cc: Discover Reporting Guide, V5.0 R2

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Revision History			
Revision	**Change Description**	**Author**	**Effective Date**
0	Initial Release	JThomas	2012-04-01
1	Clarified the Report Subscriptions' New and New Advanced options.	JThomas	2012-07-19
2	Updated details for Agent Call Summary intro. Reformatted document for consistency.	MBuckingham	2012-10-01

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Introduction

The cc: Discover Reporting module enables users to generate and save or print reports as well as find real-time data about the system. This information provides:

- Quality Assurance managers insight into the performance of employees and business processes.
- System administrators knowledge about cc: Discover's performance and actions taken in the system.

This document explains:

- How to navigate the Reporting module and use its functions.
- The information that appears on the reports.
- How to create and manage reports.

Reporting Basics

Quick Links Page

Upon clicking the Reporting tab in the upper left-hand corner of the cc: Discover web portal, you will access the page seen below. The Quick Links page shows them organized by a filter such as Group. Individual printable reports can be accessed from this page by clicking on the name of the report (shown in blue underlined font).

These reports are also available from the menus on the left side of the Reporting tab.

Reporting Tab Navigation

Printable Reports

Analytics Reporting
Call Reporting
QA Reporting
System Reporting

Report Tools

System Reports
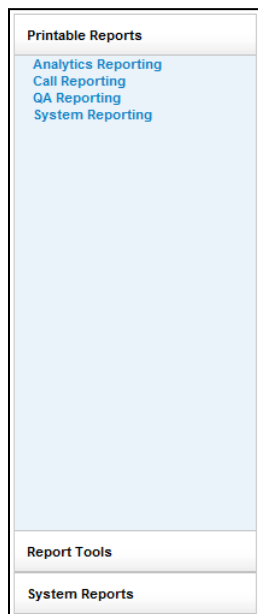
The menus on the left side of the Reporting tab provide access to reports and tools.

The Printable Reports menu has these links:

- Analytics – These reports are available only if the cc: Analytics module for analyzing call records has been purchased.
- Call Reporting – These are the Agent Reports on the Quick Link page.
- QA Reporting
- System Reporting – See also the System Reports menu.
- Survey Reporting – These reports are available only if the cc: Survey module has been purchased.

The Report Tools menu provides access to tools for automatically generating reports (subscriptions) and report libraries.

The System Reports menu provides administrators with the ability to monitor the health and performance of the system and to audit actions taken on the system. These reports cannot be printed.

Clicking a link, such as QA Reporting, displays that list of report types. The Date Created column indicates the date that the XML file used to generate this report type was installed in the cc: Discover system.
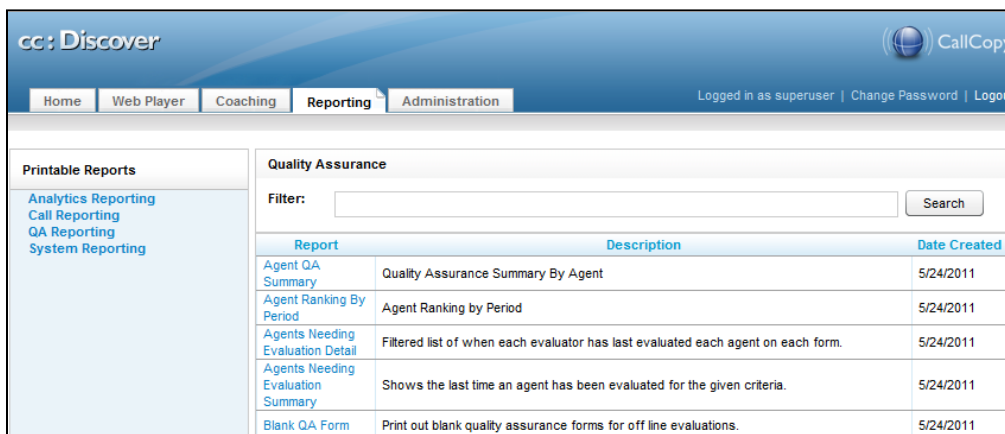
The Filter allows you to search for a particular report type based on the name of the report or a key word. For example, "Agent" entered into the Filter field as a key word will bring up all of the report types with 'agent' in either the report name or description.

Click a report name to open a page for generating that report.

Printable-Report Functions

These tasks can be performed when using printable reports.

Specify Criteria and Create a Report

Each report has criteria that must be set to select data. These criteria can include date ranges, user or agent selections, and other data fields depending on the report type. Once you have the report criteria entered, click the **Generate Report** button to create the report.

Save Report Search Criteria

You can save the criteria for reports that are created frequently. Click the inverted chevron icon to see a list of saved report search criteria.

Enter a name for the report in the Search Name field. Select the Public box only if you want others to be able to view your saved report. Then click Save Search.

The report criteria item appears on the page. To use these criteria again, click the item. A report page with the criteria opens. Edit the criteria as needed. Then, click Generate Report to create the report. All saved report criteria appear in the Report Tools' Report Library.

Navigate Report Pages

Use the navigation menu to move back and forth across appropriate report pages. The single arrow to the right takes you forward one page and the single arrow to the left takes you back one page. The double arrow to the right takes you to the last page of your report and the double arrow to the left takes you to the first page in your report.
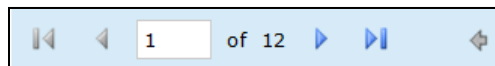
Navigate Report Details

Some reports provide additional details in related reports. The mouse pointer turns to a hand 🖑 if an item in a report has additional detail. The ◄ arrow allows you to go up one level if you have "drilled down" into a report.

Zoom
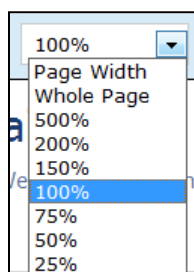
Use the zoom menu to format the size of the report output in your browser window.

Search

Use the search input box to find specific text or values within the report. Select "Find" to find the first option, then "Next" to find subsequent matches.

Save and Export a Report
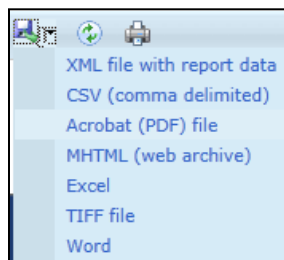
From the report management interface, choose an option from the "Select a Format" drop-down menu. Choose the preferred format, and then press "Export" to output your report to the selected format.

Refresh and Print

The refresh button reloads the report display after any formatting changes were made. The print button brings up the Windows print controls with standard print options available.

Sort Report Records

Data records on some printable reports can be sorted. To sort from highest-to-lowest or A-to-Z, click the top triangles by a column label. To sort from highest-to-lowest or Z-to-A, click the bottom triangle. In this example, the records are sorted by the Phone ID as indicated by the icon. To clear all sorts, click the Refresh button.

Group Membership

Selected Group: Calibration

Group	Agent	Phone ID
Calibration	YANG, MELANIE	4001
Calibration	POTTS, JERRY	4002
Calibration	DANIEL, OFELIA	4003
Calibration	GIBBS, REGINALD	4004
Calibration	MASON, TRACY	4005
Calibration	MONTGOMERY, ALFREDO	4006

Common Report Criteria

Start Date

Indicates the start of the date range from which reporting data will be pulled. The Start Date can be selected by clicking on the calendar icon located to the right of the field, or by typing the date into the field.

End Date

Indicates the end of the date range from which reporting data will be pulled. The End Date can be selected by clicking on the calendar icon located to the right of the field, or by typing the date into the field.

Group

Allows you to select a particular group of Agents to report on. This is based on the groups of Agents that have been created in the system under the Administration tab. You can select one group, multiple groups (by shift-clicking), or all groups.

Call Direction

Allows you to narrow the scope of the report by selecting the directionality of the call to report on. Options in this selection are: All, Incoming, Outgoing, or Unknown (meaning that we are not able to identify the directionality of the recorded contact).

Period Type

Allows you to narrow the scope of the report by selecting the duration of time to report on. Options in this selection are: Week, Month, Quarter, and Year.

Year

Allows you to narrow the scope of the report by selecting the year to report on.

Period

The Period field is used with the Period Type, and the selections will be varied based on what is selected in the Period Type dropdown. For example, if the Period Type selected is Month, the Period options will be the months of the year. If the Period Type is Quarter, the Period options will be 1 – 4.

Form

Allows you to select the form that you want to report on. The available options are a reflection of the forms that have been built in the Form Creator and are in enabled or disabled status. You can select one form, multiple forms (by shift-clicking), or All.

Agents

Allows you to select the Agent(s) that you want to report on. You can select one Agent, multiple Agents (by shift-clicking), or All.

Tag Category

Only used in conjunction with Speech Analytics. Allows you to select a particular Tag to report on. You can select one Tag, multiple Tags, or ALL.

Status/Active

Allows you to choose the status of the Agents to report on. Options are: Active, Inactive, and All.

Date Type

Used to select the data set you want to pull in QA reporting. Options are: Call Date and Evaluations Date. Call Date is based on the date the call was recorded in the system. Evaluation date is based on when the recorded contact was evaluated in the system.

Users

Allows you to select the User(s) that you want to report on. You can select one User, multiple Users (by shift-clicking), or All.

Report Type

Allows you to narrow the scope of the report by selecting the type of report to generate. Options in this selection are: Agent, Form, Section, and Question. This is one indication that a report is able to be drilled down into, to access the additional data that supports the cumulative view of the data.

Section

The Sections dropdown is used in conjunction with the Form dropdown and the selections will be a reflections of the sections created for a form in the Form Creator. You can section one section, multiple sections, or All.

Failure Type

Allows you to report on Section or Form failures for a particular form. You can also report on All.

Month

Select the starting month for your report.

Periods

Select the number of months that you want to include in your report (1 -12).

Call Reporting

Overview of Call Reporting

The cc: Discover Call Reports provide 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.

To access call reports, from the Printable Reports menu, click Call Reporting. On the Agent Reporting page, click the link to a report type such as Agent Call Summary.

Agent Reporting

Filter: [   ] [Search]

Report	Description	Date Created
Agent Call Summary	Agent Call Summary	5/24/2011
Assigned Agents Report	Assigned agents and their device ID's	5/24/2011
Call Recording Detail	Details of a Recorded Call	5/24/2011
Duplicate ANI Report	Calls Observed During a Period with Duplicate Caller IDs.	5/24/2011
Group Membership Report	Membership of agents in Groups	5/24/2011

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Agent Call Summary

The Agent Call Summary displays call totals captured in the call recording system. The report displays the number of calls recorded for an agent over a period of time, as well as the recording duration information. The recording duration may include on-hold and after call work depending on the customer's specific configuration and the recording scripts used.

Agent Call Summary				Back	Generate Report
Start Date 12/1/2010	End Date 12/31/2010	Group All			
Call Direction Incoming					

Agent Call Summary
For period beginning 12/1/2010 and ending 12/31/2010

Selected Call Direction: Incoming

Name	Device ID	# Calls	Average Duration	Total Duration	Max Duration
ASHLEY, RUBEN	4022	16	5m 26s	1h 27m 2s	8m 11s
BAUER, ALBERT	4002	10	5m 43s	57m 9s	8m 11s
BELL, ESTER	4036	9	6m 20s	57m 1s	8m 11s
BROOKS, LARRY	4030	12	6m 16s	1h 15m 17s	8m 11s
CANTRELL, MADELEINE	4015	13	6m 7s	1h 19m 36s	8m 11s
COHEN, JIMMIE	4010	11	6m 17s	1h 9m 5s	8m 11s
DELACRUZ, BARRY	4026	23	5m 28s	2h 5m 42s	8m 11s
DILLON, BRADLEY	4031	14	5m 17s	1h 13m 58s	8m 11s
ESTES, SALVADOR	4033	12	5m 44s	1h 8m 48s	8m 11s
EWING, WILLA	4025	13	6m 50s	1h 28m 56s	8m 11s
FARRELL, HALEY	4032	15	5m 45s	1h 26m 16s	8m 11s
FISCHER, HOWARD	4029	9	6m 39s	59m 52s	8m 11s
FOSTER, HAROLD	4038	11	6m 15s	1h 8m 49s	8m 11s
GARCIA, MICHEAL	4014	17	5m 35s	1h 34m 53s	8m 11s
GRAY, SHAWN	4013	10	5m 43s	57m 7s	8m 11s
HAYS, ANGELINA	4034	14	6m 21s	1h 28m 59s	8m 11s

Assigned Agents Report

This report displays the Active, Inactive, or All agents who are currently in the database, along with their System ID, Username and Phone ID information.

