Agile WFO for SMB

NICE UPTIVITY REPORTS REFERENCE GUIDE

August 2017

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NICE UPTIVITY REPORTS REFERENCE GUIDE

- Version: This guide should be used with NICE Uptivity (formerly inContact WFO Premise) v5.6 and higher.
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| Survey > | Call F | Recording/ | Agent/Surv | ey Score | 9 | | 59 |

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 NICE Uptivity Survey for SIP Environments
- In the NICE Uptivity Survey for TDM Environments
- In the NICE Uptivity Performance Management: Dashboards & Reports Guide
- By searching online help for keyword speech analytics reporting

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.

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 <u>System Reports</u> 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.

| Agent Call Summary | | | | | | Back | Generate Report |
|---|--|------------------------|------------------|--------------------|--------------|------|-----------------|
| Start Date 1/1/2013 Call Direction Incoming | • | End Date 1/1 | /2015 | Group Legends Team | T | | |
| | | | | | | | |
| 4 4 1 of 1 ▷ | >1 4 | Find | Next 💐 🗸 🏠 | | | | |
| For period beginning 1/ Selected Group: Legend Selected Call Direction: | 1/2013 and endin s Team Incoming | y g 1/1/2015 | | | | | |
| Name | Device ID | # Calls | Average Duration | Total Duration | Max Duration | 2 | |
| Bern, Neil | 5709 | 4 | 00:07:21 | 00:29:24 | 00:12:25 | - 0 | |
| 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 | | |
| | 7507 | 1 | 00:09:45 | 00:09:45 | 00:09:45 | | |
| Fearnley, Henry | | | | | | | |
| Fearnley, Henry | 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.

| Assigned Agents R | eport | | | | Back Generate Report |
|------------------------|---------------------------------|-------------------|--------|------------|----------------------|
| Status Active v | | | | | ** |
| | | | | | * |
| | ♦ I 4 | Find Next 🛛 🔍 🗸 | ٢ | | |
| | | | | | |
| Assigne | d Agents | | | | |
| System ID 🗦 | Agent 🗧 | User Name 🕏 | Status | Phone ID 🕀 | |
| 1 | Administrator, Administrator | | Active | | |
| 7 | Gonzaga, Frode | | Active | 5004 | |
| 8 | Coscia, Sheryl | | Active | 5009 | |
| 9 | Snicket, Pietro | | Active | 5023 | |
| 10 | Cicierega, Lemony | | Active | 5024 | |
| 11 | Cunningham, Richard | | Active | 5016 | |
| 12 | Carrozza, Jeremy | | Active | 5017 | |
| 14 | Dwyer, Stuart | | Active | 5021 | |
| 15 | Handler, Franko | | Active | 5028 | |
| 16 | Boer, Orlando de | | Active | 5030 | |
| 17 | Carstensen, Dimitri | | Active | 5031 | |
| 18 | Cutting, Pietro | | Active | 5032 | |
| 19 | Flanders, John | | Active | 5131 | |
| 20 | Brooker, Anders | | Active | 5228 | |
| 21 | Fronsini, Ramon | | Active | 5525 | |
| 22 | Bibic, Cherie | cher | Active | 5555 | |
| 23 | Crowçœ, Alan | | Active | 5703 | |
| 24 | Conlee, Jean-Pierre | | Active | 5704 | |
| 25 | Chavis, Boris | | Active | 5705 | |
| 26 | Byrd, Stian | | Active | 5706 | |

Call Recording Detail

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

| Call Record | ing Detail | | | | | | | | Back | Generate Rep | ort |
|-----------------------------------|-----------------------------------|------------------------------------|-------------------------|----------------|---|------------------------|------------|----------|------|--------------|-----|
| Start Date | 1/1/2013 | End Date | 1/15/2018 | Agents | All ActiveAgent Act InactiveAgent A | tiveUser .ctiveUser | | * • | | | *** |
| Record ID | 1776 | Caller's Phone # | | Dialed Phone # | | | | | | | |
| Gate | | User 1 | | User 2 | | | | | | | |
| User 3 | | User 4 | | User 5 | | | | | | | |
| CallCopyGroup | All 🔻 | Skill Group List | All 20 30 40 ▼ | User 6 | | | | | | à | |
| User 7 | | User 8 | | User 9 | | | | | | | |
| User 10 | | User 11 | | User 12 | | | | | | | |
| User 13 | | User 14 | | User 15 | | | | | | | |
| II 4 1 Call Re For Tuesday, | of 2 b b ecording Detai | Find /, January 15, 2016 | Next 🔍 🔍 | | | | | | | | |
| Record | ID: <u>1776</u> | | | | | | | | | | |
| | Agent: Ayala, Daniel | | ANI: 7504 | DNIS: 91203 | 32998375 | Call Directio | on: | Outbound | | | |
| | Time: 1/22/ | /2013 5:27 PM Du | ration: 00:00:47 | Gate: | 10 Device: | 7504 | Channel: 3 | | | | |
| inCont | Group: | | | ACD Group: | 40 | | | | | | |
| Custon | ner Number: u1-8000 | | User2: | u | 2-8000 | User3: | | u3-6000 | | | |
| | User4: u4-4000 | | User5: | u1 | 5-5000 | 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 D | Direction Incoming V | *** |
| 🛙 🖞 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 | |
| 6/842/8598 | 4 | |
| 7023030303 | 2 | |
| 7440 | 2 | |
| 7466 | 5 | |
| 7467 | 6 | |
| 7477 | 18 | |
| 7536 | 2 | |
| 7546 | 2 | |
| 7553 | 2 | |
| 8888260080 | 63 | |
| 9548176817 | 2 | |
| Duplicate ANI Report - 1/13/2016 | Page 1 of 1 | |

Group Membership Report

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

| Group Membership Report | | | Back Generate Report |
|-------------------------------------|---------------------|-------------|----------------------|
| Group Leaders Team Active All | T | | ** |
| | | | * |
| [] 4 4 1 of 1 ▷ ▷] 4 | Find Next 🛛 🖳 🔹 🛞 | | |
| Group Members | hip | | |
| Group ⇔ | Agent ⇔ | Phone ID 🗧 | |
| Leaders Team | Ayala, Daniel | 7504 | |
| Leaders Team | Barnes, Phil | 7502 | |
| Leaders Team | Berner, Carmen | 5019 | |
| Leaders Team | Bouclier, Jenny | 7522 | |
| Leaders Team | Brechin, Joe | 5950 | |
| Leaders Team | Burke, Keith | 7512 | |
| Leaders Team | Carrozza, Jeremy | 5017 | |
| Leaders Team | Condon, Anthony | 7505 | |
| Leaders Team | Deiro, Rolf | 5990 | |
| Leaders Team | George, Gina | 9000 | |
| Group Membership Report - 1/13/2016 | | Page 1 of 1 | |

QA Reporting Reports

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**.

| Agent QA Summa | ry | | | | | | | Back Generate Report |
|---|---|-----------------------------|--|------------------|----------------|--|--------|----------------------|
| | | _ | | _ | | | | ** |
| Start Date | 1/1/2014 | End Date | 1/13/2016 | | Date Type | Evaluation Date V | | |
| Active/Deleted Forms | Active V | Forms | All 1Sales Call 1Support Call Enable Arbitration Workfk | ow not checked 👻 | Agents | All ActiveAgent ActiveUser InactiveAgent ActiveUser Insight Agent | * • | |
| Groups | All | Users | All Active User ActiveAgent ActiveUser ActiveAgent InactiveUser | | Report Type | Agent V | | |
| Status | All All Complete Question | | | | | | | |
| | | | | | | | | * |
| 4 4 1 of 1 | | Find Nex | t 🖳 • 😨 | | | | | |
| Agent QA For Wednesday, Ja Selected Forms: 15 | Summary Repor inuary 01, 2014 to Wednes Sales Call, 1Support Call | t day, January 13 | 3, 2016 | | | | | |
| | | Ager | t Summary | | | | | |
| | | Numbe | r of Evaluations | | Cou | int | | |
| | 0 1 | 2 | 3 | 4 | 5 Sco | re | | |
| | | | | | | | | |
| | | | | | | | | |
| Daniel | Ayala – | | | | | | | |
| gents | | | | | | | | |
| Phil B | arnes – | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | 0% 20% | 40% | 60% | 80% | 100% | | | |
| | | Av | erage Score | | | | | |
| Agent | | | # Evaluations | Score F | Possible Perce | ntage | | |
| 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 13, 2016 | | | | I | 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 *A*//.

| Agent Ranking By Period | | | | | | Back | Generate Report |
|---|---------------------------------|-------------------------|----------------------|----------|-----|------|-----------------|
| | | | | - | | | [|
| Form 1Support Call Year 2013 ▼ | Group All Period January | ▼ Peri | od Type Month ▼ | | | | |
| | | | | | | | 1 |
| | Find Next | 4 • 🛞 | | | | | |
| Agent Ranking I For period beginning 1/1/2013 ar Selected Form: 1Support Call | Dy Month Id ending 1/31/2013 | | | | | | |
| 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) | ř. | | |
| 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) | 1 | | |
| 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) | L . | | |
| SLOAN, SHAWN | | 2286 of 2515 (90.9%) | 2802 of 2990 (93.7%) | 14 (-9) | L | | |
| EWING, WILLA | | 2511 of 2765 (90.8%) | 4700 of 5095 (92.2%) | 15 (0) | 1 | | |
| 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) | 1 | | |
| CANTRELL, MADELEINE | | 1286 of 1420 (90.6%) | 3435 of 3720 (92.3%) | 19 (-7) | | | |
| FARRELL, HALEY | | 2100 of 2325 (90.3%) | 4098 of 4505 (91%) | 20 (+7) | | | |

Agents Needing Evaluation Detail

The **Agents Needing Evaluation Detail** report helps you determine agents who may be due for evaluation. The report displays the Agent name, all 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 E | valuation Detail | | | | | Back Generate Report |
|--|--|--|---|-------------------------------------|---|----------------------|
| Last Evaluated Before Agent List | e 12/1/2015 All ActiveAgent ActiveUser InacitiveAgent ActiveUser Insicht Agent | Group List | Group03 Group04 Group05 Leaders Team All ActiveAgent ActiveUser ActiveAgent InactiveUser ActiveAgent InactiveUser | Form List | All |))) |
| | | | | | | \$ |
| [4 4 1 of 1 | | Find Next 🛛 🛃 🕶 🚱 | | | | |
| | | | | | | |
| Selected Groups: L | eaders Team, Legends Team | Form | Fvaluator | last Evaluated | | |
| Daniel Avala | Legends Team | 1Support Call | Gina George | 6/18/2015 | | |
| Phil Barnes | Leaders Team | Sales Evaluation v2 | Gina George | 7/29/2014 | | |
| Phil Barnes | Leaders Team | 1Sales Call | Jessica Hessler | 6/18/2015 | | |
| Neil Bern | Legends Team | 1Support Call | Gina George | 11/5/2013 | | |
| Neil Bern | Legends Team | Sales Evaluation v2 | Gina George | 6/18/2015 | | |
| Anders Brooker | Legends Team | 1Support Call | Gina George | 11/5/2013 | | |
| Roy Chenier | Legends Team | 1Support Call | Gina George | 11/5/2013 | | |
| Sheryl Coscia | Legends Team | 1Support Call | Gina George | 11/5/2013 | | |
| Pietro Cutting | Legends Team | 1 Europart Call | Gina George | 11/5/2013 | | |
| ricato catalig | Ecgenico ream | 15upport Call | | | | |
| Kevin Dimetrik | Legends Team | 1Support Call | Gina George | 11/5/2013 | | |
| Kevin Dimetrik Henry Fearnley | Legends Team Legends Team | 1Support Call 1Support Call | Gina George Gina George | 11/5/2013 11/5/2013 | | |
| Kevin Dimetrik Henry Feamley Zach Haltli | Legends Team Legends Team Legends Team Legends Team | 1Support Call 1Support Call 1Support Call 1Support Call | Gina George Gina George Gina George | 11/5/2013 11/5/2013 11/5/2013 | | |

