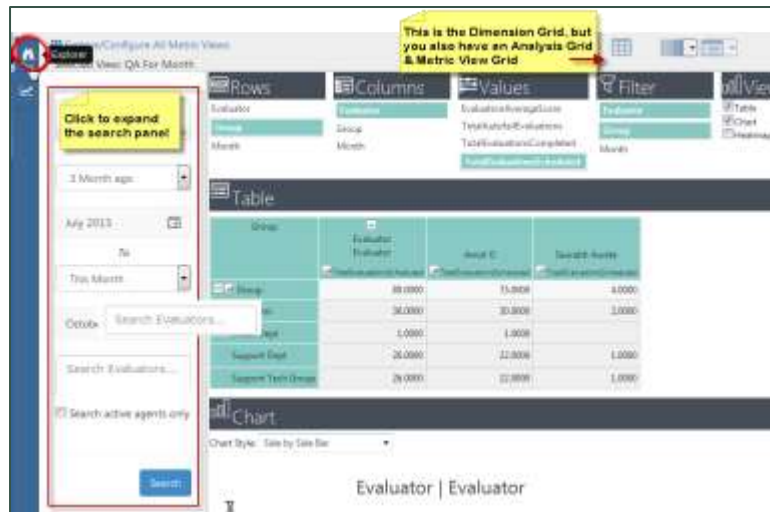
Of the many metrics collected, the *particular metrics* on which you focus are your KPIs – *Key Performance Indicators*.

Tools for Data Analysis and Discovery

The **BI Explorer** features data discovery tools that you can use for further analysis at multiple levels. To compare collections of KPIs on multiple levels (by agent, group, or company), you use **Metric Views** in the BI Explorer.



The **Analysis and Dimension Grids** are useful for organizing and manipulating data, presenting it in graphical formats, and exporting it for use outside the Performance Management system.



Instead of muddling through confusing calculations or relying on your stakeholders to interpret spreadsheets and draw their own conclusions from a list of metrics, you can use **Balanced Scorecards** to tell the “performance story” for you. Balanced scorecards combine your most important KPIs into a single performance indicator called a weighted score metric that lets everybody know how they are performing.

Scorecard For Support Tech Group		January-2015	
Group Scorecard			
Metric Name	Metric Value	Score	Rank
Quality of Service			
Number of Hold Events (10%)	67	10.00%	
Total Evaluations Completed (15%)	31	15.00%	
Evaluation Average Score (20%)	21.07%	0.00%	
Number of Interactions With Multiple Transfer Events (25%)	42	25.00%	
Enterprise			
Number of Outbound Interactions (15%)	762	15.00%	
Overall Score:		65.00%	

You can define company-level objectives and tie them to scorecards. By setting goals on metrics and enabling trend, you can track different aspects of KPI performance through dashboards, tickers, metric views, and balanced scorecards.

Introducing Performance Management

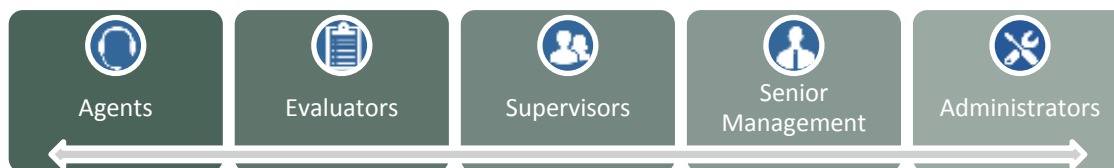
Powerful Ways to Share Data and Information

NICE Uptivity Performance Management makes it easy to broadcast and share data in visually-rich and impactful ways for maximum exposure across the organization.

- Deliver timely updates at any level using personalized dashboards that easily double as a workspace to provide people with what they need to work more effectively – whether it is handling calls, evaluating calls, managing groups, following up on hot issues, reading reports, or working through a task list.



- Dashboards can include data from any source; you can mix KPIs from different data sources on the same dashboard.
- Enhance engagement and drive accountability of all team members by empowering them with the information they need to be successful. With their KPIs in front of them, people work more efficiently because they are on top of virtually any statistic they need to perform and excel.



- Precision-monitor any area you want to improve. You can configure any metric for trending against the previous period or the same period for the previous year.

VPI		Coaching	Calls/Hr.	Avg. Talk	Transfers	Conversions	Sales (\$)	Credits	Adherence	Avg. QA	In Queue	Abandons	MAIN
4	Agent	12	3:04	1	83%	\$6,354	\$562	72%	91%	Group	12	5	QA
	Goal	15	3:30	3	70%	\$3,000	\$200	80%	85%		3:48		COACH

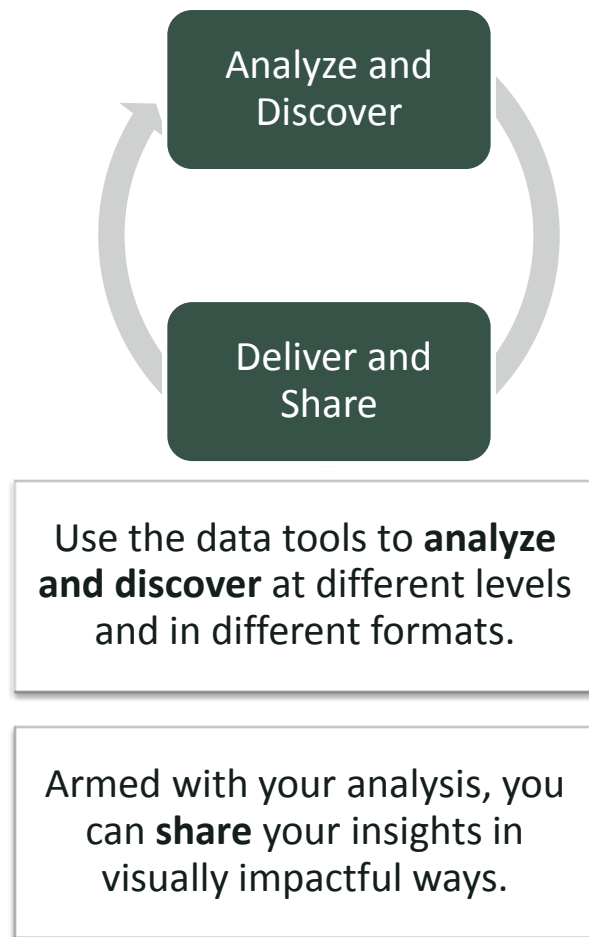
Stacy Adams (AGENT SCORECARD) Expect Higher Call Volumes at 2:30pm Today Due to TV Promotion

- Share progress at any level by setting Goals on your agent and group KPIs. On dashboards, gauge widgets light up when a KPI drops below goal – similar to how gauges work on the dashboard of a car.



Ways to Get Started

NICE Uptivity Performance Management provides everything you need to explore and analyze data about your contact center—and then effectively communicate meaningful information about performance and operations across your organization.



The NICE Uptivity Performance Management suite of tools can help drive real change in your contact center by giving you tools for analyzing data and broadcasting the right information across your organization.

Data Analysis Overview

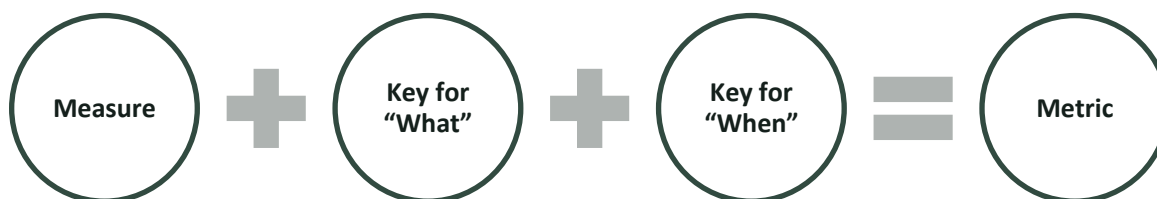
NICE Uptivity Performance Management uses data collectors to collect and process data from your licensed NICE Uptivity components, as well as contact center ACD systems and other telephony devices. Data collectors are available for integrating any data source, including:

- Contact center systems such as ACDs from Avaya, Cisco, and so forth
- PBX and radio systems
- CAD, dispatch console, and protocol management systems
- Business applications including CRM, ERP, Helpdesk, HR, and customer-developed systems
- Workforce management systems
- Customer survey systems

Understanding Measures, Metrics, and Keys

The system processes data collected from different sources as a series of measures. A measure is a simple measurement, such as: average talk time, average QA score, number of calls handled, average interaction talk time, average handle time, average hold time, number of calls transferred, and so forth.

Each measure belongs to a metric. Metrics calculate a measure for the various intervals of time and various roll-up combinations. A metric is a measure plus the keys for "what" and "when" (in other words, the defined time period).



For example, consider the measure "Average Talk Time" (ATT). For this measure, you may be interested in seeing ATT "By Group, By Day" or "By Agent, By Week". These are two different metrics for the same measure:

- Average Talk Time (measure) for Group (what), Day (when)
- Average Talk Time (measure) for Agent (what), Week (when)

Keys are an important component of a metric. The following example further emphasizes the three parts of a metric.

Metric: Average Talk Time for the Customer Service Team Today

- Measure: Average Talk Time
- Key for What: Customer Service Team
- Key for When: Today

i You can combine metrics in multiple data-point metric widgets, metric views and scorecards as long as the metrics share the same keys. For example, the keys for the "Average Evaluation Score by Agent, Month" metric are "Agent" and "Month". You can combine this metric with other "Agent, Month" metrics in a view or scorecard.

Available Measures and Metrics

The measures and metrics available in your system depend on the NICE Uptivity components licensed and, if applicable, integration with additional data sources. You can also create new measures and metrics using the **BI Designer**.

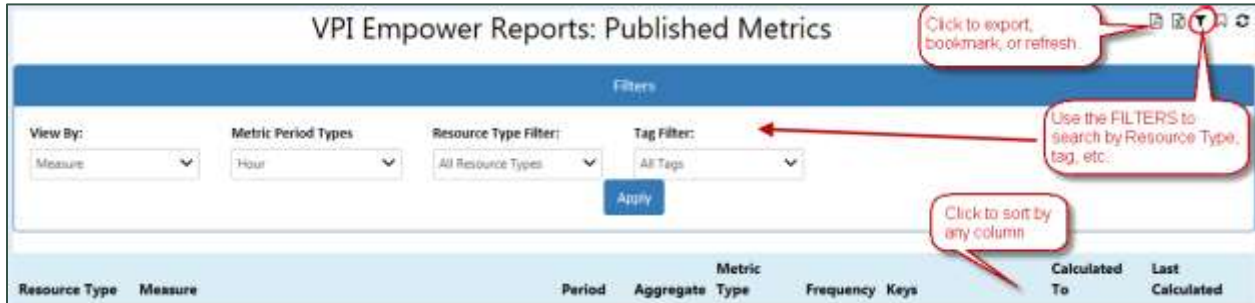
Measure List Report

The **Measure List** report contains the defined measures used to group metrics that are related.

