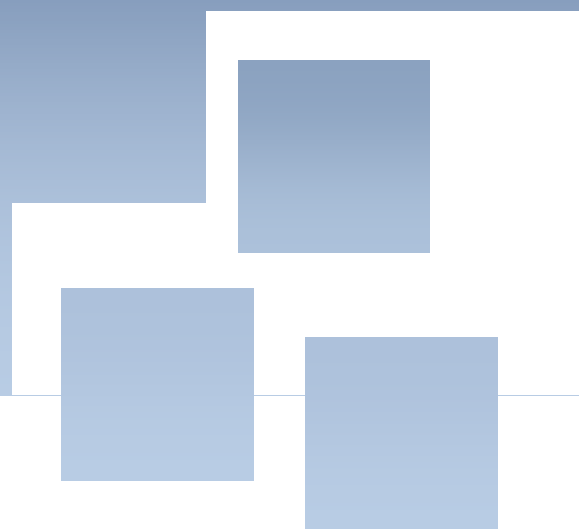




CallCopy®

Innovations in Call Recording
and Contact Center Solutions



cc: Discover Reporting Guide, Version 4.5

June 2011

Security Classification: CallCopy Confidential

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Note: Applicable non-disclosure agreements must be in force for authorization.

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Introduction

In this chapter we will cover:

- ✓ Reporting overview

Overview

The cc: Discover Reporting module 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.

Web Portal Basics

In this chapter we will cover:

- ✓ Requirements to run the cc :Discover Suite
- ✓ Logging in and out of the systems, log in errors, and password recovery
- ✓ Version number
- ✓ Basic Web Portal navigation

Requirements

The cc: Discover suite includes a Web Portal and a Web Player. The Web Portal has a light-weight administrative system. The Web Player component does have minimum system requirements due to the processing required for full audio and video playback. With those tasks in mind, CallCopy recommends exceeding the minimum system requirements listed below:

- Microsoft Windows XP/2003/Vista/2008/7
- Internet Explorer 7; Firefox 3.0
- Microsoft Silverlight browser plug-in, v4.0 or higher
- 2.0Ghz Processor
- 1GB RAM
- 1280 x 800 screen resolution at 16 bit color depth

Logging In

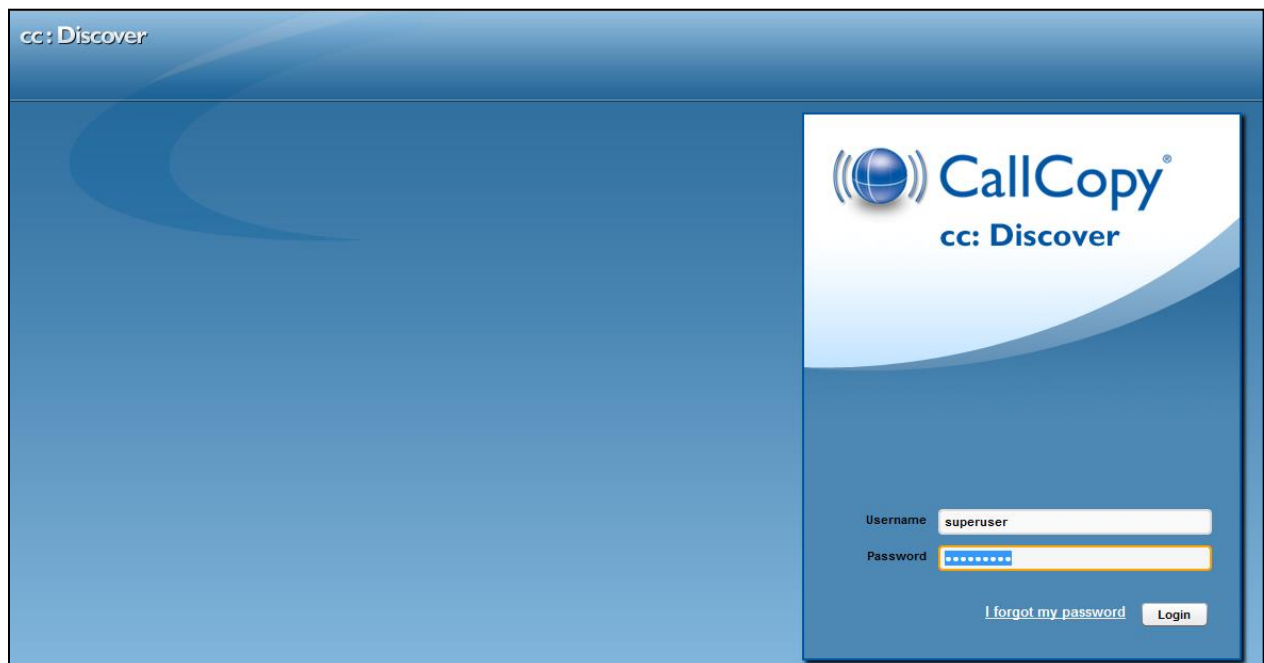
The CallCopy Installation team will provide you with a user account with system administrator level privileges during installation and Administrator training. Your User account will consist of a Username and Password.

