NICE UPTIVITY REPORTS REFERENCE GUIDE

March 2017

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Version:	This guide should be used with NICE Uptivity (formerly inContact WFO Premise) v5.6 and higher.
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Contact:	Send suggestions or corrections regarding this guide to documentationrequests@incontact.com.

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Introduction

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Introduction

Audience

This document is designed for users of the NICE Uptivity 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 Uptivity **Web Portal**.

Goals

The goal of this document is to provide reference information about the various reports available in NICE Uptivity. 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 NICE Uptivity 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. Finally, it assumes that you have access to online help for NICE Uptivity as a resource for conceptual and task information.

Need-to-Knows

This guide describes reports available for the following NICE Uptivity features: call recording, quality management, and system reporting (including audit logging). Additional report descriptions can be found in the following guides for specific NICE Uptivity modules:

- *NICE Uptivity Survey for SIP Environments*
- *NICE Uptivity Survey for TDM Environments*
- *NICE Uptivity Speech Analytics Administration Guide*
- *NICE Uptivity Performance Management: Dashboards & Reports Guide*

Introduction

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

NICE Uptivity 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 NICE Uptivity administrator.

Several NICE Uptivity 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 **Web Portal**.

NICE Uptivity 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, NICE Uptivity 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

- No changes to reporting have been made for this release. Conceptual and task documentation for the feature has been moved to online help and is now searchable.

Printable Reports

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

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

The **System Reports** category of printable reports includes reports typically viewed onscreen by the NICE Uptivity administrator; see System Reports for more information.
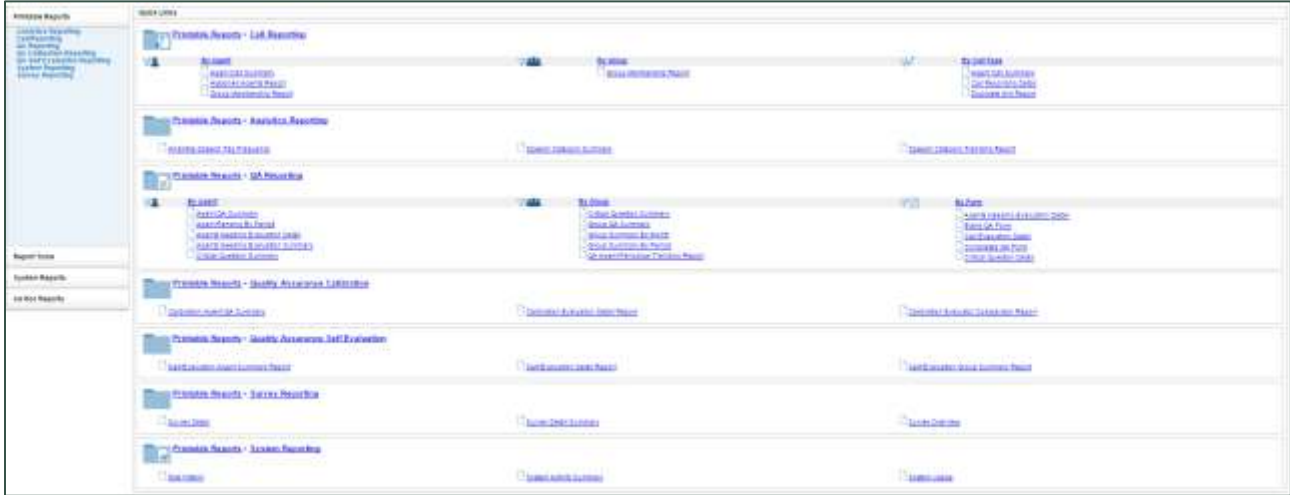
Alternatively, you can view a **Report List** that provides the name, description, and creation date for each report in the chosen category. For more information, search online help for keyword: *printable reports*.

Call Reporting Reports

NICE Uptivity **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.

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.

NICE Uptivity Reports Reference Guide

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 NICE Uptivity administrator if you need to view information for other agents and are unable to do so.

Assigned Agents Report

Status Active ▼

Assigned Agents

System ID	Agent	User Name	Status	Phone ID
1	Administrator, Administrator		Active	
7	Gonzaga, Frode		Active	5004
8	Coscia, Sheryl		Active	5008
9	Snicket, Pietro		Active	5023
10	Ocierega, Lemony		Active	5024
11	Cunningham, Richard		Active	5018
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	Fromini, Ramon		Active	5525
22	Bibic, Cherie	cher	Active	5555
23	Crowcox, Alan		Active	5703
24	Conlee, Jean-Pierre		Active	5704
25	Chavis, Boris		Active	5705
26	Byrd, Stian		Active	5706

Printable Reports

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		Back	Generate Report

Start Date 1/1/2013   End Date 1/13/2016   Call Direction Incoming ▼

ANI

◁◁ ◁ 1 of 1 ▷ ▷▷   ⬦ _____ Find | Next 📙 ▼ 🔄

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

Printable Reports

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	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

QA Reporting Reports

NICE Uptivity 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, search online help for keyword: *create forms*.

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 following image, **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*.

Printable Reports

NICE Uptivity Reports Reference Guide

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*.

Printable Reports

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 Uptivity 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 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 Uptivity 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*.

Blank QA Form

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

Printable Reports

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 **Coaching** > **Search QA Evaluations**, 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.

Printable Reports

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*.

