



UPTIVITY
Agile WFO for SMB

NICE UPTIVITY REPORTS REFERENCE GUIDE

March 2017

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Introduction

NICE UPTIVITY REPORTS REFERENCE GUIDE

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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 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

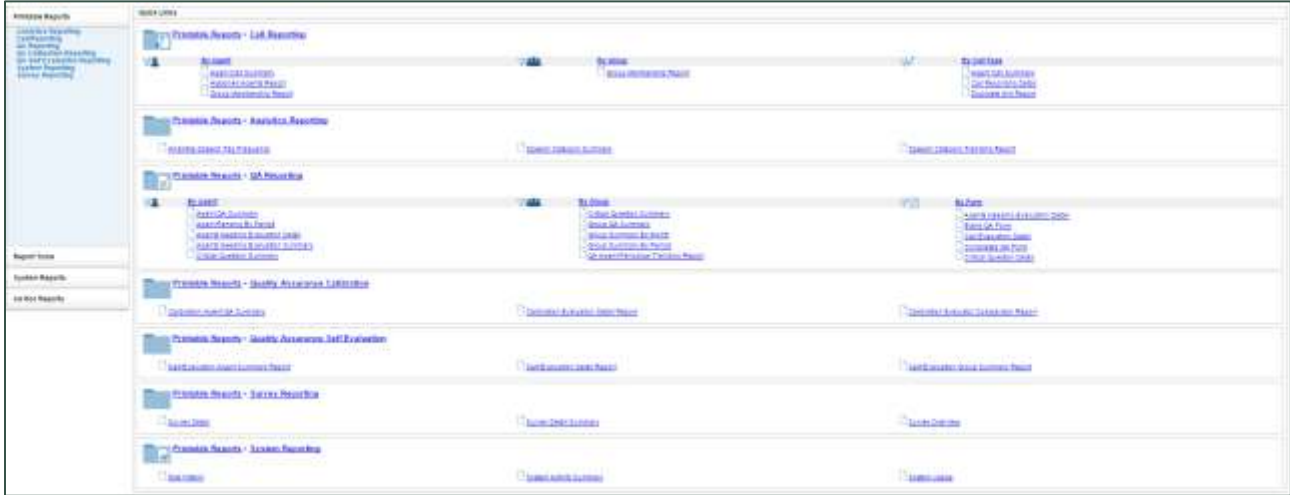
- No changes to reporting have been made for this release. Conceptual and task documentation for the feature has been moved to online help and is now searchable.

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.

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

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.

The screenshot shows the 'Assigned Agents Report' interface. At the top, there are 'Back' and 'Generate Report' buttons. Below them is a 'Status' dropdown menu set to 'Active'. A navigation bar shows '1 of 3' and a search field. The main content is a table titled 'Assigned Agents' with the following data:

System ID	Agent	User Name	Status	Phone ID
1	Administrator, Administrator		Active	
7	Gonzaga, Prode		Active	5004
8	Coscia, Sheryl		Active	5009
9	Snicket, Pietro		Active	5023
10	Oclerega, Lemony		Active	5024
11	Cunningham, Richard		Active	5018
12	Carozza, Jeremy		Active	5017
14	Dwyer, Stuart		Active	5021
15	Handler, Franko		Active	5028
16	Bow, Orlando de		Active	5030
17	Carstensen, Dimitri		Active	5031
18	Cutting, Pieter		Active	5032
19	Flanders, John		Active	5131
20	Brooker, Anders		Active	5228
21	Fronzoni, Ramon		Active	5525
22	Babic, Cheryl	cher	Active	5555
23	Crowson, Alan		Active	5703
24	Conlee, Jean-Pierre		Active	5704
25	Chavis, Boris		Active	5705
26	Byrd, Stan		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.

Call Recording Detail
Back Generate Report

Start Date: End Date:

Agents:
ActiveAgent ActiveUser
InactiveAgent ActiveUser
Insight Agent

Record ID:

Gate:

CallCopyGroup:

Caller's Phone #:

User 1:

User 3:

User 7:

User 10:

User 13:

Dialed Phone #:

User 2:

User 5:

User 8:

User 9:

User 12:

User 15:

Skill Group List:
20
30
40

User 4:

User 6:

User 8:

User 11:

User 14:

Call Recording Detail

For Tuesday, January 01, 2013 to Friday, January 15, 2016

Record ID: 1776					
Agent: Ayala, Daniel	ANI: 7504	DNIS: 912032998375	Call Direction: Outbound		
Time: 1/22/2013 5:27 PM	Duration: 00:00:47	Gate: 10	Device: 7504	Channel: 3	
inContact WFO Group: Group01	ACD Group: 40				
Customer Number: u1-8000	User2: u2-8000	User3: u3-6000			
User4: u4-4000	User5: u15-5000	User6:			
User7:	User8:	User9:			
User10:	User11:	User12:			
User13:	User14:	User15:			

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**.

The screenshot shows the 'Group Membership Report' interface. At the top, there are 'Back' and 'Generate Report' buttons. Below that, there are dropdown menus for 'Group' (set to 'Leaders Team') and 'Active' (set to 'All'). A navigation bar shows '1 of 1' items. The main content area is titled 'Group Membership' and includes the text 'Selected Group: Leaders Team' and 'Active: All'. A table lists the agents with their names and phone IDs. The footer shows 'Group Membership Report - 1/13/2016' and 'Page 1 of 1'.

Group	Agent	Phone ID
Leaders Team	Ayala, Daniel	7504
Leaders Team	Barnes, Phil	7502
Leaders Team	Berner, Camen	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

Agent QA Summary
Back Generate Report

Start Date: 1/1/2014 End Date: 1/13/2016 Date Type: Evaluation Date

Active/Deleted Forms: Active Forms: 1Sales Call, 1Support Call, Enable Arbitration Workflow not checked

Agents: ActiveAgent, ActiveUser, InactiveAgent, ActiveUser, Insight Agent

Groups: All, BAT_TeamToCreate, BAT_TeamToEdit, CallTeam

Users: All, Active User, ActiveAgent, ActiveUser, ActiveAgent, InactiveUser

Status: All, In Progress, Complete, Question

Report Type: Agent

14 of 1 of 1 Find & Next

Agent QA Summary Report

For Wednesday, January 01, 2014 to Wednesday, January 13, 2016
 Selected Forms: 1Sales Call, 1Support Call

Agent Summary

Number of Evaluations

Average Score

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

Agent QA Summary - Wednesday, January 23, 2016 Page 1 of 1

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*.

Back Generate Report

Form: 1Support Call Group: All Period Type: Month

Year: 2013 Period: January

1 of 1 Find | Next

Agent Ranking by Month

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

Selected Form: 1Support Call

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

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*.

Agent	Group	Form	Evaluator	Last Evaluated
Daniel Ayala	Legends Team	1Support Call	Gina George	6/18/2015
Phil Barnes	Leaders Team	Sales Evaluation v2	Gina George	7/29/2014
Phil Barnes	Leaders Team	1Sales Call	Jessica Hezler	6/18/2015
Nail Ben	Legends Team	1Support Call	Gina George	11/5/2013
Nail Ben	Legends Team	Sales Evaluation v2	Gina George	6/18/2015
Anders Brooker	Legends Team	1Support Call	Gina George	11/5/2013
Roy Chenier	Legends Team	1Support Call	Gina George	11/5/2013
Sheryl Cosca	Legends Team	1Support Call	Gina George	11/5/2013
Pietro Cutting	Legends Team	1Support Call	Gina George	11/5/2013
Kevin Dimattio	Legends Team	1Support Call	Gina George	11/5/2013
Henry Feamley	Legends Team	1Support Call	Gina George	11/5/2013
Zach Halli	Legends Team	1Support Call	Gina George	11/5/2013

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*.

Agent	Group	Form	Evaluator	Last Evaluated
Ayala, Daniel	Legends Team	1Support Call	Gina George	6/18/2015
Barnes, Phil	Leaders Team	1Sales Call	Jessica Hezler	6/18/2015
Ben, Nail	Legends Team	Sales Evaluation v2	Gina George	6/18/2015
Boucher, Jenny	None	None		Never
Brechin, Joe	None	None		Never

Blank QA Form

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

Blank QA Form

Form: 1Support Call

1Support Call

Opening

Proper introduction?