Assigned Agents Report			Back	Generate Report
Status Active ▾				

Assigned Agents

System ID ⇕	Agent ⇕	User Name ⇕	Status	Phone ID ⇕
1	SOLOMON, DUANE		Active	4001
2	BAUER, ALBERT		Active	4002
3	PECK, LUPE		Active	4003
4	JONES, MARVIN		Active	4004
5	MCDONALD, ANTHONY		Active	4005
6	NIEVES, LATONYA		Active	4006
7	HOOPER, LARRY		Active	4007
8	OCHOA, YOUNG		Active	4008
9	JIMENEZ, JUNE		Active	4009
10	COHEN, JIMMIE		Active	4010
11	USER, CALLCOPY	Administrator	Active	4011
12	HOLDEN, ANTHONY		Active	4012
13	GRAY, SHAWN		Active	4013
14	GARCIA, MICHEAL		Active	4014
15	CANTRELL, MADELEINE		Active	4015
16	SAMPSON, THERESA		Active	4016
17	SLOAN, SHAWN		Active	4017
18	ZIMMERMAN, KARINA		Active	4018
19	SCHNEIDER, EVANGELINA		Active	4019
20	HORN, ERIK		Active	4020
21	PADILLA, MARLENE		Active	4021
22	ASHLEY, RUBEN		Active	4022
23	NOEL, CARLA		Active	4023
24	MOSES, DIANA		Active	4024
25	EWING, WILLA		Active	4025
26	DELACRUZ, BARRY		Active	4026
27	WARD, JON		Active	4027
28	SALINAS, JIMMY		Active	4028
29	FISCHER, HOWARD		Active	4029

Call Recording Detail

This report displays the call metadata for your selected agent(s) over a period of time. The report provides the Record ID number, along with critical data like ANI, DNIS, Date and time recorded, duration of the call, and the Device ID where the call was recorded. The User fields are defined on the Terminology page and vary by customer.

Duplicate ANI Report

This report displays the call metadata information for repeat calls into your organization from the same phone number over a period of time. If the same ANI has not called into your location multiple times over your selected timeframe, you will see the result listed below.

Group Membership Report

This report displays the active or inactive Agents in a particular group, along with their Phone Id information.

Group	Agent	Phone ID
Calibration	ASHLEY, RUBEN	4022
Calibration	BAUER, ALBERT	4002
Calibration	BELL, ESTER	4036
Calibration	BROOKS, LARRY	4030
Calibration	CANTRELL, MADELEINE	4015
Calibration	COHEN, JIMMIE	4010
Calibration	DELACRUZ, BARRY	4026
Calibration	DILLON, BRADLEY	4031
Calibration	ESTES, SALVADOR	4033
Calibration	EWING, WILLA	4025
Calibration	FARRELL, HALEY	4032
Calibration	FERGUSON, LATONYA	4040
Calibration	FISCHER, HOWARD	4029
Calibration	FOSTER, HAROLD	4038
Calibration	GARCIA, MICHEAL	4014
Calibration	GRAY, SHAWN	4013
Calibration	HAYS, ANGELINA	4034
Calibration	HEBERT, FRANCISCO	4037
Calibration	HOLDEN, ANTHONY	4012
Calibration	HOOPER, LARRY	4007
Calibration	HORN, ERIK	4020
Calibration	JENNINGS, TABITHA	4035

QA Reporting

Overview of QA Reports

The cc: Discover QA Reports allow you to trend and track the Quality Assurance performance of your agent, analysts, and groups. The various QA reports give you insight into QA critical areas such as calibration, trending, and team performance. The QA report also serve as an extremely powerful coaching tool to help close knowledge gaps, as identified through the evaluation of call and shown through reporting.

QA Reporting is based on the evaluations that your Quality Assurance (QA) Team have performed. These reports require that a QA form be created in cc: Discover using the Form Creator in the Coaching tab, under the Quality Assurance Area. The way that your form is created affects and impacts the reporting data that you are able to see in the QA focused reports.

Quality Assurance

Filter: [   ]   [Search]

Report	Description	Date Created
Agent QA Summary	Quality Assurance Summary By Agent	3/1/2011
Agent Ranking By Period	Agent Ranking by Period	3/1/2011
Agents Needing Evaluation Detail	Filtered list of when each evaluator has last evaluated each agent on each form.	3/1/2011
Agents Needing Evaluation Summary	Shows the last time an agent has been evaluated for the given criteria.	3/1/2011
Blank QA Form	Print out blank quality assurance forms for off line evaluations.	3/1/2011
Call Evaluation Detail	Full details of the QA evaluation and the evaluated call. For performance reasons, limited to first 500 records meeting criteria.	3/1/2011
Completed QA Form	Review or print out complete quality assurance evaluations.	3/1/2011
Critical Question Detail	Detail of performance on critical questions.	3/1/2011
Critical Question Summary	Summary of performance on critical questions by agent or group.	3/1/2011
Evaluator QA Summary	Evaluator Calibration Report	3/1/2011
Form and Section Failures Report	Displays the list of calls which were evaluated to contain a response that indicated a failure at a section or form level.	3/1/2011
Group QA Summary	Quality Assurance Summary By Group	3/1/2011
Group Summary By Month	Group performance trend over monthly intervals.	3/1/2011
Group Summary By Period	Group performance trend over time with selectable intervals.	3/1/2011
Multiple Evaluations Summary	Comparison of the prior twelve evaluations of an agent on a particular form.	3/1/2011
QA Agent Periodical Trending Report	This specialized trending report makes it easy to compare the performance of groups in different sections of a QA form over time.	3/1/2011
QA Agent Trending Report	Trending reports allow you to read across the data to see changes over time. The QA agent trending report breaks down scores by agent and allows you to easy compare the performance of an agent in different sections or on different questions.	3/1/2011
QA Calibration Trending Report	Trending reports allow you to read across the data to see changes over time. The QA calibration trending report breaks down scores by QA evaluator and allows you to easily compare the performance of a user in different sections or on different questions.	3/1/2011
QA Form Trending Report	Trending reports allow you to read across the data to see changes over time. The QA form trending report breaks down scores by form or form component, and may further break them down by subgroup for easy comparison.	3/1/2011
QA Group Periodical Trending Report	This specialized trending report makes it easy to compare the performance of groups in different sections of a QA form over time.	3/1/2011

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Agent QA Summary

This report displays the selected Group(s) or Agent(s) Quality Assurance (QA) performance over a period of time. The Report Type criteria specify a level of detail: Agent, Form, Section, and Question. If the report is used in cc: Discover, users can drill-down to lower levels of detail.

In the example below, the Report Type was set to Section, and a user can drill down to Question level results by clicking a section label.

Agent Performance Summary Report by Section
For Monday, February 13, 2012 to Tuesday, March 13, 2012

Agent	# Evaluations	Score	Possible	Percentage
Brad Anderson	4	645	1559	41.4%
Customer 1 Evaluation	1	600	1490	40.3%
Section 1	1	150	490	30.6%
Section 2	1	400	500	80.0%
Section 3	1	50	500	10.0%
Customer 2 Evaluation	1	35	35	100.0%
s1	1	30	30	100.0%
s2	1	5	5	100.0%
Summer Sales Evaluation	1	5	9	55.6%
Section 1	1	5	9	55.6%
Finance Customer Evaluation	1	5	25	20.0%
s1	1	5	25	20.0%
s2	1	0	0	N/A

Agent Ranking by Period

This report compares your 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 the Agents in your system from 1 – X and show their positive trending with a green arrow and negative trending with a red arrow.

Agent Ranking By Period				Back	Generate Report

Period Type [Month ▾]   Year [2010 ▾]   Period [December ▾]
Form [All ▾]   Group [All ▾]

Agent Ranking by Month

For period beginning 12/1/2010 and ending 12/31/2010

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

Agents Needing Evaluation Detail

This report displays the last time a selected Agent(s) were scored on a particular form, based on the Group(s) they are assigned to and the Evaluator who last completed the QA evaluation.

Selected Forms: Customer Service Evaluation, Sales Evaluation

Agent	Group	Form	Evaluator	Last Evaluated
JOANN ABBOTT	ClientXYZ	Customer Service Evaluation	Jeff Rector	Never
JOANN ABBOTT	ClientXYZ	Customer Service Evaluation	Cheryl Rankin	Never
JOANN ABBOTT	ClientXYZ	Customer Service Evaluation	Barry Knack	Never
JOANN ABBOTT	ClientXYZ	Customer Service Evaluation	Beki Nowlan	Never
JOANN ABBOTT	ClientXYZ	Sales Evaluation	Jeff Rector	Never
JOANN ABBOTT	ClientXYZ	Sales Evaluation	Cheryl Rankin	Never
JOANN ABBOTT	ClientXYZ	Sales Evaluation	Barry Knack	Never
JOANN ABBOTT	ClientXYZ	Sales Evaluation	Beki Nowlan	Never
JOANN ABBOTT	Support Team	Customer Service Evaluation	Jeff Rector	Never
JOANN ABBOTT	Support Team	Customer Service Evaluation	Cheryl Rankin	Never
JOANN ABBOTT	Support Team	Customer Service Evaluation	Barry Knack	Never
JOANN ABBOTT	Support Team	Customer Service Evaluation	Beki Nowlan	Never

Agents Needing Evaluation Summary

This report displays the last time an Agent was evaluated, by any Evaluator, from a selected end time.

Selected Forms: Customer Service Evaluation, Sales Evaluation

Agent	Group	Form	Evaluator	Last Evaluated
ABBOTT, JOANN	ClientXYZ	Customer Service Evaluation	Sue Smith	9/26/2011
BOYER, MABEL	Support Team	Sales Evaluation	Bob Smith	9/26/2011
BUCKLEY, ROBIN	Sales Team	Sales Evaluation	Administrator	9/27/2011
CAMPOS, DEIRDRE	Support Team	Sales Evaluation	John Doe	9/27/2011
CARROLL, LIZA	Calibration	Sales Evaluation	John Doe	9/27/2011
COLEMAN, THERESA	Calibration	Customer Service Evaluation	Jane Doe	9/27/2011
COLLINS, DOREEN	Support Team	Customer Service Evaluation	Administrator	9/27/2011
CONRAD, NELDA	Janes Team	Customer Service Evaluation	Administrator	9/26/2011
CROSBY, NELDA	Support Team	Sales Evaluation	Administrator	9/27/2011
DENNIS, FLORINE	Support Team	Sales Evaluation	Bob Smith	9/27/2011
ELLIOTT, CLARISSA	ClientXYZ	Customer Service Evaluation	John Doe	9/27/2011
ELLIOTT, MARIANNE	Johns Team	Customer Service Evaluation	Jane Doe	9/27/2011
ENGLAND, CANDICE	None	None		Never

Blank QA Form

This report displays a blank version of a specific Quality Assurance form that has been created in the cc: Discover system.

Call Evaluation Detail

This report shows the detailed results on a completed evaluation based on your selection criteria. The data is broken down by metadata information at the top and then a section and question level breakdown of the form, complete with individual responses.

Completed QA Form

This report displays the scoring data for a specific QA evaluation. This report is automatically generated when the Print Report Button is pressed from the Search QA Evaluations link, located under the coaching tab, or by inputting the Record number, also located on the Search QA Evaluations page under the Coaching tab.

Critical Question Detail

This report allows you to see the detailed insight as to how each agent has scored on the Critical question on all evaluated calls.

Critical Question Summary

This report shows the summary of the critical question as a whole.

Critical Question Summary   Back   Generate Report

Start Date: 1/24/2011   End Date: 2/24/2011   Group List:
All
Calibration
ClientABC
ClientXYZ

Form List:
All
Customer Service Evaluation
Sales Evaluation

Agent List:
All
VERONICA ALVAREZ
URSULA AVERY
TRACY BLACKBURN

User List:
All
Administrator
Barry Knack
Bob Smith

Report Type: Agent   Date Type: Call Date   Active: Active

Critical Question Summary by Agent

For Monday, February 28, 2011 to Tuesday, March 29, 2011

Selected Forms: Critical Question Form

Agent	Form	Question	Score
CAMPOS, DEIRDRE	Critical Question Form	Is this a critical question example?	10.0 of 10.0 (100.0%)
GILBERT, ADELINE	Critical Question Form	Is this a critical question example?	10.0 of 10.0 (100.0%)
KIM, BOBBY	Critical Question Form	Is this a critical question example?	0.0 of 10.0 (0.0%)
Total:			**20.0 of 30.0 (66.7%)**

Critical Question Summary - 3/29/2011   CallCopy Recorder Reporting Service   Page 1 of 1

Evaluation List Report

This report generates a list of agent evaluations that were performed. This report provides a means of tracking the evaluation process and the scoring of evaluations.