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*.
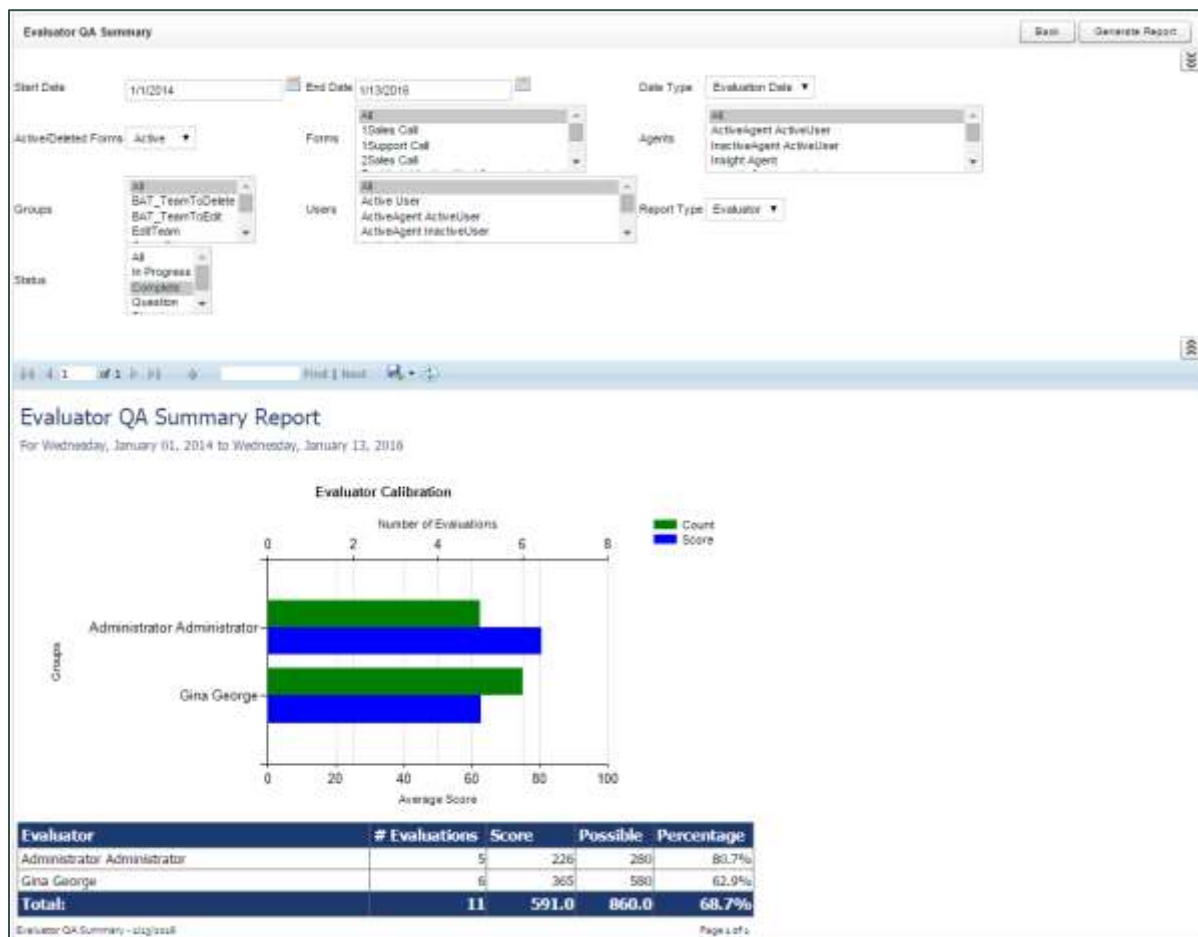
Form and Section Failures Report

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 failures and 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*.