Resource Type	Measure Name	Description	Aggregate	Content Type	Bias	Tags	Num Metrics
Cisco UCC Express	ACD Calls / Quality	Percentage of ACD calls that rang at an agent's phone that were answered.	Statistic	Percentage		ACD, Answer, Answered, Calls, Percent, UCCX	10
Cisco UCC Express	ACD Calls / V Portal	Percentage of ACD calls that rang at an agent's phone that were not answered.	Statistic	Percentage		ACD, Answered, Calls, NoAnswer, Percent, RNA, UCCX	11

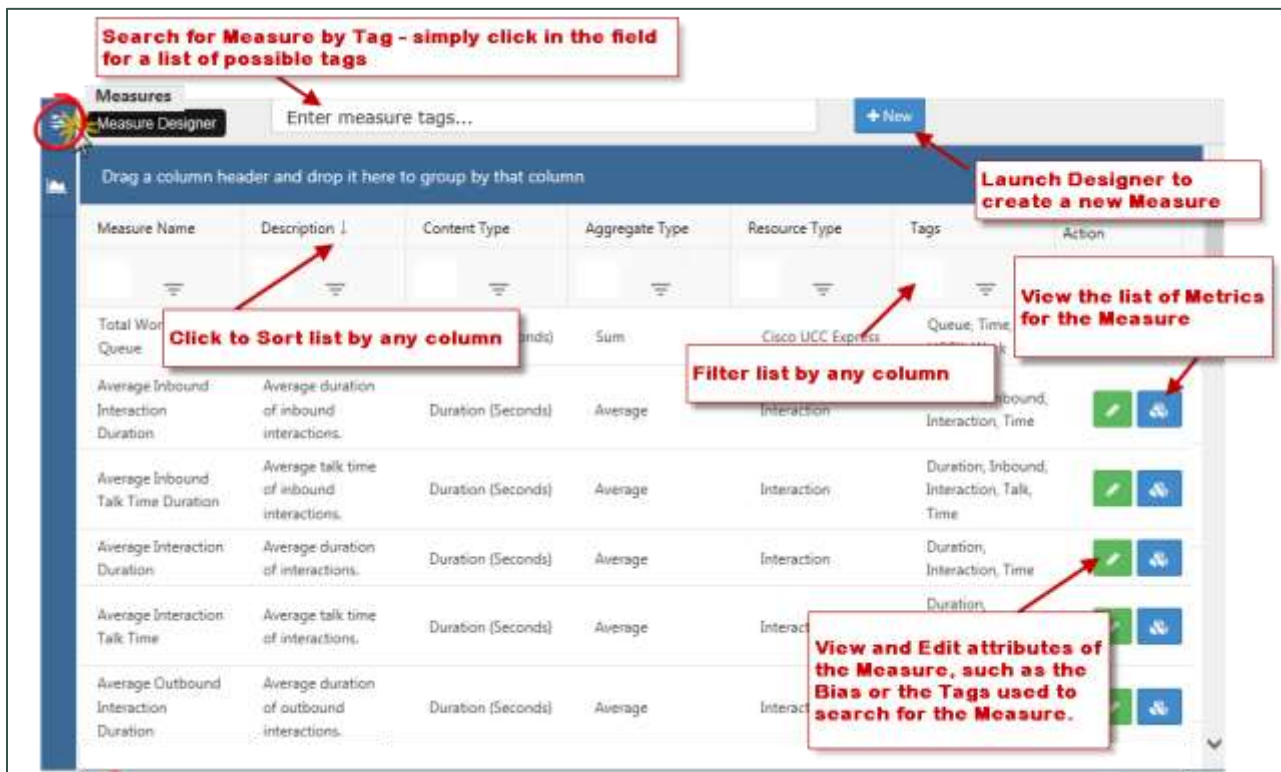
Metrics List Report

The **Metrics List** report contains defined, published metrics. You can filter to display metrics for a selected resource, period, or tag.



Measure Designer

To access the **Measure Designer**, select Intelligence>BI Designer and click the **Measure Designer** icon in the left panel. The following image provides an overview of the **Measure Designer**.



Data Attributes of Measures and Metrics

Measure Attributes

Attribute	Explanation
Bias	<p>Bias is measure attribute that comes into play when you trend or set goals on a metric that uses that measure. Bias is used in trending (see Metric Trending) and goals (see Metric Goals), where you set values for Variance Type and Variance Value to work with bias. Not every measure has a bias, and the bias may be different for different measures and different customers.</p> <p>When you create a measure, a drop-down list presents these options: <i>Higher Is Worse</i> or <i>Lower Is Worse</i>.</p>
Content Type	<p>Content Type describes the value of a measure. When you create a measure, a drop-down list presents these options: <i>Currency</i>, <i>Duration (Seconds)</i>, <i>Number</i>, or <i>Percentage</i>. <i>Duration</i> is stored in seconds and displayed as H-M-S.</p>
Aggregate Type	<p>Aggregate Type provides metadata only; it does not perform any computations. The following options are presented in a drop-down list when you create a measure: <i>Any</i>, <i>Average</i>, <i>Count</i>, <i>First</i>, <i>Last</i>, <i>Maximum</i>, <i>Minimum</i>, <i>None</i>, <i>Rank</i>, <i>Score</i>, <i>Statistic</i>, <i>Std Deviation</i>, <i>Sum</i>, and <i>Weighted Score</i>.</p>
Resource Type	<p>Resource Type defines the data source for the measure. Performance Management uses data collectors to collect and process business application data from a variety of disparate sources (see Data Analysis Overview).</p> <p>When you create a measure, a drop-down list presents you with all integrated and available data sources.</p>
Measure Tags	<p>Measure Tags help people find and use metrics in dashboard widgets, views, scorecards, tickers, and so forth. Measure tags are what people will use to look up the metrics for the measure. Each measure can have multiple measure tags. When you create a measure, a drop-down list presents a lengthy list of possible tags.</p>
Display Precision	<p>Display Precision specifies the total number of digits for the displayed value of the measure.</p>

Data Analysis Overview

Attribute	Explanation
Numeric Precision	Specify Numeric Precision for measure when you are using goals and trend.
Numeric Scale	Specify Numeric Scale for measure when you are using goals and trend.

Metric Attributes

Attribute	Explanation
Metric Type: Reference	Use reference metrics to base one metric on another. For example, you might create a new reference metric based on the "hourly count" metric and use SQL to perform operations on it.
Metric Type: Calculation	Use calculation metrics to create metrics processed from data collected from a data source, such as Cisco UCCX or Coaching.
Metric Type: Roll-Up	"Roll-up" metrics are group metrics rolled up from agent metrics. This term is a simply name for these metrics and not a choice when creating metrics.
Period Key	The Period Key is set based on the Metric Type . For calculation metrics, the period key is set by the system based on the metric data (making it read-only). For reference metrics, you must specify the period key from a drop-down list of the following values: <i>15 Minute, 30 Minute, Hour, Day, Week, Month, Quarter, Calendar, Year</i> .
Frequency	Frequency is set based on the Metric Type . For calculation metrics, the frequency is set by the system based on the metric data (making it read-only). For reference metrics, you must specify the frequency for the Metric from a drop-down list of the following values: <i>1 Minute, 5 Minutes, 15 Minutes, 30 Minutes, 1 Hour, 12 Hours, 1 Day, 1 Week, 30 Days</i> .
Period SQL	Period SQL identifies the data source for a calculation metric. When you create such a metric, you must enter an SQL statement in this field that points the system to the correct data source.

Attribute	Explanation
Active Dates	<p>The Active From and Active To dates tell the system the periods for which to calculate the Metric. If you leave the Active To blank, the system treats the calculation period open (that is, having no end date).</p> <p>When a metric is used in scorecards or associated with a goal, the active period for the metric should align with the periods set for the goal and scorecard.</p>
Metric Status	<p>Metric Status indicates whether a metric has been published. Metrics must be published to be considered active; that is, to be automatically updated by the system, to appear on the Metrics List Report and to be used in other features of Performance Management. Each version of a metric has a Published indicator. In addition to Published, metrics can also be in one of these two statuses:</p> <ul style="list-style-type: none"> • Edit – the metric (or new version of a metric) has been saved but not published • Problem – the metric has been published but the system experienced an issue during computation

HOW TO: Create New Measures

i For more information on the fields referenced in this task, see [Measure Attributes](#).

1. Select Intelligence>BI Designer and click the **Measure Designer** icon (designated by three parallel lines) in the left panel.
2. Click **New**.
3. Enter a unique **Name** for the measure.
4. **Optional**: Enter a **Description**.
5. Select a **Content Type** from the drop-down list.
6. Select an **Aggregate Type** from the drop-down list.
7. Select a **Resource Type** from the drop-down list.

Data Analysis Overview

8. For **Numeric Precision**, select a numeric value.
9. For **Numeric Scale**, select a numeric value.
10. For **Display Precision**, select the number of total digits for the displayed value.
11. Select a **Bias** from the drop-down list.
12. Select one or more **Measure Tags**.
13. Click **Save**.

HOW TO: Edit Measures

You can only modify measures created in the BI Designer. System-generated measures are locked.

1. Select Intelligence>BI Designer and click the **Measure Designer** icon (designated by three parallel lines) in the left panel.
2. **Optional**: Use the filtering tools to narrow the list of displayed measures.
3. Click the green **Edit** icon for the measure you want to edit.
4. Configure the measure's settings as needed.
5. Click **Save**.

HOW TO: Create Metrics for an Existing Measure

For more information on the difference between measures and metrics, see [Understanding Measures, Metrics, and Keys](#). For more information on the fields referenced in this task, see [Metric Attributes](#).

1. Select Intelligence>BI Designer and click the **Measure Designer** icon (designated by three parallel lines) in the left panel.
2. **Optional**: Use the filtering tools to narrow the list of displayed measures.
3. Click the blue **Metrics** icon for the measure want to use.
4. In the **Manage Metrics** window, click **New**.
5. Select a **Metric Type** from the drop-down list. If you select *Calculation*, skip the next two steps.
6. Select a **Period Key** from the drop-down list.
7. Select a **Frequency** from the drop-down list. If you selected *Reference* for **Metric Type**, skip the next two steps.
8. Enter a value for **Period SQL**.

9. Enter a value for **Metric SQL** if applicable.
10. **Optional:** Select the checkbox for **Display Trend** if you plan to use trending with the metric.
11. Configure the active period for the metric by using the date selectors in the **Active From** and **Active To** fields.
12. Click **Save Metric**.
13. If you are ready to activate the metric, click **Publish Metric**. Metrics are not considered active until they have been published (see [Metric Attributes](#), **Metric Status**). You can optionally return to this task to publish a metric saved previously.