Quality Assurance Evaluation List

Form	Agent	Record ID	Recording Date	Evaluated By	Evaluation Date	Score
Customer Service Evaluation	ANTHONY, LAWANDA	5742	06/22/11	Administrator	06/22/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	ANTHONY, LAWANDA	6225	06/23/11	Administrator	06/23/2011	134.0 of 140.0 (95.7%)
Customer Service Evaluation	ANTHONY, LAWANDA	12436	06/23/11	Jane Doe	06/23/2011	120.0 of 140.0 (85.7%)
Customer Service Evaluation	AYALA, JEFFERY	25950	06/22/11	Bob Smith	06/22/2011	120.0 of 140.0 (85.7%)
Customer Service Evaluation	BARRETT, WHITNEY	21438	06/22/11	Administrator	06/22/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	BARRETT, WHITNEY	21439	06/22/11	Administrator	06/22/2011	134.0 of 140.0 (95.7%)
Customer Service Evaluation	CLARK, DOMINIQUE	22821	06/22/11	Bob Smith	06/22/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	CLARK, DOMINIQUE	22822	06/22/11	Administrator	06/22/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	CONTRERAS, KRISTINE	5119	06/23/11	Administrator	06/23/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	CONTRERAS, KRISTINE	11697	06/23/11	Jane Doe	06/23/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	DANIEL, OFELIA	14372	06/22/11	Bob Smith	06/22/2011	134.0 of 140.0 (95.7%)

Evaluator QA Summary

This report displays the results of your evaluator's QA performance over a selected period of time. It can be used to calibrate evaluator's scoring practices to ensure consistent and fair scoring. The initially generated report is a high level comparison, but it can be drilled-down into for more granular detail.

Evaluator	# Evaluations	Score	Possible	Percentage
Administrator	720	78013	81755	95.4%
Bob Smith	157	16370	18145	90.2%
Jane Doe	282	29868	32720	91.3%
John Doe	196	11649	19965	58.3%
Sue Smith	175	13875	18715	74.1%

Evaluator QA Summary - 2/24/2011   CallCopy Recorder Reporting Service   Page 1 of 1
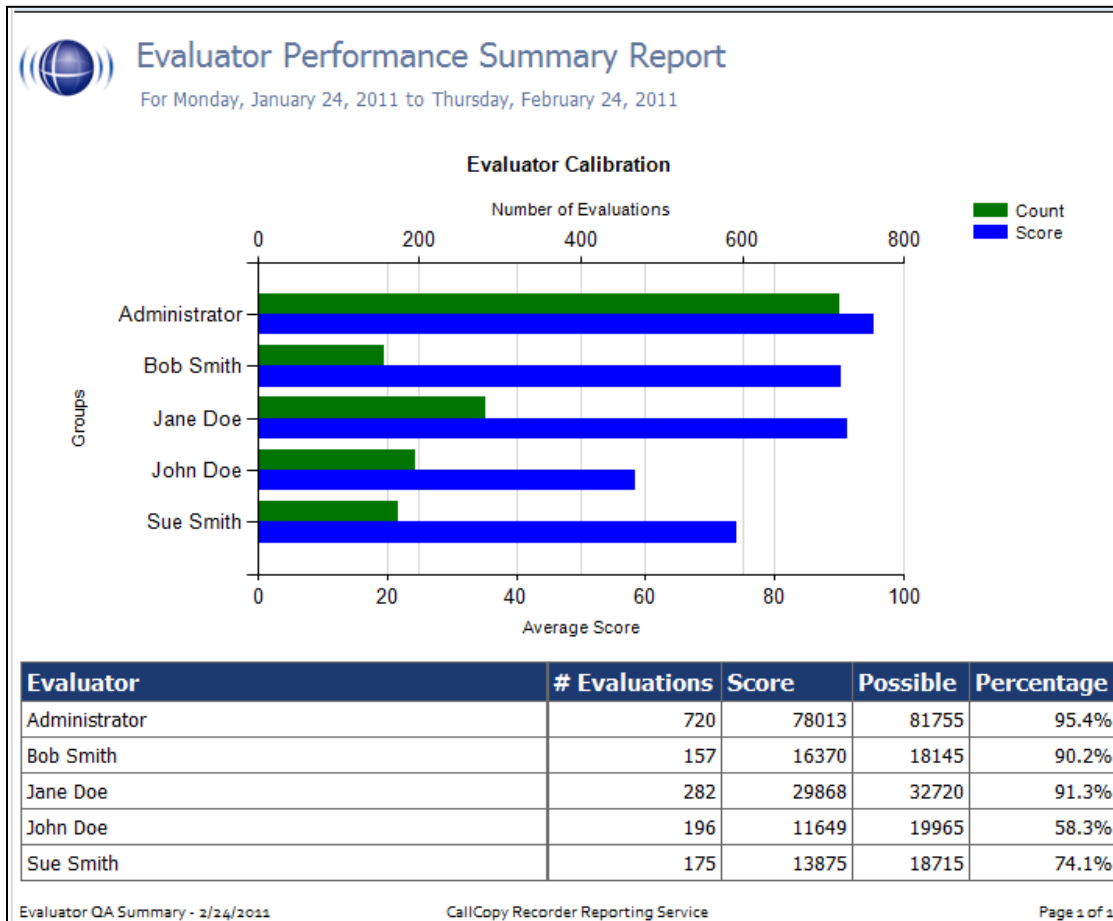
Form and Section Failures Report

This report displays the critical failure points in a form(s) over a selected period of time. The top section will show a summary, indicating the total number of form and/or section failure per agent; while the lower section supplies the detail of the failure.

Group QA Summary

This report displays the performance of a selected team(s) on a form(s) over a period of time, for quick and easy comparison. This report enables drill-down for more granular data on Report Type (Group, Form, Section, and Question).

Group	# Evaluations	Score	Possible	Percentage
Calibration	267	26366	29970	88.0%
ClientABC	171	16925	19000	89.1%
ClientXYZ	236	23094	26995	85.5%
Janes Team	94	8631	9910	87.1%
Johns Team	111	10633	12160	87.4%
Sales Team	193	19022	21755	87.4%
Support Team	458	45104	51510	87.6%

Group QA Summary - 2/24/2011   CallCopy Recorder Reporting Service   Page 1 of 1
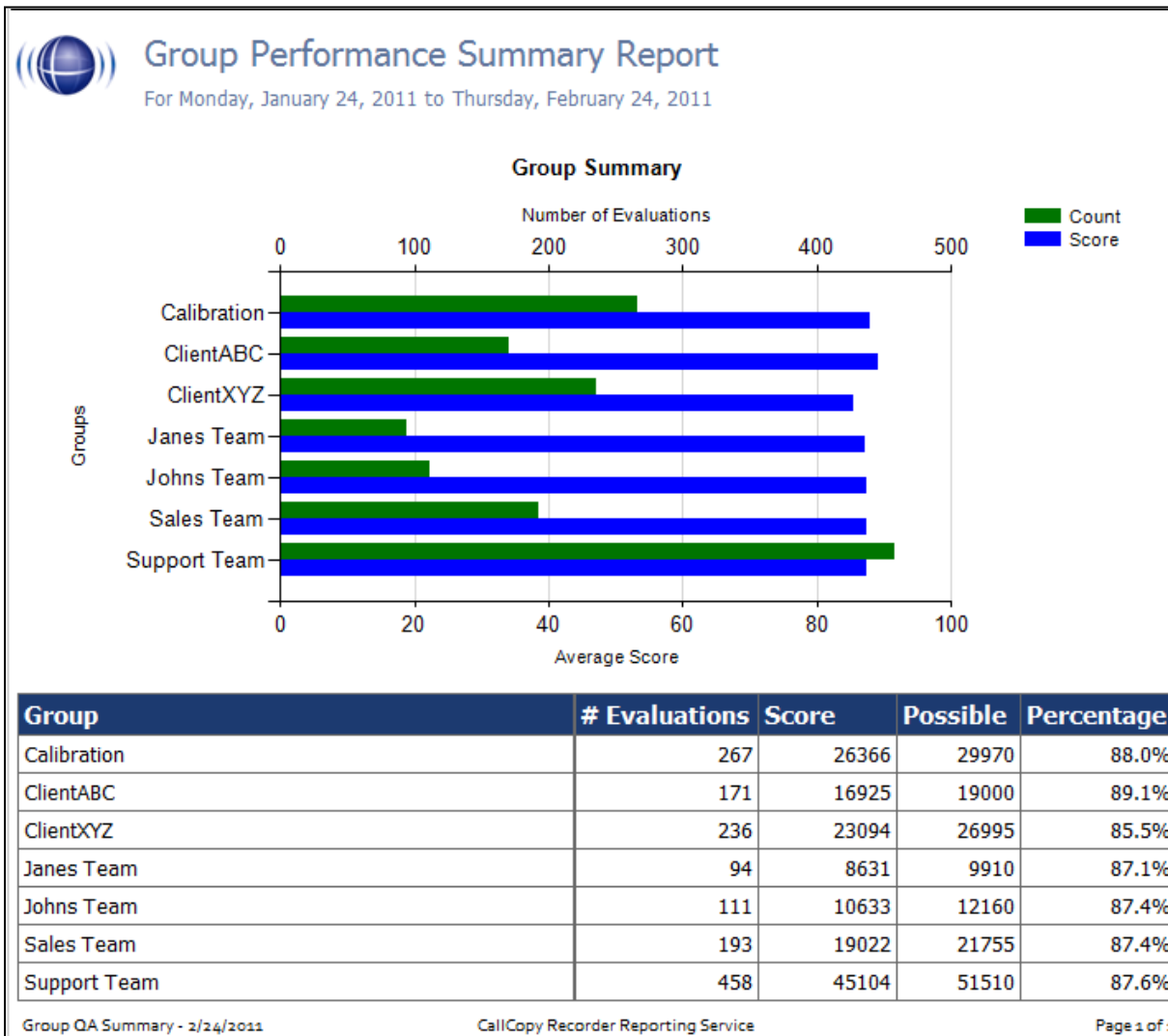
Group Summary by Month

This report displays the performance of a selected team(s) on a form(s), charted over a certain number of months based on your selection of a targeted end month. Report Type of Month shows data only by month. Report Type of Group shows evaluation data by group for each month.