Yes

No

Ask for caller's name?

Yes

No

Restate problem to ensure understanding?

Yes

No

Comments:

Communication Skills

Technical language at caller's level of understanding?

Yes

No

Pace and enunciation clear and understandable?

Yes

No

Patient and empathetic tone?

Yes

No

Comments:

Technical Skills

Application UI knowledge and proficiency

Excellent

Acceptable

Unacceptable

Underlying system knowledge and proficiency (DB, OS, scripts, etc.)

Excellent

Acceptable

Unacceptable

Overall technical speed and proficiency (moving through screens, using tools, etc.)

Excellent

Acceptable

Unacceptable

Comments:

Closing

Clarify and communicate next steps?

Yes

No

Thank caller?

Yes

No

Blank QA Form - 1/13/2018 Page 1 of 1

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.

Call Evaluation Detail
Back Generate Report

Start Date: 10/1/2015

Agent: Daniel Ayala

Active/Deleted Evaluations: Active

Response: Any

Gate: User 1

User 3:

User 7:

User 10:

User 13:

End Date: 1/15/2016

Evaluator: All

Group: All

Caller's Phone #:

User 1:

User 4:

User 8:

User 11:

User 14:

Date Type: Evaluation Date

Form: All

Question: Any

Dated Phone #:

User 2:

User 5:

User 6:

User 9:

User 12:

User 15:

QA Record ID:

status: All

Call Evaluation Detail

For Thursday, October 01, 2015 to Friday, January 15, 2016

Selected Agent: Daniel Ayala

Agent: Ayala, Daniel	
Form Name	Call ID
2Sales Call	1772
Group: Leaders Team	ANE: 7504
Time: 1/22/2013 5:17 PM	Duration: 00:00:45
Customer Number: u1-9000	User2: u2-3000
User4: u4-7000	User5: u15-8000
User7:	User8:
User10:	User11:
User13:	User14:
User3:	User6:
User9:	User12:
User15:	

Form Name	Call ID	Evaluated By	Complete Date
2Sales Call	1772	Gina George	1/13/2016
Group: Leaders Team	ANE: 7504	DNIS: 912032998378	Call Direction: Outbound
Time: 1/22/2013 5:17 PM	Duration: 00:00:45	Gate: 10	Device: 7504
Channel: 2			

Section Name: Opening		
Question	Evaluation	Score
Proper introduction?	Yes	10.00 of 10.00 (100.0%)
Ask for caller's name?	No	0.00 of 10.00 (0.0%)
Restate problem to ensure understanding?	Yes	10.00 of 10.00 (100.0%)
Ask for permission to place customer on hold?	Not Applicable	N/A
Comments:		N/A
Subtotal:		20.00 of 30.00 (67%)

Section Name: Communication Skills		
Question	Evaluation	Score
Technical language at caller's level of understanding?	Yes	10.00 of 10.00 (100.0%)
Pace and enunciation clear and understandable?	Yes	10.00 of 10.00 (100.0%)
Patient and empathetic tone?	Yes	10.00 of 10.00 (100.0%)
Comments:		N/A
Subtotal:		30.00 of 30.00 (100%)

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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.

Completed QA Form			
Agent:	Barnes, Phil	Evaluation ID:	90
Evaluator:	George, Gina	Call ID:	No Recording
Date of Evaluation:	7/29/2014	Date of Recording:	
Duration:	0:0:0	Arbitrator:	No Dispute
Evaluation Form:	Sales Evaluation v2	Station ID:	
Agent Number:		Number Called	
CallerID ANI:		DNIS:	
Group:		Channel:	
Call Direction:		ACD Gate:	
User1:		Screen Capture:	
User2:		User2:	
User3:		User4:	
User5:			
Intro			20 of 30 (66.67%)
Did the agent introduce him/herself by name?			
Yes	<input checked="" type="checkbox"/>	10pts	
No	<input type="checkbox"/>	0pts	
Did the agent ask for the caller's name?			
Yes	<input type="checkbox"/>	10pts	
No	<input checked="" type="checkbox"/>	0pts	
Did the agent use the current promotional greeting?			
Yes	<input checked="" type="checkbox"/>	10pts	
No	<input type="checkbox"/>	0pts	
Soft Skills			15 of 30 (50.00%)
Did the agent personalize the conversation by using the caller's name on at least two occasions?			
Yes	<input type="checkbox"/>	10pts	
No	<input checked="" type="checkbox"/>	0pts	
Did the agent suggest appropriate add-on products based on the caller's initial order?			
Yes	<input checked="" type="checkbox"/>	10pts	
No	<input type="checkbox"/>	0pts	
Was the agent warm and friendly while remaining professional?			
Exceeds Expectations	<input type="checkbox"/>	10pts	
Meets Expectations	<input checked="" type="checkbox"/>	5pts	
Did Not Meet Expectations	<input type="checkbox"/>	0pts	
Technical Skills			15 of 30 (75.00%)
Was the agent able to navigate through product screens efficiently?			
Exceeds Expectations	<input type="checkbox"/>	10pts	
Meets Expectations	<input checked="" type="checkbox"/>	5pts	
Did Not Meet Expectations	<input type="checkbox"/>	0pts	
Did the agent correctly handle credit card processing?			
Yes	<input checked="" type="checkbox"/>	10pts	
No	<input type="checkbox"/>	0pts	
Form Total:			50 of 80 (62.50%)
Comments			
Completed QA Form - 6/7/2016			
Page 1 of 1			

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 Detail

Start Date: 12/13/2015 End Date: 1/13/2016

Form List: All, BAT_2012-02-10, BAT_2012-10-05-2-00, CoachingPIAT 2012-05-08 09:00:04

Agent List: All, ActiveAgent ActiveUser, InactiveAgent ActiveUser, Insight Agent

Group List: All, BAT_TeamToDelete, BAT_TeamToDelete, AllTeam

User List: All, Active User, ActiveAgent ActiveUser, ActiveAgent InactiveUser

Date Type: Evaluation Date Active/Deleted Evaluations: Active

Critical Question Detail

For Sunday, December 13, 2015 to Wednesday, January 13, 2016

Agent:	Ayala, Daniel					
Date of Call	Record	Date of Eval	Form	Question	Score	
1/22/2013	122	1/13/2016	2Sales Call	Restate problem to ensure understanding?	10 of 10 (100.0%)	