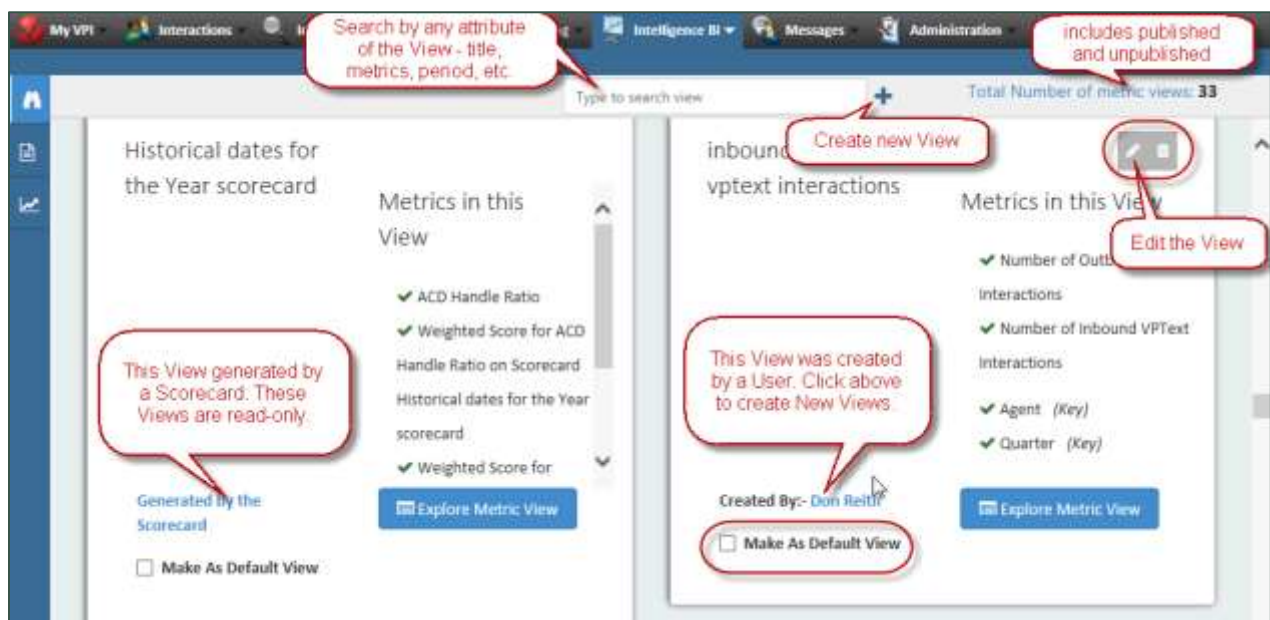
Metric Views

Metric Views enable you to analyze and compare data from a collection of metrics, and are useful for exploring a collection of related KPIs. The following considerations apply to metric views:

- You can pick your own selection of metrics from any available data sources
- Raw data is presented in a grid for contrast and comparison of values over a period of time
- You can create metric views for different levels, such as agent, group, or company
- Metric views include no calculated scores and no weighting of metrics
- You can export metric views to different formats
- You can broadcast and share scorecards with agents and groups through a published dashboard

NICE Uptivity Performance Management includes some metric views out of the box, but you will probably want to create your own custom views.

The **Metric Views** page presents you with a list of all views (unless a default view was previously set). You can select a metric view to explore it. If you have View Designer permissions, you can also edit views.



To explore another view, click **Explore/Configure All Metric Views** in the top-left corner.

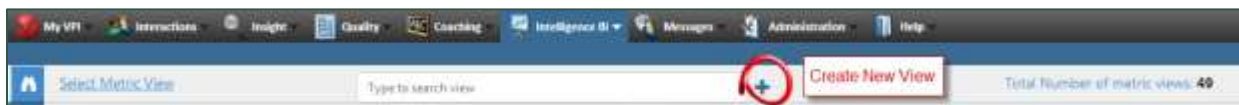


i A metric view generated by a scorecard includes the scorecard metrics, the weighted score for each metric on the scorecard, and the overall weighted score metric. If a metric has multiple versions, the view contains all metrics from all scorecard versions. Scorecard views are read-only. For more information, see [Balanced Scorecards](#).

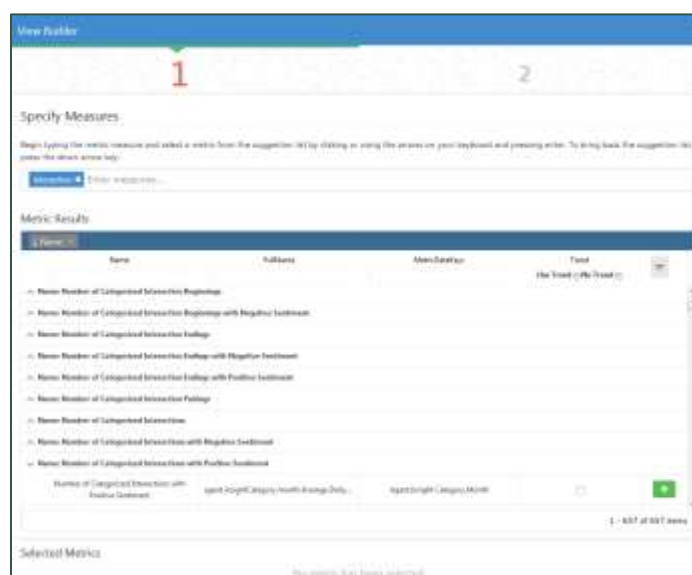
HOW TO: Create Custom Metric Views

i Views generated by a scorecard are read-only, but you can open and edit any metric views created by a user.

1. Click the **+** icon to launch the **View Designer**.

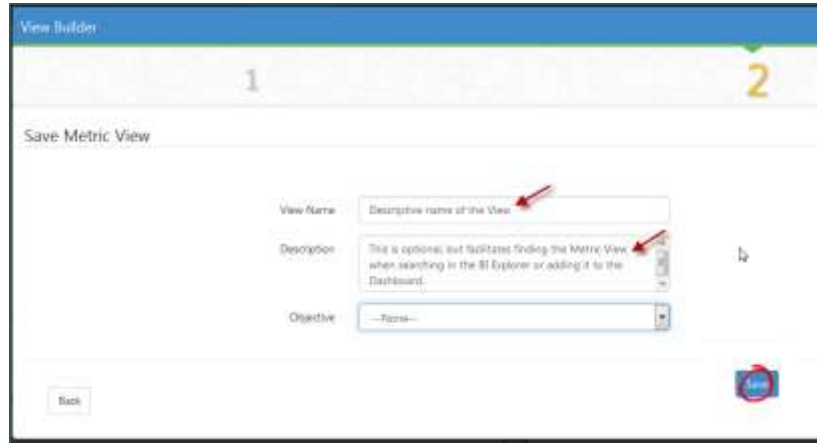


2. Select a metric. Once you select the first metric, the list refreshes with metrics that have the same (or compatible) keys. When you have finished selecting metrics, click **Next**.



Metric Views

3. Enter a **Name** and **Description** for the view.



4. **Optional:** Select an **Objective** from the drop-down list. When your organization has defined company-level objectives, you can tie them to metrics on scorecards and metric views.
5. Click **Save**.

HOW TO: Add Metric Views to a Dashboard

You can add metric views (including scorecard views) to any dashboard. For more information, see the *NICE Uptivity Performance Management Dashboards and Reports Guide*.

1. Unlock the dashboard.
2. Expand **Add Content** in the left pane, click **Add Metric View**, and drag it onto the dashboard. This launches a wizard for adding views.
3. Follow the steps in the wizard to select an existing metric view and configure the presentation of the data on the dashboard.

i You can easily condense information for efficient use of space by removing redundant columns (such as the date, if it is the same for all rows of the view).

Grid Views

When you open a metric view, you have a flexible set of data analysis tools to explore the data in 3 different grids. You can switch between the different grids without losing changes. Clicking the **Search** tab on the left side allows you to search and filter from any grid.

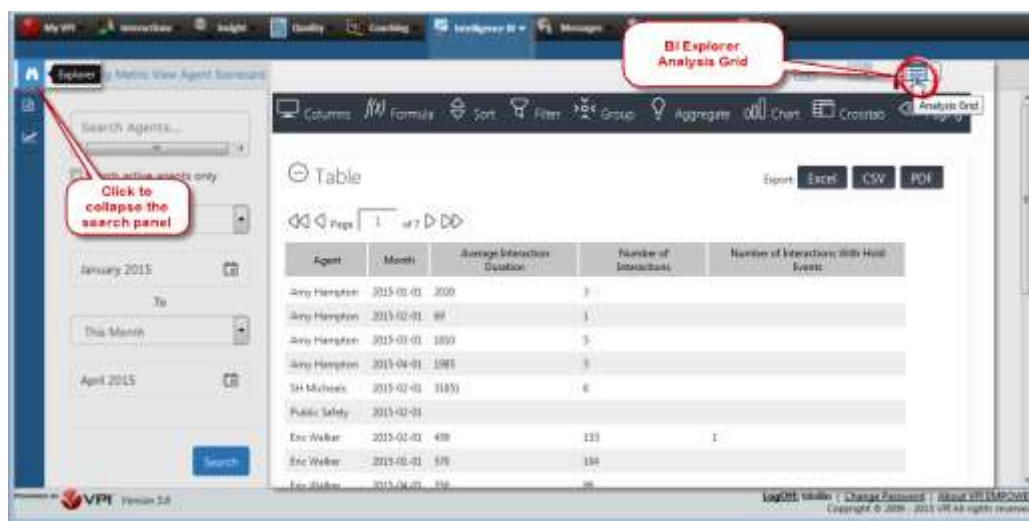
Metric Grid View

The **Metric Grid** is displayed by default.

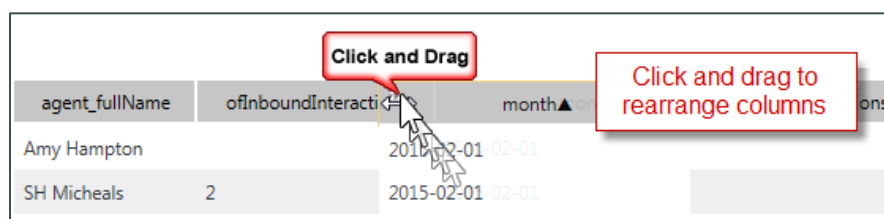


Analysis Grid View

The **Analysis Grid** presents the view metrics in a table format that you can sort, order, and filter. This grid is similar to a spreadsheet and useful for aggregating data in different ways for further analysis.



To rearrange columns, drag and drop them in the table.



You can export an **Analysis Grid** to Excel, PDF, or comma-separated values (CSV) formats. You can also save **Analysis Grid** layouts for later use.