Month	# Evaluations	Score	Possible Score	Percentage
September	358	36560	40565	90.1%
October	444	47096	51110	92.1%
November	552	57454	63110	91.0%
December	738	75126	82455	91.1%
January	999	102264	112040	91.3%
February	1261	128843	140725	91.6%

Group Summary By Month - 2/24/2011   CallCopy Recorder Reporting Service   Page 1 of 1
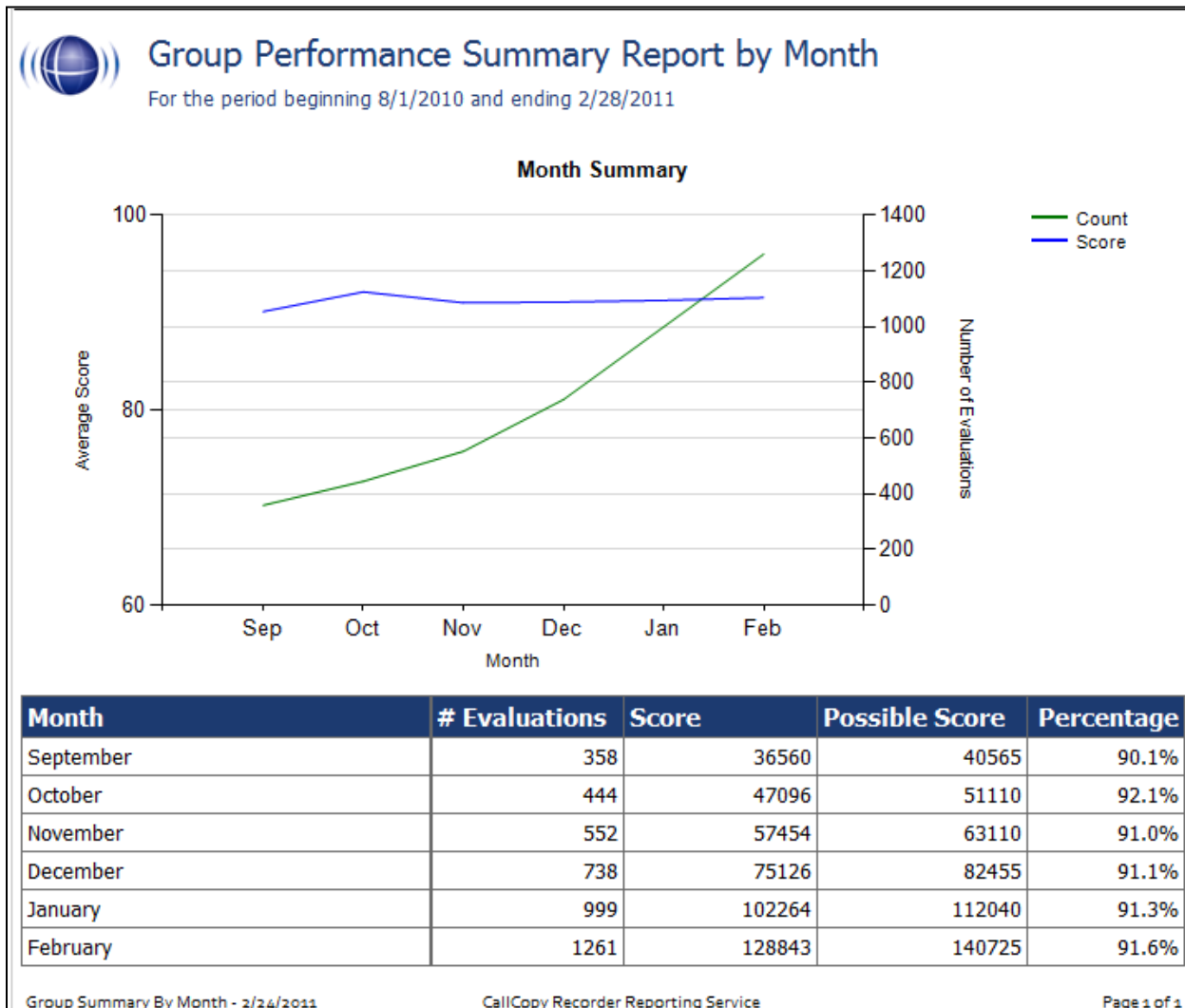
Group Summary by Period

This report displays the performance of a selected team(s) on a form(s), charted over a certain number of periods (week, month, quarter, or year) based on your selection of a targeted end period. The Period Name field specifies a starting point and the number of periods goes back from it.

Group Performance Summary Report by Month
For the period beginning 8/1/2010 and ending 2/28/2011

Month	Year	# Evaluations	Score	Possible Score	Percentage
September	2010	358	36560	40565	90.1%
October	2010	444	47096	51110	92.1%
November	2010	552	57454	63110	91.0%
December	2010	738	75126	82455	91.1%
January	2011	999	102264	112040	91.3%
February	2011	1261	128843	140725	91.6%

Group Summary By Period - 2/24/2011   CallCopy Recorder Reporting Service   Page 1 of 1
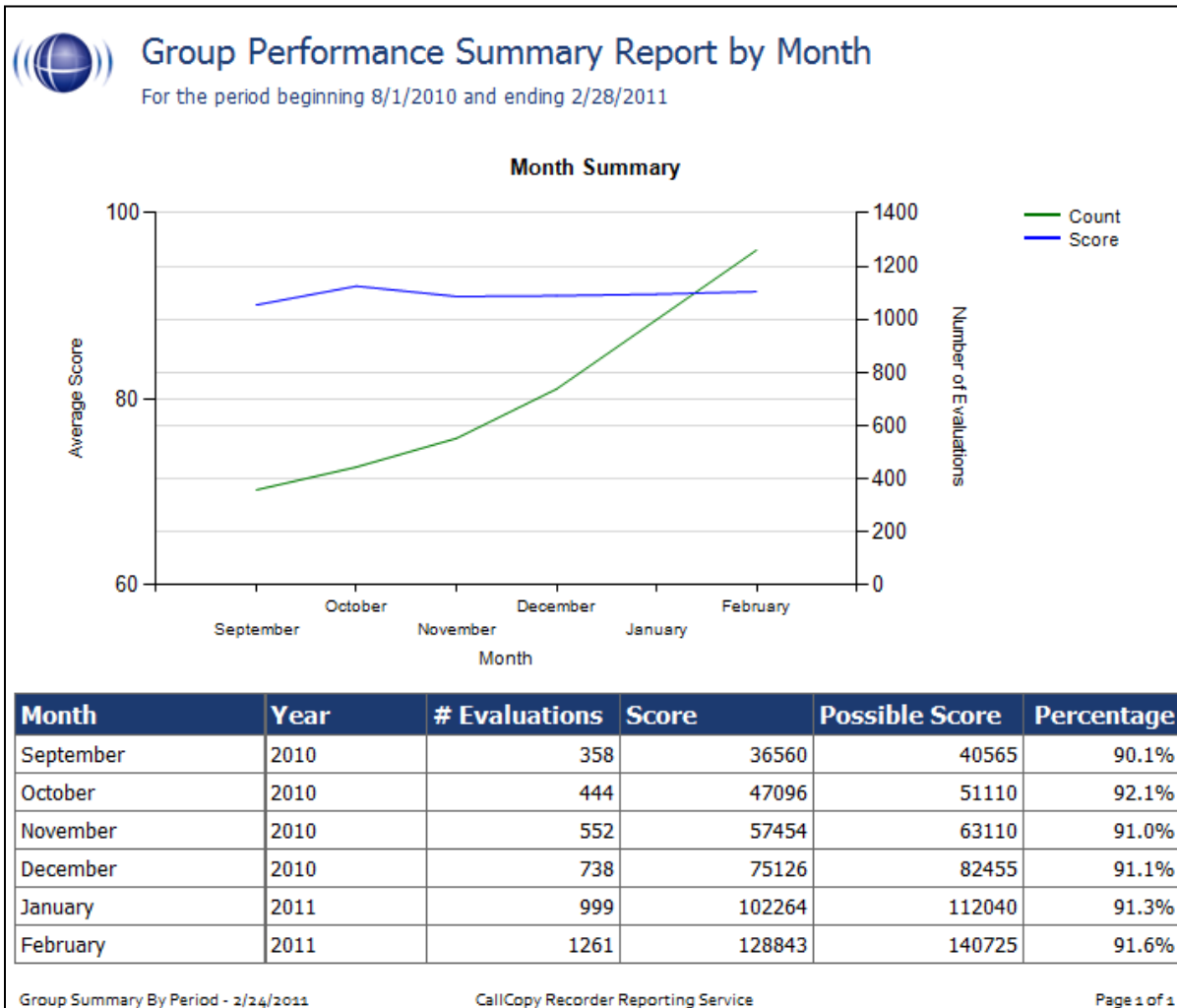
Multiple Evaluations Summary

This report displays the last 12 evaluations that were conducted on a selected agent and form, based on a selected end date. Agent ID and Form ID are required fields.

Multiple Evaluations Summary Report

Contact Date Range:	December 19, 2010 - February 23, 2011	
Agent Name:	ALVAREZ, VERONICA	
Supervisor Name:	Administrator	Overall Average: 92.3%

Form: Customer Service Evaluation — Average Score for this Form: 97.9%

Section/Questions	Total Possible	1	2	3	4	5	6	7	8	9	10	11	12	Total	Overall Percentage
Greeting	240													240	100.0%
Did Agent state company name?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did Agent state his/her name?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Soft Skills	360													324	90.0%
Did Agent demonstrate Active Listening?	120	10	10	7	7	10	7	10	7	10	10	7	7	102	85.0%
Did Agent use courtesy statements as appropriate?	120	10	10	7	7	10	7	10	7	10	10	7	7	102	85.0%
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													360	100.0%
Did Agent find record in CRM in timely manner?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
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%

QA Agent Periodical Trending Report

This report displays the summary of an agent's performance on a particular form over a selected period of time. The performance will be broken down on a section by section basis, depending on how your QA form is created in the system.

Sales Evaluation	Sep	Oct	Nov	Dec	Jan	Feb
Greeting	93.8%	90.0%	96.7%	92.3%	97.7%	92.1%
Sales Skills	81.3%	90.0%	69.4%	86.0%	75.6%	74.6%
Documentation	68.8%	81.0%	73.3%	66.4%	74.7%	78.2%

Greeting	Sep	Oct	Nov	Dec	Jan	Feb
AVERY, URSULA	100.0%	100.0%				100.0%
BLACKWELL, CLAUDIA		0.0%	100.0%	50.0%	100.0%	100.0%
BURNETT, LAURIE		100.0%	100.0%		57.1%	100.0%
CALLAHAN, KIMBERLY			100.0%		100.0%	100.0%
CARPENTER, CHRYSTAL		100.0%	100.0%	100.0%	100.0%	100.0%
CLARK, WADE				80.0%	100.0%	100.0%
COTTON, KAY	100.0%		100.0%	100.0%	100.0%	66.7%
FRANCO, REYNA	50.0%		100.0%	100.0%	100.0%	100.0%
GOOD, ETTA	100.0%		50.0%	75.0%	100.0%	66.7%

QA Agent Trending Report

This report displays the summary of an agent's performance on a particular form over a selected period of time. The performance will be broken down on a section by section, and question by question basis, depending on how your QA form is created in the system.

QA Calibration Trending Report

This report displays the detail of an Evaluator's performance on a particular form over a selected period of time. The performance will be broken down on a section by section, and question by question basis, depending on how your QA form is created in the system.

Monthly QA Calibration Trending Report
For Monday, November 01, 2010 to Thursday, February 24, 2011

		2010		2011	
		Nov	Dec	Jan	Feb
Administrator		95.6%	95.5%	94.8%	95.7%
Customer Service Evaluation		96.2%	95.9%	95.4%	96.5%
Greeting		100.0%	98.9%	98.1%	99.4%
Did Agent state company name?		100.0%	98.9%	98.1%	99.4%
Did Agent state his/her name?		100.0%	98.9%	98.1%	99.4%
Soft Skills		86.6%	86.6%	86.9%	87.9%
Did Agent use courtesy statements as appropriate?		79.3%	79.8%	80.0%	81.4%
Did Agent demonstrate Active Listening?		80.6%	80.6%	81.4%	82.2%
Did Agent use proper hold procedures?		100.0%	99.5%	99.3%	100.0%
Notes		N/A	N/A	N/A	N/A
Use of Tools		95.8%	95.9%	94.2%	96.4%
Did Agent use correct closing code in CRM?		100.0%	99.5%	99.3%	100.0%
Did Agent find record in CRM in timely manner?		93.8%	94.7%	91.1%	94.8%
Did agent navigate knowledgebase efficiently (if needed)?		93.8%	93.6%	92.2%	94.5%
Closing		100.0%	99.5%	99.3%	100.0%
Did Agent resolve call within support guidelines?		100.0%	99.5%	99.3%	100.0%
Did Agent probe for additional concerns?		100.0%	99.5%	99.3%	100.0%
Did Agent thank customer for calling?		100.0%	99.5%	99.3%	99.7%
Did Agent offer to transfer to customer sat survey?		100.0%	99.5%	99.3%	100.0%