Agents Needing Evaluation Summary

The **Agents Needing Evaluation Summary** displays the same information as the <u>Agents Needing Evaluation Detail</u> 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 **A**//.

| 4 4 1 of 1 ▷ | Þ 4 | Find Next 🛛 🔍 🔹 🛞 | | |
|---|--------------------------------------|--|--------------------------------|---------------------------------|
| Agents Ne | eding Evalua | tion Summarv | | |
| | den Terr de Terr | , | | |
| Selected Groups: Lea | ders Team, Legends Team | | | |
| Agent | Group | Form | Evaluator | Last Evaluated |
| Ayala, Daniel | Legends Team | 1Support Call | Gina George | 6/18/2015 |
| | | | | |
| Barnes, Phil | Leaders Team | 1Sales Call | Jessica Hessler | 6/18/2015 |
| Barnes, Phil Bern, Neil | Leaders Team Legends Team | 1Sales Call Sales Evaluation v2 | Jessica Hessler Gina George | 6/18/2015 6/18/2015 |
| Barnes, Phil Bern, Neil Bouclier, Jenny | Leaders Team Legends Team None | 1Sales Call Sales Evaluation v2 None | Jessica Hessler Gina George | 6/18/2015 6/18/2015 Never |

Blank QA Form

| Blank QA Form | | Back Generate Report |
|--|-------------|----------------------|
| Form Support Call | | |
| ld d t oft b bl & Endland D t | | |
| IA A I OFIPPI Q FINA Next 👒 🦦 | | |
| 1Support Call | | |
| Opening | | |
| Proper introduction? | | |
| Yes | | |
| NO Ask for caller's name? | | |
| Yes | | |
| No | | |
| Restate problem to ensure understanding? | | |
| Yes | | |
| NO Comments: | | |
| connector. | | |
| | | |
| Communication Skills | | |
| Technical language at caller's level of understanding? | _ | |
| Yes | | |
| Pace and enunciation clear and understandable? | | |
| Yes | | |
| No | | |
| Patient and empathetic tone? | | |
| Yes | | |
| No | | |
| comments. | | |
| - 1 - 1 - 1 - 1 - 1 | 0 | |
| Technical Skills | | |
| Application UI knowledge and proficiency | - | |
| Excellent Accentable | | |
| Unacceptable | | |
| Underlying system knowledge and proficiency (DB, OS, scripts, etc.) | | |
| Excellent | | |
| Acceptable | | |
| Overall technical speed and proficiency (moving through screens, using tools, etc.) | | |
| Excellent | | |
| Acceptable | | |
| Unacceptable | | |
| Comments: | | |
| Clasing | | |
| Closing Clarify and communicate next steps? | | |
| Yes | | |
| No | | |
| Thank caller? | | |
| Yes | | |
| NU | | |
| Blank 0A Form - 1/13/2016 | Doop 4 of 4 | |
| energy for the state of the sta | Fage 1011 | • |

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

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*.

Call Evaluation Detail Back Generate Report Start Date End Date Date Type Evaluation Date 🔻 10/1/2015 1/15/2016 Daniel Ayala Evaluator All Form All Agent All Active/Deleted Evaluations Active V Group ٠ Question Any 🔻 Response Any 🔻 Caller's Phone # Dialed Phone # Gate User 1 User 2 User 3 User 4 User 5 In Progress Complete QA Record ID status User 6 Question User 7 User 9 User 8 User 10 User 12 User 11 User 13 User 14 User 15 🕅 🖣 1 of 2 🕨 🌬 🖕 Find | Next 🛛 🛃 🕶 📀 Call Evaluation Detail For Thursday, October 01, 2015 to Friday, January 15, 2016 Selected Agent: Daniel Ayala Agent: Ayala, Daniel Call ID **Evaluated By** Complete Date Form Name 2Sales Call 1772 Gina George 1/13/2016 Group: Leaders Team ANI: 7504 DNIS: 912032998378 Outbound Call Direction: 1/22/2013 5:17 PM Duration: 00:00:45 10 7504 Channel: 2 Time: Gate: Device: Customer Number: u1-9000 User2: u2-3000 User3: u3-4000 User4: u4-7000 u15-8000 User5: User6: User7: User8: User9: User10: User11: User12: User13: User14: User15: Section Name: Opening Question Evaluation Score Proper introduction? 10.00 of 10.00 (100.0%) Yes Ask for caller's name? No 0.00 of 10.00 (0.0%) 10.00 of 10.00 (100.0%) Restate problem to ensure understanding? Yes Ask for permission to place customer on hold? Not Applicable N/A Comments: N/A 20.00 of 30.00 (67%) Subtotal: Section Name: Communication Skills Question Evaluation Score Technical language at caller's level of 10.00 of 10.00 (100.0%) Yes understanding? Pace and enunciation clear and 10.00 of 10.00 (100.0%) Yes understandable? Patient and empathetic tone? Yes 10.00 of 10.00 (100.0%) Comments: N/A Subtotal: 30.00 of 30.00 (100%)

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

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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 | I QA Form | | | | |
|-------------------------|--------------------------------|-------------------------------------|--------------------|-------------------|-----------|
| Agent: | Barnes, Phil | Evaluation ID: | 96 | | |
| Evaluator: | George, Gina | Call ID: | No Recording | | |
| Date of Evaluation: | 7/29/2014 | Date of Recording: | | | |
| Duration: | 0:0:0 | Arbitrator: | No Dispute | | |
| Evaluation Form: | Sales Evaluation v2 | Station ID: | | | |
| Agent Number: | | Number Called DNIS: | | | |
| CallerID ANI: | | Channel: | | | |
| Group: | | ACD Gate: | | | |
| Call Direction: | | Screen Capture: | | | |
| User1: | | User2: | | | |
| User3: | | User4: | | | |
| User5: | | | | | |
| Intro | | | 20 of | f 30 (66.6 | 7% |
| Did the agent intr | oduce him/herself by name? | | | | |
| Yes | | | 5 | 🖌 10pts | |
| No | | | |] Opts | |
| Did the agent ask | for the caller's name? | | | | |
| Yes | | | , E |] 10pts | |
| No | | | 5 | 🖌 Opts | |
| Did the agent use | e the current promotional gree | eting? | | | |
| Yes | | | 5 | f 10pts | |
| No | | | Ē |] Upts | |
| Soft Skills | | | 15 of | 30 (50.0 | 0% |
| Did the agent per | sonalize the conversation by | using the caller's name on at le | ast two occasions? | | |
| Yes | | | , C |] 10pts | |
| No | | | 5 | f Opts | |
| Did the agent sug | ggest appropriate add-on proc | lucts based on the caller's initial | order? | | |
| Yes | | | 5 | f 10pts | |
| No Was the agent w | arm and friendly while remain | ving professional? | |] Upts | |
| was the agent wa | ann and mendiy while remain | ing professional? | | 7 10nto | |
| Exceeds Expect | ions | | | j ⊺upts ≮ 5nts | |
| Did Not Meet E | xpectations | | | 0 Opts | |
| Ta ala al a la chille | | | | | 004 |
| Ves the egent of | le te neviente through produ | at assesses officiently? | 15.0 | 20 (75.0 | 0% |
| was the agent ac | ble to havigate through produ | ct screens efficiently? | | - 10 - | |
| Exceeds Expect | tations | | , L | J TUpts | |
| Did Not Meet P | xpectations | | | 0 Opts | |
| Did the agent cor | rectly handle credit card proc | essing? | | | |
| Yes | | | 5 | 10pts | |
| No | | | |] Opts | |
| Form Total: | | | 50.0 | F 80 (62 5 | 0% |
| . c. m rotai. | | | 30.0 | 50 (02.5 | <i></i> |
| Comments | | | | | |
| | | | | | |
| | | | | | |
| Completed OA Form - 6/7 | 7/2016 | | | Page | 1 of |

NICE Uptivity Reports Reference Guide

Critical Question Detail

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

| Critical Question Detail | | | Back Generate Report |
|--|---|---|----------------------|
| Start Date 12/13/2015 End Date | 1/13/2016 Group List | All BAT_TeamToDelte BAT_TeamToDelte EditTeam | |
| Form List BAT_2012-02-10 BAT_2012-10-03-2:02 CoachingRAT 2012-05-09 09:02:04 | ActiveAgent ActiveUser InactiveAgent ActiveUser Insight Agent | Active User ActiveAgent ActiveUser ActiveAgent InactiveUser | • |
| Date Type Evaluation Date Active/Deleted Evaluation | Active 🔻 | | |
| | | | * |
| 4 4 1 of 1 ▷ ▷ 4 Find Next 🔩 • 🤹 | | | |
| Critical Question Detail For Sunday, December 13, 2015 to Wednesday, January 13, 2016 | | | |
| Agent: Ayala, Daniel | | | |
| Date of Call Record Date of Eval Form | Question | Score | |
| 1/22/2013 122 1/13/2016 2Sales Call | Restate problem to ensure understanding? | 10 of 10 (100.0%) | |
| 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*.

| Lyanation List Report | | | | | | | Back Genera | ate Report |
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| Start Date 9/1/ | 2015 | End Date | 1/14/2016 | 🔲 Date Ty | pe Call Date | • | | |
| Group All | | ▼ Status | All All All All All All All All | Agent | All | ¥ | | |
| Active/Deleted Evaluations Act | ive 🔻 | Form | All | ▼ Evaluato | or All | • | | |
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| Quality Assu | rance Evalua | ation Lis | τ | | | | | |
| | | | | n I: A | - | F I A | a | |
| Form - | Agent - | | Record ID - | Recording - Date | Evaluated = By | Evaluation = Date | Score - | |
| Customer Service Evaluati | on Administrato | r, Uptivity | 22388 | 09/09/15 | Vicki Hardwick | 09/09/2015 | 140.0 -5140.0 | |
| | | | | , | VICKI Hardwick | 09/09/2015 | (100.0%) | |
| Customer Service Evaluati | on Administrato | r, Uptivity | 13256 | 09/12/15 | Abe Capote | 09/12/2015 | 140.0 of 140.0 (100.0%) 120.0 of 140.0 (85.7%) | |
| Customer Service Evaluati Customer Service Evaluati | on Administrato | r, Uptivity r, Uptivity | 13256 | 09/12/15 | Abe Capote Vicki Hardwick | 09/12/2015 09/20/2015 | 140.0 of 140.0 (100.0%) 120.0 of 140.0 (85.7%) 140.0 of 140.0 (100.0%) | |
| Customer Service Evaluati Customer Service Evaluati Customer Service Evaluati | on Administrato on Administrato on Administrato | r, Uptivity r, Uptivity r, Uptivity | 13256 13170 15658 | 09/12/15 09/20/15 10/06/15 | Abe Capote Vicki Hardwick Your Uptivity Administrator | 09/12/2015 09/20/2015 10/06/2015 | 140.0 of 140.0 (100.0%) 120.0 of 140.0 (85.7%) 140.0 of 140.0 (100.0%) 134.0 of 140.0 (95.7%) | |
| Customer Service Evaluati Customer Service Evaluati Customer Service Evaluati Customer Service Evaluati | on Administrato on Administrato on Administrato on Administrato | r, Uptivity r, Uptivity r, Uptivity r, Uptivity | 13256 13170 15658 25477 | 09/12/15 09/20/15 10/06/15 10/14/15 | Abe Capote Vicki Hardwick Your Uptivity Administrator Your Uptivity Administrator | 09/12/2015 09/20/2015 10/06/2015 10/14/2015 | 140.0 of 140.0 (100.0%) 120.0 of 140.0 (85.7%) 140.0 of 140.0 (100.0%) 134.0 of 140.0 (95.7%) 134.0 of 140.0 (95.7%) | |
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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 **A**//.