Critical Question Detail - 1/13/2016 Page 1 of 1

Critical Question Summary

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

Evaluation List Report

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

Evaluation List Report
Back Generate Report

Start Date End Date Date Type

Group Status Agent

Active/Deleted Evaluations Form Evaluator

1 of 133 Find | Next

Quality Assurance Evaluation List

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

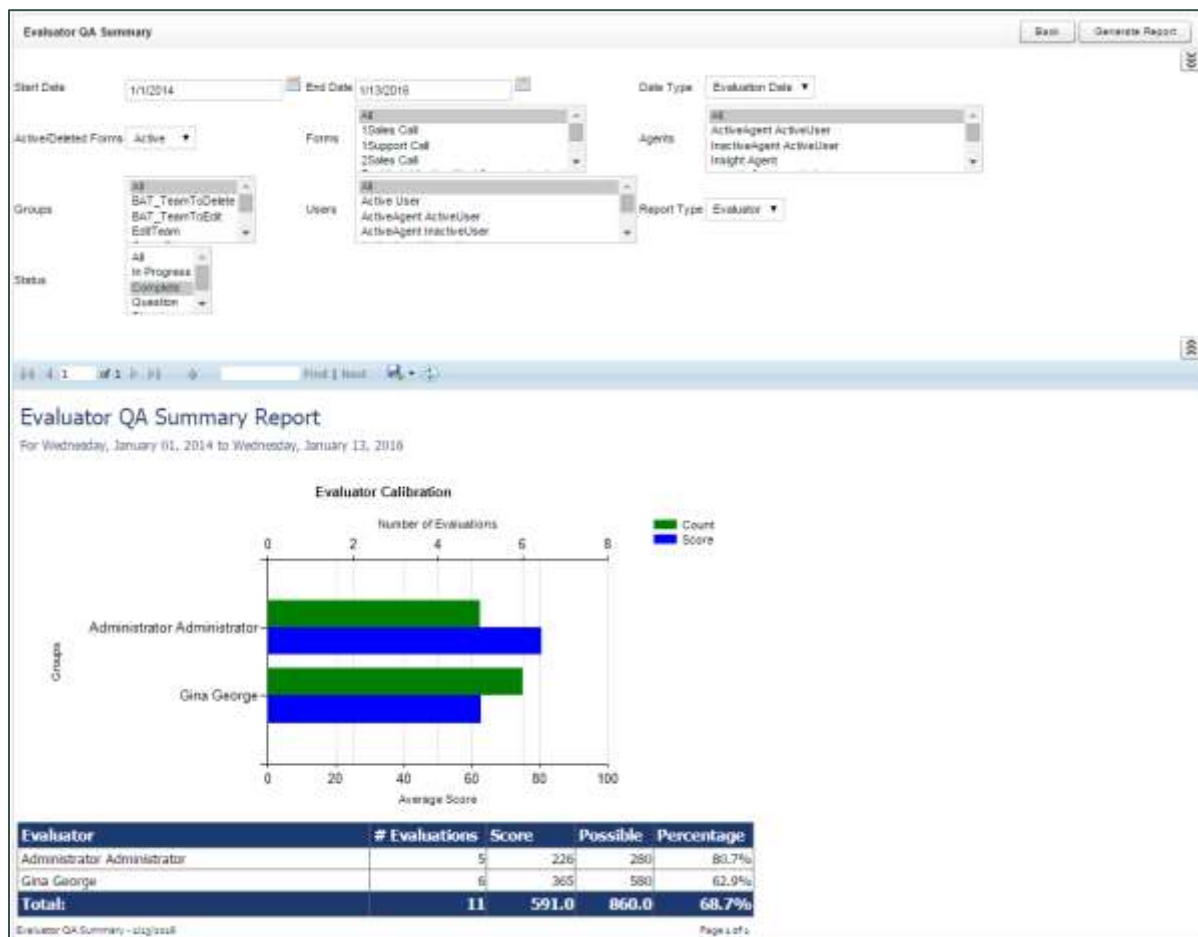
Printable Reports

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*.

Form and Section Failures Report
Back Generate Report

Start Date: 1/1/2015

End Date: 1/14/2016

Date Type: Evaluation Date

Active/Deleted Evaluations: Active

Form: All

Section: All

Agents:

- All
- Uptivity Administrator
- Germaine Ahner
- Barry Aman

Groups:

- All
- Billing - Location A
- Billing - Location B
- Corporate Account Records

Users:

- All
- Abe Capote
- Aleshia Zahm
- Alesia Cravey

Report Type: Agent

Failure Type: Any

1 of 48
Find | Next

Form and Section Failure Report by Agent

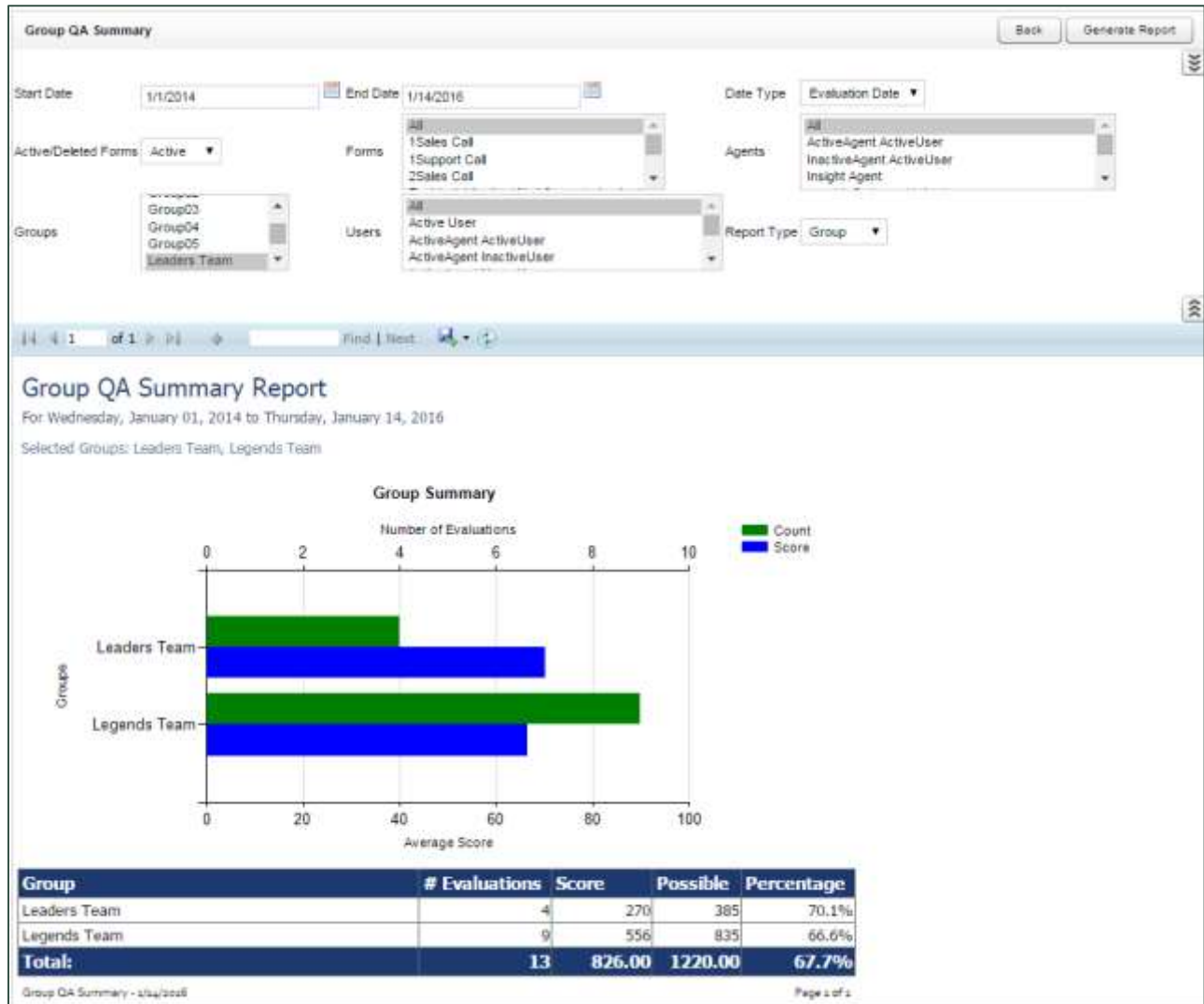
For Thursday, January 01, 2015 to Thursday, January 14, 2016

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

Printable Reports

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*.