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*.
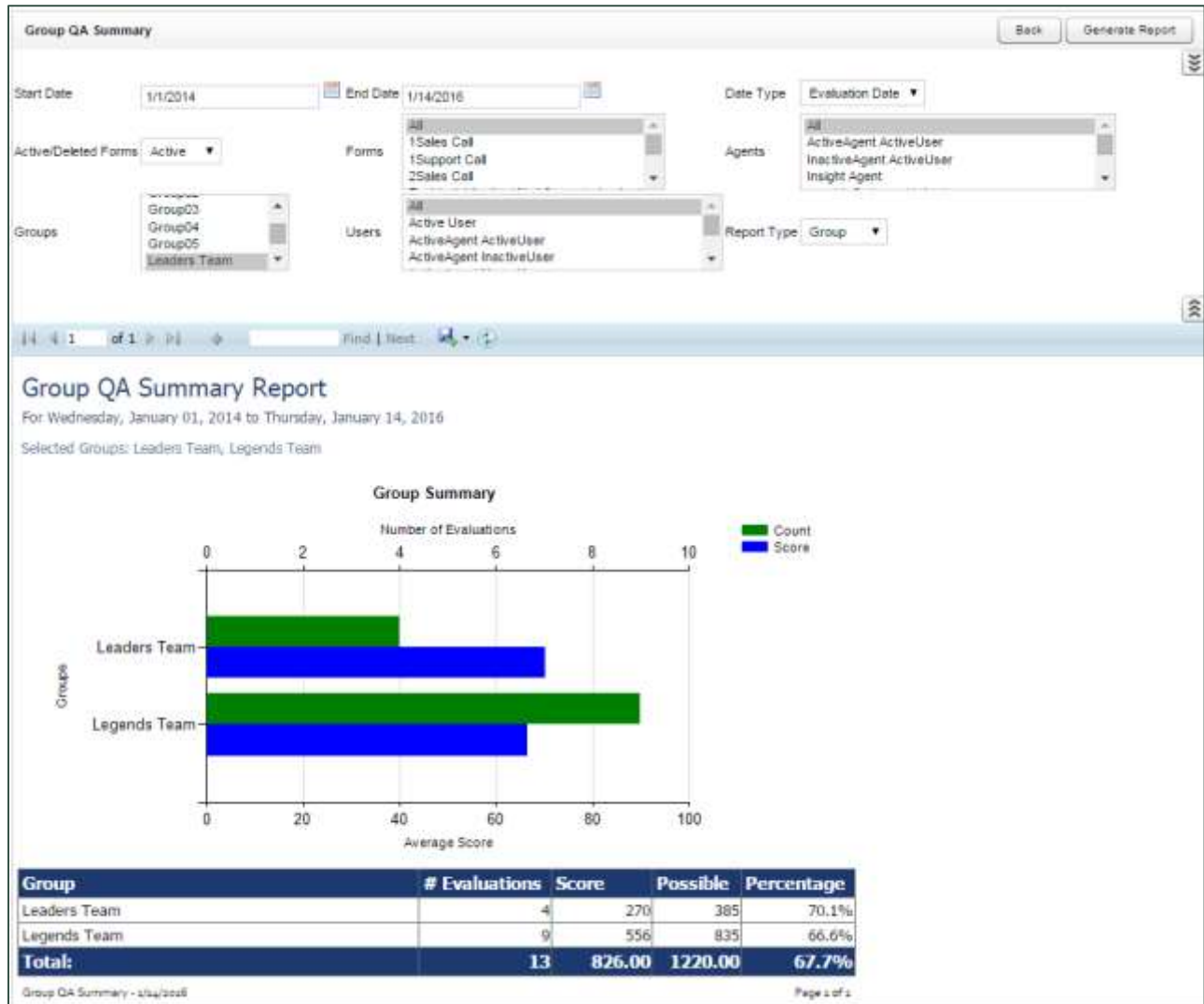
Group Summary by Month

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 Uptivity Group for each month. Report results are limited to groups to which you have access, even if you select *All*.

Printable Reports

Group Summary by Period

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

Group Performance Summary Report by Quarter

For the period beginning 7/1/2014 and ending 3/31/2016

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%
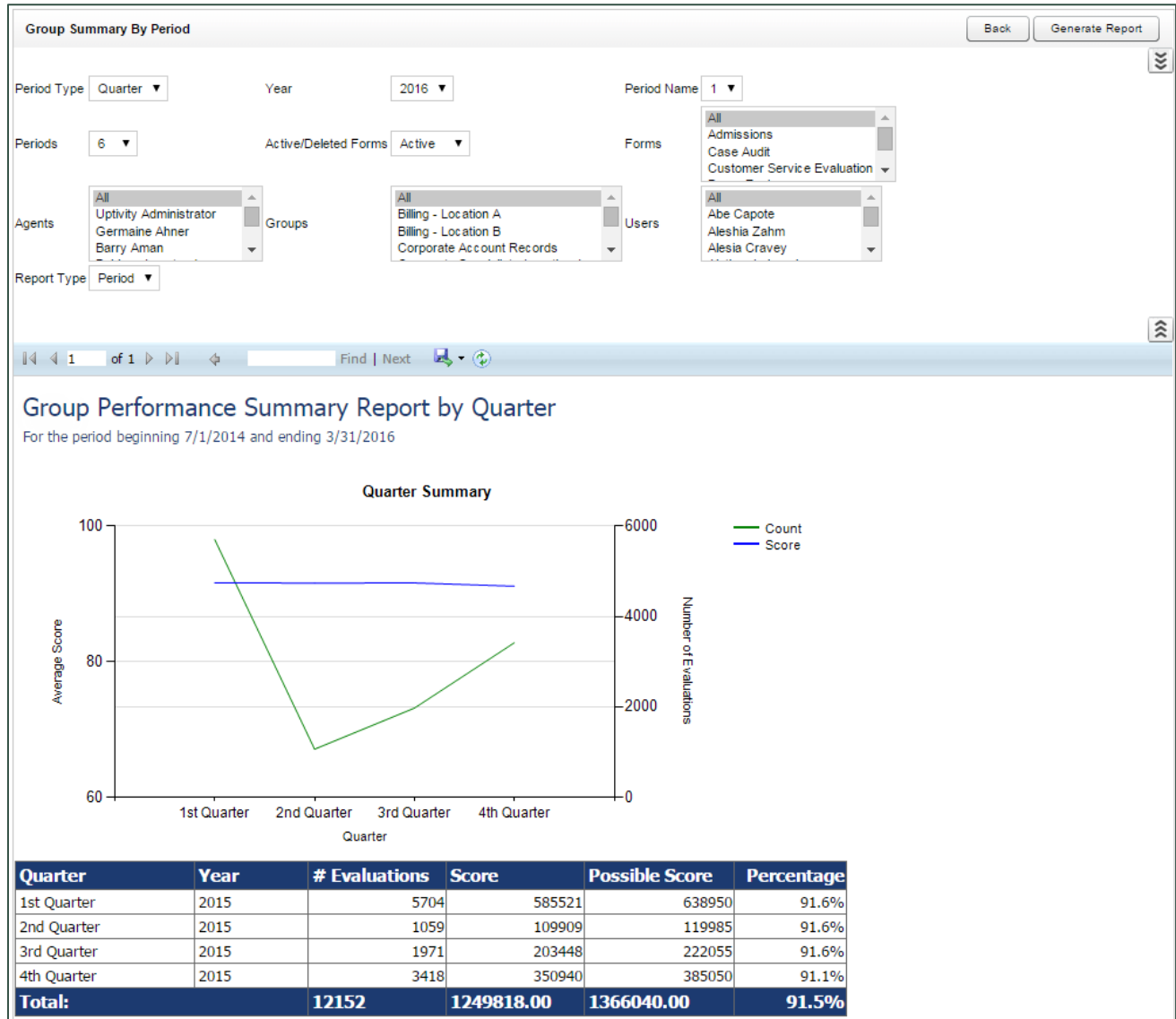
Multiple Evaluations Summary