| | | | | | | | | | | | _ |
|----------------------|---------------------------|----------------|------------------------------|---------------|----------|---------------|--------------------------|----------|------|-----------------|---|
| Evaluator QA Sum | mary | | | | | | | | Back | Generate Report | |
| | | | | | | | | | | 1 | ž |
| Start Date | 1/1/2014 | End Date | 1/13/2016 | | | Date Type | Evaluation Date | | | | _ |
| | 1112014 | | A1 | | | | | | | | |
| Astive/Delated Forms | Astivo T | Formo | 1Sales Call | | <u> </u> | Acosta | ActiveAgent ActiveUser | <u> </u> | | | |
| Active/Deleted Forma | Active . | 1 Office | 1Support Call 2Sales Call | | _ | Agenta | InactiveAgent ActiveUser | _ | | | |
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| Cround | BAT_TeamToDelete | Linera | Active User | | | Report Type | Evolutor - | | | | |
| Groups | BAT_TeamToEdit | Cacia | ActiveAgent Active | lser Ilser | | - Report Type | | | | | |
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| Status | In Progress | | | | | | | | | | |
| Citato | Complete Question | | | | | | | | | | |
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| Evaluator (| QA Summary Re | port | | | | | | | | | |
| For Wednesday, Ja | nuary 01, 2014 to Wednesd | lay, January 1 | 3, 2016 | | | | | | | | |
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| | | Evalua | tor Calibration | | | | | | | | |
| | | | Number of Eval | uations | | Co | unt | | | | |
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| ø Admir | listrator Administrator – | | | | | | | | | | |
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| 0 | Gina George - | | | | | | | | | | |
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| | 0 | 20 | 40 | 60 8 | 30 1 | 00 | | | | | |
| | | | Average Sc | bre | | | | | | | |
| Evaluator | | | # Evaluatio | ns Score | Pos | sible Perce | entage | | | | |
| Administrator Adr | ninistrator | | | 5 | 226 | 280 | 80.7% | | | | |
| Gina George | | | | 6 | 365 | 580 | 62.9% | | | | |
| Total: | | | | 11 5 | 591.0 | 860.0 | 68.7% | | | | |
| Evaluator QA Summary | - 1/13/2016 | | | | | | Pageiofi | | | | |

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 Failu | ires Report | | | | | | | Back Generate Repo | rt |
|----------------------------|---|--------------|--|-------|-----------|--|---|--------------------|----|
| | | | | | | | | | š |
| Start Date | 1/1/2015 | End Date | 1/14/2016 | | Date Type | Evaluation Date | , | | |
| Active/Deleted Evaluations | Active v | 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 🔻 | | | | | | |
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| | | | | | | | | | ~ |
| 4 | Fi 💠 | nd Next | 💐 • 📀 | | | | | | |
| Form and Cor | tion Epiluro Dono | | ant | | | | | | |
| Form and Sec | cuon Fallure Repo | t by Ag | lent | | | | | | |
| For Thursday, January | 01, 2015 to Thursday, January | 14, 2016 | | | | | | | |
| Customer Service | e Evaluation | Greet | ting | | | | | | |
| Agent | | Failur | re Count | | | | | | |
| Administrator, Uptivity | / | Form F | Failures: 0, Section Failure | es: 1 | | | | | |
| Ahner, Germaine | | Form F | Failures: 0, Section Failure | es: 2 | | | | | |
| Aman, Barry | | Form F | Failures: 0, Section Failure | es: 4 | | | | | |
| Armstead, Bobbye | | Form F | Failures: 0, Section Failure | es: 4 | | | | | |
| Arriaga, Shanita | | Form F | Failures: 0, Section Failure | es: 1 | | | | | |
| Balcom, Jerry | | Form F | Failures: 0, Section Failure | es: 3 | | | | | |
| Baughman, Lilly | | Form F | Failures: 0, Section Failure | es: 3 | | | | | |
| Belle, Joey | | Form F | Failures: 0, Section Failure | es: 1 | | | | | |
| Berard, Elmo | | Form F | Failures: 0, Section Failure | es: 2 | | | | | |
| Bullen, Daniella | | Form F | Failures: 0, Section Failure | es: 3 | | | | | |
| Burling, Leona | | Form F | Failures: 0, Section Failure | es: 2 | | | | | |

Group QA Summary

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

| Group QA Summa | ry | | | | | | | | Back Generate Report |
|----------------------|---|----------------|----------------------|--|---------|----------|---|---|----------------------|
| | | | | | | | | | š |
| Start Date | 1/1/2014 | | End Date 1/ | 14/2016 | | Da | te Type Evaluatio | n Date 🔻 | |
| Active/Deleted Forms | Active v | | Forms | l Sales Call Support Call Sales Call | | Ag | All ActiveAge InactiveA Insight Ag | ent ActiveUser gent ActiveUser jent | ▲ |
| Groups | Group03 Group04 Group05 Leaders Team | • | Users Ac Ac Ac | l tive User tiveAgent ActiveUser tiveAgent InactiveUser | | Re | eport Type Group | V | |
| | | | | | | | | | \$ |
| 14 4 1 of 1 | | | Find Nevt | 📕 🕶 🛞 | | | | | ~ |
| | e en de | | The Hore | ~ • | | | | | |
| Group QA | Summary | Report | | | | | | | |
| For Wednesday, Ja | anuary 01, 2014 | to Thursday, I | January 14, 2 | 016 | | | | | |
| Selected Groups: L | eaders Team, Le | gends Team | | | | | | | |
| | | | | | | | | | |
| | | | Group | Summary | | | | | |
| | | | Numbe | er of Evaluations | | | Count | | |
| | 0 | 2 | 4 | 6 | 8 | 10 | Score | | |
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| | | | | | | | | | |
| Leade | rs Team- | | | | | | | | |
| s | | | | | | | | | |
| 8 | | | | | | | | | |
| Legen | ds Team- | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | 0 | 20 | 40 | 60 | 80 | 100 | | | |
| | - | | Av | erage Score | | | | | |
| Crown | | | | # Evolutions | Score - | Dossible | Dorcontogr | | |
| Leaders Team | | | | # Evaluations | 270 | 205 | 70 1% | | |
| Legends Team | | | | 4 | 556 | 835 | 66.6% | | |
| Total: | | | | _13 | 826.00 | 1220.00 | 67.7% | | |
| Group QA Summary - | 1/14/2016 | | | | | | Page 1 of 1 | | |
| | | | | | | | • | | |

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 E | By Month | | | | | Back Generate Report |
|----------------------|--|-------------------|--|--|--|----------------------|
| | | | | | | |
| Month | January V | Year 201 | 6 🔻 | Periods 6 | • | |
| Active/Deleted Forms | s Active v | Forms All Case | issions e Audit tomer Service Evaluation | Agents Agents Barry | ity Administrator naine Ahner Aman | |
| Groups | All Billing - Location A Billing - Location B Corporate Account Records | Users Ales | Capote hia Zahm ia Cravey | Report Type Mont | h▼ | |
| | | | | | | ĺ |
| 4 4 1 of 1 | | Find Next | L • 🚯 | | | |
| For the period beg | Aug Sep | Oct Nov Month | nmary Dec Jan | 2000 1500 Number of Evaluations 500 0 | — Count — Score | |
| Month | | # Evaluations | Score | Possible Score | Percentage | |
| August | | 656 | 66470 | 7305 | 5 91.0% | |
| September | | 749 | 77477 | 8438 | 5 91.8% | |
| October | | 947 | 95879 | 10586 | 5 90.6% | |
| November | | 1196 | 123774 | 13591 | 5 91.1% | |
| December | | 1275 | 131287 | 14327 | 0 91.6% | |
| January | | 1600 | 164565 | 17921 | 5 91.8% | |
| Total: | | 6423 | 659452.00 | 721705.00 | 91.4% | |
| Group Summary By M | lonth - 1/14/2016 | CallCopy Recorder | Reporting Service | | Page 1 of 1 | |

Group Summary by Period

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

| Bit General Report Bit Counter Year 2010 Period Name Austral Deleted Form Period Name Agents Astrandbetted Form Bit Astrandbetted Form Bit Counter Count Summary Astrandbetted Form Count Formance Summary Report by Quarter Counter For the period beginning 7/1/2014 and ending 3/31/2016 Counter Cuarter 2000 Counter But Active Form Counter Cuarter 2010 | | | | | | | | | | | |
|--|--|---|---------------------|--|----------------------|--------------|--|-----------------|------|-----------------|--|
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| Periods 6 Active/Deleted Forms Active Torms | Period Type | Quarter 🔻 | Year | 2016 🔻 | | Period Name | 1 🔻 | | | | |
| Agerts with Administrator Germanie Almer Billing - Location A Billing - Location A B | Periods | 6 🔻 | Active/Deleted | Forms Active V | | Forms | All Admissions Case Audit Customer Servi | ce Evaluation 👻 | | | |
| Report Type Period | Agents | All Uptivity Administrat Germaine Ahner Barry Aman | or Groups | All Billing - Location A Billing - Location E Corporate Accourt | a 3 nt Records | Users | All Abe Capote Aleshia Zahm Alesia Cravey | ▲ | | | |
| Image: Construction of the period beginning 7/1/2014 and ending 3/31/2016 Count of the period beginning 7/1/2014 and ending 3/31/2016 Outrier Summary Outrier Summary <th col<="" td=""><td>Report Type</td><td>e Period 🔻</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></th> | <td>Report Type</td> <td>e Period 🔻</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> | Report Type | e Period 🔻 | | | | | | | | |
| Count of 1 b b count | | | | | | | | | | ^ | |
| Group Performance Summary Report by Quarter For the period beginning 7/1/2014 and ending 3/31/2016 Quarter Summary | 14 4 1 | of 1 D | <i>/</i> 2 | ind Next 🛛 📕 🕶 🛞 | | | | | | 2 | |
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Multiple Evaluations Summary