Group Summary By Month
Back Generate Report

Month: January

Active/Deleted Forms: Active

Groups: All, Billing - Location A, Billing - Location B, Corporate Account Records

Year: 2016

Forms: All, Admissions, Case Audit, Customer Service Evaluation

Users: All, Abe Capote, Aleshia Zahm, Alesia Cravey

Periods: 6

Agents: All, Uptivity Administrator, Germaine Ahner, Barry Aman

Report Type: Month

1 of 1 | Find | Next

Group Performance Summary Report by Month

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

Month Summary

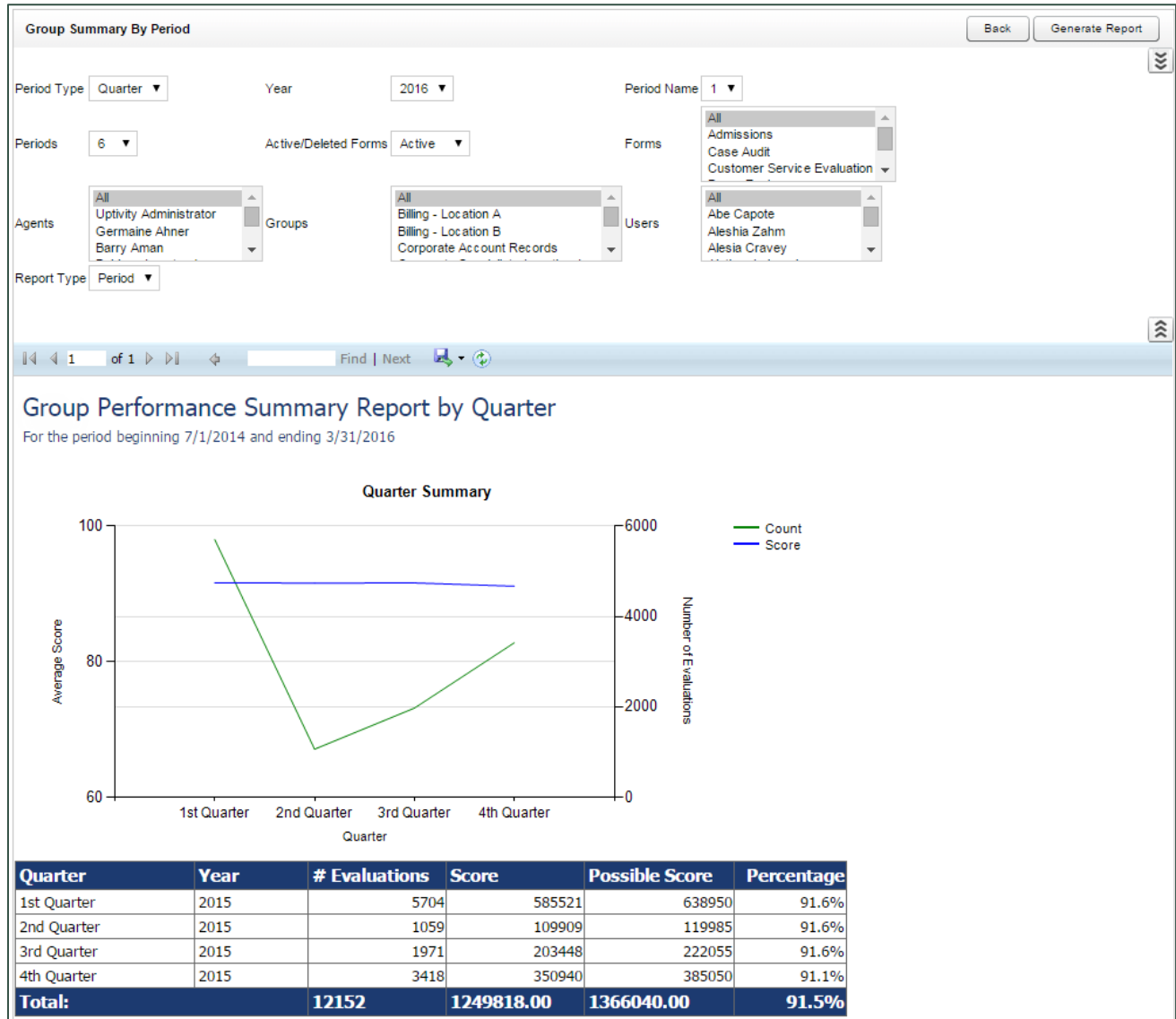
Month	# Evaluations	Score	Possible Score	Percentage
August	656	66470	73055	91.0%
September	749	77477	84385	91.8%
October	947	95879	105865	90.6%
November	1196	123774	135915	91.1%
December	1275	131287	143270	91.6%
January	1600	164565	179215	91.8%
Total:	6423	659452.00	721705.00	91.4%

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

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**.



Multiple Evaluations Summary

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

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

Multiple Evaluations Summary
Back Generate Report

End Date: 1/14/2016 Agent ID: Germaine Ahner Form ID: Customer Service Evaluation

Supervisor ID: Your Uptivity Administrator Status: All
In Progress
Complete
Question

Multiple Evaluations Summary Report

Contact Date Range: July 22, 2015 - January 12, 2016

Agent Name: Germaine Ahner

Supervisor Name: Your Uptivity Administrator Overall Average: 92.4%

Form: Customer Service Evaluation

Average Score for this Form: 97.1%

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

Multiple Evaluations Summary - 2/14/2016 CallCov Recorder Reporting Service Page 2 of 2

Printable Reports

QA Agent Periodical Trending Report

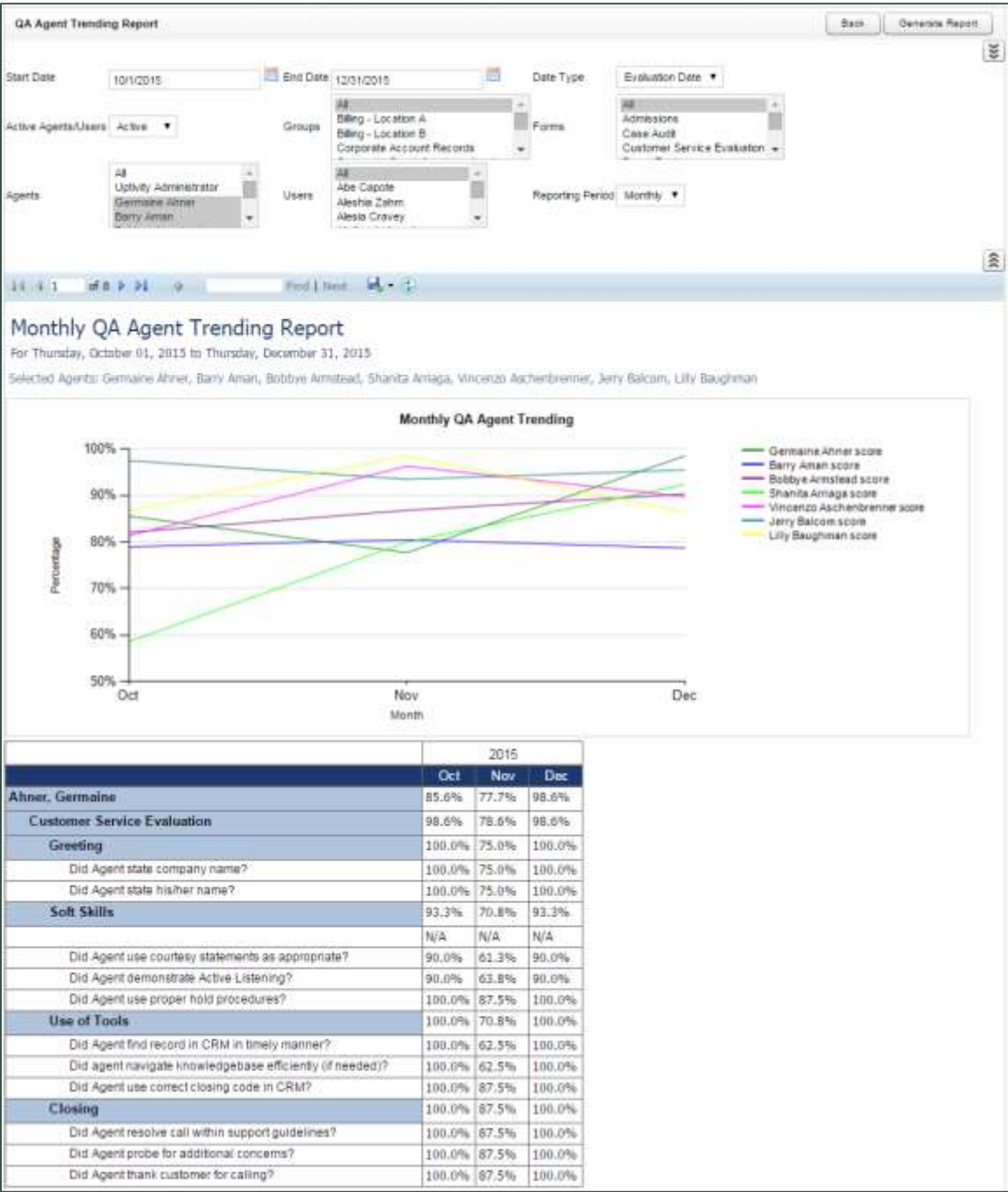
The **QA Agent Periodical Trending Report** summarizes an agent's performance over a selected period of time. This time period begins with the date or period selected in the **Period Name** field and looks backward over the specified number of periods. The reporting period can be daily, weekly, monthly,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



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*.