It is recommended you change your password from the default provided as soon as possible.

Additionally, a hostname or IP address for the server will be established so that you may access the web-based administration interface.



Type in the hostname or IP address for your server into your browser's address bar (http://callcopyserver.yourcompany in the example above). You will be presented with a login page similar to the one displayed below.



Login Screen Fields

Login Mode: There are two authentication modes available.

Database mode utilizes cc: Discover's internal user database that has been populated from manually entered user accounts.

Active Directory Mode is available only if the Active Directory Sync module is enabled and configured in the cc: Discover software. This mode uses Kerberos authentication to validate an Active Directory user is logged in and a member of the proper AD groups to access cc: Discover. With this mode, entering a username and password is not necessary as the user is already logged into the computer with their domain credentials.

Username: Enter your cc: Discover username

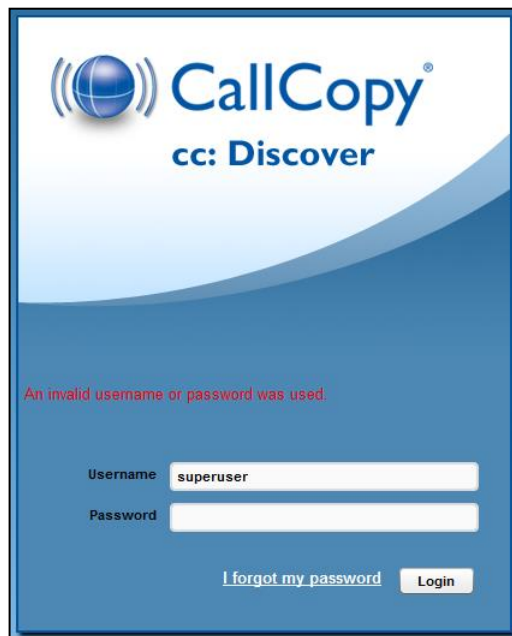
Password: Enter your cc: Discover password

Fill in the listed field and click the '**Login**' button to continue.

Login Errors

If your login fails you will be presented with the following error:

"Username or password is incorrect."



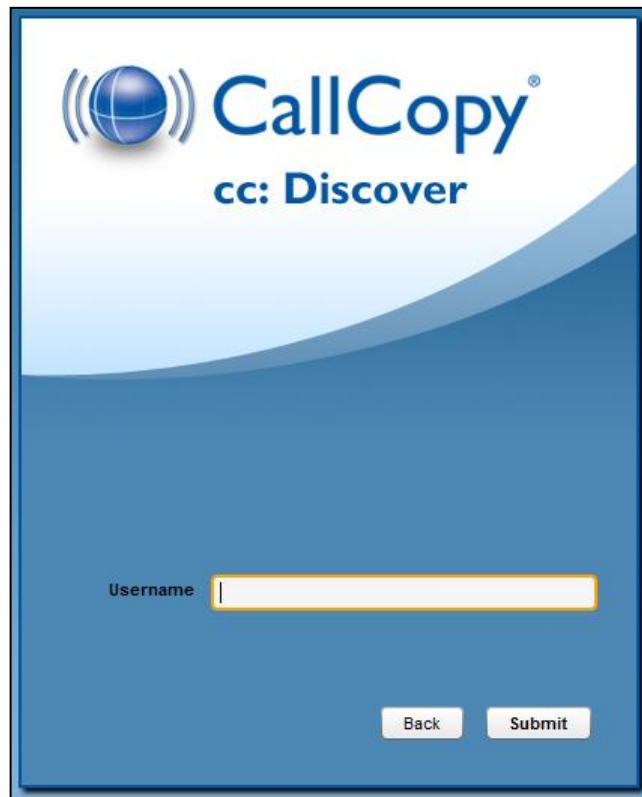
Note: Passwords are case sensitive. If you are unable to login using the username and password you believe to be correct, please contact your CallCopy Support provider.

“Forgot Password” Reset

If you are unsure of or have forgotten your password, you can use the “Forgot Password” function on the login page. Your password will be reset and a temporary password will be e-mailed to you if you use this option.

To use the feature, first click the **‘Forgot Password’** link on the login screen.

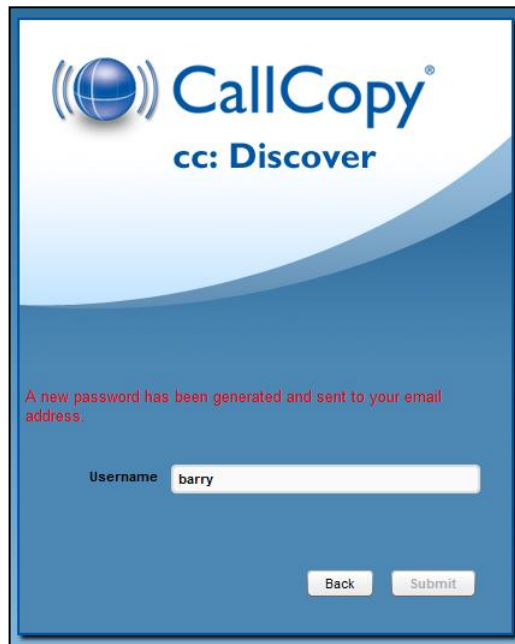
You will be taken to a page asking for the username that you wish to reset the password for. Enter the username and click **‘Submit’**.