QA Form Trending Report

This report displays the total quality performance on a particular form over a selected period of time.
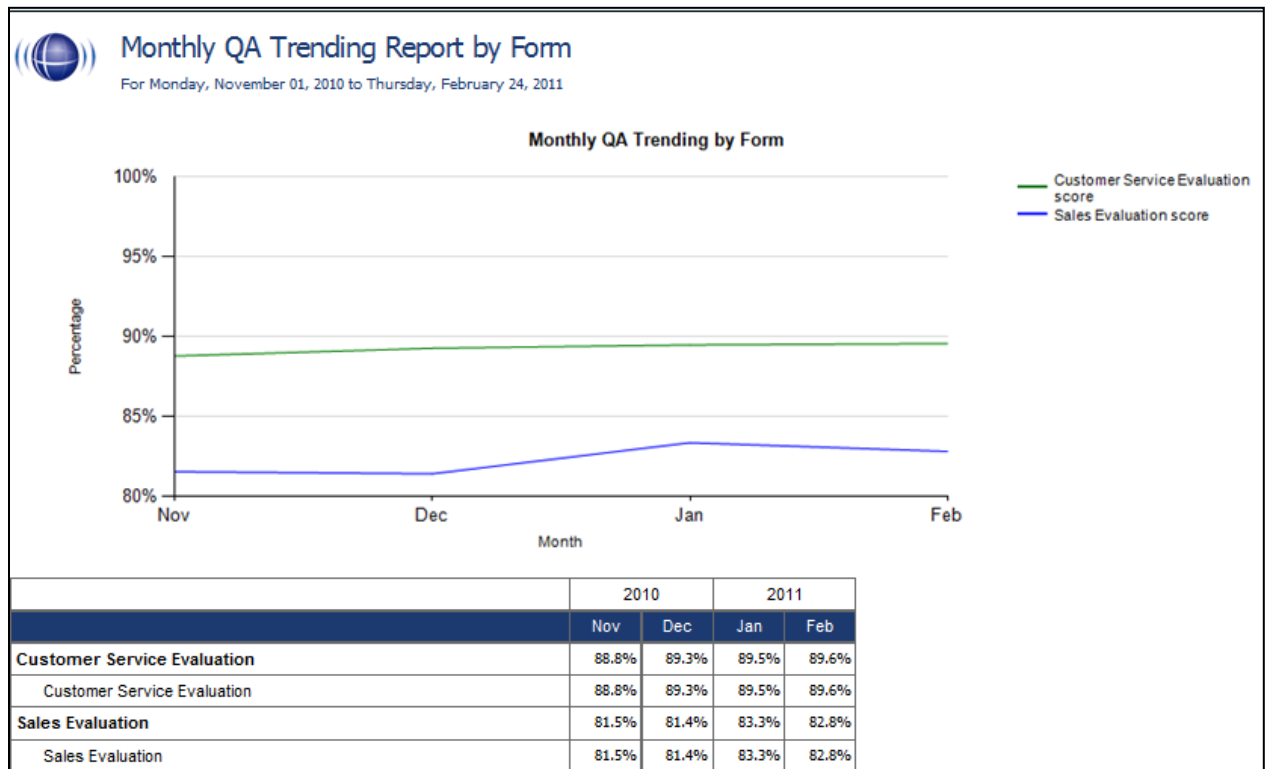
QA Group Periodical Trending Report

This report displays the performance of a selected group(s) on a form(s), charted over a certain number of periods (daily, weekly, monthly, quarterly, or yearly) based on your selection of a targeted end period. The data is broken down section by section.

Monthly QA Group Trending Report

For the period beginning 8/1/2010 and ending 2/28/2011

Customer Service Evaluation	Sep - 10	Oct - 10	Nov - 10	Dec - 10	Jan - 11	Feb - 11
Greeting	85.3%	91.2%	88.3%	89.0%	89.7%	91.0%
Soft Skills	79.0%	83.0%	80.2%	80.6%	80.4%	80.2%
Use of Tools	81.8%	87.2%	84.2%	84.8%	84.4%	85.2%
Closing	95.3%	97.5%	95.5%	95.9%	96.5%	96.0%
Notes	N/A	N/A	N/A	N/A	N/A	N/A

Sales Evaluation	Sep - 10	Oct - 10	Nov - 10	Dec - 10	Jan - 11	Feb - 11
Greeting	92.5%	95.3%	91.3%	91.0%	91.1%	90.4%
Sales Skills	76.2%	80.6%	72.9%	74.8%	74.1%	74.4%
Documentation	66.7%	68.8%	69.4%	68.7%	74.6%	74.0%

Greeting	Sep - 10	Oct - 10	Nov - 10	Dec - 10	Jan - 11	Feb - 11
Calibration	83.3%	96.2%	91.7%	90.9%	92.5%	88.5%
ClientABC	85.7%	93.3%	88.2%	80.9%	92.2%	90.4%
ClientXYZ	80.6%	90.0%	93.5%	88.3%	88.8%	90.0%
Janes Team	91.7%	92.3%	96.2%	72.7%	92.9%	88.9%
Johns Team	75.0%	93.8%	82.6%	95.8%	85.7%	94.1%
Sales Team	90.5%	88.6%	85.4%	91.2%	87.5%	94.3%
Support Team	87.5%	88.5%	83.7%	92.0%	88.8%	91.4%
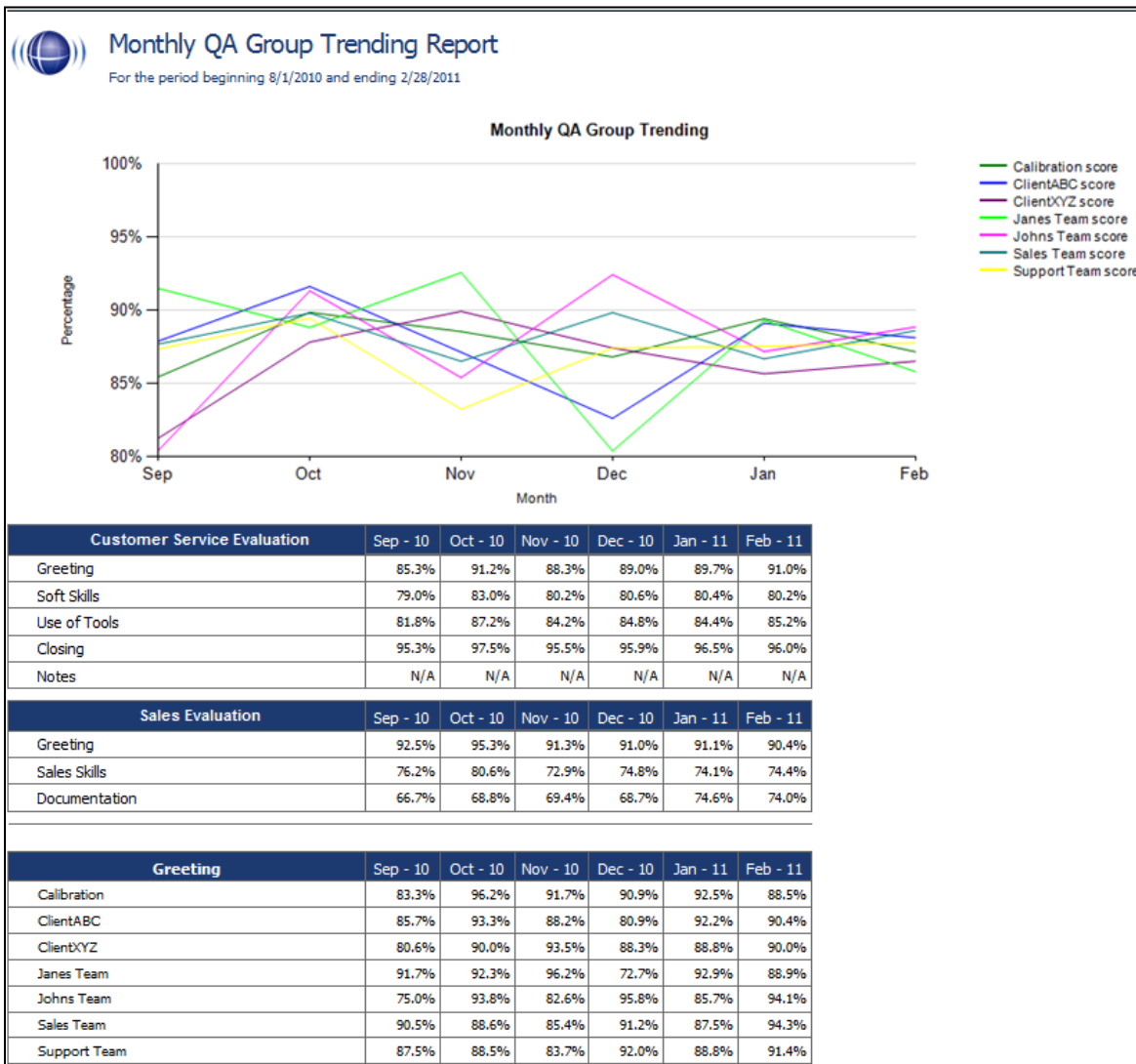
QA Group Scorecard

This report displays a group by group comparison of quality results of a form, at a question level, based on a selected period of time.

QA Group Trending Report

This report displays a group by group comparison of quality results of a form, at a question level, based on a selected period of time. The data is compared daily, weekly, monthly, or yearly based on your selection.

		2010		2011	
		Nov	Dec	Jan	Feb
Calibration		88.5%	86.8%	89.4%	87.2%
Customer Service Evaluation		90.7%	89.1%	90.8%	88.8%
Greeting		91.7%	90.9%	92.5%	88.5%
Did Agent state company name?		91.7%	90.9%	92.5%	88.5%
Did Agent state his/her name?		91.7%	90.9%	92.5%	88.5%
Soft Skills		81.1%	81.5%	81.2%	80.3%
Did Agent use courtesy statements as appropriate?		72.6%	74.7%	71.7%	71.5%
Did Agent demonstrate Active Listening?		73.5%	76.2%	73.8%	73.6%
Did Agent use proper hold procedures?		97.2%	93.5%	98.1%	95.9%
Notes		N/A	N/A	N/A	N/A
Use of Tools		87.0%	86.6%	85.2%	83.9%
Did Agent use correct closing code in CRM?		97.2%	93.5%	98.1%	95.9%
Did Agent find record in CRM in timely manner?		84.7%	83.1%	78.3%	75.4%
Did agent navigate knowledgebase efficiently (if needed)?		79.2%	83.1%	79.2%	80.3%
Closing		97.0%	93.5%	97.8%	95.7%
Did Agent resolve call within support guidelines?		97.2%	93.5%	98.1%	95.9%
Did Agent probe for additional concerns?		97.2%	93.5%	98.1%	95.9%
Did Agent thank customer for calling?		94.4%	93.5%	94.3%	93.4%
Did Agent offer to transfer to customer sat survey?		97.2%	93.5%	98.1%	95.9%

QA Pending Acknowledgement

This report displays a list of the unacknowledged QA evaluations that are still in the system, on an agent by agent, and form by form basis. This report is only needed if you are sending Acknowledgement requests to your Agents using the CallCopy system.

QA Pending Acknowledgement

Selected Groups: ClientXYZ

Form	Agent	Call ID	Evaluator	Completed Date	Status
Customer Service Evaluation	ALVAREZ, VERONICA	1965	Administrator	3/30/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	2206	Administrator	8/2/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	5209	Bob Smith	8/6/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	6824	Administrator	9/15/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	1128	Administrator	9/27/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	1128	John Doe	9/27/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	3220	Sue Smith	10/3/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	957	Sue Smith	11/9/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	4780	Bob Smith	11/12/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	3047	Jane Doe	11/17/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	6209	Administrator	12/4/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	8703	Administrator	12/12/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	8173	Jane Doe	12/20/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	7466	Administrator	12/20/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	4311	Administrator	1/4/2011	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	4303	Administrator	1/31/2011	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	3853	Jane Doe	2/8/2011	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	390	John Doe	2/11/2011	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	8108	Jane Doe	2/22/2011	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	3527	John Doe	5/11/2010	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	1039	Administrator	5/31/2010	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	4434	Jane Doe	7/24/2010	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	8793	Jane Doe	10/12/2010	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	5744	Administrator	12/6/2010	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	2691	Jane Doe	12/9/2010	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	7265	Bob Smith	1/13/2011	Unacknowledged

QA Summary by Form

This report displays the QA performance on a form(s) over a period of time. This report can be drilled down into for additional details.

cc: Discover Reporting Guide, V5.0 R2

QA Summary by Question

This report displays the QA performance on a form's questions over a period of time. This report can be drilled down into for additional details.