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.

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*.

Monthly QA Agent Trending Report

For the period beginning 7/1/2015 and ending 1/31/2016

Selected Agents: Germaine Ahner, Barry Aman, Bobbye Armstead, Shanita Arriaga, Vincenzo Aschenbrenner, Jerry Balcom, Lilly Baughman

Selected Forms: Customer Service Evaluation

Customer Service Evaluation	Aug	Sep	Oct	Nov	Dec	Jan
Greeting	98.0%	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	98.0%	98.6%	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	87.5%	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*.
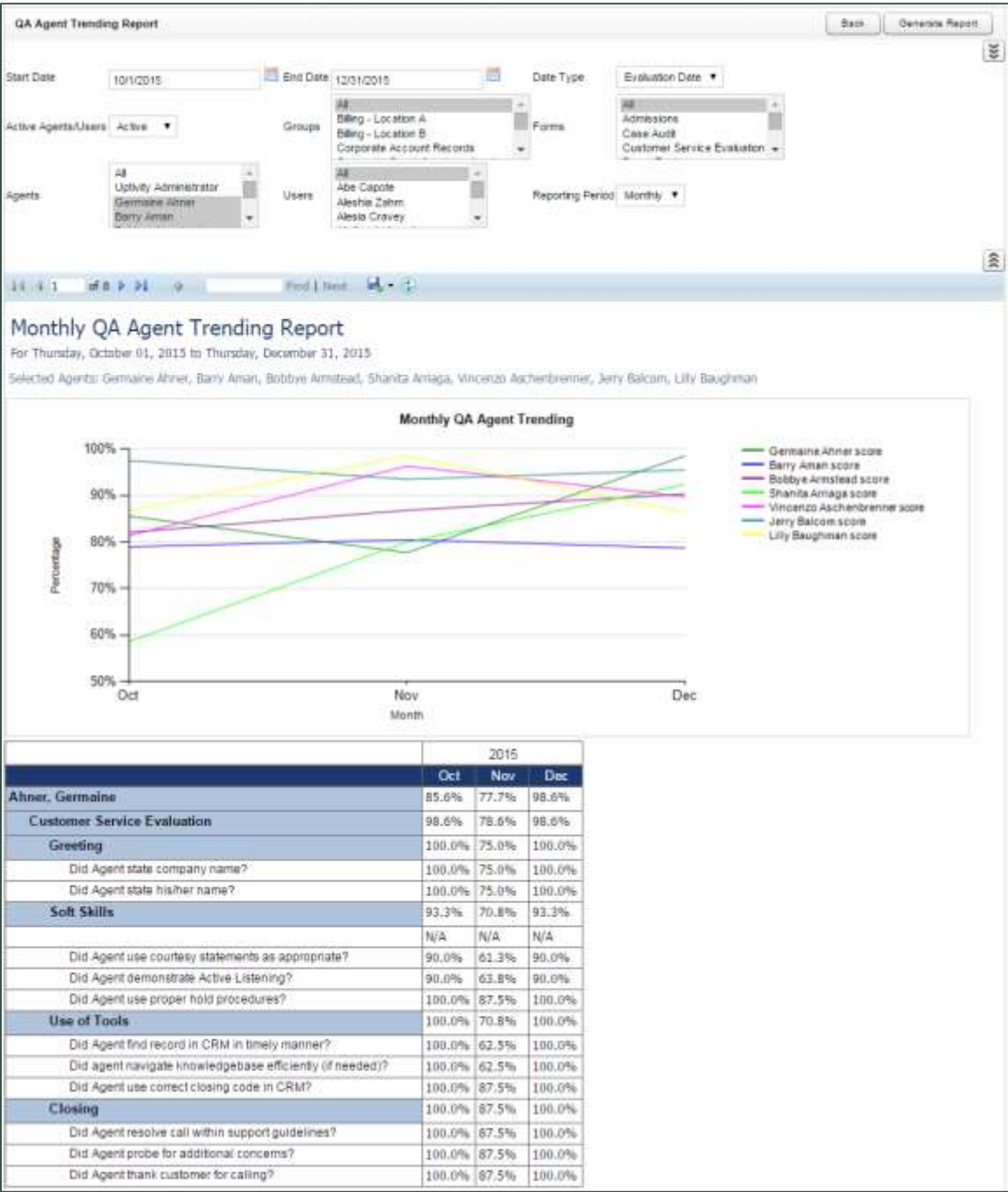
QA Form Trending Report

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.