Metric Views

Table

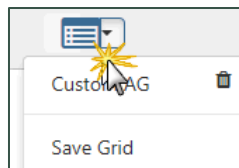
Export: Excel CSV PDF

Export Options

agent_fullName	month	ofInboundInteractions	ofInteractionsPutonHold	ofOutboundInteractions
Mark Lucena	2015-02-01			1
SH Micheals	2015-02-01	2		

HOW TO: Save an Analysis Grid Layout

1. Select a **Metric View**
2. Click the **Analysis Grid** tab.
3. In the right corner, click **Save Grid**.



4. Enter a **Grid Name**.

Save Analysis Grid

Grid name: Name of my Analysis Grid

Description: Saves my layout selections to reuse later with same or different data

Save Cancel

5. Enter a **Description**.
6. Click **Save**.

Dimension Grid View

The **Dimension Grid** provides additional ways to organize data and present it in graphical formats, such as a chart or heatmap. You can export **Dimension Grids** to Excel format.



HOW TO: Configure a Dimension Grid

1. Select a **Metric View**.
2. Click the **Dimension Grid** icon.
3. Click items in the **Rows** and **Columns** lists to configure the dimensions.
4. Click one or more metrics from the **Values** list.
5. Click the **Explorer** icon (signified by a pair of binoculars) in the left panel.
6. Configure the time period for the grid by selecting a pre-determined period from the drop-down list or by clicking the date selectors to choose a custom date range.
7. Click items in the **Filters** list to filter the grid display. As you make your selections, the grid appears in the area below.
8. **Optional:** Select the checkbox(es) for **Chart**, **Heatmap**, or both to add these graphical elements to the grid display.
9. **Optional:** Save the grid for future use.
 - a. Click the drop-down indicator next to the **Dimension Grid** icon and select **Save this grid**.
 - b. Enter a **Grid Name**.
 - c. Enter a **Description**.
 - d. Click **Save**.

Metric Trending

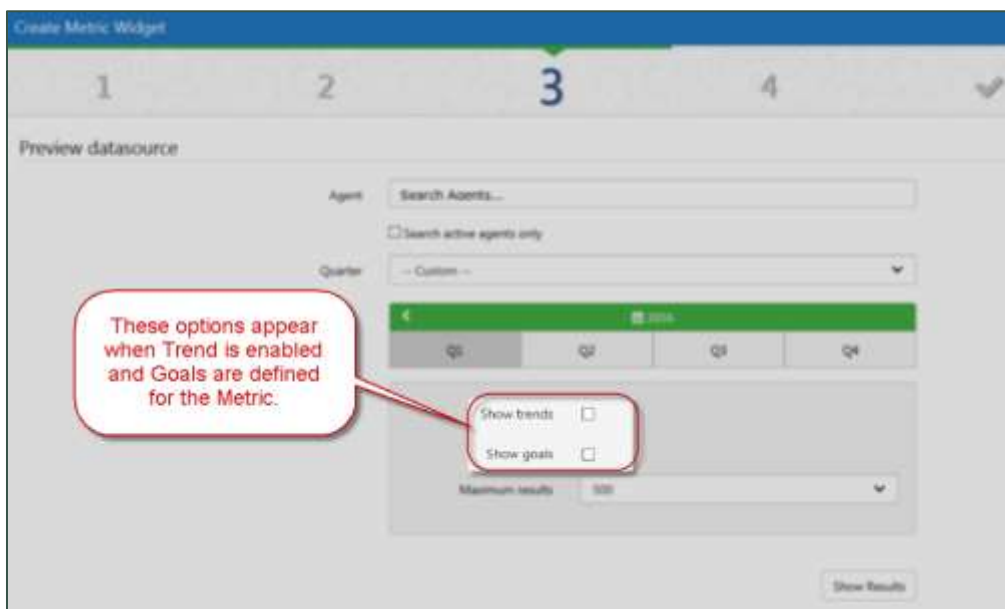
NICE Uptivity Performance Management allows you to enable trending for metrics, so you can see how performance compares to a previous period. You can configure any metric to support a trend indicator, including scorecard-generated metrics.

Trend is presented as an arrow in any widgets, scorecards, and metric views that reference the metric. The up or down direction of the arrow indicates the trend of this data in comparison with the data you have configured to trend against in the **BI Designer**. You have these options for trending:

- Trend against the previous period
- Trend against the same period for the previous year

When trend is enabled for a metric, it can be configured for display in various places where the metric is used:

- Single-point metric widgets offer the **Show Trend** option.



- **Single-value widgets** (such as those shown in the following image) can be configured to display a trend line.



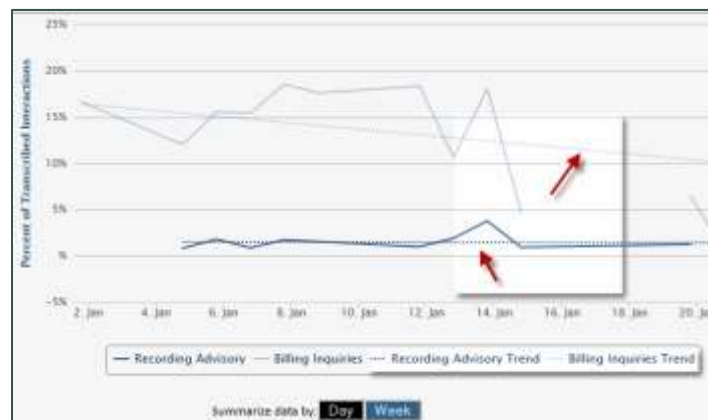
- When you use the metric in scorecards, a trend indicator is displayed (green and red icons in this image).

Scorecard widget on Dashboard

Metric Name	Metric Value	Score
Average Callation Score (20%)	12.0%	100%
Evaluation Average Score (20%)	12.0%	100%

Detail View

- In **Instant Analyzer** charts, the application dynamically derives a trend line from the data.

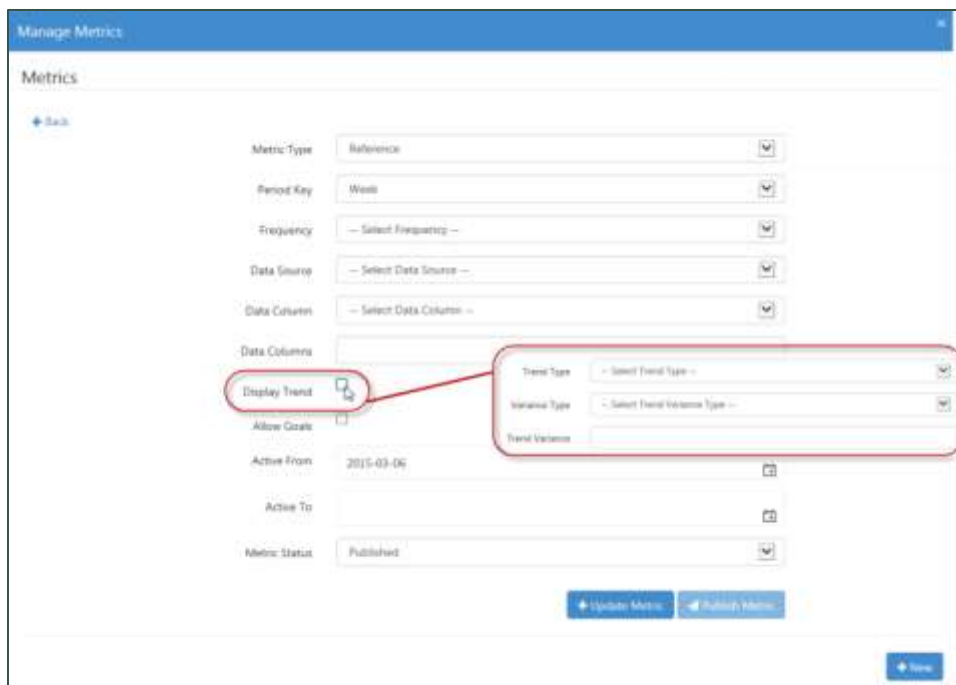


HOW TO: Enable Trend for a Metric

- Select Intelligence>BI Designer.
- Click the **Measure Designer** icon (designated by three parallel lines) in the left panel.
- Locate the measure associated with the metric you want to trend and click the blue **Metrics** icon.
- For the metric you want to trend, click the **Edit** icon.

Metric Trending

5. Select the **Display Trend** checkbox.



The screenshot shows the 'Manage Metrics' interface. The 'Metrics' section is active, and the 'Display Trend' checkbox is highlighted with a red circle. A callout box points to the 'Trend Type', 'Variance Type', and 'Trend Variance' fields. The 'Trend Type' field is currently set to '- Select Trend Type -'. The 'Variance Type' field is currently set to '- Select Trend Variance Type -'. The 'Trend Variance' field is currently empty. The 'Update Metric' and 'Publish Metric' buttons are visible at the bottom of the form.

6. For **Trend Type**, select one of the following from the drop-down list: *Previous Period* or *Same Period Last Year*.
7. For **Variance Type**, select one of the following from the drop-down list: *Absolute* or *Percentage*.
8. For **Trend Variance**, enter a value representing the variation that is considered acceptable before the trend is impacted. The number you enter is treated differently depending on the selected Variance Type. For example, a value of **10** may be 10 calls (absolute) or 10%.

i For some measures, such as average hold time, a downward trend may be considered good. For others, such as upsell dollars, the opposite is true. Whether up or down is "better" is determined by the **Bias** field in the measure (see [Data Attributes of Measures and Metrics](#))

Measure Attributes

Attribute	Explanation
-----------	-------------

Attribute	Explanation
Bias	<p>Bias is measure attribute that comes into play when you trend or set goals on a metric that uses that measure. Bias is used in trending (see Metric Trending) and goals (see Metric Goals), where you set values for Variance Type and Variance Value to work with bias. Not every measure has a bias, and the bias may be different for different measures and different customers.</p> <p>When you create a measure, a drop-down list presents these options: <i>Higher Is Worse</i> or <i>Lower Is Worse</i>.</p>
Content Type	<p>Content Type describes the value of a measure. When you create a measure, a drop-down list presents these options: <i>Currency</i>, <i>Duration (Seconds)</i>, <i>Number</i>, or <i>Percentage</i>. <i>Duration</i> is stored in seconds and displayed as H-M-S.</p>
Aggregate Type	<p>Aggregate Type provides metadata only; it does not perform any computations. The following options are presented in a drop-down list when you create a measure: <i>Any</i>, <i>Average</i>, <i>Count</i>, <i>First</i>, <i>Last</i>, <i>Maximum</i>, <i>Minimum</i>, <i>None</i>, <i>Rank</i>, <i>Score</i>, <i>Statistic</i>, <i>Std Deviation</i>, <i>Sum</i>, and <i>Weighted Score</i>.</p>
Resource Type	<p>Resource Type defines the data source for the measure. Performance Management uses data collectors to collect and process business application data from a variety of disparate sources (see Data Analysis Overview).</p> <p>When you create a measure, a drop-down list presents you with all integrated and available data sources.</p>
Measure Tags	<p>Measure Tags help people find and use metrics in dashboard widgets, views, scorecards, tickers, and so forth. Measure tags are what people will use to look up the metrics for the measure. Each measure can have multiple measure tags. When you create a measure, a drop-down list presents a lengthy list of possible tags.</p>
Display Precision	<p>Display Precision specifies the total number of digits for the displayed value of the measure.</p>

Metric Trending

Attribute	Explanation
Numeric Precision	Specify Numeric Precision for measure when you are using goals and trend.
Numeric Scale	Specify Numeric Scale for measure when you are using goals and trend.