QA Summary By Question   Back   Generate Report

Start Date	1/24/2011	End Date	2/24/2011	Date Type	Call Date
Active	Active	Groups	All / Calibration / ClientABC / ClientXYZ	Forms	All / Customer Service Evaluation / Sales Evaluation
Agents	All / VERONICA ALVAREZ / URSULA AVERY / TRACY BLACKBURN	Users	All / Administrator / Barry Knack / Bob Smith	Report Type	Form

Question Performance Summary Report

For Tuesday, May 24, 2011 to Friday, June 24, 2011

Selected Forms: Customer Service Evaluation

Question Summary

Question Performance Summary Report

For Monday, January 24, 2011 to Thursday, February 24, 2011

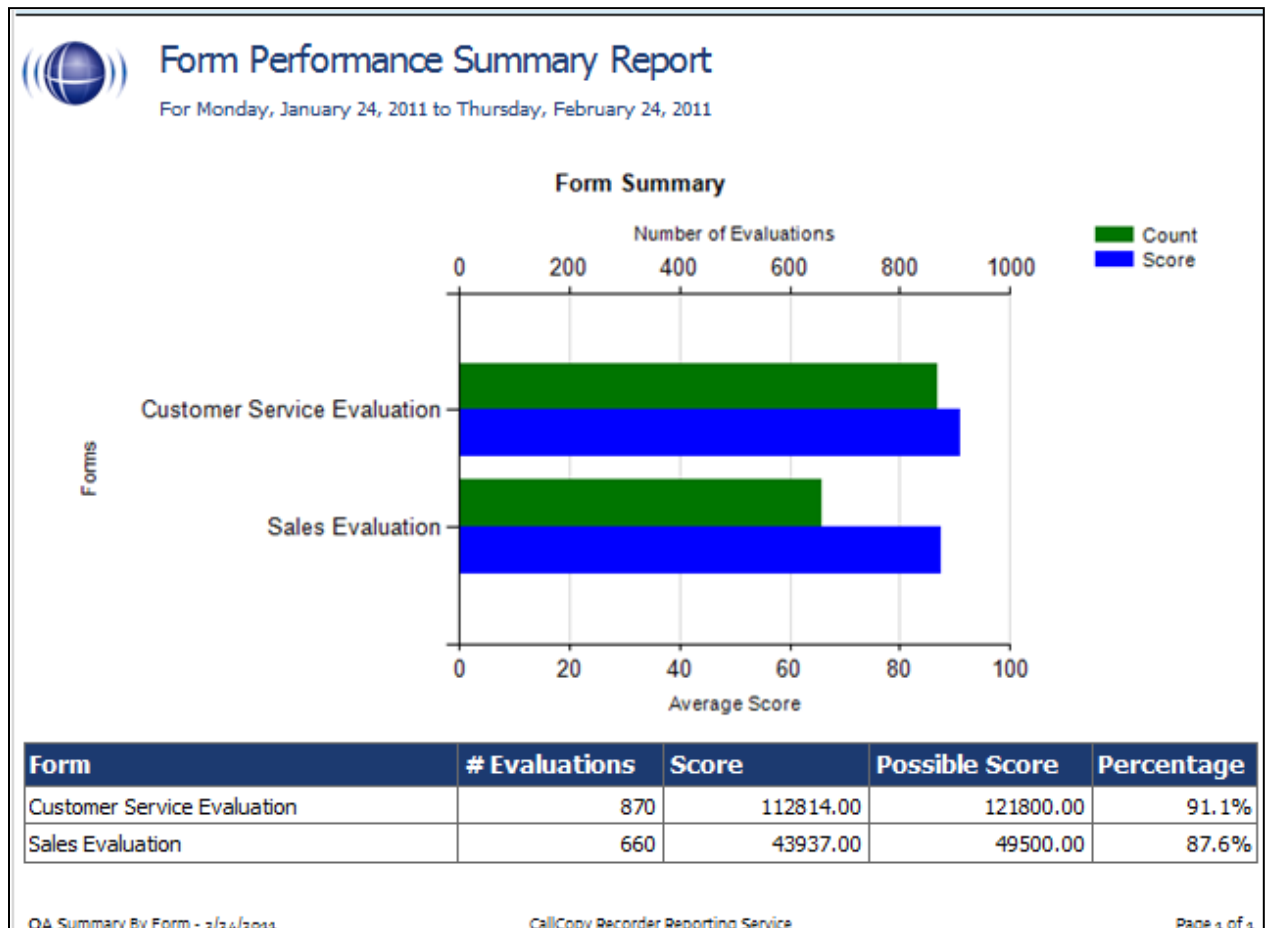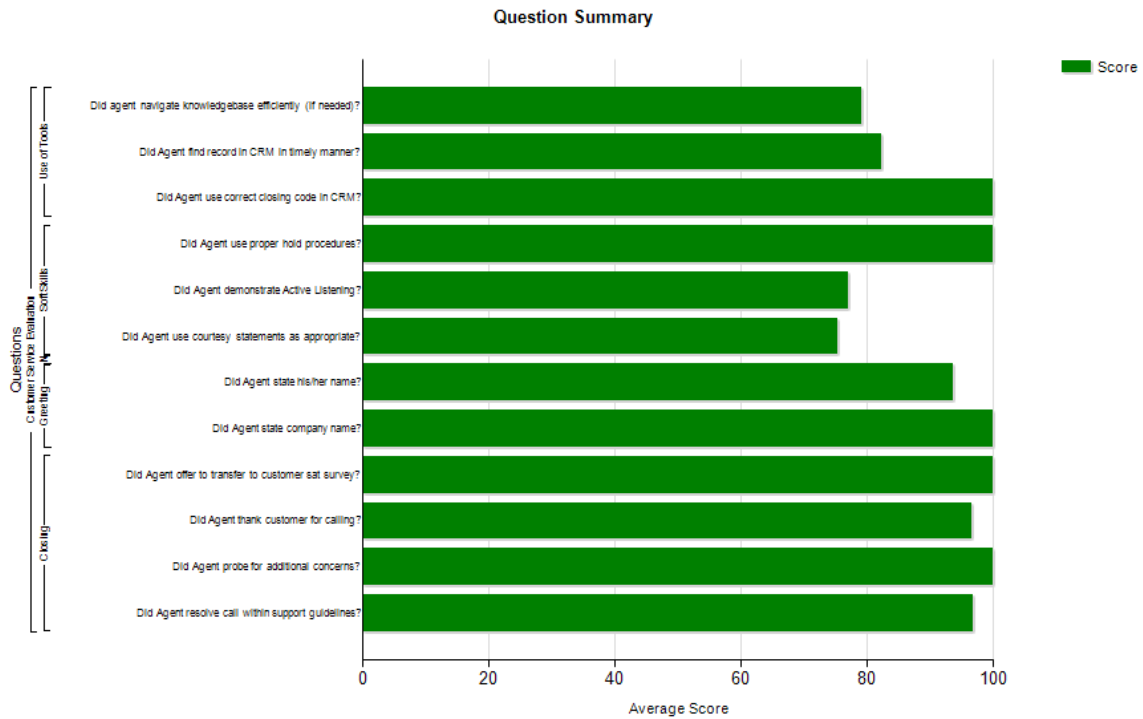| Form: Sales Evaluation	660 Forms Scored			Grade:	88.8%
Section: Greeting				**Grade:**	**98%**
Did Agent use branded greeting?		Auto-Fail	Value	Grade:	97.0%
Yes	640 (97%)	None	10.00 of 10.00		
No	20 (3%)	Section	0.00 of 10.00		
Did the Agent state his/her name?		Auto-Fail	Value	Grade:	100.0%
Yes	637 (97%)	None	10.00 of 10.00		
No	23 (3%)	Section	0.00 of 10.00		
Did the agent verify the promo code?		Auto-Fail	Value	Grade:	96.5%
Yes	637 (97%)	None	20.00 of 20.00		
No	23 (3%)	Form	0.00 of 20.00		
Section: Sales Skills				**Grade:**	**77%**
Was sale closed?		Auto-Fail	Value	Grade:	76.7%
Yes	506 (77%)	None	10.00 of 0.00		
No	154 (23%)	None	0.00 of 0.00		
What objections were given?		Auto-Fail	Value	Grade:	N/A
Price	401 (61%)	None	0.00 of 0.00		
Delivery time	20 (3%)	None	0.00 of 0.00		
Item not available	134 (20%)	None	0.00 of 0.00		
No objections given	105 (16%)	None	0.00 of 0.00		
How many rebuttals were used?		Auto-Fail	Value	Grade:	N/A
None	216 (33%)	None	0.00 of 0.00		
1	20 (3%)	None	0.00 of 0.00		
2	424 (64%)	None	0.00 of 0.00		
Notes / Tips		Auto-Fail	Value	Grade:	N/A
	660 (100%)	None	N/A		
Section: Documentation				**Grade:**	**80%**
Were notes concise and professional?		Auto-Fail	Value	Grade:	67.7%
Excellent	215 (33%)	None	10.00 of 10.00		
Very Good	23 (3%)	None	7.00 of 10.00		
Good	399 (60%)	None	5.00 of 10.00		
Fair	23 (3%)	None	3.00 of 10.00		
Was proper closing code used?		Auto-Fail	Value	Grade:	87.6%
Yes	578 (88%)	None	15.00 of 15.00		
No	82 (12%)	Section	0.00 of 15.00		

QA Summary by Section

This report displays the QA performance on a form's sections over a period of time. This report can be drilled down into for additional details.
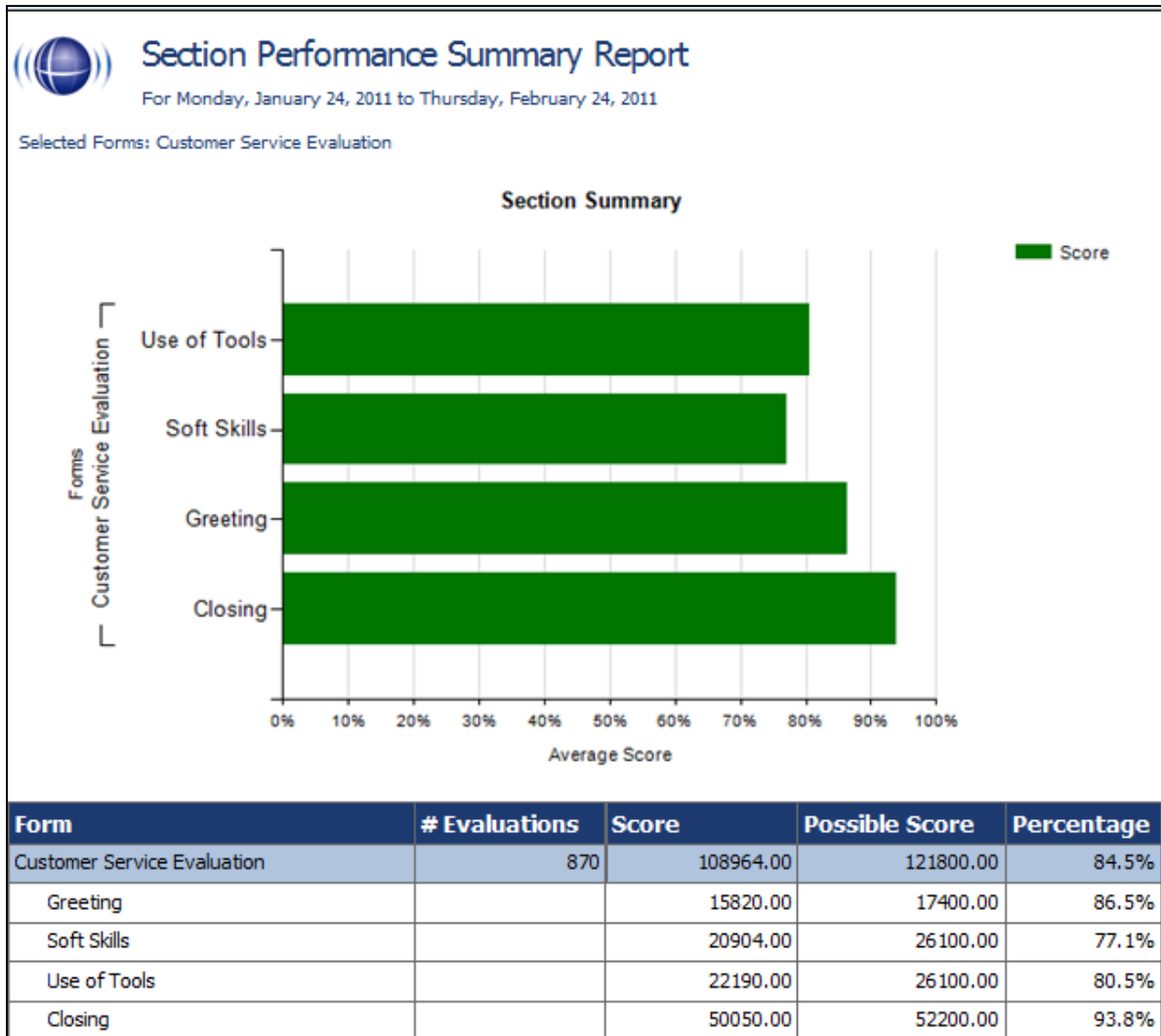
Quality Assurance Detail

This report shows the individual responses to each question in a completed QA evaluation, based on the Call ID. The specific call that was graded for the evaluation can be played back by clicking on the Call ID hyperlink.