The **Multiple Evaluations Summary** displays the last 12 evaluations conducted on a selected agent and form, based on a selected end date. **Overall Average %** is the average score of all evaluations done using the selected form regardless of agent or evaluator. **Average Score for this Form %** is the total average of the last 12 evaluations performed using the selected form, by the selected evaluator, for the selected agent. Individual percentages in the **Overall Percentage** column are Section totals. Individual question **Totals** are for the last 12 evaluations performed on the selected form, by the selected evaluator, for the selected 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 Gern | naine A | hner | | ▼ Fo | orm ID | Custo | mer Se | rvice E | valuatio | n 🔻 | | | | | |
| Supervisor ID Your Uptivity Administrator 🔻 | All In Pro Comp Ques | ogress blete tion | • | | | | | | | | | | | | | * |
| ∥4 4 1 of 1 ▷ ▷∥ 4 | Find N | lext | . , - | ٩ | | | | | | | | | | | | |
| Multiple Evaluations Summary Report Contact Date Range: July 22, 2015 - January 12, 2016 Agent Name: Germaine Ahner Contact Date Range: Germaine Ahner Conta | | | | | | | | | | | | | | | | |
| Supervisor Name: Your Uptivity A | Administrator | | | | | | Ove | erall A | verag | je: | 92.4% | | | | | |
| | | | | | | | | | | | | | | | | |
| Form: Customer Service Evaluation | | | | | | | | | | | | | | | | |
| Average Score for this Form: 97.1% | | | | | | | | | | | | | | | | |
| | Total | | | | | | | | | | | | | | Overall | |
| Section/Questions | Possible | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | Total | Percentage | |
| Greeting | 240 | | | | | | | | | | | | | 240 | 100.0% | |
| Did Agent state company name? | 120 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 120 | 100.0% | |
| Did Agent state his/her name? | 120 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 120 | 100.0% | |
| Soft Skills | 360 | | | | | | | | | | | | | 332 | 92.2% | |
| Did Agent demonstrate Active Listening? | 120 | 10 | 7 | 10 | 7 | 10 | 10 | 10 | 7 | 10 | 10 | 7 | 10 | 108 | 90.0% | |
| Did Agent use courtesy statements as appropriate? | 120 | 10 | 7 | 10 | 5 | 10 | 10 | 10 | 7 | 10 | 10 | 5 | 10 | 104 | 86.7% | |
| Did Agent use proper hold procedures? | 120 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 120 | 100.0% | |
| Notes | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.0% | |
| Use of Tools | 360 | | | | | | | | | | | | | 340 | 94.4% | |
| Did Agent find record in CRM in timely manner? | 120 | 10 | 10 | 10 | 0 | 10 | 10 | 10 | 10 | 10 | 10 | 0 | 10 | 100 | 83.3% | |
| Did agent navigate knowledgebase efficiently (if needed)? | 120 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 120 | 100.0% | |
| Did Agent use correct closing code in CRM? | 120 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 120 | 100.0% | |
| Closing | 720 | | | | | | | | | | | | | 720 | 100.0% | |
| Did Agent offer to transfer to customer sat survey? | 180 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 15 | 180 | 100.0% | |
| Did Agent probe for additional concerns? | 120 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 10 | 120 | 100.0% | |
| Did Agent resolve call within support guidelines? | 360 | 30 | 30 | 30 | 30 | 30 | 30 | 30 | 30 | 30 | 30 | 30 | 30 | 360 | 100.0% | |
| Did Agent thank customer for calling? | 60 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 5 | 60 | 100.0% | |
| Notes | 0 | | | | | | | | | | | | | 0 | 0.0% | |
| Reviewer Notes | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.0% | |
| Multiple Evaluations Summary - 1/14/2016 CallCopy Recorder Reporting Service Page 1 of 1 | | | | | | | | | | | | | | | | |

NICE Uptivity Reports Reference Guide

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*.

| Base General Report Report Type New Year Diff Perced Hames Ganuary New Year Diff Perced Hames Ganuary Manuary Manuary< | | | | | | | | | | | | |
|---|---|--|--|---|------------------|--------------|--------------------------------------|--------------------------|---------------------------------|--|----------------|------|
| Report Type Learthy Ver 2010 Percent New Jones And | QA Agent Periodi | cal Trending Report | | | | | | | | Back | Generate Rep | port |
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| Peros For La de De Detender Porme For La de De De Detender Porme For La de De De Detender Porme For La de De De De Detender Porme For La de De De Detender Porme For La de | Report Type Month | ly 🔻 | Year | 2016 🔻 | | Period Nam | Januar | у 🔻 | | | | |
| Form Lat Important action of the second action | Periods 6 V | | Active/Deleted Forms | Active v | | Group List | All Billing - Billing - | Location A Location B | - | | | |
| Contract Service Evaluation Contract Service Evaluati | Form List All Admiss Case A Custor Date Type Evalue | sions Audit mer Service Evaluation | Agent List | All Uptivity Admir Germaine Ahr Barry Aman | histrator her | User List | All Abe Ca Aleshia Alesia (| pote Zahm Cravey | | | | |
| I III IIIIIIIIIIIIIIIIIIIIIIIIIIIIIII | | | | | | | | | | | | *** |
| Monthly QA Agent Trending Report Sidetad Agents: Germaine Ahner, Barry Aman, bobbye Amstad, Shanta Artaga, Vincenzo Aschenbrenner, Jenry Balcon, Lilly Baughman Sidetad Agents: Customer Service Evaluation Monthly QA Agent Trending Monthly Chack Monthly Chack | 🛛 🖣 🖞 1 of 2 | 2 🕨 🕅 💠 | Find Next | 🛃 - 📀 | | | | | | | | |
| Monthly QA Agent Trending 4 Anter; Germaine score Anna, Barry score Anter, Bernales dobbye score Aschenbrenner, Vincenzo Aschenbrenner, Vincenzo Aschenbrenner, Vincenzo Baughman, Lily score Anter; Germaine score Arriaga, Shanita Score Vision Dec Jan Creeting 60 0% 55.% 88.1% 71.1% Soft Skills 94.23% 98.85% 75.5% Use of Tools 0.91% 92.7% 70.9% Vise of Tools 0.91% 90.9% 0.05% 100.0% Notes 0.09% 0.05% 0.05% 0.05% Notes 100.05% 100.05% 100.05% 100.05% Anner, Germaine 00.05% | Monthly Q For the period be Selected Agents: G Selected Forms: C | A Agent Tren ginning 7/1/2015 and Germaine Ahner, Barry A ustomer Service Evaluat | ding Report ending 1/31/2016 aman, Bobbye Armstea ion | ad, Shanita A | rriaga, Vince | nzo Aschenbi | enner, Je | rry Balcom, Lilly Bau | ıghman | | | |
| Image: construct of the second seco | | | | Mo | nthly QA A | gent Trendi | ng | | | | | |
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| Soft Skills Aug Sep Oct Nov Dec Jan Ahner, Germaine 90.0% 82.2% 93.3% 70.8% 82.7% 70.7% | Armer, German | lie | 100.04 | 100.0% | 100.0% | 71.4% | 100.0% | 71.4% | | | | |
| 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% 100.0% 66.7% Baughman, Lilly 80.0% 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% Armstad, Bobbye 87.6% 83.8% 100.0% 79.2% 74.4% | Armstead, Bob | bye | 100.09 | 6 100.0% | 50.0% | 100.0% | 100.0% | 91.7% | | | | |
| Aschenbrenner, Vincenzo 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 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% Amstead, Bobbye 87.6% 89.3% 100.0% 70.9% 74.4% | Arriaga, Shanit | a | 100.09 | 6 66.7% | 66.7% | | 100.0% | 75.0% | | | | |
| Balcom, Jeny 100.0% 100.0% 100.0% 100.0% 66.7% Baughman, Lilly 80.0% 100.0% 100.0% 100.0% 75.0% 87.5% Soft Skills Aug Sep Oct Nov Dec Jan Ahner, Germaine 90.0% 82.2% 93.3% 70.8% 93.3% 70.7% Aman, Barry 90.0% 86.7% 78.1% 82.7% 79.0% Armstead, Bobbye 87.6% 89.3% 63.3% 100.0% 70.4% | Aschenbrenner | , Vincenzo | 100.09 | 6 100.0% | 100.0% | 100.0% | 100.0% | 100.0% | | | | |
| Baughman, Lilly 80.0% 100.0% 100.0% 75.0% 87.5% Soft Skills Aug Sep Oct Nov Dec Jan Ahner, Germaine 90.0% 82.2% 93.3% 70.8% 93.3% 70.7% Aman, Barry 90.0% 86.7% 78.1% 82.7% 79.0% Armstead, Bobbye 87.6% 89.3% 63.3% 100.0% 74.4% | Balcom, Jerry | | | 100.0% | 100.0% | 100.0% | 100.0% | 66.7% | | | | |
| Soft Skills Aug Sep Oct Nov Dec Jan Ahner, Gemaine 90.0% 82.2% 93.3% 70.8% 93.3% 70.7% Aman, Barry 90.0% 86.7% 78.1% 82.7% 79.0% Armstead, Bobbye 87.6% 89.3% 63.3% 100.0% 70.9% 74.4% | Baughman, Lil | lγ | 80.09 | 6 100.0% | 100.0% | 100.0% | 75.0% | 87.5% | | | | |
| Soft Skills Aug Sep Oct Nov Dec Jan Ahner, Gemaine 90.0% 82.2% 93.3% 70.8% 93.3% 70.7% Aman, Barry 90.0% 86.7% 78.1% 82.7% 79.0% Armstead, Bobbye 87.6% 89.3% 63.3% 100.0% 72.4% | | | | | | | | | | | | |
| Anner, vermaine 90.0% 82.2% 93.3% 00.7% Aman, Barry 90.0% 86.7% 78.1% 82.7% 79.0% Amstad, Bahbya 87.6% 89.3% 63.3% 100.0% 74.4% | | Soft Skills | Aug | Sep | Oct | Nov | Dec | Jan 70,7% | | | | |
| Ametada Rohhva 87.6% 89.3% 63.3% 100.0% 79.67.44% | Anner, Germain | ne | 90.09 | 6 82.2% | 93.3% | 79.1% | 93.3% | 70.7% | | | | |
| | Armstead, Boh | bve | 87.69 | 6 89.3% | 63.3% | 100.0% | 79.2% | 74.4% | | | | |