Printable Reports

QA Form Trending Report

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

QA Form Trending Report
Back Generate Report

Start Date: 10/1/2015 End Date: 12/31/2015 Reporting Period: Monthly

Internal All Active/Deleted Forms: Active Group List: Billing - Location A, Billing - Location B, Corporate Account Records

Form List: Admissions, Case Audit, Customer Service Evaluation Agent List: Uptivity Administrator, Germaine Ahner, Barry Aman User List: Abe Capote, Aleshia Zahm, Alesia Cravey

Report Type: Form Report Detail: Form

Monthly QA Trending Report by Form

For Thursday, October 01, 2015 to Thursday, December 31, 2015

	2015		
	Oct	Nov	Dec
Customer Service Evaluation	88.3%	89.1%	90.0%
Customer Service Evaluation	88.3%	89.1%	90.0%
Sales Evaluation	81.9%	82.4%	83.2%
Sales Evaluation	81.9%	82.4%	83.2%

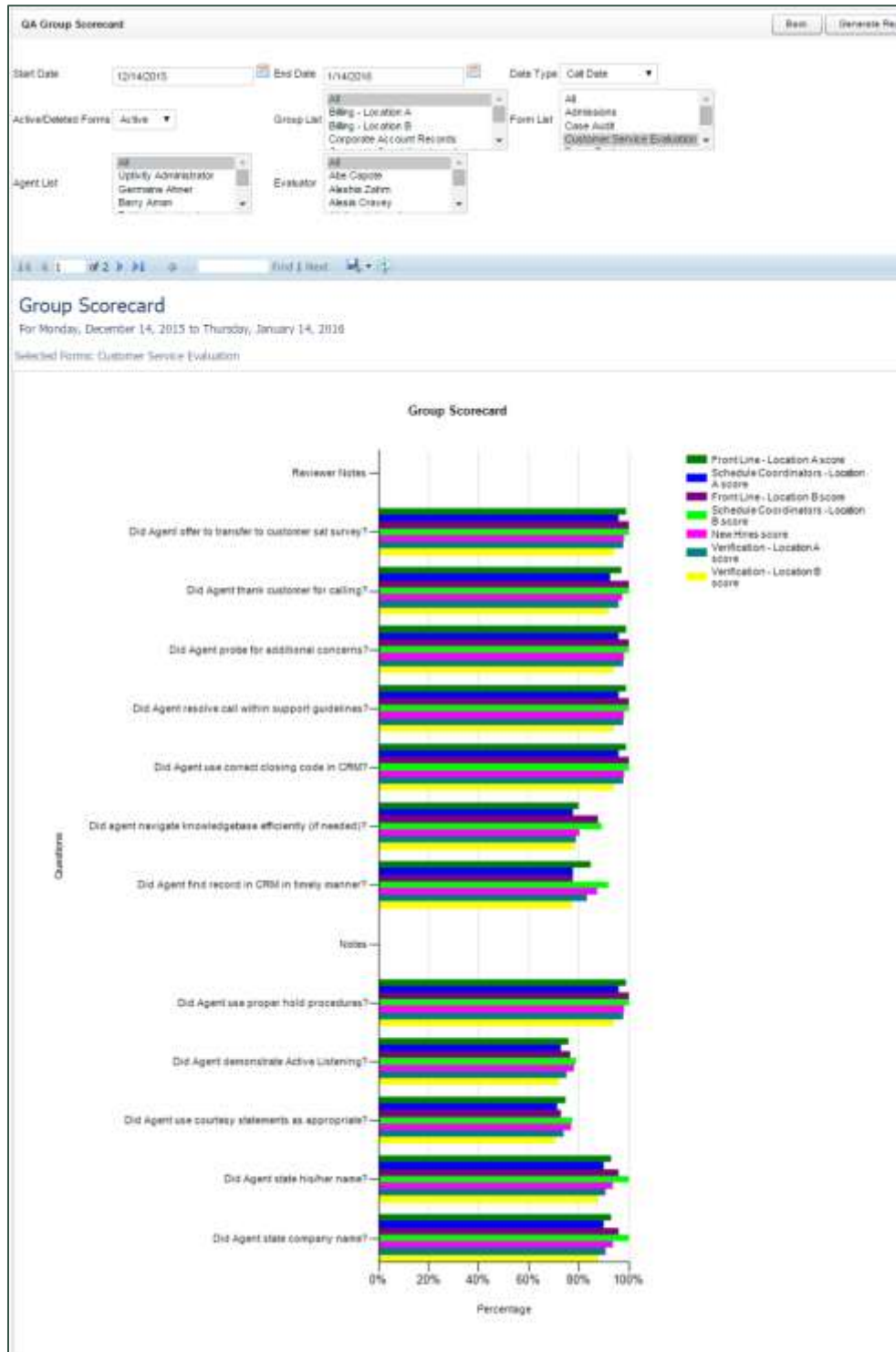
QA Group Periodical Trending Report

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.

QA Group Trending Report
Back Generate Report

Start Date: 12/14/2015

Active/Deleted Forms: Active

Agents: All, Uptivity Administrator, Gemmae Abrar, Barry Aman

End Date: 1/14/2016

Groups: All, Billing - Location A, Billing - Location B, Corporate Account Records

Users: All, Abe Capote, Alekha Zahra, Alekha Cravey

Date Type: Call Date

Forms: All, Admissions, Case Audit, Customer Service Evaluation

Reporting Period: Monthly

Monthly QA Group Trending Report

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

Selected Forms: Customer Service Evaluation

Monthly QA Group Trending

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

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 Pending Acknowledgment

Older Than Groups

- Corporate Specialist - Location A
- Corporate Specialist - Location B
- Foundation
- Front Line - Location A

1 of 1 Find | Next

QA Pending Acknowledgment

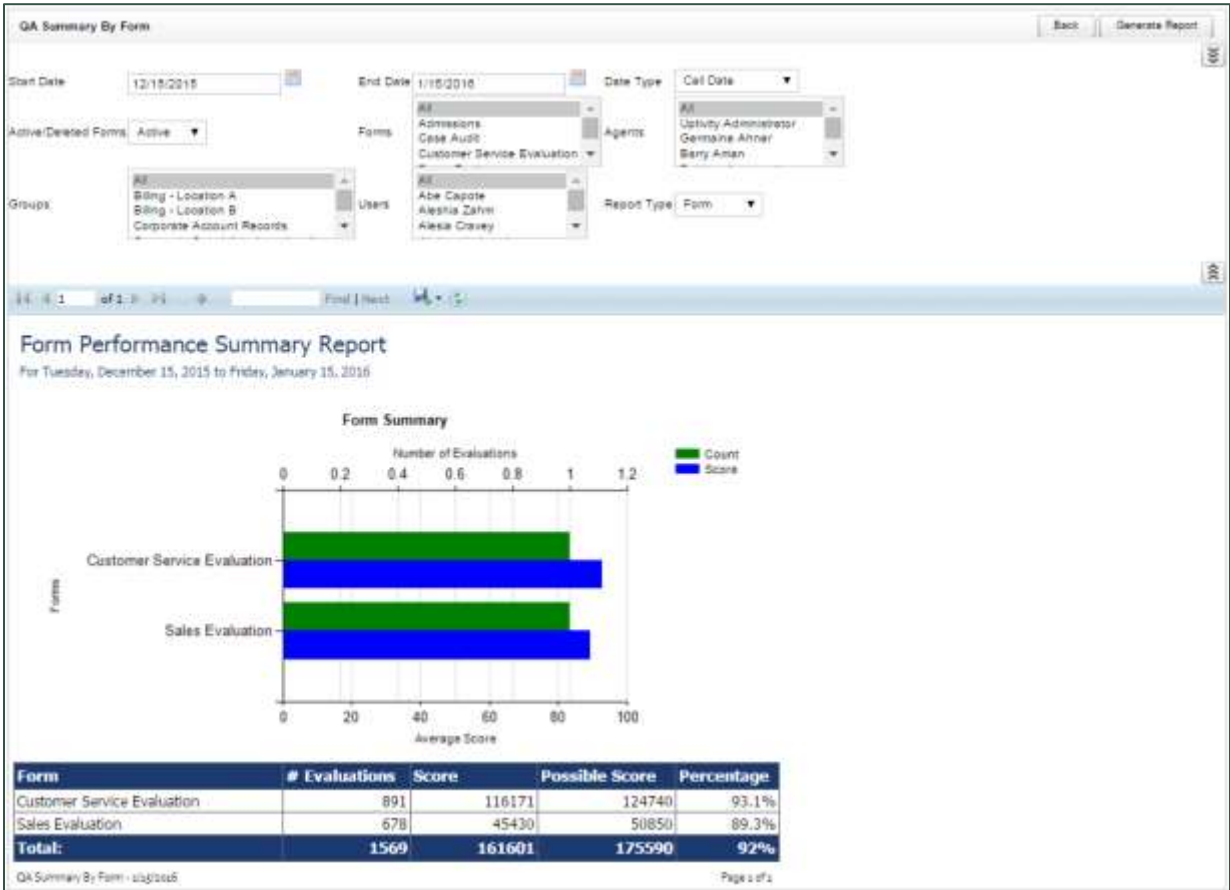
Selected Groups: Front Line - Location A