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.
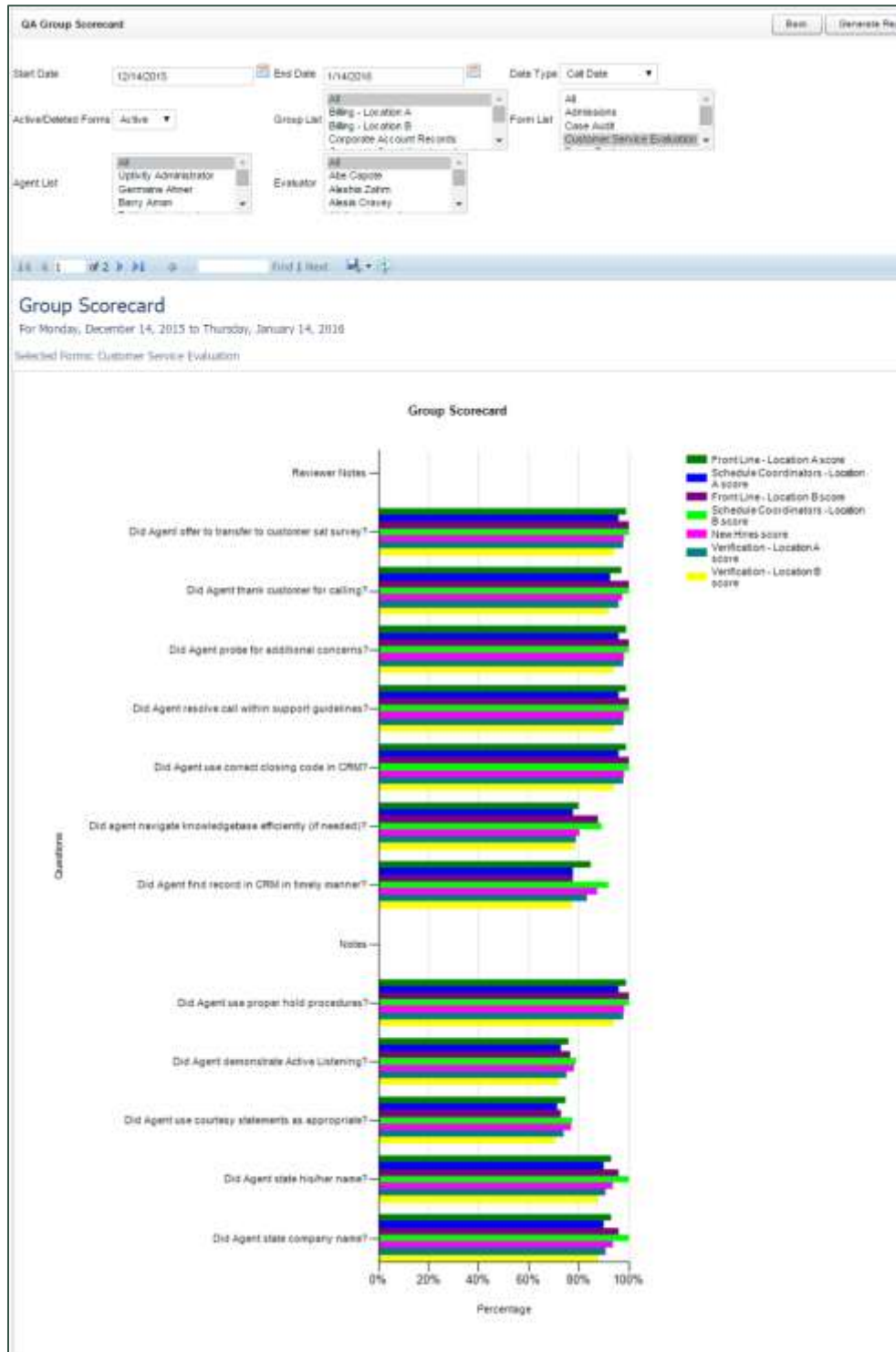
QA Group Trending Report

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.

Printable Reports

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, search online help for keyword *arbitration*.