Metric Attributes

Attribute	Explanation
Metric Type: Reference	Use reference metrics to base one metric on another. For example, you might create a new reference metric based on the "hourly count" metric and use SQL to perform operations on it.
Metric Type: Calculation	Use calculation metrics to create metrics processed from data collected from a data source, such as Cisco UCCX or Coaching.
Metric Type: Roll-Up	"Roll-up" metrics are group metrics rolled up from agent metrics. This term is a simply name for these metrics and not a choice when creating metrics.
Period Key	The Period Key is set based on the Metric Type . For calculation metrics, the period key is set by the system based on the metric data (making it read-only). For reference metrics, you must specify the period key from a drop-down list of the following values: <i>15 Minute, 30 Minute, Hour, Day, Week, Month, Quarter, Calendar, Year</i> .
Frequency	Frequency is set based on the Metric Type . For calculation metrics, the frequency is set by the system based on the metric data (making it read-only). For reference metrics, you must specify the frequency for the Metric from a drop-down list of the following values: <i>1 Minute, 5 Minutes, 15 Minutes, 30 Minutes, 1 Hour, 12 Hours, 1 Day, 1 Week, 30 Days</i> .
Period SQL	Period SQL identifies the data source for a calculation metric. When you create such a metric, you must enter an SQL statement in this field that points the system to the correct data source.

Attribute	Explanation
Active Dates	<p>The Active From and Active To dates tell the system the periods for which to calculate the Metric. If you leave the Active To blank, the system treats the calculation period open (that is, having no end date).</p> <p>When a metric is used in scorecards or associated with a goal, the active period for the metric should align with the periods set for the goal and scorecard.</p>
Metric Status	<p>Metric Status indicates whether a metric has been published. Metrics must be published to be considered active; that is, to be automatically updated by the system, to appear on the Metrics List Report and to be used in other features of Performance Management. Each version of a metric has a Published indicator. In addition to Published, metrics can also be in one of these two statuses:</p> <ul style="list-style-type: none"> • Edit – the metric (or new version of a metric) has been saved but not published • Problem – the metric has been published but the system experienced an issue during computation

HOW TO: Create New Measures).

9. Click **Save**.

Metric Goals

Setting goals allows you to measure performance against performance targets. You can gain richer information from the metrics used in tickers, dashboards and scorecards by setting goals at different levels. You can set goals for any metric, including scorecard-generated metrics, if you have Goals Designer permissions.

Basic Goals are set on measures. They enable you to set an overall target for any measure. Basic goals are set globally and have no specific date range.

Advanced Goals are set on metrics. Advanced goals are usually set for defined periods of time, but can be left open-ended. You can set an advanced goal for any metric whose only non-period key is Company, Group, or Agent. For example, you can set an advanced goal for "Agent, Week" but not "Agent, Skill".

You can set goals at both levels (basic and advanced) for associated data. For example, you can set a basic goal for a measure and an advanced goal for one of its metrics. Where the two goals might conflict, an advanced goal on a metric takes precedence over a basic goal on a measure.

You view and manage both types of goals from the **Goal Manager**. To access it, select Intelligence>BI Designer and then click the **Goals** icon (represented by a graph) in the left panel. You can also view the history of basic goals set on a particular measure, or advanced goals set on a particular metric, by clicking the **History** button.

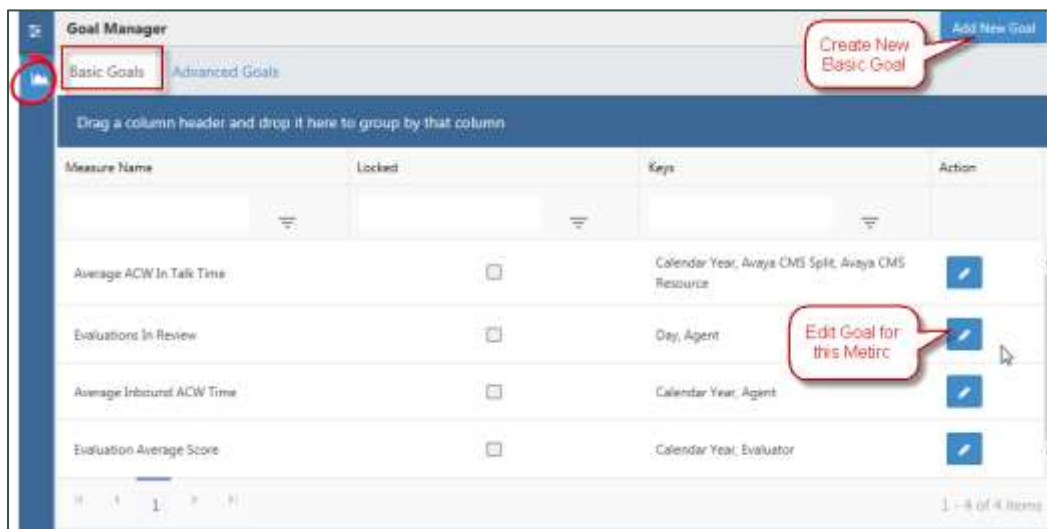
You can edit existing basic and advanced goals. When you make changes to an advanced goal with an open period (no end date), the system closes the original period and starts a new period and version of the advanced goal.

HOW TO: Configure a Basic Goal for a Measure

1. Select Intelligence>BI Designer and then click the **Goals** icon in the left panel.
2. Click the **Basic Goals** tab.
3. Click **Add New Goal**.
4. **Optional:** Enter keywords to filter the list of available metrics.
5. Select the metric for which you want to create a goal by clicking the **Add** icon.
6. Click **Next**.
7. For **Target Value**, enter the desired threshold value for the goal.

8. For **Variance Type**, select one of the following from the drop-down list: *Absolute* or *Percentage*.
9. Enter a **Variance Value**. Metrics are considered to be "At Goal" if they fall within a range of the **Target Value** plus/minus the **Variance Value**. For example, if the target value is **90**, and the variance value is **3**, then a metric value of 87-93 would be considered "At Goal". Entering a value of 0 ensures that only metrics exactly meeting the target value are considered to be "At Goal".
10. Click **Save**.

HOW TO: Edit Basic Goals



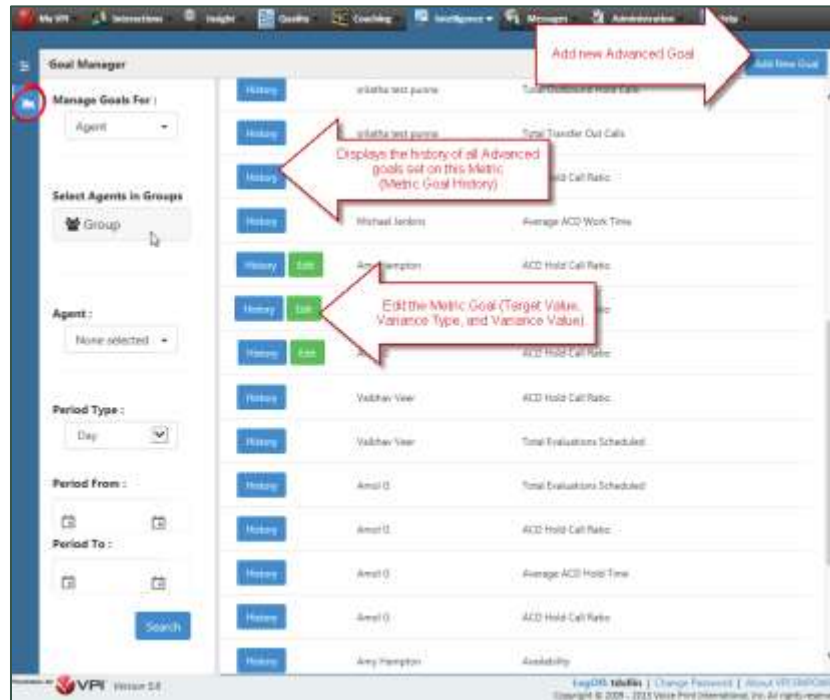
You can edit, or change, a basic goal at any time. When you do this, metrics are recalculated according to their individual schedule.

1. Select Intelligence>BI Designer and then click the **Goals** icon in the left panel.
2. Click the **Basic Goals** tab.
3. **Optional:** Use the filtering tools to limit the list of displayed measures.
4. Locate the measure for the goal you want to edit and click the **Edit** icon.
5. Revised the settings as needed.
6. Click **Save**.

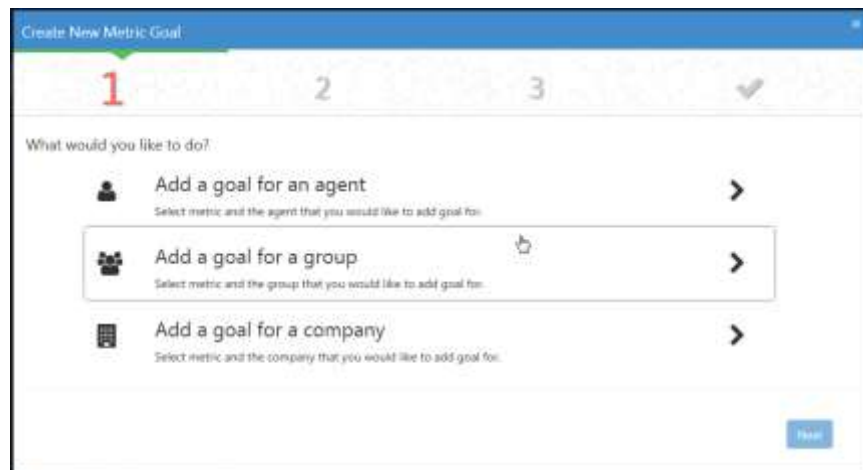
Metric Goals

HOW TO: Configure an Advanced Goal for a Metric

You can use the options in the left pane to narrow the list of existing advanced goals displayed in the **Goal Manager**.



1. Select Intelligence > BI Designer and click the **Goals** icon in the left panel.
2. Click the **Advanced Goals** tab.
3. Click **Add New Goal**.
4. Click the type of goal you want to set: **Agent**, **Group**, or **Company**.