QA Agent Trending Report

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

| QA Agent T | Frending Report | | | | | | Back Generate Repo | rt |
|--|---|--|---|---|--|---|---|----|
| | | | | | | | | š |
| Start Date | 10/1/2015 | End Date 12/31/20 | 015 | | Date Type | Evaluation Date V | | |
| Active Agents/ | /Users Active V | Groups All Billing - Billing - Corpora | Location A Location B ate Account Records | | Forms | All Admissions Case Audit Customer Service Eva | iluation 👻 | |
| Agents | All Uptivity Administrator Germaine Ahner Barry Aman | Users All Abe Ca Aleshia Alesia C | pote Zahm Cravey | * * | Reporting Peric | Monthly T | | |
| | | | | | | | | ~~ |
| 4 4 1 | of 8 🕨 🕅 💠 | Find Next | ۵ 🕲 | | | | | |
| Monthly For Thursday Selected Age | y QA Agent Trendin y, October 01, 2015 to Thursday ents: Germaine Ahner, Barry Ama | ng Report y, December 31, 2015 n, Bobbye Armstead, S | Shanita Arriaga, Vir | icenzo As | chenbrenner, Je | erry Balcom, Lilly Baugh | ıman | |
| | | | Monthly QA | Agent T | rending | | | |
| | 100% | | | | | | Germaine Ahner score | |
| | | | | | | | - Bobbye Armstead score | |
| | 90% - | | | | | | Snanita Arriaga score Vincenzo Aschenbrenner score | |
| | 80.9/ | | | Jerry Balcom score Lilly Baughman score | | | | |
| ntage | 80% | | | | | | | |
| ercel | 709/ | | | | | | | |
| Ċ. | 70% - | | | | | | | |
| | 60% | | | | | | | |
| | 504 | | | | | | | |
| | Oct | | Nov | | | Dec | | |
| | | | Month | | | | | |
| | | | | 2015 | | | | |
| | | | Oct | 2015 | Dec | | | |
| Ahner, Ger | rmaina | | | NOV | | | | |
| | Inname | | 85.6% | 77.7% | 98.6% | | | |
| Custom | ner Service Evaluation | | 85.6% | 77.7% 78.6% | 98.6% 98.6% | | | |
| Custom Gree | ner Service Evaluation | | 85.6% 98.6% 100.0% | 77.7% 78.6% 75.0% | 98.6% 98.6% 100.0% | | | |
| Custom Gree D | ner Service Evaluation eting Did Agent state company name? | | 85.6% 98.6% 100.0% | 77.7% 78.6% 75.0% | 98.6% 98.6% 100.0% | | | |
| Custom Gree D | ter Service Evaluation eting Did Agent state company name? Did Agent state his/her name? | | 85.6% 98.6% 100.0% 100.0% | Nov 77.7% 78.6% 75.0% 75.0% | 98.6% 98.6% 100.0% 100.0% | | | |
| Custom Gree D D Soft | Internet Service Evaluation eting Did Agent state company name? Did Agent state his/her name? : Skills | | 85.6% 98.6% 100.0% 100.0% 93.3% | 77.7% 78.6% 75.0% 75.0% 75.0% 70.8% | 98.6% 98.6% 100.0% 100.0% 93.3% | | | |
| Custom Gree D D Soft | Internet Service Evaluation eting Did Agent state company name? Did Agent state his/her name? Skills | | 85.6% 98.6% 100.0% 100.0% 93.3% N/A | Nov 77.7% 78.6% 75.0% 75.0% 75.0% 70.8% N/A | 98.6% 98.6% 100.0% 100.0% 93.3% N/A | | | |
| Custom Gree D Soft | Internet Service Evaluation eting Did Agent state company name? Did Agent state his/her name? Skills Did Agent use courtesy statement | is as appropriate? | 85.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% | Nov 77.7% 78.6% 75.0% 75.0% 70.8% N/A 61.3% | 98.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% | | | |
| Custom Gree D Soft | Internet Service Evaluation eting Did Agent state company name? Did Agent state his/her name? Eskills Did Agent use courtesy statement Did Agent demonstrate Active List | is as appropriate? tening? | 85.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% | NOV 77.7% 78.6% 75.0% 75.0% 70.8% N/A 61.3% 63.8% | 98.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% | | | |
| Custom Gree D Soft D D | Inter Service Evaluation eting Did Agent state company name? Did Agent state his/her name? Skills Did Agent use courtesy statement Did Agent demonstrate Active Liss Did Agent use proper hold procee | ts as appropriate? tening? tures? | 85.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 90.0% 100.0% | Nov 77.7% 78.6% 75.0% 75.0% 70.8% N/A 61.3% 63.8% | 98.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 90.0% | | | |
| Custom Gree D Soft D D Use | her Service Evaluation eting Did Agent state company name? Did Agent state his/her name? Skills Did Agent use courtesy statement Did Agent demonstrate Active List Did Agent use proper hold procec of Tools | ts as appropriate? tening? tures? | 85.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 90.0% 100.0% | NOV 77.7% 78.6% 75.0% 75.0% 70.8% N/A 61.3% 63.8% 87.5% 70.8% | 98.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 90.0% 100.0% | | | |
| Custom Gree D Soft D D D Use D | her Service Evaluation eting Did Agent state company name? Did Agent state his/her name? Skills Did Agent use courtesy statement Did Agent demonstrate Active Liss Did Agent use proper hold proced of Tools Did Agent find record in CRM in ti | ts as appropriate? tening? tures? mely manner? | 85.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 90.0% 100.0% 100.0% | NOV 77.7% 78.6% 75.0% 75.0% 70.8% N/A 61.3% 63.8% 87.5% 70.8% 62.5% | 98.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 90.0% 100.0% 100.0% 100.0% | | | |
| Custom Gree Soft | her Service Evaluation eting Did Agent state company name? Did Agent state his/her name? Skills Did Agent use courtesy statement Did Agent demonstrate Active Liss Did Agent use proper hold proced of Tools Did Agent find record in CRM in ti Did agent navigate knowledgent and | ts as appropriate? tening? tures? mely manner? se efficiently (if needed | 85.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 100.0% 100.0% 100.0% 100.0% | NOV 77.7% 78.6% 75.0% 75.0% 70.8% N/A 61.3% 63.8% 87.5% 70.8% 62.5% 62.5% | 98.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 90.0% 100.0% 100.0% 100.0% | | | |
| Custom Gree Soft | her Service Evaluation eting Did Agent state company name? Did Agent state his/her name? Skills Did Agent use courtesy statement Did Agent demonstrate Active Liss Did Agent use proper hold procect of Tools Did Agent find record in CRM in ti Did Agent navigate knowledgebaa Did Agent use correct closing cod | ts as appropriate? tening? tures? mely manner? se efficiently (if needed ie in CRM? | 85.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% | NOV 77.7% 78.6% 75.0% 75.0% 75.0% 70.8% N/A 61.3% 63.8% 87.5% 70.8% 62.5% 62.5% 87.5% | 98.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 90.0% 100.0% 100.0% 100.0% | | | |
| Custom Gree Soft | her Service Evaluation eting Did Agent state company name? Did Agent state his/her name? Skills Did Agent use courtesy statement Did Agent use courtesy statement Did Agent use proper hold procec of Tools Did Agent find record in CRM in ti Did agent navigate knowledgeba Did Agent use correct closing cod sing Did Agent resolve call within sum | ts as appropriate? tening? tures? mely manner? se efficiently (if needed ie in CRM? | 85.6% 98.6% 100.0% 93.3% N/A 90.0% 90.0% 100.0% 100.0% 100.0% 100.0% 100.0% | NOV 77.7% 78.6% 75.0% 75.0% 75.0% 70.8% N/A 61.3% 63.8% 87.5% 62.5% 87.5% 87.5% 87.5% 87.5% | 98.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 90.0% 100.0% 100.0% 100.0% 100.0% | | | |
| Custom Gree Soft | her Service Evaluation eting Did Agent state company name? Did Agent state his/her name? Skills Did Agent use courtesy statement Did Agent use courtesy statement Did Agent use proper hold procec of Tools Did Agent find record in CRM in ti Did Agent avigate knowledgeba Did Agent use correct closing cod sing Did Agent probe for additional cor | ts as appropriate? tening? tures? mely manner? se efficiently (if needed ie in CRM? port guidelines? nort guidelines? | 85.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% 100.0% | NOV 77.7% 78.6% 75.0% 75.0% 75.0% 70.8% N/A 61.3% 63.8% 87.5% 87.5% 87.5% 87.5% | 98.6% 98.6% 100.0% 100.0% 93.3% N/A 90.0% 90.0% 100.0% 100.0% 100.0% 100.0% | | | |

QA Form Trending Report

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



QA Group Periodical Trending Report

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



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 Sco | orecard | | | Back Generate Rep |
|------------------|---|--|------------------------------------|---|
| Start Date | 10/14/2015 End Date | 11 A/DDAR | Date Type Call Date | |
| Start Date | 12/14/2015 | ul - | All | |
| Active/Deleted F | orms Active Group List | illing - Location A illing - Location B | Form List Admissions Case Audit | |
| | | Corporate Account Records | Customer Service Ev | aluation - |
| Agent List | Uptivity Administrator Germaine Ahner Evaluator | be Capote | | |
| | Barry Aman 👻 | Jesia Cravey 👻 | | |
| | | | | |
| [4 4 1 | of 2 🕨 🕅 💠 🛛 Find Next | 🛃 • 😳 | | |
| Group S | corecard | | | |
| For Monday, I | December 14, 2015 to Thursday, January 14, 20 | 16 | | |
| Selected Forms | s: Customer Service Evaluation | | | |
| | | Group Scorecar | d | |
| | | | | |
| | Reviewe | Notes - | | Front Line - Location A score Schedule Coordinators - Location |
| | | | | A score Front Line - Location B score |
| | Did Agent offer to transfer to customer sat : | urvey?— | | B score New Hires score |
| | | | | Verification - Location A score |
| | Did Agent thank customer for o | alling?— | | score |
| | | | | |
| | Did Agent probe for additional cor | icerns?— | | |
| | | | | |
| | Did Agent resolve call within support guid | elines?— | | |
| | | | | |
| | Did Agent use correct closing code in | CRM? - | | |
| | | | | |
| suo | Did agent navigate knowledgebase efficiently (if ne | eded)? — | | |
| Quest | Did Accel field second in CDM in timely a | | | |
| | Did Agent ind record in CRM in timely in | annei ? — | | |
| | | Notes - | | |
| | | | | |
| | Did Agent use proper hold proce | dures?- | | |
| | | | | |
| | Did Agent demonstrate Active List | ening?— | | |
| | | | | |
| | Did Agent use courtesy statements as appro | priate?— | | |
| | | | | |
| | Did Agent state his/her | name?— | | |
| | | | | |
| | Did Agent state company | name?— | | |
| | | 0% 20% 40% | 60% 80% 100% | |
| | | Perce | entage | |
| | | | | |
| | | | | |

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 Tren | iding Report | | | | | | | Back Gener | ate Report |
|--|--|-----------------------------------|--|--------------------|-------------------|---|---------------------|-----------------------------------|------------|
| | | | | | | | | | * |
| Start Date | 12/14/2015 | End Date | 1/14/2016 | | Date Type | Call Date | • | | |
| Active/Deleted For | ms Active V | Groups | All Billing - Location A Billing - Location B Corporate Account Rec | ords | Forms | All Admissions Case Audit Customer Ser | vice Evaluation | | |
| Agents | All Uptivity Administrator Germaine Ahner Barry Aman | Users | All Abe Capote Aleshia Zahm Alesia Cravey | * | Reporting Perio | d Monthly v | | | |
| | | | | | | | | | * |
| 4 4 1 o | f 5 🕨 🕅 💠 | Find Ne | ext 🔍 • 📀 | | | | | | |
| Monthly (For Monday, De Selected Forms: | QA Group Trendir cember 14, 2015 to Thursday Customer Service Evaluation | n g Repoi , January 14, | t 2016 | | | | | | |
| | | | Monthly (| A Group | Trending | | | | |
| 10 | 00% – | | | | | | - Front Li | ne - Location A score | |
| g | | | | | | | Front Li New Hir | ne - Location B score es score | |
| G | 6% | | | | | | Schedu A score | le Coordinators - Location | |
| | | | | | | | Schedu B score | le Coordinators - Location | |
| entage Constant | 94% | | | Verificat score | tion - Location A | | | | |
| Berge | 02% | | | Verificat score | tion - Location B | | | | |
| g | 90% | | | | | | | | |
| | 28% | | | | | | | | |
| | 0076 | | | | | | | | |
| 8 | 36% | | Month | | | Jan | | | |
| | | | 201 | 5 2016 | | | | | |
| | | | De | : Jan | | | | | |
| Front Line - Lo | ocation A | | 93.79 | 6 93.3% | | | | | |
| Customer | Service Evaluation | | 93.79 | 6 93.3% | - | | | | |
| Greetin | g | | 98.99 | 6 95.4% | - | | | | |
| Did A | Agent state company name? | | 100.0 | % 100.09 | 6 | | | | |
| Did A | Agent state his/her name? | | 97.89 | 6 90.7% | _ | | | | |
| Soft Sk | ills | | 84.69 | 6 83.8% | _ | | | | |
| Did A | Agent use courtesy statements | as appropriat | e? 76.19 | 6 75.4% | _ | | | | |
| Did A | Agent demonstrate Active Liste | roe? | 100.0 | 6 /6.1% | 4 | | | | |
| Note | s | 1163: | N/Δ | -76 100.04 N/Δ | • | | | | |
| Use of | Tools | | 89.19 | 6 88.3% | _ | | | | |
| Did / | Agent find record in CRM in tin | nely manner? | 87.09 | 6 85.2% | - | | | | |
| Did a | agent navigate knowledgebas | e efficiently (if | needed)? 80.49 | 6 79.6% | - | | | | |
| Did A | Agent use correct closing code | in CRM? | 100.0 | % 100.09 | 6 | | | | |
| Closing | J | | 98.79 | 6 99.8% | | | | | |
| Did A | Agent resolve call within suppo | ort guidelines? | 97.89 | 6 100.09 | 6 | | | | |
| Did A | Agent probe for additional con | cerns? | 100.0 | % 100.09 | 6 | | | | |
| Did A | Agent thank customer for callin | ig? | 97.89 | 6 98.1% | | | | | |