Quality Assurance Detail				Back	Generate Report

Start Date	2/23/2011	End Date 2/24/2011	Date Type Call Date
Agent	All	Evaluator All	Form All
Active	Active	Group All	Question Any
Response	Any		

Quality Assurance Detail

Agent: ALVAREZ, VERONICA

Form Name	Call ID	Evaluated By	Complete Date
Sales Evaluation	1103	Administrator	2/23/2011

Section Name: Greeting

Question	Evaluation	Score
Did Agent use branded greeting?	Yes	10.00 of 10.00 (100.0%)
Did the Agent state his/her name?	Yes	10.00 of 10.00 (100.0%)
Did the agent verify the promo code?	Yes	20.00 of 20.00 (100.0%)
	Subtotal:	40.00 of 40.00 (100%)

Section Name: Sales Skills

Question	Evaluation	Score
Was sale closed?	Yes	10.00 of 10.00 (100.0%)
What objections were given?	Price	N/A
How many rebuttals were used?	2	N/A
Notes / Tips	Not bad, but we will need to work on your documentation.	N/A
	Subtotal:	10.00 of 10.00 (100%)

Section Name: Documentation

Question	Evaluation	Score
Was proper closing code used?	Yes	15.00 of 15.00 (100.0%)
Were notes concise and professional?	Good	5.00 of 10.00 (50.0%)
	Subtotal:	20.00 of 25.00 (80%)
	Total:	70.00 of 75.00 (93%)

Weighted QA Group Periodical Trending Report

This report displays a group by group comparison of quality results of a form, at a section level, based on a selected period of time. The data is compared daily, weekly, monthly, or yearly based on your selection.
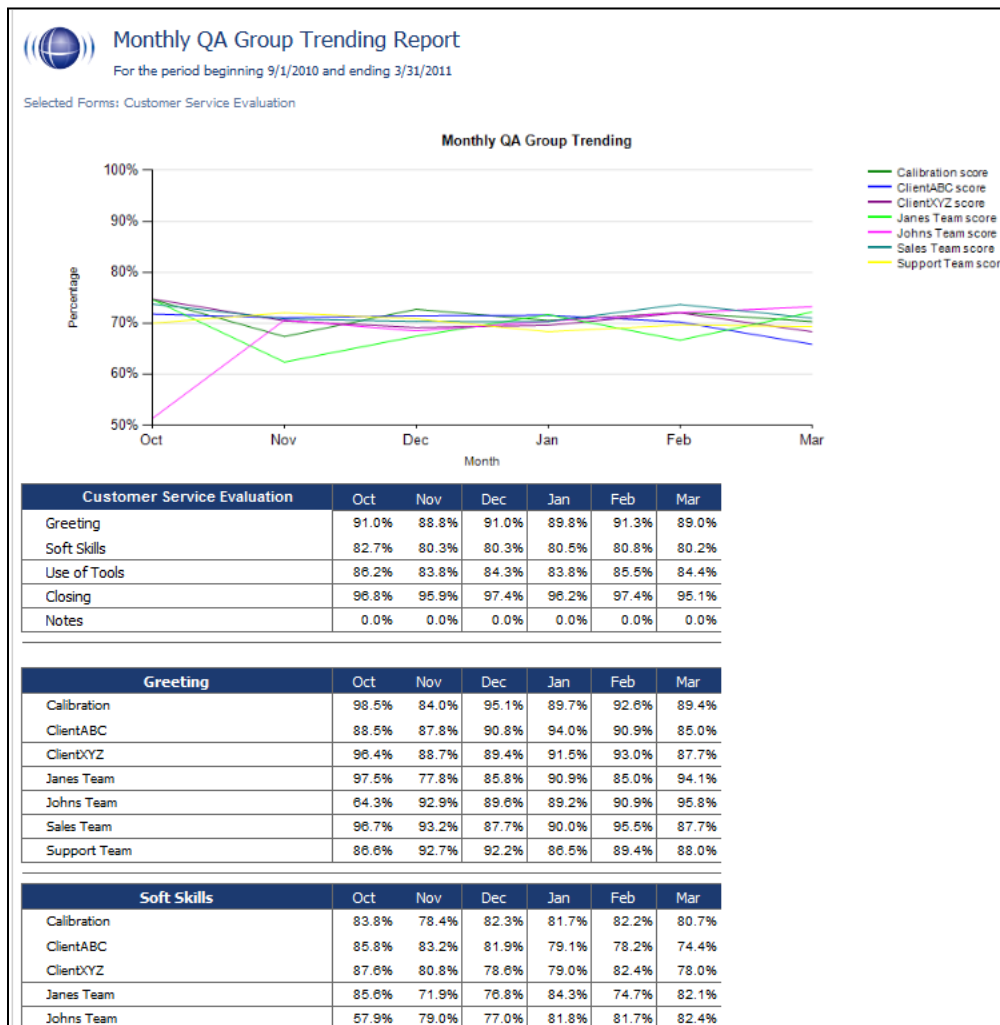

Customer Service Evaluation	Oct	Nov	Dec	Jan	Feb	Mar
Greeting	91.0%	88.8%	91.0%	89.8%	91.3%	89.0%
Soft Skills	82.7%	80.3%	80.3%	80.5%	80.8%	80.2%
Use of Tools	86.2%	83.8%	84.3%	83.8%	85.5%	84.4%
Closing	96.8%	95.9%	97.4%	96.2%	97.4%	95.1%
Notes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Greeting	Oct	Nov	Dec	Jan	Feb	Mar
Calibration	98.5%	84.0%	95.1%	89.7%	92.6%	89.4%
ClientABC	88.5%	87.8%	90.8%	94.0%	90.9%	85.0%
ClientXYZ	96.4%	88.7%	89.4%	91.5%	93.0%	87.7%
Janes Team	97.5%	77.8%	85.8%	90.9%	85.0%	94.1%
Johns Team	64.3%	92.9%	89.6%	89.2%	90.9%	95.8%
Sales Team	96.7%	93.2%	87.7%	90.0%	95.5%	87.7%
Support Team	86.6%	92.7%	92.2%	86.5%	89.4%	88.0%

Soft Skills	Oct	Nov	Dec	Jan	Feb	Mar
Calibration	83.8%	78.4%	82.3%	81.7%	82.2%	80.7%
ClientABC	85.8%	83.2%	81.9%	79.1%	78.2%	74.4%
ClientXYZ	87.6%	80.8%	78.6%	79.0%	82.4%	78.0%
Janes Team	85.6%	71.9%	76.8%	84.3%	74.7%	82.1%
Johns Team	57.9%	79.0%	77.0%	81.8%	81.7%	82.4%

System Reports

Overview of System Reporting

The Printable Reports' System Reporting section provide historical data that relates to the usage of the cc: Discover software and the status of the system and software.

The **System Reports** menu provides non-printable reports, which have data that is not suited for printing or exporting. These reports are usually interactive or providing real-time updates to the user.
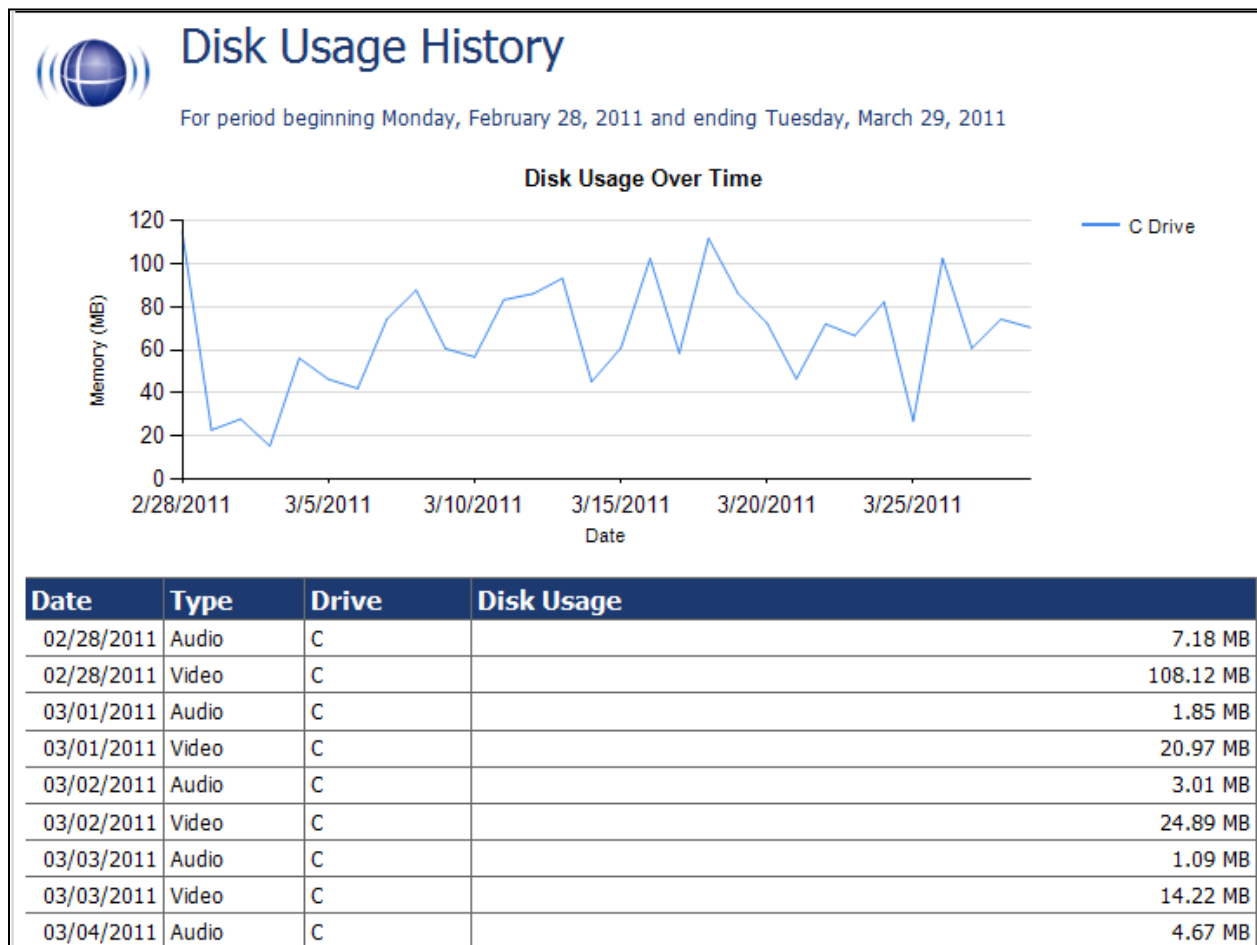
Disk History

The Disk Usage History Report Displays the historical disk usage in MB for recording data over a range of days defined by the user. The results are displayed in both line chart and list format. Multiple drives are distinguished by lines.

Date	Type	Drive	Disk Usage
02/28/2011	Audio	C	7.18 MB
02/28/2011	Video	C	108.12 MB
03/01/2011	Audio	C	1.85 MB
03/01/2011	Video	C	20.97 MB
03/02/2011	Audio	C	3.01 MB
03/02/2011	Video	C	24.89 MB
03/03/2011	Audio	C	1.09 MB
03/03/2011	Video	C	14.22 MB
03/04/2011	Audio	C	4.67 MB

System Activity Summary

The System Activity Summary Report displays what actions a specified user performed in the CallCopy system during a given date range. The report is separated with a different section for each date in the range selected that has activity. Actions such as login/logout, call playback, call deletes, and QA functions are all tracked with this report.

System Activity Summary

For period begining Monday, February 13, 2012 and ending Tuesday, March 13, 2012

Date	User	Count	Event
02/13/2012			No activity on this date.
02/14/2012			No activity on this date.
02/15/2012		3	Invalid Page Access Attempt
02/15/2012		1	System Start
02/15/2012	Administrator Administrator	5	Live Monitor Observed
02/15/2012	Administrator Administrator	8	Login
02/15/2012	Administrator Administrator	4	Logout
02/15/2012	Administrator Administrator	1	Schedule Created
02/16/2012		1	System Start
02/17/2012		2	Invalid Page Access Attempt
02/17/2012		1	System Start
02/17/2012	Administrator Administrator	2	Login
02/17/2012	Administrator Administrator	2	Logout
02/18/2012			No activity on this date.
02/19/2012			No activity on this date.
02/20/2012		1	Failed Login Attempt
02/20/2012		43	Invalid Page Access Attempt
02/20/2012		4	System Start
02/20/2012	Administrator Administrator	2	Edit QA Score
02/20/2012	Administrator Administrator	1	Group Created
02/20/2012	Administrator Administrator	18	Login

System Usage

The System Usage report displays the total time a user was logged into the system based on the time range given in the report options.