5. For **Time Period**, select one of the following from the drop-down list: *Day*, *Week*, *Month*, *Quarter*, or *Calendar Year*.

6. Enter the measure for metric on which you want to set a goal. You can enter one or more keywords if you don't know the measure name.

Metric Name	Description	Aggregate Type	Content Type	Keys	Action
Evaluation Average Score	Average evaluation score	Average	Percentage	Group, Day	+ Add

7. Locate the metric you want to use and click the **Add** icon.
8. Click **Next**.

Metric Goals

- Use the date drop-downs, date selectors, or both, to configure start and end dates for the goal. If you want to apply the advanced goal for an indefinite period, clear the **Specify Range** checkbox.

i If you are using metrics with goals on scorecards, be sure the goal period correlates with the active dates for the metric (see [HOW TO: Create Metrics for an Existing Measure](#)) and the time period of the scorecard (see [HOW TO: Create a Scorecard](#)).

The screenshot shows the 'Create New Metric Goal' interface. It features a progress bar with three steps, where the third step is active. The form includes date pickers for 'Today' (7/9/2015) and 'To' (Custom). The 'Group' field is set to 'tra'. The 'Target Value' is 'Avectra Team'. The 'Variance Type' dropdown is open, showing options like 'Training Dept', 'Mgmt Trainers Group', and 'Trainers Group'. A red callout box highlights the 'Variance Type' field with the message: 'You must specify Agent or Group to create goals on Agent or Group Metrics.' A 'Save Goal' button is located at the bottom right.

- If you are creating a goal for an agent or group metric, specify the agent(s) or group(s). If you are creating a goal for a company metric, you can disregard this step.
- For **Target Value**, enter the desired threshold value for the goal.
- For **Variance Type**, select one of the following from the drop-down list: *Absolute* or *Percentage*.
- Enter a **Variance Value**. Metrics are considered to be "At Goal" if they fall within a range of the **Target Value** plus/minus the **Variance Value**. For example, if the target value is **90**, and the variance value is **3**, then a metric value of 87-93 would be considered "At Goal". Entering a value of 0 ensures that only metrics exactly meeting the target value are considered to be "At Goal".
- Click **Save**.

HOW TO: Edit Advanced Goals

Over time, you might want to edit, or change, an advanced goal to set different target values for different periods. For example, you may want to set targets higher for periods of historically heavy volume, different seasons, or known busy times.

If the metric you select already has an advanced goal defined, and that goal has not reached the end date (or has no end date), the system automatically closes the period and creates a new version of the goal that reflects the changed values.

1. Select Intelligence>BI Designer, then click the **Goal Manager** icon in the left panel.
2. Click the **Edit** icon for the goal you want to edit.
3. Revise the settings as needed.
4. Click **Save**.

Balanced Scorecards

It is common for many metrics to play a role in how overall performance is measured. Interpreting all the data together can be a challenge. How do you draw conclusions about overall performance from a mix of different KPIs?

You can use the **Balanced Scorecards** feature to compute the overall performance score. Weighted scores are useful for communicating performance to stakeholders across your organization because they are all-inclusive, easy to understand, and do not require users to perform (or even understand) the math behind them.

With scorecards, you define how metrics are weighted in comparison to each other, and scores are calculated based on these weights. There are two kinds of scores calculated on a scorecard:

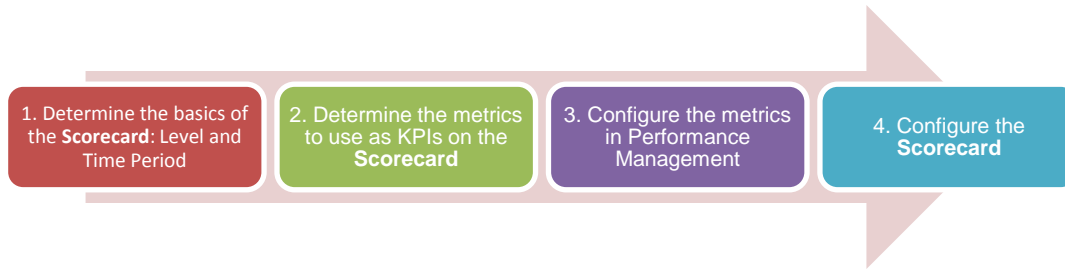
- **Weighted Score** — Calculated for each metric on the scorecard. You determine the weight for each metric. The total weight for all metrics on the scorecard must equal 100%. The calculation method for these scores is explained later in this section. A weighted score metric for each individual metric is generated by the scorecard during calculations, and is named "Weighted Score for <measure name> on <scorecard name>".
- **Overall Score** — Total of all weighted scores in the scorecard. A weighted overall score metric is generated by the scorecard during calculations, and is named "Weighted Score for Scorecard <scorecard name>".

You can use these scorecard-generated metrics anywhere in the system where metrics are viewed. You can also set goals and enable trending for these generated metrics so you can track different aspects of performance using color indications (for goal adherence) and arrows (for trend) through dashboards and scorecards. These metrics are useful for communicating overall agent, group, and company performance to stakeholders across your organization because they are all-inclusive, easy to understand, and do not require users to perform (or even understand) the math used to generate the balanced score.

Scorecards can be used to:

- Draw conclusions about overall performance from a mix of different measures
- Measure performance numerically with a calculated score
- Calculate scores across a range of metrics for agents, groups, or the company
- Broadcast and share calculated scores through a published dashboard

Creating a scorecard requires a workflow that includes planning steps as well as tasks within Performance Management. This workflow can be illustrated as follows:



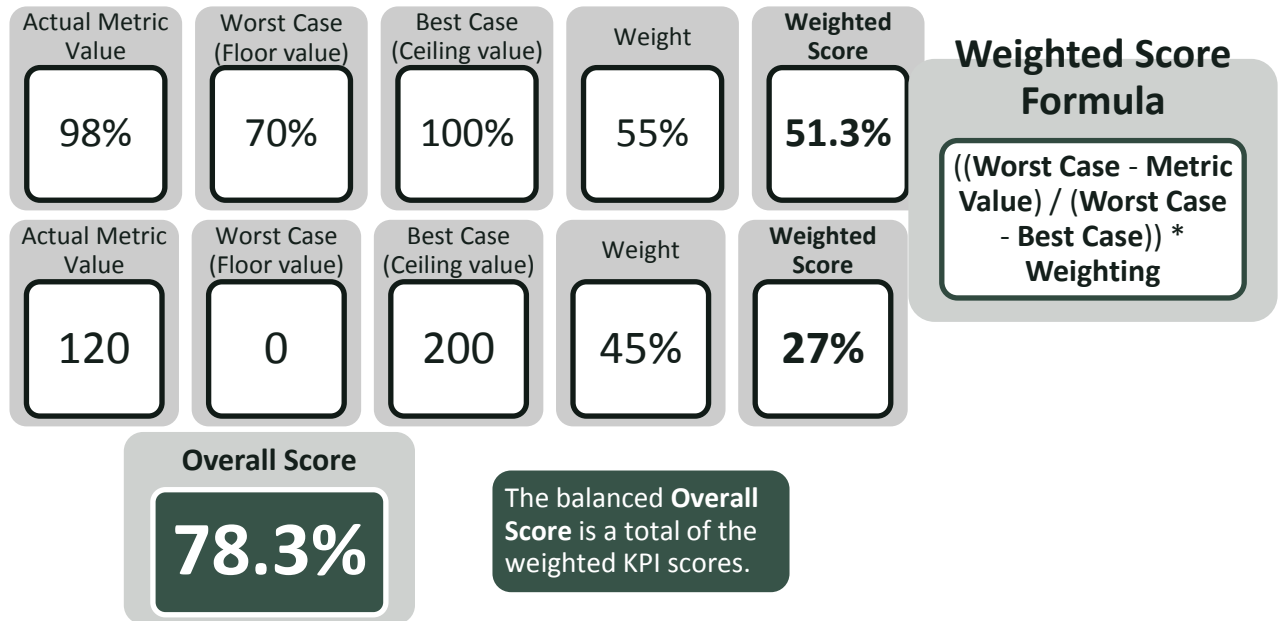
Balanced Scorecard Elements

Scorecard For: Company				Company Scorecard		4/26/2015	
	Metric Name	Metric Value		Score			
Enterprise	Number of Outbound Interactions (25%)	344	↑	25.00%			
	Number of Inbound Interactions (15%)	137		15.00%			
Quality of Service	Evaluations Started (15%)		↑				
	Total Evaluations Completed (15%)		↑				
	Evaluation Average Score (20%)		↓				
	Percent of Evaluations Scored Below Standard Deviation (10%)		↑				
Overall Score:							40.00%

- Scorecard Type** (Agent, Group, Company) , **Name** and **Calculated Period** (set at scorecard creation)
- Objective** — If KPIs on the **scorecard** were assigned to organizational **Objectives** (set at scorecard creation time), the KPIs are listed by **Objective**. When **Objectives** are used, a weighted percentage score is calculated for KPIs per **Objective**.
- Metric Name** — KPIs on the scorecard
- Weighting** — All metrics in a scorecard are weighted at scorecard creation. The weighting percentage is shown in parentheses and used to calculate the score.
- Metric Trend** — If trending is enabled for the metric, up/down arrows indicate the actual performance against either the **Same Period Last Year** or **Last Period**. Trend may be presented for both raw values and calculated scores.
- Metric Value** — Actual value recorded for the KPI. Depending on the metric, the number may be absolute or a percentage.
- Weighted Score** — Weighted percentage score calculated for an individual metric. This value is used to calculate the **Overall Score**.
- Overall Score** — Total balanced score for the scorecard and **Calculated Period**.

Scorecard Calculations

There are two types of scores calculated for a scorecard: weighted scores and a balanced overall score. This section explains how these score types are calculated.



A weighted score is calculated for each KPI, guided by these values:

- **Actual Metric Value** — Actual value recorded. Depending on the metric, it may be an absolute number (like number of calls handled) or a percentage (such as a QA score).
- **Metric Weight** — Weighting is required for each KPI. It represents the relative importance of the metric against the other metrics used on the scorecard, expressed as a percentage. The total for all metrics in the scorecard must equal 100%.
- **Worst Case and Best Case Values** — Used to create a floor and ceiling range for a metric.

Worst case and best case values are optional. You should leave these blank to let the system infer using actual values, unless you want to constrict the range used in the weighted score calculation.

The weighted score is computed based on where the value is positioned in the range. By setting these values, you are configuring the range that constrains the value used in the weighted score calculation. This can sometimes help to minimize the impact of extreme values (“outliers”) and ensure that a bad or exceptional

performance on one metric doesn't affect the computation of scores for the other metrics on the scorecard. It also enables you to set baselines for metrics (where it makes sense to do so). For example, for a metric such as Average Evaluation Score, you may want to set an acceptable minimum evaluation performance level on a scorecard to 65%.