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.
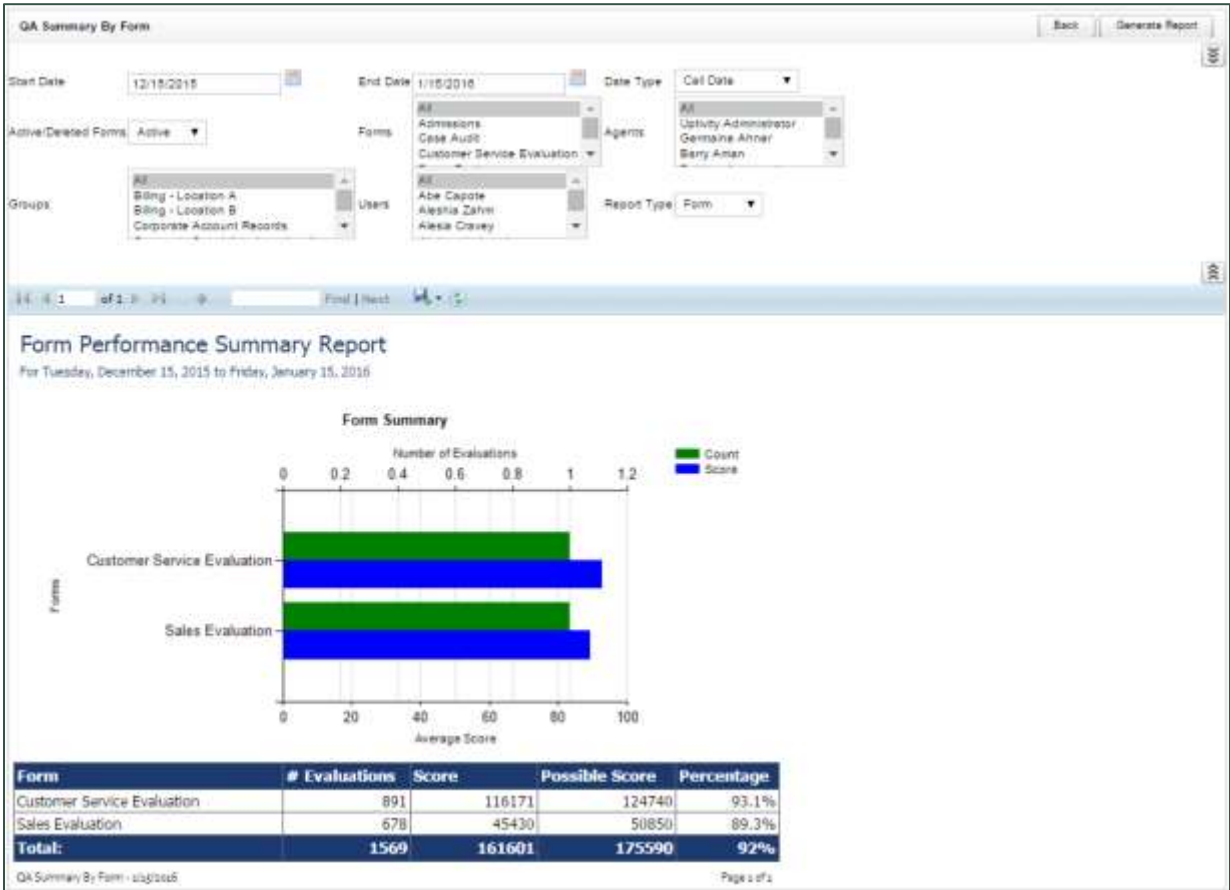
Printable Reports

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.
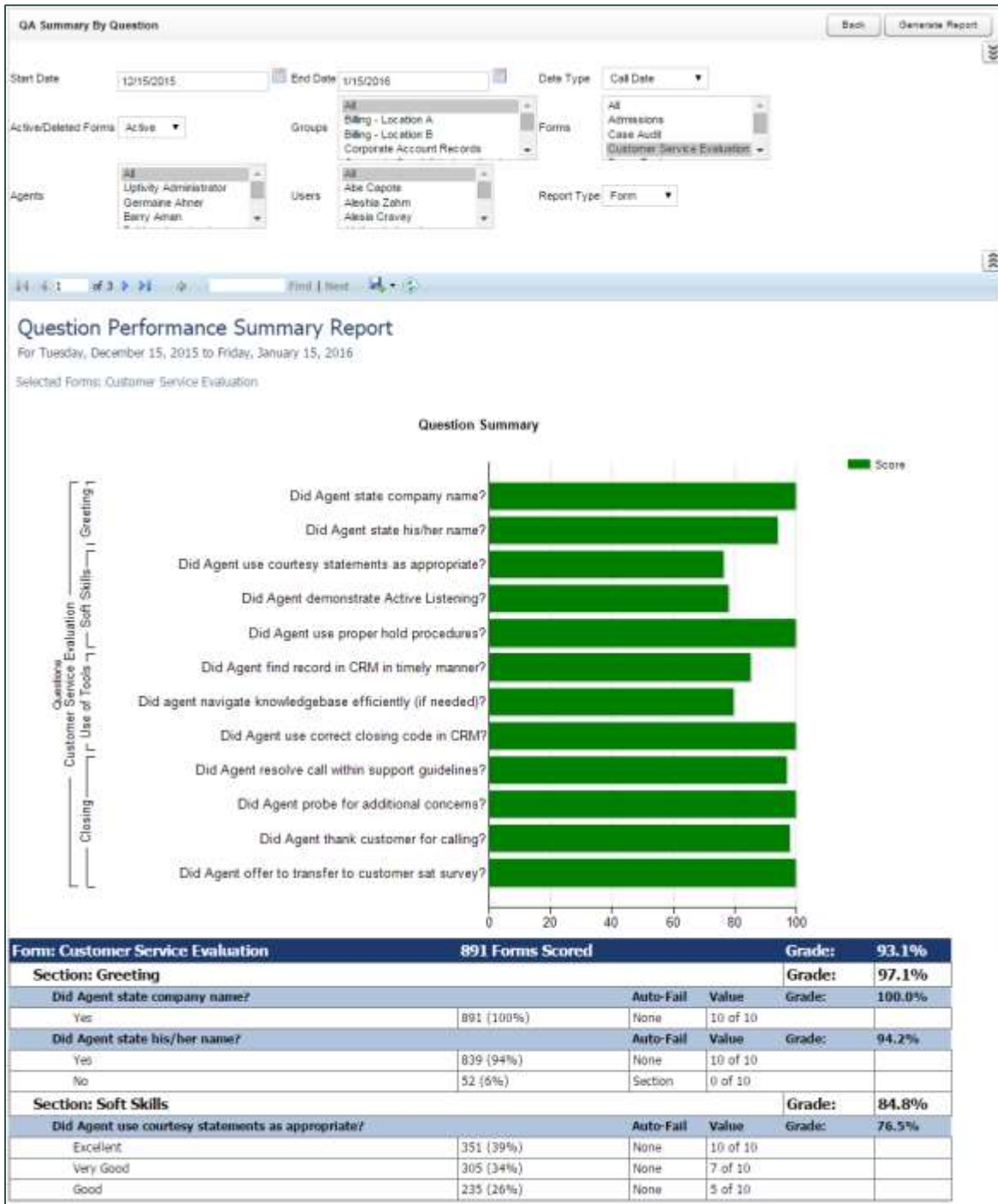
QA Summary by Section

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.