QA Pending Acknowledgment

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

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

| QA Pending Acknowledgment | | | | | Back Ge | enerate Report | | | | | |
|---|-----------------|---------------------|--------------------|-------------|----------------|----------------|--|--|--|--|--|
| Older Than 1/15/2016 Corporate Specialist - Location A Foundation Front Line - Location A | | | | | | | | | | | |
| | | | | | | * | | | | | |
| 4 4 1 of 1 ▷ ▷ 4 | | Find Next 🛛 🔍 🔹 😨 | | | | | | | | | |
| QA Pending Selected Groups: Front Line - Lo | Acknow | vledgment | | | | | | | | | |
| Form 🗧 | Agent 🗧 | Call ID | Evaluator 🕀 | Completed D | ate ≑ Status | | | | | | |
| Customer Service Evaluation | Garner, Dwayne | 3 | 8212 Meda Swindall | 8/8/2015 | Unacknowledged | | | | | | |
| Sales Evaluation | Costales, Brice | 3 | 6702 Kendra Breed | 9/1/2015 | Unacknowledged | | | | | | |
| QA Pending Acknowledgment - 1/15 | /2016 | | | | Page 1 of 1 | | | | | | |

QA Summary by Form

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



QA Summary by 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 B | Question | Back Generate Re | eport |
|----------------------------|---|------------------|-------|
| | | | 101 |
| Start Date | 12/15/2015 End Date 1/15/2016 Date Type Call Date V | | |
| Active/Deleted For | All All All Admissions Groups Corporate Account Records Corporate Account Records Corporate Account Records Corporate Account Records Control of the second content of the | | |
| Agents | All All Administrator Germaine Ahner Barry Aman ▼ Users Alesia Zahm Alesia Cravey ▼ | | |
| | | | 111 |
| [4 4 1 of | 3 🕨 🕅 🔅 🕹 🕹 🕹 🕹 🕹 🕹 | | |
| Ouestion | Performance Summary Report | | |
| For Tuesday, De | cember 15, 2015 to Friday, January 15, 2016 | | |
| Selected Forms: | Customer Service Evaluation | | |
| | Question Summary | | |
| | | Score | |
| ۲. | | 30010 | |
| eting | Did Agent state company name? | | |
| - ⁵ | Did Agent state his/her name? | | |
| ļ | Did Agent use courtesy statements as appropriate? | | |
| Skill | Did Agent demonstrate Active Listening? | | |
| Soft | Did Agent use proper held procedure? | | |
| L at L | | | |
| lestion ervice Tools | Did Agent find record in CRW in timely manner? | | |
| e ND | Did agent navigate knowledgebase efficiently (if needed)? | | |
| L Uston | Did Agent use correct closing code in CRM? | | |
| ı ı | Did Agent resolve call within support guidelines? | | |
| - ling | Did Agent probe for additional concerns? | | |
| Clos | Did Agent thank customer for calling? | | |
| | Did Agent offer to transfer to customer sat survey? | | |
| | | | |
| | 0 20 40 60 80 100 |) | |
| Form: Custo | mer Service Evaluation 891 Forms Scored Gr | ade: 93.1% | |
| Section: 0 | Greeting Gr | ade: 97.1% | |
| Did Age | nt state company name? Auto-Fail Value Gra | ade: 100.0% | |
| Yes Did too | 891 (100%) None 10 of 10 | odo: 04.20/ | |
| Vec Vec | R state msyner name: Auto-Fail Value Gra | aue: 94.2% | |
| No | 52 (6%) Section 0 of 10 | | |
| Section: S | Soft Skills | ade: 84.8% | |
| Did Age | nt use courtesy statements as appropriate? Auto-Fail Value Gra | ade: 76.5% | |
| Excel | ent 351 (39%) None 10 of 10 | | |
| Very | Good 305 (34%) None 7 of 10 | | |
| Good | 235 (26%) None 5 of 10 | | |

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.

| Quality Assurance Detail | | | | | Back Generate Report |
|--|----------------------|--------------------------------|---------------------------|--------------|----------------------|
| | | | | | × |
| Start Date 1/1/2016 | End Date 1/15/2016 | | Date Type Evaluation Date | • | |
| Agent All Y | Evaluator All | • | Form Customer Service | Evaluation V | |
| Astive/Deleted Eveluations Astive | Crown All | | Ouestien Any | | - |
| Active/Deleted Evaluations Active + | Group Air | | Question Any | | • |
| Response Any V | | | | | |
| | | | | | \$ |
| | | | | | ~ |
| I4 4 1 of 330 ▶ ▶I 4 Fi | nd Next 🔍 🔍 🏈 | | | | |
| Overlite Assessment Data II | | | | | |
| 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 | | Administrator | | - | |
| Question | Evaluation | | Score | - | |
| Did Agent state company name? | Ves | | 10.00 of 10.00 (100.0%) | | |
| Did Agent state company name: | Ves | | 10.00 of 10.00 (100.0%) | | |
| Did Agent state his/her hame: | Subtotal: | | 20.00 of 20.00 (100%) | | |
| Section Name: Soft Skills | Subtotali | | 20.00 01 20.00 (100 %) | - | |
| | Evaluation | | Score | | |
| Did Agent use courtesy statements as | Evaluation | | 10.00 of 10.00 (100.0%) | | |
| appropriate? | Excellenc | | 10.00 0/ 10.00 (100.070) | | |
| 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 sa | it Yes | | 15.00 of 15.00 (100.0%) | | |
| Survey. | Subtotal: | | 60.00 of 60.00 (100%) | | |
| Section Name: Notes | | | (| | |
| Question | Evaluation | | Score | | |
| Reviewer Notes | You are a superstart | | N/A | | |
| | Subtotal: | | 0.00 of 0.00 (0%) | | |
| | Total: | | 140.00 of 140.00 | - | |
| | . otan | | (100%) | | |
| Quality Assurance Detail - 1/15/2016 | | | Page 1 of 330 | 1 | |

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.



NICE Uptivity Reports Reference Guide

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 <u>Call</u> <u>Evaluation Detail</u> report.
- <u>Calibration Evaluator Comparison Report</u> allows you to see how each participating evaluator scored the designated call
- <u>QA Calibration Trending Report</u> 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 sectionby-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**).

| alibration Evaluator (| Comparison Report | | | | | Back Generate Rep |
|--|-----------------------------------|---------------------------------|---------------------|-----------|-------|-------------------|
| Record Id 1825 | | rm ld 49 | aluation Start Date | 110015 | | |
| | | LV | | /1/2015 | | |
| auation End Date 4/30 | /2015 | | | | | |
| ∢ 1 of 3 ▶ | ▶ ↓ F | nd Next 🛛 🛃 🕶 🚯 | | | | |
| 10 or = | | . . | | | | |
| alibration Ev | valuator Comparis | son Report | | | | |
| ient: | Bern, Neil | | Call ID: | 1825 | | |
| ient Id: | 28 | | Call Date: | 1/23/2013 | | |
| , aluation Date Rang | je: Wednesday, April 01, 2 | 015 to Thursday, April 30, 2015 | | | | |
| valuator | Evaluation ID | Points | Possible Poir | nts % | | |
| ldy, Cheryl | 107 | 85. | 00 100 | .00 85 | .00% | |
| eorge, Gina | 105 | 75. | 00 100 | .00 75 | .00% | |
| essler Jessica | 108 | 85 | 00 100 | 00 85 | 00% | |
| ard Rae | 105 | 75 | 00 100 | 00 75 | 00% | |
| 1Support Call | 100 | 15. | 100 | | | |
| Opening | | | | | | |
| Proper introduction | on? | | Possible Poi | nts: # | 10.00 | |
| Evaluation ID Evaluation | aluator | Response | FUSSIBLE FU | ints. π | 10.00 | |
| 107 Ed | | Vos | | | 10.00 | |
| 107 Ed | aorge Gina | Ves | | | 10.00 | |
| 105 Ge | esler Jessina | Yes | | | 10.00 | |
| 106 Wa | ard Rae | Yes | | | 10.00 | |
| Ask for caller's n | ame? | 103 | Possible Poi | nts: # | 10.00 | |
| Evaluation ID Eva | aluator | Response | 1 0331510 1 01 | | 10.00 | |
| 107 Ed | ldv. Chervl | Yes | | | 10.00 | |
| 105 Ge | eorge, Gina | Yes | | | 10.00 | |
| 108 He | essler, Jessica | Yes | | | 10.00 | |
| 106 Wa | ard, Rae | Yes | | | 10.00 | |
| Restate problem | to ensure understanding? | | Possible Poi | nts: # | 10.00 | |
| Evaluation ID Eva | aluator | Response | | | | |
| 107 Ed | ldy, Cheryl | Yes | | | 10.00 | |
| 105 Ge | eorge, Gina | No | | | 0.00 | |
| 108 He | essler, Jessica | No | | | 0.00 | |
| 106 Wa | ard, Rae | Yes | | | 10.00 | |
| Comments: | | | Possible Poi | nts: # | 0.00 | |
| Evaluation ID Eva | aluator | Response | | | | |
| 107 Ed | ldy, Cheryl | | | | 0.00 | |
| 105 Ge | eorge, Gina | Restated but missed part of is | sue. | | 0.00 | |
| 108 He | essler, Jessica | | | | 0.00 | |
| 106 Wa | ard, Rae | | | | 0.00 | |
| Communication 9 | Skills ge at caller's level of | | Possible Dei | nts: # | 10.00 | |
| understanding? | go at caller 5 level of | | 1 USSIDIE POI | | 10.00 | |
| Evaluation ID Eva | aluator | Response | | | | |
| 107 Ed | ldy, Cheryl | Yes | | | 10.00 | |
| 105 Ge | eorge, Gina | Yes | | | 10.00 | |
| 108 He | essier, Jessica | Yes | | | 10.00 | |
| 106 Wa | aro, Kae | T ES | Deer'hie P. 1 | | 10.00 | |
| Daco and anumate | auon clear and | | POSSIBle Pol | ints. # | 10.00 | |
| Pace and enuncia understandable? | | | | | | |
| Pace and enuncia understandable? Evaluation ID Eva | aluator | Response | | | | |