If the actual value is greater than the best case value, then best case is used in the calculation. If the actual value is less than the worst case value, then worst case is used in the calculation.

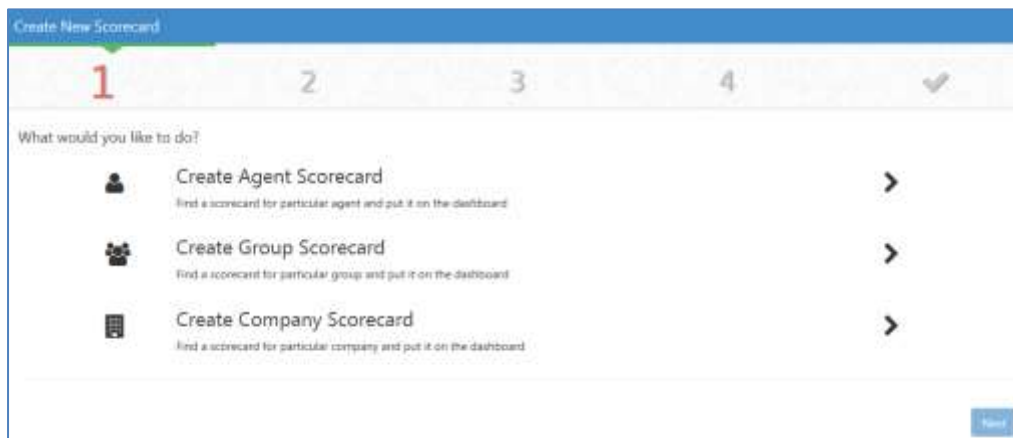
As shown in the preceding image, the base formula used to calculate the weighted score is:

$$((\text{Worst Case} - \text{Actual Metric Value}) / (\text{Worst Case} - \text{Best Case})) * \text{Weighting}$$

Changing these values will change how the score is computed on the scorecard. For most situations, you only need to set the weight for each KPI.

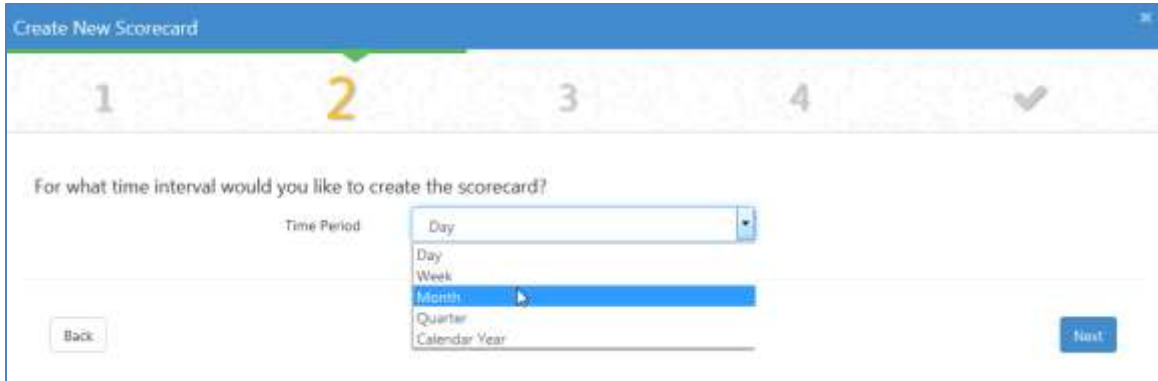
HOW TO: Create a Scorecard

1. Click the **Scorecard** icon (indicated by a graph icon) in the left panel.
2. Launch the **Scorecard Wizard**.
3. Click the type of scorecard you want to create from the options provided.



Balanced Scorecards

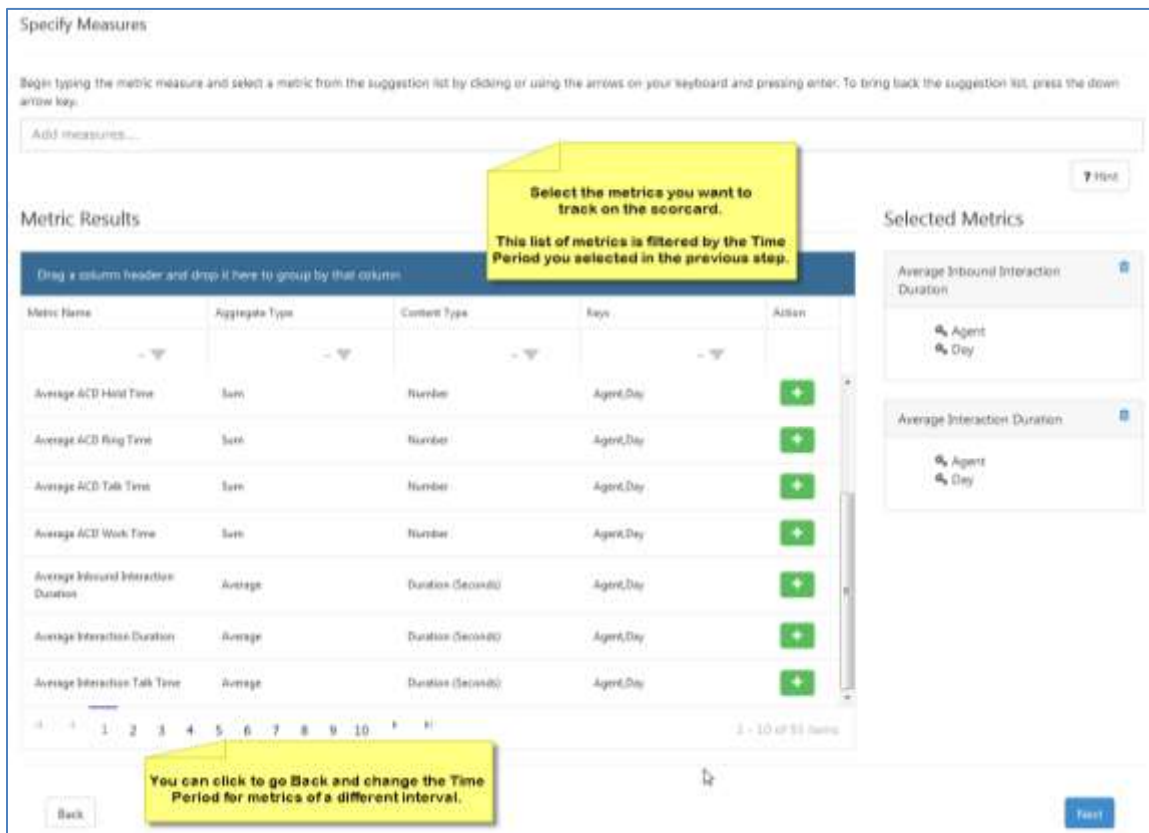
4. Select a **Time Period** from the drop-down list.



The screenshot shows a 'Create New Scorecard' window with a progress bar at the top indicating step 2. Below the progress bar, the text asks 'For what time interval would you like to create the scorecard?'. A 'Time Period' dropdown menu is open, showing options: Day, Week, Month (highlighted), Quarter, and Calendar Year. There are 'Back' and 'Next' buttons at the bottom.

5. Click the **+** icon to select a metric to include in the scorecard. Only metrics that have keys matching your earlier selections are presented. For more information, see [Understanding Measures, Metrics, and Keys](#). Repeat this step until you have selected all metrics you want to include.

Avoid selecting recursive or dependent metrics (that is, metrics that refer back to themselves).



The screenshot shows the 'Specify Measures' interface. It includes a search bar for adding measures, a 'Metric Results' table, and a 'Selected Metrics' panel. A yellow callout box points to the table with the text: 'Select the metrics you want to track on the scorecard. This list of metrics is filtered by the Time Period you selected in the previous step.' Another yellow callout box points to the 'Back' button with the text: 'You can click to go Back and change the Time Period for metrics of a different interval.'

Metric Name	Aggregate Type	Content Type	Keys	Action
Average ACD Hold Time	Sum	Number	Agent,Day	+
Average ACD Ring Time	Sum	Number	Agent,Day	+
Average ACD Talk Time	Sum	Number	Agent,Day	+
Average ACD Work Time	Sum	Number	Agent,Day	+
Average Inbound Interaction Duration	Average	Duration (Seconds)	Agent,Day	+
Average Interaction Duration	Average	Duration (Seconds)	Agent,Day	+
Average Interaction Talk Time	Average	Duration (Seconds)	Agent,Day	+

6. Click **Next**.

- For **Weight**, enter the weight of this metric in relation to all metrics included in the scorecard. Repeat this step until you have entered a **Weight** value for all metrics. The total weight of all metrics must equal 100%.

The screenshot shows the 'Configure Metrics' interface with the following fields and callouts:

Metric Name	Min Value	Max Value	Weight (%)	Objective	Position
Average Interaction Duration	0	0		None selected	↑ ↓
... (partially visible)	0	0		None selected	↑ ↓
... (partially visible)	0	0		None selected	↑ ↓

Callouts include: 'Min and Max establish a floor/ceiling range for the metric' pointing to the Min/Max value fields; 'Must equal 100%' pointing to the 'Total Weight: 0%' label; 'Select from a defined Objective.' pointing to the objective dropdown menu; and 'Change the position of KPIs in the scorecard' pointing to the position arrow buttons.

- Optional:** Enter **Min Value** (worst case) and **Max Value** (best case) for the metric. Repeat this step for additional metrics if applicable. For more information, see [Scorecard Calculations](#).
- Optional:** From the drop-down list, select an organizational **Objective** to be tied to the metric. Repeat this step for additional metrics if applicable. Objectives will be available only if they have already been established in your Performance Management system.
- Optional:** Click the up or down arrow buttons to change the order in which metrics are displayed on the **scorecard**.
- Click **Next**.
- Enter a **Scorecard Name**.

The screenshot shows the 'Configure Scorecard' interface with the following fields and callouts:

- Scorecard Name:** Name of your Scorecard. Callout: 'Since Weighted Score measures and metrics automatically include the name of the scorecard, we recommend using unique names when creating new scorecards to keep these new Measures and their Metrics clear.'
- Description:** (Empty text area)
- Select Group:** Search Group... Callout: 'You specify the groups that to compute scorecard metrics for. To add agents or groups to the scorecard later, you can edit the Scorecard and the Metrics Engine will compute the scorecard for them.'
- From Date:** (Calendar icon)
- To Date:** (Calendar icon). Callout: 'Select the period to calculate the Scorecard for'

The calendar shows the month of May 2018, with the date Wednesday, April 25, 2018, highlighted at the bottom.