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 does not work in exported versions of the report.

NICE Uptivity Reports Reference Guide

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.

QA Calibration Reporting Reports

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. NICE Uptivity supports the calibration process by means of calibration evaluations. For more information, search online help for keyword *calibration*.

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

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 in the following image, a group of four evaluators has completed a calibration evaluation for the same call (**Call 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

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.
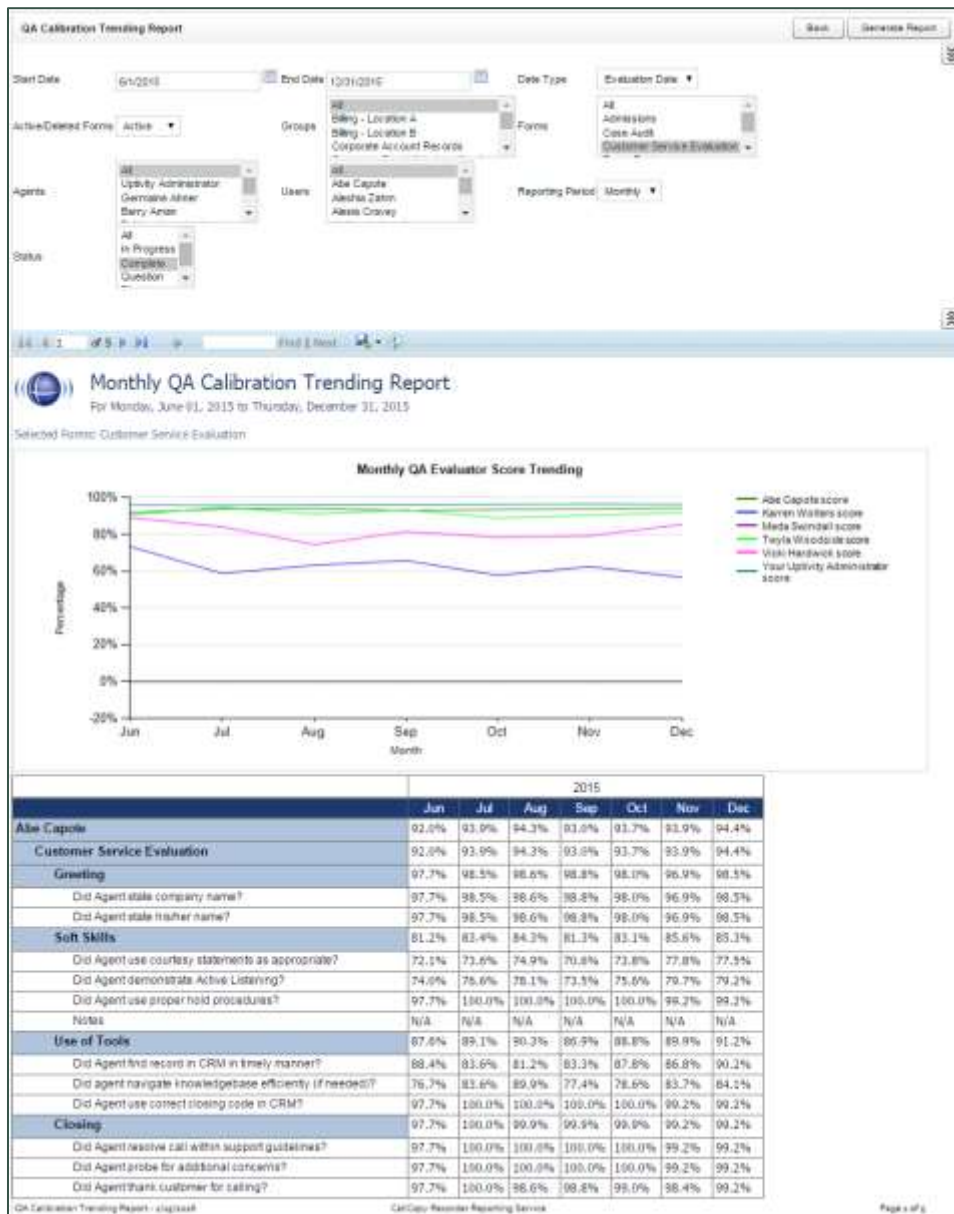
QA Self-Evaluation Reports

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, search online help for keyword *self-evaluation*.

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.

Printable Reports

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 in the following image, a standard evaluation and a self-evaluation have been completed for the same call using different forms (**Call ID** *1747*).