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 Calibration Tren | nding Report | | | | | | | | | | Back Generate | Report |
|---|---|--|---|---|--|--|--|--|---|---|--|--------|
| | | | | | | | | | | | | |
| Start Date | 6/1/2015 | End Date | 12/31/2015 | | | Date Typ | e E | Evaluation [| Date ▼ | | | |
| Active/Deleted Forms | Active v | Groups | All Billing - Location Billing - Location Corporate Acco | A B unt Record | s . | Forms | A A C | dmissions ase Audit ustomer S | ervice Eva | luation 👻 | | |
| gents | All Administrator Germaine Ahner Barry Aman | Users | All Abe Capote Aleshia Zahm Alesia Cravey | | • | Reportin | Period N | Nonthly 🔻 | | | | |
| tatus | All All Complete Question | | | | | | | | | | | |
| 🛯 🖣 1 of 5 | ▶ 1 | Find Ne | xt – 🛃 • 📀 | | | | | | | | | 3 |
| Mo | nthly OA Calibra | tion Tre | endina Re | eport | | | | | | | | |
| For M | fonday, June 01, 2015 to T | hursday, Dec | ember 31, 2015 | 5 | | | | | | | | |
| Selected Forms: Cus | stomer Service Evaluation | | | | | | | | | | | |
| | | | Monthly | QA Eval | uator Sc | ore Tren | ling | | | | | |
| 100% | · | | | | | | | | | _ | Abe Capote score | |
| 909/ | | | | | | | | | | _ | Karren Wolters score Meda Swindall score | |
| 00% | | | | | | | | | | _ | Twyla Woodside score Vicki Hardwick score | |
| e0% | | | | | | | | | _ | — | Your Uptivity Administrator score | |
| 8 40% | , | | | | | | | | | | | |
| E 20% | | | | | | | | | | | | |
| 2070 | 7 | | | | | | | | | | | |
| 0% | , | | | | | | | | | | | |
| -20% | , <u> </u> | | | | | | | | _ | | | |
| | Jun Jul | Aug | Mo | ep nth | Oct | | Nov | | Dec | | | |
| | | | | | | | | | | | 1 | |
| | | | | lun | Lul. | Aug | 2015 | Oat | Nev | Dee | | |
| be Capote | | | | 92.0% | 93.9% | 94 3% | 93.0% | 93.7% | 93.9% | 94 4% | | |
| Customer Ser | vice Evaluation | | | 92.0% | 93.9% | 94.3% | 93.0% | 93.7% | 93.9% | 94.4% | - | |
| Greeting | | | | 97.7% | 98.5% | 98.6% | 98.8% | 98.0% | 96.9% | 98.5% | | |
| Did Ager | nt state company name? | | | 97.7% | 98.5% | 98.6% | 98.8% | 98.0% | 96.9% | 98.5% | | |
| Did Ager | nt state his/her name? | | | 97.7% | 98.5% | 98.6% | 98.8% | 98.0% | 96.9% | 98.5% | | |
| Soft Skills | | | | 81.2% | 83.4% | 84.3% | 81.3% | 83.1% | 85.6% | 85.3% | 1 | |
| Did Ager | nt use courtesy statements a | | e? | 72.1% | 73.6% | 74.9% | 70.6% | 73.8% | 77.8% | 77.5% |] | |
| Dia Agei | | as appropriat | | | | | | las en | 20 20/ | 70.00/ | | |
| Did Ager | nt demonstrate Active Listen | ning? | | 74.0% | 76.6% | 78.1% | 73.5% | /5.6% | 79.7% | 79.2% | - | |
| Did Ager Did Ager | nt demonstrate Active Listen nt use proper hold procedur | ning? res? | | 74.0% 97.7% | 76.6% | 78.1% 100.0% | 73.5% | 75.6% | 99.2% | 99.2% | | |
| Did Ager Did Ager Notes | nt demonstrate Active Listen nt use proper hold procedur | ning? es? | | 74.0% 97.7% N/A 87.6% | 76.6% 100.0% N/A 80.1% | 78.1% 100.0% N/A | 73.5% 100.0% N/A 86.9% | 75.6% 100.0% N/A 88.8% | 99.2% N/A | 99.2% N/A | | |
| Did Ager Did Ager Notes Use of Too | nt demonstrate Active Listen nt use proper hold procedur ols nt find record in CRM in time | ing? es? | | 74.0% 97.7% N/A 87.6% | 76.6% 100.0% N/A 89.1% | 78.1% 100.0% N/A 90.3% | 73.5% 100.0% N/A 86.9% 83.3% | 75.6% 100.0% N/A 88.8% | 99.2% N/A 89.9% | 79.2% 99.2% N/A 91.2% | | |
| Did Ager Did Ager Notes Use of Too Did Ager Did Ager | nt demonstrate Active Listen nt use proper hold procedur ols nt find record in CRM in time nt navigate knowledgebase | es? es? ely manner? efficiently (if | needed)? | 74.0% 97.7% N/A 87.6% 88.4% 76.7% | 76.6% 100.0% N/A 89.1% 83.6% 83.6% | 78.1% 100.0% N/A 90.3% 81.2% 89.9% | 73.5% 100.0% N/A 86.9% 83.3% 77.4% | 75.6% 100.0% N/A 88.8% 87.8% 78.6% | 79.7% 99.2% N/A 89.9% 86.8% 83.7% | 79.2% 99.2% N/A 91.2% 90.2% 84.1% | · · · | |
| Did Ager Did Ager Notes Use of Too Did Ager Did Ager Did Ager | nt demonstrate Active Listen nt use proper hold procedur sls nt find record in CRM in time nt navigate knowledgebase nt use correct closing code i | es? es? ely manner? efficiently (if n CRM? | needed)? | 74.0% 97.7% N/A 87.6% 88.4% 76.7% 97.7% | 76.6% 100.0% N/A 89.1% 83.6% 83.6% 100.0% | 78.1% 100.0% N/A 90.3% 81.2% 89.9% 100.0% | 73.5% 100.0% N/A 86.9% 83.3% 77.4% 100.0% | 75.6% 100.0% N/A 88.8% 87.8% 78.6% 100.0% | 99.2% N/A 89.9% 86.8% 83.7% 99.2% | 79.2% 99.2% N/A 91.2% 90.2% 84.1% 99.2% | | |
| Did Ager Did Ager Notes Use of Too Did Ager Did ager Did Ager Closing | nt demonstrate Active Listen nt use proper hold procedur ols nt find record in CRM in time nt navigate knowledgebase nt use correct closing code i | es? ely manner? efficiently (if n CRM? | needed)? | 74.0% 97.7% N/A 87.6% 88.4% 76.7% 97.7% 97.7% | 76.6% 100.0% N/A 89.1% 83.6% 83.6% 100.0% | 78.1% 100.0% N/A 90.3% 81.2% 89.9% 100.0% 99.9% | 73.5% 100.0% N/A 86.9% 83.3% 77.4% 100.0% 99.9% | 75.6% 100.0% N/A 88.8% 87.8% 78.6% 100.0% 99.9% | 99.2% N/A 89.9% 86.8% 83.7% 99.2% | 79.2% 99.2% N/A 91.2% 90.2% 84.1% 99.2% | | |
| Did Ager Did Ager Did Ager Notes Use of Too Did Ager Did ager Did Ager Did Ager Did Ager | nt demonstrate Active Listen nt use proper hold procedur Dis nt find record in CRM in time nt navigate knowledgebase nt use correct closing code i nt resolve call within suppor | es? ely manner? efficiently (if n CRM? t guidelines? | needed)? | 74.0% 97.7% N/A 87.6% 88.4% 76.7% 97.7% 97.7% 97.7% | 76.6% 100.0% N/A 89.1% 83.6% 83.6% 100.0% 100.0% | 78.1% 100.0% N/A 90.3% 81.2% 89.9% 100.0% 99.9% 100.0% | 73.5% 100.0% N/A 86.9% 83.3% 77.4% 100.0% 99.9% 100.0% | 75.6% 100.0% N/A 88.8% 87.8% 78.6% 100.0% 99.9% 100.0% | 79.7% 99.2% N/A 89.9% 86.8% 83.7% 99.2% 99.2% 99.2% | 79.2% 99.2% N/A 91.2% 90.2% 84.1% 99.2% 99.2% 99.2% | | |
| Did Ager Did Ager Notes Use of Too Did Ager Did Ager Did Ager Closing Did Ager Did Ager | nt demonstrate Active Listen nt use proper hold procedur Ds nt find record in CRM in time nt navigate knowledgebase nt use correct closing code i nt resolve call within suppor nt probe for additional conce | ely manner? efficiently (if n CRM? t guidelines? erns? | needed)? | 74.0% 97.7% N/A 87.6% 88.4% 76.7% 97.7% 97.7% 97.7% | 76.6% 100.0% N/A 89.1% 83.6% 100.0% 100.0% 100.0% | 78.1% 100.0% N/A 90.3% 81.2% 89.9% 100.0% 99.9% 100.0% | 73.5% 100.0% N/A 86.9% 83.3% 77.4% 100.0% 99.9% 100.0% | 75.6% 100.0% N/A 88.8% 87.8% 78.6% 100.0% 99.9% 100.0% | 79.7% 99.2% N/A 89.9% 86.8% 83.7% 99.2% 99.2% 99.2% | 79.2% 99.2% N/A 91.2% 90.2% 84.1% 99.2% 99.2% 99.2% | | |

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

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 Con | nparison Report | | | | | Back Generate Report |
|---------------------------------|--------------------------------|---|-------------------|----------------|---------------|----------------------|
| | | | | | | |
| Form | All | Call Record ID 1747 | Evalu | uation Start [| Date 1/1/2016 | |
| Evaluation End Date | 2/4/2016 | | | | | |
| | | | | | | |
| | | _ | | | | |
| 4 1 of 2 | Fin | d Next 🛛 🖳 🔻 🛞 | | | | |
| Solf-Evolus | tor Comparison Bon | ort | | | | |
| Sell-Lvalua | | UIL | | | | |
| Agent: | Avala Daniel | | | 1747 | | |
| Agent Id: | 34 | | Call Date: | 1/22/201 | 3 | |
| Evaluation Date R | ange: Friday January 01 2016 | to Thursday, February 04, 2016 | can bace. | 1/22/201 | 5 | |
| Evaluator | Evaluation ID P | oints | Possible Poi | ints % | | |
| | | | | | | |
| Opening | | | | | | |
| Proper introdu | ation? | | Possible Poi | inte: # | 10.00 | |
| Evaluation ID | Evaluator | Resnance | FUSSIBLE FU | ints. # | 10.00 | |
| 123 | Administrator Administrator | Voc | | | 10.00 | |
| Ask for caller's | name? | 165 | Possible Poi | inte• # | 10.00 | |
| Evaluation ID | Evaluator | Response | 1 0331516 1 01 | 11103. 11 | 10.00 | |
| 123 | Administrator Administrator | No | | | 0.00 | |
| Restate proble | m to ensure understanding? | | Possible Poi | ints: # | 10.00 | |
| Evaluation ID | Evaluator | Response | 1 0331510 1 01 | | 10.00 | |
| 123 | Administrator Administrator | No | | | 0.00 | |
| Comments: | | | Possible Poi | ints: # | 0.00 | |
| Evaluation ID | Evaluator | Response | | | | |
| 123 | Administrator, Administrator | Saying, "I understand the proble | em" is not the sa | ame | 0.00 | |
| | | as restating the problem. | | | | |
| Communicatio | on Skills | | | | | |
| Technical lang understanding | uage at caller's level of ? | | Possible Poi | ints: # | 10.00 | |
| Evaluation ID | Evaluator | Response | | | | |
| 123 | Administrator, Administrator | Yes | | | 10.00 | |
| Pace and enun understandable | iciation clear and e? | | Possible Poi | ints: # | 10.00 | |
| Evaluation ID | Evaluator | Response | | | | |
| 123 | Administrator, Administrator | Yes | | | 10.00 | |
| Patient and em | pathetic tone? | | Possible Poi | ints: # | 10.00 | |
| Evaluation ID | Evaluator | Response | | | | |
| 123 | Administrator, Administrator | No | | | 0.00 | |
| Comments: | | | Possible Poi | ints: # | 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 sectionby-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 selfevaluation scores to regular QA scores for the same agent.