Framer Statistics

This report is only for analog and digital installs, not VoIP (e.g. deployments using AI-Logix voice boards). The report shows voltage level on each channel and line-side errors, which can indicate problems connecting with the phone. Those problems can affect or prevent call recording.

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 list shows the device extension number, the IP address of the device, 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 auto-updates the list every 5 seconds and can also be exported into a CSV file by clicking the Export button at the top-right of the report. Confidence indicates the Discover's certainty that the Voice Port is actually assigned to the IP address. Confidence can be

- 1 No
- 2 Best Guess
- 3 Parsed – Somewhat confident. A Discover script has detected the port value based on agent's entry of digits when logging into the phone.
- 4 Phone Registered – Very confident. The telephony system has provided the Port/Address combination to Discover.
- Static Entry – The Port/Address has been entered on the Discover Administration tab's IP Phone list.

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

License Info

The License Information report shows in real time if the system is currently licensed for recording. It displays the License ID number, the date the license was issued, the expiration date, and the number of channels the system is licensed for.

This report shows licenses for the Web Portal server. It does not check licenses on recording cores on multiple servers.

License Information

System License Available :	Yes
License ID :	1
Created On :	08/10/2009
Licensed To :	Devel01
	CallCopy
License Type :	Production
Expires On :	Never
Licensed Audio Ports :	500
Licensed Screen Capture Ports :	500
Licensed Desktop Only Ports :	500
Maximum Concurrent Recordings :	-1

System Status

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

System Status

This page automatically refreshes every 5 seconds. Last Refresh Time: 3/13/2012 3:48:06 PM

System Information
Uptime: 0 days, 12 hours, 12 minutes, 21 seconds.

Memory: 2252MB / 4095 MB
Recording Disk Space: .00GB / .00 GB

Logged In Users

No Users Logged In.

Channel Summary

Idle	Recording	Total Channels
0	1	12

Channel Status

Channel	State	Last State Change	Agent Name	Recording Device	Recording Device Alias	Playback Extension
0	PreparingToRecord	12/14/2011 6:16:35 PM		chatsession_6		
1	Ready	3/13/2012 3:48:04 PM				
2	Ready	3/13/2012 2:58:34 PM				
3	Ready	3/13/2012 3:27:35 PM				
4	Ready	3/13/2012 3:47:37 PM				
5	Ready	3/13/2012 3:47:48 PM				
34	Ready	9/8/2011 7:02:44 PM				
35	Ready	9/8/2011 7:04:51 PM				
36	Recording	9/8/2011 7:05:32 PM	7001			
37	OutOfService	9/8/2011 6:24:22 PM				
38	OutOfService	9/8/2011 6:24:22 PM				
39	OutOfService	9/8/2011 6:24:22 PM				

Agent Status

Status	Last State Change	Computer	Username	IP Address	Port	Version
AVAILABLE	Mar 13 2012 9:56AM	MINGALE-PC	mingale	10.100.5.131	0	5.0.2299.0

Transcoder Status

The Transcoder Status report gives a near real-time display of what audio files are being processed by the Transcoder module. The list displays the last 10 Completed and Failed records, and will display any records that are in progress at the time the report is run. This is useful in verifying the proper operation of the Transcoder. The Source files are the raw audio files, and the Destination lists the files that have been successfully transcoded.

Transcoder Status

This page automatically refreshes every 5 seconds. Last Refresh Time: 6/11/2010 11:29:00 AM

Completed Records

Identity	Source	Destination	Queued Time	Last Update Time
102866	E:\Recordings\20100611\7536\7536-11-19-24.cca	E:\Recordings\20100611\7536\7536-11-19-24.wav	6/11/2010 11:20:36 AM	6/11/2010 11:20:38 AM
102864	E:\Recordings\20100611\7536\7536-11-09-12.cca	E:\Recordings\20100611\7536\7536-11-09-12.wav	6/11/2010 11:17:06 AM	6/11/2010 11:17:13 AM
102861	E:\Recordings\20100611\7504\7504-11-08-23.cca	E:\Recordings\20100611\7504\7504-11-08-23.wav	6/11/2010 11:12:18 AM	6/11/2010 11:12:20 AM
102860	E:\Recordings\20100611\5707\5707-11-11-05.cca	E:\Recordings\20100611\5707\5707-11-11-05.wav	6/11/2010 11:12:12 AM	6/11/2010 11:12:13 AM
102859	E:\Recordings\20100611\7517\7517-11-11-21.cca	E:\Recordings\20100611\7517\7517-11-11-21.wav	6/11/2010 11:11:56 AM	6/11/2010 11:11:56 AM
102858	E:\Recordings\20100611\7517\7517-11-07-13.cca	E:\Recordings\20100611\7517\7517-11-07-13.wav	6/11/2010 11:07:50 AM	6/11/2010 11:07:50 AM
102857	E:\Recordings\20100611\7502\7502-11-06-40.cca	E:\Recordings\20100611\7502\7502-11-06-40.wav	6/11/2010 11:07:42 AM	6/11/2010 11:07:43 AM
102856	E:\Recordings\20100611\5980\5980-11-07-08.cca	E:\Recordings\20100611\5980\5980-11-07-08.wav	6/11/2010 11:07:40 AM	6/11/2010 11:07:41 AM
102855	E:\Recordings\20100611\7517\7517-11-05-50.cca	E:\Recordings\20100611\7517\7517-11-05-50.wav	6/11/2010 11:07:04 AM	6/11/2010 11:07:05 AM
102854	E:\Recordings\20100611\7513\7513-10-49-39.cca	E:\Recordings\20100611\7513\7513-10-49-39.wav	6/11/2010 11:06:35 AM	6/11/2010 11:06:53 AM

In Progress Records

Failed Records

Audit Report

The Audit Report displays the log of specific actions taken by each user in the system. Use the Function Type list to search for specific actions performed by a user, such as Login, Logout, or Change Password. The system generates messages when certain actions are performed for a date range.

Some of the search fields are:

- Log Type – This menu shows all the event types that are logged. Examples include User Changed and Changed Password.
- Component or Page – cc: Discover system component or HTML page involved in the event. For example, if the user is on the Login page, the event would be a login. AuditLog returns activity on the audit page and audit log.
- IP Address – Address of the user whose action caused the event.
- ID of Related Object – Call records and audio recordings are objects with ID numbers. Some events, such as login attempts, will not have an object.
- Message Text 1/2/3 – This feature should be used only for advanced audit investigations. It is most effective for filtering. Audit messages consist of one to three parts. Each part contains different text. After a list of events is retrieved, review the messages to find which events are useful and pick the key words and enter them in the Message Text fields. Determining which words appear in which field involves some trial and error

Report Tools

Overview of Reporting Tools

The Reporting Tools make your reporting functions more effective and efficient, and to make reporting as easy as possible.

Report Subscriptions

Report subscriptions allow you to set a specific report to run at a scheduled time, and provide the results to multiple users via e-mail.

To access Report Subscriptions, click the **Reporting** tab in the Web Portal, and click on the **Report Tools** menu. The link to Report Subscriptions will be listed on the menu.

Manage Subscriptions

When you load the Report Subscriptions page, you will be presented with a list of any subscriptions you have already configured.

Report Subscriptions						New Advanced	New
Subscription	**Report**	**Status**	**Owner**	**Last Run**	**Date Created**		
agents	Agent Ranking By Period	New Subscription	Administrator	01/01/0001	06/09/2010		
agents	Assigned Agents Report	New Subscription	Administrator	01/01/0001	06/09/2010		
agents	Assigned Agents Report	New Subscription	Administrator	01/01/0001	06/09/2010		
calls	Call Recording Detail	New Subscription	Administrator	01/01/0001	06/09/2010		

Clicking on any of the subscriptions listed will display the subscription settings for editing. To delete an existing subscription, you can click the **Delete** icon from this list.

Create New Subscriptions

The procedure for creating new subscriptions depends on whether an environment uses the Enterprise edition of Microsoft SQL Server or another edition. SQL Enterprise-edition users create new subscriptions using the New Advanced button. Other versions of SQL use the New button. Only one button, New OR New Advanced, can be used, not both. If you use the wrong button, Discover will show an error message that the subscription was not saved. In this case, use the other button to create the subscription.

1. Click the **New** button at the top-right of the page. The new subscription page will load, displaying sections of settings that need to be entered to create the Subscription.
2. Choose a report from the **Select a Report** field. Any Printable Report currently installed on the system is available to use for a subscription.
3. The **Description** field is a custom title for your subscription. Enter a description in the field.

4. Enter the e-mail addresses the report will be sent to in the **To:**, **CC:**, or **BCC:** fields. (SQL Enterprise Edition users click New Recipient and select a cc: Discover user from the drop-down menu.)
5. The **Reply-To** field will be the e-mail address that any replies to the subscription e-mail will be sent.
6. By default, the **Subject** field will display the Report name and the time the report was generated. A custom subject can be entered by the creator into this field.
7. The **Include Report** option will generate a file containing the report results and attach it to the subscription e-mail.
8. The **Include Link** option adds a link to the report file. This option is useful if the report is distributed to a large number of users, which would consume network traffic. The report file is located on the SQL Report Server; thus, all report recipients must be assigned user accounts on the server. (Do not select this option without first discussing it with your system administrator and the CallCopy Install engineer.)
9. Using the **Render Format** option, you can select the type of file that will be attached. Currently, the following file types are supported:

   - Acrobat (PDF) File
   - Excel (XLS) File

- CSV
- Image (TIFF) File
- MS Word (DOC) File
- Data (XML) File

10. You can set the **Priority** field in order to flag the subscription e-mail at a higher or lower priority for the recipients.
11. A custom message can also be included with each subscription e-mail by using the **Comment** field.

12. Reports can be scheduled to be run

- Daily – If the report should run every other day regardless of the day of the week, enter 2 in the Repeat after this number of days field.
- Weekly – Select the day(s) the report should run.
- Monthly – Select the months, week of the month, and day(s). You can also select the **On Calendar day(s):** option and enter specific dates *(in mm/dd/yyyy format)* for the report to be generated.

13. For any schedule option that is selected, you must select the time of day the report will generate with the **Start Time** fields.

> **Note** It is recommended to select Report Subscription start times outside of peak usage hours for the CallCopy system to minimize impact on performance for other CallCopy functions.

14. Report Parameters are the data options that will be used to run the selected report. The options in this section will vary depending on the **Report Type** selected in the Subscription Details section of the page. These options will be the same as the options for the report when viewed through the **Printable Reports** menu.

15. Click the **Save** button at the top of the page to save your Report Subscription. You will be taken back to the Report Subscription list, where the newly created report will be displayed as the first item on the list.

Report Library

The Report Library is available under the **Report Tools** menu on the Reporting tab. This page will list any saved report criteria you have created for printable reports.

Select a saved report criteria from the list to run the report.

Delete the saved search by clicking the **Delete** icon.

Report Library		
Private Listing		
Report	**Date Created**	**Owner**
Sales Agent Incoming Call Summary Report	6/23/2011 12:13:19 PM	superuser
Sales Agent Outgoing Call Summary Report	6/23/2011 12:14:03 PM	superuser
Sales Agents Ranking Report	6/23/2011 3:17:45 PM	superuser
Public Listing		
Report	**Date Created**	**Owner**
Calibration Group QA Summary	6/24/2011 1:56:51 PM	superuser

About CallCopy

CallCopy, a leading provider of innovative call recording and contact center solutions, is dedicated to ensuring the highest standards of customer and employee satisfaction. The award-winning, enterprise-proven cc: Discover suite delivers advanced call recording, screen capture, quality management, speech analytics, performance management, customer survey and workforce management capabilities to organizations of all sizes and industries across the globe.

CallCopy empowers these organizations to gather business intelligence, which is leveraged to maximize operational performance, reduce liability, achieve regulatory compliance and increase customer satisfaction.

For more information, visit www.callcopy.com.