Balanced Scorecards

13. **Optional:** Enter a **Description**.
14. **Select Group** or **Select Agents** depending on the type of scorecard you selected earlier. If you do not make any selections, the scorecard values are computed for all agents (agent scorecards) or all groups (group scorecards). You can edit the scorecard later to add agents or groups.
15. Use the **From Date** selector to specify beginning of the time period for the scorecard.
16. Use the **To Date** selector to specify the end of the time period for the scorecard. If you do not specify a **To Date**, the metrics are calculated until you change the period or create a new version of the scorecard. Scorecard version is tied to the applicable time period and displayed in the **Scorecard Explorer**.
17. Click **Save** to publish the scorecard. No calculations are performed until the scorecard is published.

i The time period for a scorecard applies to the period for which metrics are being calculated (for example, last week) and not to the period when the metric calculations are actually performed (for example, today). This distinction may be important when you are back-filling data or redoing historical work.

Published Scorecards

You may periodically review your scorecards and decide to change what you are measuring, set different goals, or adjust the weighting for promotions or historically busy periods. A scorecard can have different versions, which enables you to use the same scorecard for users or groups, even when the scorecard inputs (metrics, goals, and so forth) change over time.

You can see and view all scorecard versions in the **Scorecard Explorer**. The version is represented by the time period for which the scorecard metrics are calculated. Each new period for the scorecard creates a new version. You can also create a new version of a scorecard by ending the current scorecard period and starting a new period with your changes.

When you create a scorecard, a view is dynamically generated and is then accessible through the **BI Explorer**. These views include the original metrics selected for the scorecard, the per-metric weighted score, and the overall score metric. If a metric has multiple versions, the view contains all metrics from all scorecard versions. These views cannot be edited.

Using Published Scorecards

After you create and publish a scorecard, you can display and view it in any of the following ways:

- **Scorecard Explorer**
- **BI Explorer**
- **Scorecard Widget** on a dashboard
- **Metric View** on a dashboard

Each of these is discussed in more detail in this section. The following table provides a brief overview of how the different viewing options affect availability of scorecard-related features.

Element	Scorecard as widget on Dashboard	Scorecard as View widget on Dashboard	Scorecard in the Scorecard Explorer	Scorecard in the BI Explorer (as Metric View)
Goal Color	✓	✓	✓	✓
Trend Arrow	✓	No	✓	No
Overall Score	✓	No	✓	No
Most useful for viewing...	Viewing a scorecard for Company, a single Agent or a single Group.	Viewing scorecards that include multiple Agents or Groups	Viewing scorecards that include multiple Agents or Groups	Viewing scorecards that include multiple Agents or Groups

Displaying Scorecards in the Scorecard Explorer

Use the **Scorecard Explorer** to view scorecards for multiple agents or groups at once, to view trending for a scorecard, or both. A scorecard is only calculated for the people and time periods for which it is configured. To access the **Scorecard Explorer**, click the graph icon in the left panel of the **BI Explorer**.

The **Select Scorecard Type** field in the **Scorecard Explorer** enables you to filter the type of scorecards displayed by **Agent**, **Group**, or **Company**. If you filter by agent, you can further filter for specific agents, or agents in specific groups. If you filter by group, you can filter for specific groups based on your permissions. The **Group** filter also tells you how many agents you selected.

Balanced Scorecards

When you click the **Scorecard** drop-down, a search field appears that allows you to search existing scorecards based on their attributes, such as title, metrics, description, and so forth.

You can drag and drop scorecard rows to compare them, and you can hover over any cell in a scorecard to see additional detail about the value, configuration, and score. For more information on the elements of a scorecard viewed in the **Scorecard Explorer**, see [Balanced Scorecard Elements](#).



Displaying Scorecards in Metric View

Use the **BI Explorer** to view scorecards for multiple agents or groups with goals.

The screenshot shows the BI Explorer interface. At the top, there's a navigation bar with 'My Work', 'Interactions', 'Insight', 'Quality', 'Coaching', 'WebServer', 'Messages', 'Administration', and 'Help'. Below it, a blue bar says 'Drag a column header and drop it here to group by that column'. The main table has columns: 'Company', 'Week', 'Number of Out', 'Evaluation Ave', 'Weighted Score', 'Evaluations Sta', 'Number of Inq', 'Total Autofail E', and 'Weighted Score'. The table contains data for three weeks: 10/18/2013, 10/25/2013, and 11/1/2013. Red callouts 1 through 5 point to specific UI elements: 1 points to the 'Explorer' tab, 2 points to the view name 'Company Version...', 3 points to the 'Week' column, 4 points to the 'Evaluation Ave' column, and 5 points to the view format buttons.

Company	Week	Number of Out	Evaluation Ave	Weighted Score	Weighted Score	Evaluations Sta	Weighted Score	Number of Inq	Weighted Score	Total Autofail E	Weighted Score	Weighted Score
Company Name	10/18/2013	46.00	25.41%	10.50%	0.00%	4	0.00%	17	0.00%	2.00	0.00%	10.50%
Company Name	10/25/2013		0.00%	0.00%	0.00%	-2	0.00%		0.00%	1.00	0.00%	0.00%
Company Name	11/1/2013		89.77%	0.00%	0.00%	8	0.00%		0.00%	1.00	0.00%	0.00%
Company Name	11/8/2013						0.00%		0.00%		0.00%	0.00%

1. **Metric View Explorer** tab of the **BI Explorer**
2. Name of selected view, including version
3. Calculated period
4. Goal — Cell color indicates performance against a defined goal
5. View format buttons – Click to toggle between Metric Grid, Analysis Grid, and Dimension Grid

Displaying Scorecards on the Dashboard

You have two options for putting a scorecard on the dashboard: the **Scorecard** widget and the **Metric View** widget. Scorecard widgets are best used to view single agents or groups, to see goals, to see trending, or any combination of these. Metric view widgets should be used to view scorecards for multiple agents or groups with goals.



1. Name of scorecard
2. You can sort/filter by columns
3. Cells display in different colors when goals are defined

In a scorecard widget, you can hover over a cell to see additional information. Details include the metric value, trend value (the metric value from the “trend against” period), worst and best case values, and weighting. Scorecards present the goal and trend of the score (as opposed to the base value of the metric).

Remember that scorecards are calculated for select agents and groups as defined in the **Scorecard Designer**. When no data is presented, it means that the scorecard has not been configured to calculate the user or group.



Scorecard Best Practices

- Before creating a scorecard, it is important to understand how weighted scores are calculated (see [Scorecard Calculations](#)) and how scorecard creation generates new metrics. Then you can take advantage of these new metrics effectively by using them anywhere that metrics are used in the system, including metric widgets on the dashboard and in metric views.
- When naming a scorecard, consider that a weighted score metric automatically include the name of the scorecard that generated it. For this reason, best practice is to use brief, unique names for scorecards. For example, if you name a scorecard "CS Manager Quarterly", then the weighted overall score metric generated by that scorecard will be: "Weighted Score for CS Manager Quarterly".
- Setting goals and enabling trend on all KPIs where it will be useful to you. Using these features lets you track different aspects of KPI performance through dashboards, tickers, metric views, and scorecards. Goals and trending can be configured for the metrics displayed on the scorecard, generated by the scorecard, or both. For more information, see [Error! Reference source not found.](#)
- Determine the best way to present your published scorecards (see [Using Published Scorecards](#)). Choosing the right display method will enhance the usefulness of the scorecard.

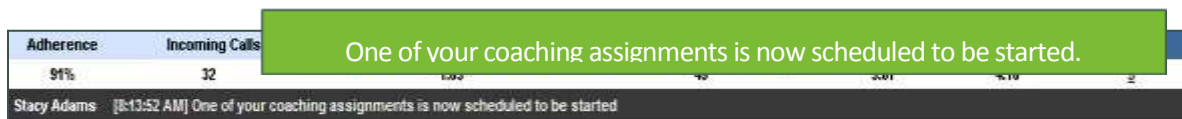
Desktop Tickers

The **Desktop Tickers** feature is another way to enhance agent engagement by providing them with updates on how they are performing for their various KPIs. Tickers provide real-time statistics in a narrow band that runs across the top of an agent's workstation. They reside over other applications and can run on the primary or secondary monitor. Tickers can also be used on wallboards.

Coaching		Calls/Hr.	Avg. Talk	Transfers	Conversions	Sales (\$)	Credits	Adherence	Avg. QA	In Queue	Abandons
Agent	12	3.04	1	83%	\$5,354	\$562	72%	91%	Group	12	5
Goal	15	3.38	3	70%	\$3,000	\$200	80%	85%		3:49	

Stacy Adams AGENT SCORECARD Expect Higher Call Volumes at 2:30pm Today Due to TV Promotion

Desktop tickers can also be used to broadcast messages, as shown in the following image.



The **Ticker Manager** can be accessed at Intelligence>Ticker Manager.

HOW TO: Assign Tickers

You can assign tickers to groups or to individual agents. When a user has membership in multiple groups, the system automatically sets their user profile to use the ticker assigned to their primary group (or the first parent of the primary group that is assigned a ticker). If different tickers are assigned to an agent through their agent and group profiles, the agent profile tickers are displayed.

To assign a ticker to an agent:

1. Select Administration>Users & Groups.
2. In the **Select a View** area in the upper left corner, click the **Agent** icon (designated by the single person).
3. On the **General Details** tab of the **User Profile**, click **Edit**.
4. Select a **Ticker** from the drop-down list.
5. Click **Save**.

Desktop Tickers

To assign a ticker to a group:

1. Select Administration>Users & Groups.
2. In the **Select a View** area in the upper left corner, click the **Group** icon (designated by two people).
3. On the **General Details** tab of the **Group Profile**, click **Edit**.
4. Select a **Ticker** from the drop-down list.
5. Click **Save**.

Ticker Messaging

Any ticker can receive messages. When you send a message for broadcast, the ticker scrolls through messages at a regular interval. Any user with permissions to use ticker messaging can send messages to the ticker. This feature enables supervisors to communicate with groups by sending messages to the ticker on the workstation. Messages can be useful for:

- Congratulating agents who met a goal
- Sending reminders about changes to processes and procedures
- Offering quick tips
- Notifying teams about upcoming events

When you send a message, you decide which agents receive it and how long it is active. Multiple active messages scroll across tickers in a “ticker-tape” effect.

Ticker messages for short updates are usually configured for display only. However, you can also configure ticker messages to require acknowledgment. Ticker messages with acknowledgment have an added ability to capture that the message has been read. The acknowledgment is recorded when the user clicks the **OK** link next to the message.

The acknowledgment message is displayed in the ticker until the user acknowledges it or until the message expires, whichever occurs first. If multiple acknowledgments are sent, they are displayed one at a time based on the priority and sent date, with oldest displaying first. Once a user acknowledges a message that requires it, that message is no longer considered active and it is removed from the ticker display.

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Document Revision History

Revision	Change Description	Effective Date
0	Initial release for NICE Uptivity	2017-03-28