Form	Agent	Call ID	Evaluator	Completed Date	Status
Customer Service Evaluation	Gamer, Dwayne	38212	Meda Swindall	8/8/2015	Unacknowledged
Sales Evaluation	Costales, Brice	36702	Kendra Breed	9/1/2015	Unacknowledged

QA Pending Acknowledgment - 1/15/2016 Page 1 of 1

QA Summary by Form

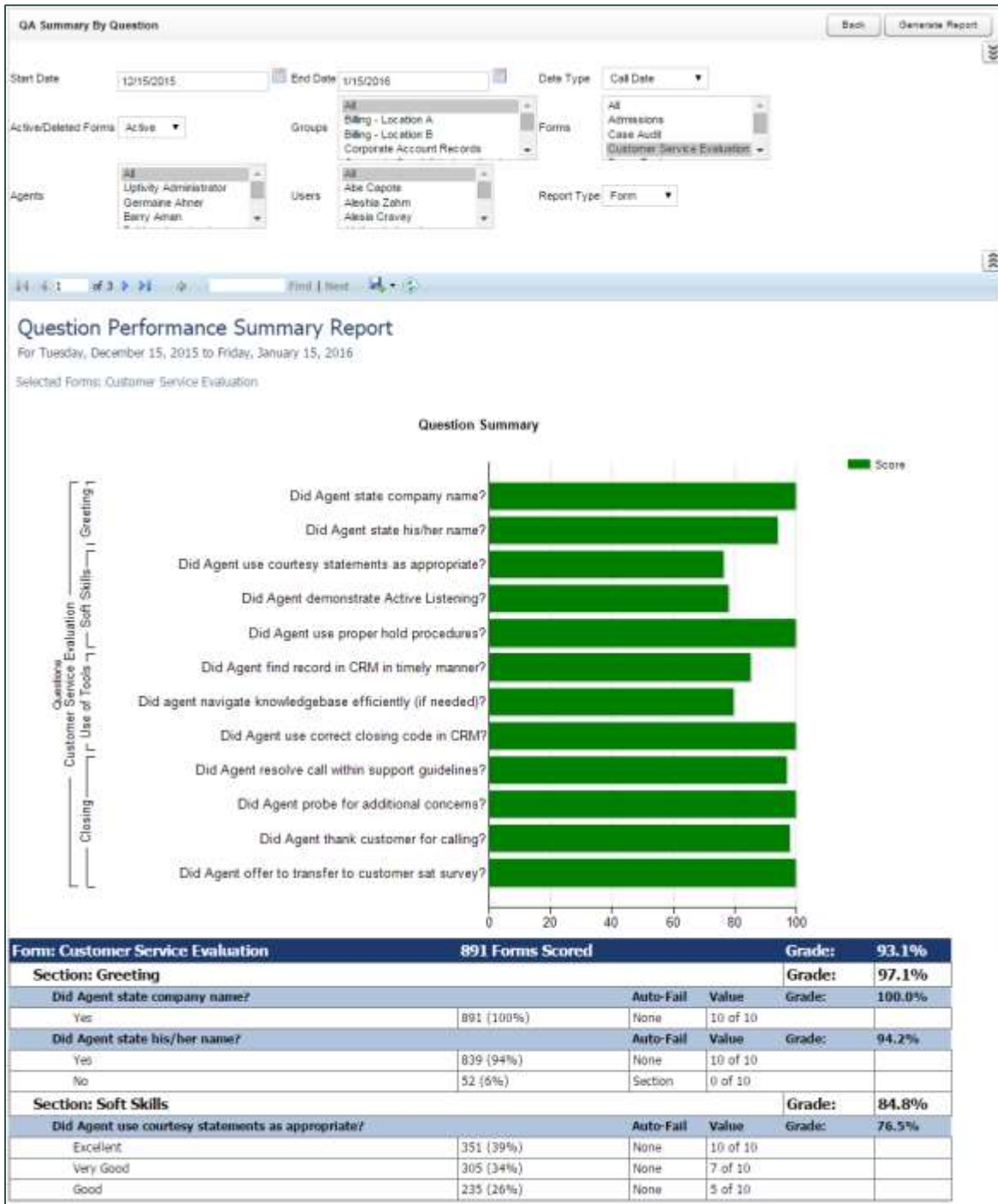
The **QA Summary by Form** report displays performance on one or more QA evaluation forms over a period of time. You can drill down into the report for additional details.



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.

QA Summary By Section
Back Generate Report

Start Date: 12/15/2015 End Date: 1/15/2016 Date Type: Call Date

Active/Deleted Forms: Active Groups: All, Billing - Location A, Billing - Location B, Corporate Account Records Forms: All, Admissions, Case Audit, Customer Service Evaluation

Agents: All, Uptivity Administrator, Germaine Ahner, Barry Aman Users: All, Abe Capote, Aleshia Zahm, Alesia Cravey Report Type: Form

Section Performance Summary Report

For Tuesday, December 15, 2015 to Friday, January 15, 2016

Selected Forms: Customer Service Evaluation

Section Summary

Section	Average Score
Use of Tools	86.3%
Soft Skills	81.9%
Greeting	91.2%
Closing	96.9%

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

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

Quality Assurance Detail

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

Back Generate Report

Start Date: 1/1/2015 End Date: 1/15/2016 Date Type: Evaluation Date

Agent: All Evaluator: All Form: Customer Service Evaluation

Active/Deleted Evaluations: Active Group: All Question: Any

Response: Any

1 of 330

Quality Assurance Detail

Selected Form: Customer Service Evaluation

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

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

Weighted QA Group Periodical Trending Report

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

Weighted QA Group Periodical Trending Report
Back Generate Report

Report Type: Monthly Year: 2016 Period Name: January

Periods: 5 Active/Completed Forms: Active Groups: All

Forms: All Agents: All Evaluators: All

Date Type: Recording Date

Monthly QA Group Trending Report

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

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

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

Greeting	Aug	Sep	Oct	Nov	Dec	Jan
Front Line - Location A	85.5%	97.4%	77.7%	89.8%	90.7%	92.7%
Front Line - Location B	88.2%	92.3%	84.5%	85.7%	91.2%	96.4%
New Hires	88.0%	88.1%	91.6%	79.1%	89.9%	88.0%
Schedule Coordinators - Location A	91.2%	96.1%	97.5%	89.1%	93.2%	90.7%
Schedule Coordinators - Location B	95.2%	97.4%	83.3%	84.5%	96.3%	97.2%
Verification - Location A	88.6%	91.4%	85.5%	89.8%	90.7%	89.4%
Verification - Location B	90.3%	88.3%	82.4%	90.9%	82.6%	90.0%