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.
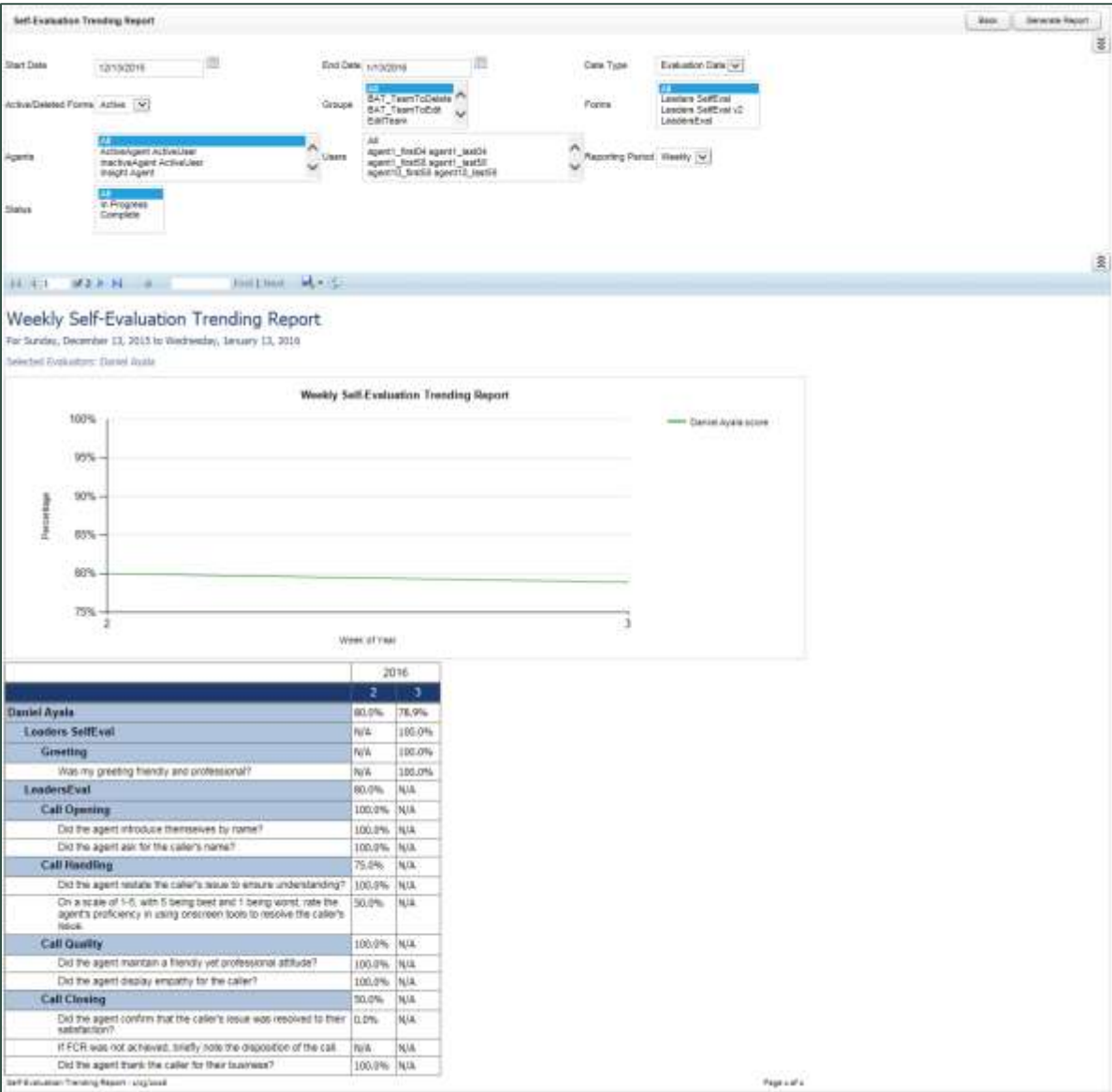
System Reports

Your NICE Uptivity system offers system reporting options in two areas. The **System Reporting** section under **Printable Reports** provides historical data that relates to usage of the NICE Uptivity 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.

System Activity Summary

The **System Activity Summary** displays the actions performed in NICE Uptivity 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.

NICE Uptivity Reports Reference Guide

System Usage

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

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 NICE Uptivity'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 NICE Uptivity script has detected the port value based on an 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 NICE Uptivity.

- **(5) Static Entry** — The port/address has been entered in the **IP Phones** (**Administration** > **Recorder Settings** > **IP Phones**).

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

License Information

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 NICE Uptivity 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 recording 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

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.

> ❶ 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

The **Transcoder Status** report gives a near real-time display of what audio files are being processed by the **Transcoder** service. 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 logins, logouts, or password changes.

For information on the fields available for filtering the **Audit Report**, search online help for keyword *audit log*.

Ad Hoc Reports

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. 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. For more information on creating, generating, and publishing ad hoc reports, search online help for keyword *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 **Report Layout**: *Summary Table*.

- **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 **Report Layout**: *Simple Table*.

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

Ad Hoc Reports

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 **Report Layout**: *Summary Table*.

- **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 **Report Layout**: *Simple Table*.

- **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 **Report Layout**: *Summary Table*.

- **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 Uptivity Desktop Analytics. Use **Report Layout**: *Simple Table*.

- **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 **Report Layout**: *Simple Table*.

- **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 **Report Layout**: *Simple Table*.

- **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 **Report Layout**: *Summary Table*.

- **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 **Report Layout**: *Summary Table*.

- **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 **Report Layout**: *Summary Table*.

- **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 **Report Layout**: *Simple Table*.

- **Column Fields —** Call Recording ID; Agent Name; Completed Survey ID; Survey Date; Survey Possible Value; Survey Value

Document Revision History

Revision	Change Description	Effective Date
0	Initial release for NICE Uptivity	2017-03-31