| Self-Evaluation Trending Repo | ort | | | | | | | Back Generate Report |
|---|--|---------------------------------|---|--|----------|-----------------|--|----------------------|
| | | | | | | | | 3 |
| Start Date | End | Date 4/40/0 | 240 | | | Date Type | Evaluation Date V | |
| 12/13/2013 | | 1/13/2 | 010 | | | | | |
| Active/Deleted Forms Active | Grou | ips All BAT_ BAT_ Edit | TeamToDele TeamToEdit | te 🗘 | | Forms | All Leaders SelfEval Leaders SelfEval v2 | |
| All | | All | cam | | | | LeadersLyar | |
| Agents Agents InactiveAgen Insight Age | nt ActiveUser ent ActiveUser ent | s agent agent | 1_first04 age 1_first58 age 10_first58 ag | nt1_last04 nt1_last58 ent10_last58 | $\hat{}$ | Reporting Perio | d Weekly 🔽 | |
| Status Complete | 5 | | | | | | | |
| | | | | | | | | |
| 4 4 1 of 2 ▶ ▶ | 🕸 🔰 Find Next 🛛 🔍 🕏 | | | | | | | Ŀ |
| | | | | | | | | |
| Weekly Self-Evalu | ation Trending Report | | | | | | | |
| For Sunday, December 13, 201 | 5 to Wednesday, January 13, 2016 | | | | | | | |
| Calacted Evoluptors: Desired Ave | | | | | | | | |
| perected Evaluators: Dahlel Aya | lid | | | | | | | |
| | Weekly | Self-Evalı | uation Tre | nding Report | | | | |
| 1000/ | , | | | 3 | | | | |
| 100% | | | | | | | Daniel Ayala score | |
| 050/ | | | | | | | | |
| 95% - | | | | | | | | |
| | | | | | | | | |
| 8 90% – | | | | | | | | |
| Leon | | | | | | | | |
| a 85% - | | | | | | | | |
| | | | | | | | | |
| 80% | | | | | | | | |
| | | | | | | | | |
| 75% | | | | | | | | |
| 2 | | | | | | 3 | | |
| | | Week of Yea | ar | | | | | |
| | | 2 | 016 | | | | | |
| | | 2 | 3 | | | | | |
| Daniel Avala | | 80.0% | 78.9% | | | | | |
| Leaders SelfEval | | N/A | 100.0% | | | | | |
| Greeting | | N/A | 100.0% | | | | | |
| Was my gradies fo | andly and professional? | N/A | 100.0% | | | | | |
| was my greeing m | enury and professional? | N/A | 100.0% | | | | | |
| Call Onaning | | 100.0% | N/A | | | | | |
| Call Opening | | 100.0% | IN/A | | | | | |
| Did the agent introd | luce themselves by name? | 100.0% | N/A | | | | | |
| Did the agent ask fo | or the caller's name? | 100.0% | N/A | | | | | |
| Call Handling | | /5.0% | N/A | | | | | |
| Did the agent restat | te the caller's issue to ensure understanding | 100.0% | N/A | | | | | |
| agent's proficiency i issue. | in using onscreen tools to resolve the caller's | 50.0% | N/A | | | | | |
| Call Quality | | 100.0% | N/A | | | | | |
| Did the agent maint | ain a friendly yet professional attitude? | 100.0% | N/A | | | | | |
| Did the agent displa | ay empathy for the caller? | 100.0% | N/A | | | | | |
| Call Closing | | 50.0% | N/A | | | | | |
| Did the agent confir satisfaction? | m that the caller's issue was resolved to the | r 0.0% | N/A | | | | | |
| If FCR was not achi | ieved, briefly note the disposition of the call. | N/A | N/A | | | | | |
| Did the agent thank | the caller for their business? | 100.0% | N/A | | | | | |
| Self-Evaluation Trending Report - 1/11 | Upor 6 | | | | | | Page 4 of 1 | |

NICE Uptivity Reports Reference Guide

System Reports

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: | | | | | | | | |
| 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: 1 | Go To F | Page : 1 of 1 Go | | | | | | |

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.

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

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

Disk History

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

| Disk History | | | | | | | | | | |
|---------------------|---------------------------------------|--------------------|----------------------------|----------------|-----------|-----------|--|--|--|--|
| Start Date 1/4/2016 | | | | | | | | | | |
| | Id d 1 of 1 b bl da Find I Nevt 🛃 🛪 🚱 | | | | | | | | | |
| Diale | | l'ata a s | | 2 | | | | | | |
| DISK U | sage F | listory | | | | | | | | |
| For period be | ginning Mond | ay, January 04, 20 |)16 and ending Friday, Jar | nuary 15, 2016 | | | | | | |
| | | | Disk Usage Over | Гime | | | | | | |
| 800 | 7 | | | | | - C Drive | | | | |
| 600 | | | | | | | | | | |
| (BW) | | | | | | | | | | |
| <u>≻</u> 400 | - | | | | | | | | | |
| [≣] 200 | _ | | | | | | | | | |
| | | | | | | | | | | |
| 0 | /2016 1 | 1/6/2016 1/8 | 8/2016 1/10/2016 | 1/12/2016 | 1/14/2016 | | | | | |
| | | | Date | | | | | | | |
| Date | Туре | Drive | Disk Usage | | | | | | | |
| 01/04/2016 | Audio | С | | | | 66.22 MB | | | | |
| 01/04/2016 | Video | С | | | | 500.21 MB | | | | |
| 01/05/2016 | Audio | С | | | | 52.91 MB | | | | |
| 01/05/2016 | Video | С | | | | 447.86 MB | | | | |
| 01/06/2016 | Audio | C | | | | 61.75 MB | | | | |
| 01/06/2016 | Video | C | | | | 508.44 MB | | | | |
| 01/07/2016 | Audio | C | | | | 57.80 MB | | | | |
| 01/07/2016 | Video | C | | | | 426.55 MB | | | | |
| 01/08/2016 | Video | | | | | 24.20 MB | | | | |
| 01/08/2010 | Audio | C | | | | 77 71 MB | | | | |
| 01/09/2016 | Video | C | | | | 637.25 MB | | | | |
| 01/10/2016 | Audio | c | | | | 70,39 MB | | | | |
| 01/10/2016 | Video | c | | | | 537.58 MB | | | | |
| 01/11/2016 | Audio | С | | | | 67.68 MB | | | | |
| 01/11/2016 | Video | с | | | | 499.60 MB | | | | |
| 01/12/2016 | Audio | С | | | | 59.80 MB | | | | |
| 01/12/2016 | Video | С | | | | 482.70 MB | | | | |
| 01/13/2016 | Audio | С | | | | 68.03 MB | | | | |
| 01/13/2016 | Video | С | | | | 509.48 MB | | | | |
| 01/14/2016 | Audio | с | | | | 81.47 MB | | | | |
| 01/14/2016 | Video | С | | | | 568.19 MB | | | | |
| 01/15/2016 | Audio | C | | | | 79.24 MB | | | | |
| 01/15/2016 | Video | С | | | | 625.90 MB | | | | |

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 12/15/2 | 2015 End Date 1/15 | 5/2016 | User All | T | ** |
| | | | | | * |
| I | f 4 🕨 🕅 💠 🛛 Fin | id Next 🛛 🛃 🕶 🤆 | Ð | | |
| System For period begin | Activity Summar | y d ending Friday, Ja | nuary 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 12/15/2015 End Date 1/15/2016 User All | | ¥ | ** |
| | | | * |
| 🛿 🖗 1 of 3 🕨 🕅 💠 👘 Find Next 🔍 🗸 🌚 | | | |
| System Usage | | | |
| 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 | | |

System Reports

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

License Information

| 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.

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

| Logged In U | sers | | | | | | | | | |
|---------------------------------|--------------------|--------------------------------|-----------------------|---------------|------------|---|---------------------|------------|----------|-------|
| Username | | | | | • | E | Login Time | | | |
| superuser | | | | | | 1 | /28/2013 3:43:56 PM | | | |
| 1 | | | | | | | | | | |
| Channel Sur | nmary | | | | | | | | | |
| Idle | | Recording | | | | | | Total Chan | nels | |
| 0 | | 0 | | | | | | 155 | | |
| Channel Sta | tus | | | | | | | | | |
| Channel | State | Last State | Chan | ge | Agent Name | | Recording D | evice | | Recor |
| 103 | OutOfService | 11/21/2012 2: | 3:05 F | 9M | | | | | | |
| 2 | Ready | 10/10/2012 6: | 10/10/2012 6:52:10 PM | | | | | | | |
| 4 | Ready | 10/10/2012 6: | 10/10/2012 6:52:10 PM | | | | | | | |
| 5 | Ready | 10/10/2012 6: | 10/10/2012 6:52:10 PM | | | | | | | |
| 6 | Ready | 10/10/2012 6: | 10/10/2012 6:52:10 PM | | | | | | | |
| 7 | Ready | 10/10/2012 6: | 10/10/2012 6:52:10 PM | | | | | | | |
| 8 | Ready | 10/10/2012 6: | 10/10/2012 6:52:10 PM | | | | | | | |
| 9 | Ready | 10/10/2012 6: | 10/10/2012 6:52:10 PM | | | | | | | |
| 10 | Ready | 10/10/2012 6: | 10/10/2012 6:52:10 PM | | | | | | | |
| 11 | Ready | 10/10/2012 6: | 10/10/2012 6:52:10 PM | | | | | | | |
| 12345678 | 9 10 11 12 13 14 1 | 5 16 > | | | | | | | | |
| Screen Capt | ure Client Status | | | | | | | | | |
| Agent Name Userr | | Username | * | IP Address | Computer | | Version | Арр | lication | |
| UNKNOWN agent1 | | agent1 | | 10.100.11.101 | agent1-pc | | 5.0.0.1020 | some | title | |
| Richard Cunningham agent1 | | agent11 | | 10.100.11.111 | agent11-pc | | 5.0.0.1020 | some | title | |
| Stuart Dwyer agent11 | | agent11 | it11 | | agent14-pc | | 5.0.0.1020 | some | title | |
| Jeremy Carrozza agent12 | | agent12 | | 10.100.11.112 | agent12-pc | | 5.0.0.1020 | some | title | |
| Carmen Berner agent1 | | agent13 | | 10.100.11.113 | agent13-pc | | 5.0.0.1020 | some | title | |
| Franko Handler agent1 | | agent15 | (15 | | agent15-pc | | 5.0.0.1020 | some | title | |

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

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

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 |
| 02/42/2042 42:57:26 | 40 400 5 424 | Maniaha Jagala | Leer "Manisha Jagale" (94) legged 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 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]

Ad Hoc Reports

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 |
| 1 | Removed Transcoder Status Report description (report was removed in 17.2) | 2017-08-18 |