Weighted QA Group Periodical Trending Report - 1/31/2016
Page 1 of 3

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		

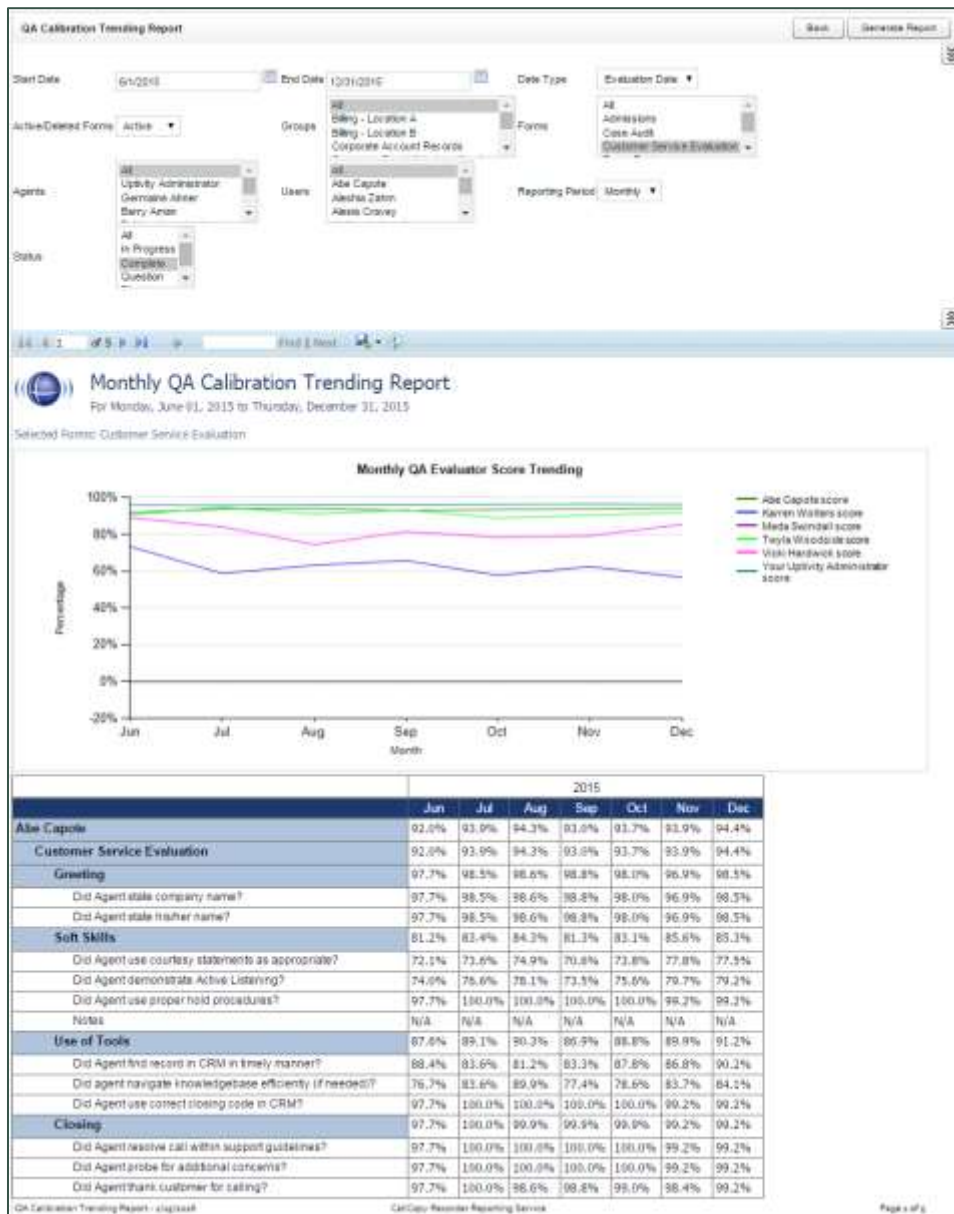
Evaluator	Evaluation ID	Points	Possible Points	%
Eddy, Cheryl	107	85.00	100.00	85.00%
George, Gina	105	75.00	100.00	75.00%
Hessler, Jessica	108	85.00	100.00	85.00%
Ward, Rae	106	75.00	100.00	75.00%

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-Evaluator Comparison Report

Form: AE Call Record ID: 1747 Evaluation Start Date: 1/1/2016
Evaluation End Date: 2/4/2016

1 of 2 pages

Self-Evaluator Comparison Report

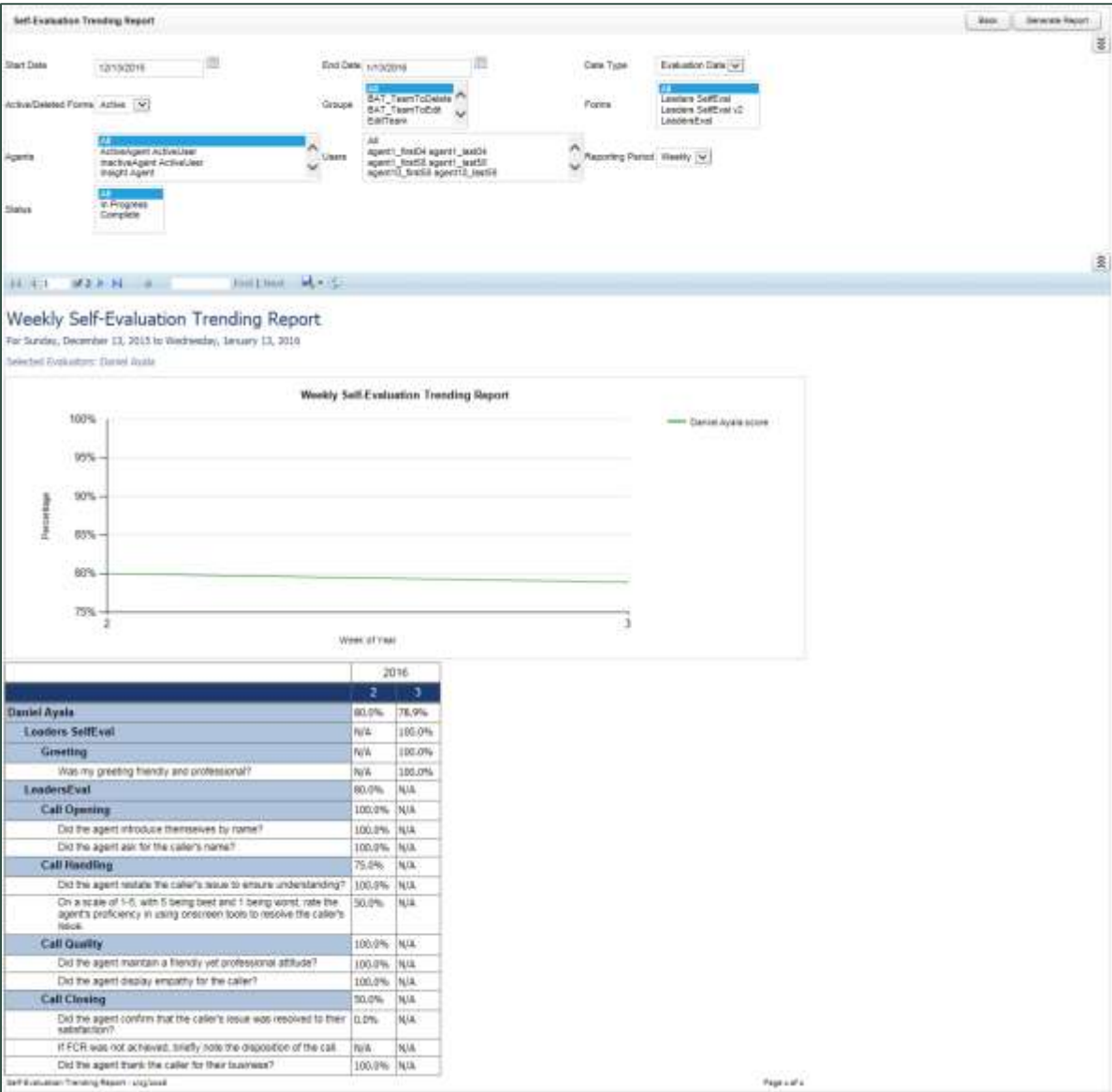
Agent: Ayala, Daniel Call ID: 1747
Agent Id: 34 Call Date: 1/22/2013
Evaluation Date Range: Friday, January 01, 2016 to Thursday, February 04, 2016

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

Self-Evaluation Trending Report

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

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



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

Pages : Go To Page : of 1

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.

Printable Reports		IP Phone Status	<input type="button" value="Export"/>
Report Tools	This page automatically refreshes every 2 seconds. Last Refresh Time: 10/22/2013 9:24:01 AM		
System Reports	IP Phone Information		
IP Phone Status	Q_Voice Port	Q_Device Alias	IP Address
License Info			Status
System Status			Confidence
Transcoder Status			Last Update
Audit Report			
	1000		10.100.10.815
	1001		10.100.10.816
	1002		10.100.10.817
	3001		10.100.5.88
	3002		10.100.5.89
	3008		10.100.8.34

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 Reports

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.

System Activity Summary

Back Generate Report

Start Date 12/15/2015 End Date 1/15/2016 User All

1 of 4 Find | Next

System Activity Summary

For period beginning Tuesday, December 15, 2015 and ending Friday, January 15, 2016

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

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

System Usage

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

System Usage
Back Generate Report

Start Date
End Date
User

1 of 3
Find | Next

System Usage

For period beginning Tuesday, December 15, 2015 and ending Friday, January 15, 2016

Date	User	Time In System
12/15/2015	Administrator Administrator	06:29:03
12/16/2015	Administrator Administrator	23:23:23
12/16/2015	callcopy admin	03:19:23
Total:		26:42:46
12/17/2015	Administrator Administrator	24:00:00
12/17/2015	callcopy admin	24:00:00
Total:		48:00:00
12/18/2015	Administrator Administrator	24:00:00
12/18/2015	callcopy admin	24:00:00
Total:		48:00:00
12/19/2015	Administrator Administrator	24:00:00
12/19/2015	callcopy admin	24:00:00
Total:		48:00:00
12/20/2015	Administrator Administrator	24:00:00
12/20/2015	callcopy admin	24:00:00
Total:		48:00:00

IP Phone Status

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

This report is useful when verifying that all phones are ready to be recorded on the network. The report automatically updates the list every 5 seconds. It can also be exported into a CSV file by clicking the **Export** button at the top-right corner of the report. Confidence indicates 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					
<i>This page automatically refreshes every 5 seconds. Last Refresh Time: 6/11/2010 11:23:46 AM</i>					
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

License Information
Reload

System License Available : **Yes**

License ID :

Licensed To :

Expires On : 1/31/2015

Licensed Audio Ports : 99

Licensed Insight Seats : 99

Licensed to Brand Insight : Yes

Licensed Analytics Seats : 99

Licensed Survey Channels : 99

Licensed Screen Capture Ports : 99

Licensed Desktop Only Ports : 99

Maximum Concurrent Recordings : 99

Licensed to Reload Voice Boards : Yes

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

i 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 Reports

System Status

Tools - System Status						
* Logged In Users						
Username				Login Time		
superuser				10/20/2013 3:43:56 PM		
1						
* Channel Summary						
Idle		Recording		Total Channels		
0		0		155		
* Channel Status						
Channel	State	Last State Change	Agent Name	Recording Device	Reco	
103	OutOfService	11/21/2012 2:53:05 PM				
2	Ready	10/18/2012 8:52:10 PM				
4	Ready	10/18/2012 8:52:10 PM				
5	Ready	10/18/2012 8:52:10 PM				
6	Ready	10/18/2012 8:52:10 PM				
7	Ready	10/18/2012 8:52:10 PM				
8	Ready	10/18/2012 8:52:10 PM				
9	Ready	10/18/2012 8:52:10 PM				
10	Ready	10/18/2012 8:52:10 PM				
11	Ready	10/18/2012 8:52:10 PM				
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 >						
* Screen Capture Client Status						
Agent Name	Username	IP Address	Computer	Version	Application	
UNADQWII	agent1	10.100.11.101	agent1-pc	5.0.0.1020	some title	
Richard Cunningham	agent11	10.100.11.111	agent11-pc	5.0.0.1020	some title	
Stuart Dwyer	agent11	10.100.11.114	agent14-pc	5.0.0.1020	some title	
Jeremy Carozza	agent12	10.100.11.112	agent12-pc	5.0.0.1020	some title	
Carmen Berner	agent13	10.100.11.113	agent13-pc	5.0.0.1020	some title	
Franks Handler	agent15	10.100.11.115	agent15-pc	5.0.0.1020	some title	

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

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

Transcoder Status

Transcoder Status						
This page automatically refreshes every 5 seconds. Last Refresh Time: 10/22/2013 11:06:12 AM						
Completed Records						
Identity	Source	Destination	Queued Time	Last Update Time		
5279	F:\CallCopy\Recordings\20131009\3602\3602-05-58-39.cca	F:\CallCopy\Recordings\20131009\3602\3602-05-58-39.wav	10/9/2013 9:19:39 AM	10/9/2013 9:19:59 AM		
No In Progress Records						
Failed Records						
Identity	Source	Destination	Last Update Time	Next Retry Time	Attempts	Status
5219	F:\CallCopy\Recordings\20130910\7477\7477-13-32-16.cca	F:\CallCopy\Recordings\20130910\7477\7477-13-32-16.wav	9/10/2013 4:19:18 PM	1378830010	3	Unknown (4)
5218	F:\CallCopy\Recordings\20130910\7477\7477-13-26-32.cca	F:\CallCopy\Recordings\20130910\7477\7477-13-26-32.wav	9/10/2013 4:19:08 PM	1378830068	3	Unknown (4)
5212	F:\CallCopy\Recordings\20130909\7546\7546-13-06-47.cca	F:\CallCopy\Recordings\20130909\7546\7546-13-06-47.wav	9/10/2013 4:18:19 PM	1378829959	3	Unknown (4)
5001	F:\Recordings\VoIP\20130807\7449\7449-10-56-21.cca	F:\Recordings\VoIP\20130807\7449\7449-10-56-21.wav	8/7/2013 10:59:11 AM	1375873211	3	Unknown (4)
4883	F:\Recordings\VoIP\20130703\7546\7546-16-53-38.cca	F:\Recordings\VoIP\20130703\7546\7546-16-53-38.wav	7/3/2013 5:20:01 PM	1372872061	3	Unknown (4)
4682	F:\Recordings\VoIP\20130703\7546\7546-15-56-15.cca	F:\Recordings\VoIP\20130703\7546\7546-15-56-15.wav	7/3/2013 4:58:12 PM	1372870752	3	Unknown (4)
4674	F:\Recordings\VoIP\20130703\7546\7546-13-26-17.cca	F:\Recordings\VoIP\20130703\7546\7546-13-26-17.wav	7/3/2013 2:53:24 PM	1372863264	3	Unknown (4)
4672	F:\Recordings\VoIP\20130703\7546\7546-12-44-06.cca	F:\Recordings\VoIP\20130703\7546\7546-12-44-06.wav	7/3/2013 12:47:02 PM	1372856682	3	Unknown (4)
4671	F:\Recordings\VoIP\20130703\7546\7546-12-34-58.cca	F:\Recordings\VoIP\20130703\7546\7546-12-34-58.wav	7/3/2013 12:40:38 PM	1372855286	3	Unknown (4)
4670	F:\Recordings\VoIP\20130703\7546\7546-12-05-18.cca	F:\Recordings\VoIP\20130703\7546\7546-12-05-18.wav	7/3/2013 12:36:49 PM	1372856089	3	Unknown (4)

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.

System Reports

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 13:57:26	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]

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