The screenshot shows a web form for password reset. At the top left is the CallCopy logo, which consists of a blue globe with signal waves. To the right of the logo, the text "CallCopy" is displayed in a large blue font, with "cc: Discover" in a smaller blue font below it. The background of the page is a gradient of blue, transitioning from light at the top to dark at the bottom. In the lower-left area, there is a label "Username" followed by a white text input field with a yellow border. At the bottom right, there are two buttons: "Back" and "Submit", both with a light blue background and dark blue text.

Web Portal Basics

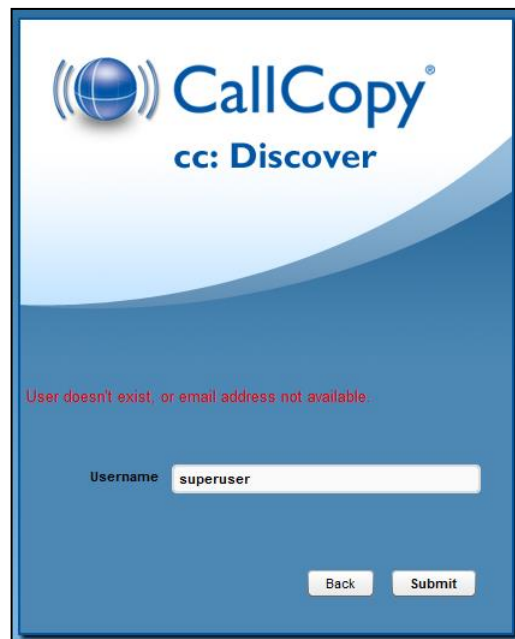
If successful, you will see the following message:



The screenshot shows the CallCopy cc: Discover login interface. At the top left is the CallCopy logo, a blue globe with signal waves, followed by the text "CallCopy" and "cc: Discover" below it. The background is a gradient of blue. A red message reads: "A new password has been generated and sent to your email address." Below this is a "Username" label and a text input field containing the text "barry". At the bottom right are two buttons: "Back" and "Submit".

A randomly generated password will be sent to the email address associated with your username. Once you have logged into the system you will be able to change your password.

If there was an issue locating your username, or if your user account does not have an e-mail address associated with it, you will see the following message. Please contact your CallCopy System Administrator to resolve this issue.



The screenshot shows the CallCopy cc: Discover login interface. At the top left is the CallCopy logo, a blue globe with signal waves, followed by the text "CallCopy" and "cc: Discover" below it. The background is a gradient of blue. A red message reads: "User doesn't exist, or email address not available." Below this is a "Username" label and a text input field containing the text "superuser". At the bottom right are two buttons: "Back" and "Submit".

Locating Version Number

The version number for your cc: Discover software is displayed in the upper-right corner of the login page. This version number can be useful for locating correct documentation for your software and when obtaining support for your system.



Navigating the Web Portal

Web Portal navigation is achieved by functional tabs and menus. The tabs available depend on the user's security permissions and the cc: Discover modules purchased. The navigation menu for a functional tab is on the left side of the page.

On the navigation menu, pages are organized under menu headers. Clicking a menu header will display the list of page links, menu items, or other content. When you click on a header to display its content, any other open sections of the menu will collapse. You can expand that section again by clicking on its header.

cc: Discover

Home Web Player Coaching Reporting Administration Logged in as su

Call List Live Monitor

Calendar

March, 2011

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Agent

CallCopy group

Queue

Group

Categories

Filter Current Filter: **Time Recorded** X

	First Name	Last Name	Extension	Time Recorded	Duration	Score	CallerID ANI	Call Direction
▶	BOBBY	KIM	1151	3/28/2011 9:27:38 PM	00:04:15	-		O
▶	ROSALIND	MOODY	1174	3/28/2011 8:17:26 PM	00:07:44	-	2123845296	I
▶	FERN	MORSE	1419	3/28/2011 5:41:05 PM	00:06:12	95.7 %		O
▶	WALTER	JUAREZ	1357	3/28/2011 5:34:56 PM	00:08:11	-		O
▶	PERRY	FARMER	1053	3/28/2011 2:33:45 PM	00:04:15	-		O
▶	JOANN	ABBOTT	1034	3/28/2011 11:08:33 AM	00:03:57	-		O
▶	MABEL	BOYER	1051	3/28/2011 10:42:54 AM	00:08:11	-	2127917495	I
▶	KATELYN	MCCLURE	1320	3/28/2011 9:45:52 AM	00:07:44	97.1 %		O
▶	CORA	LOTT	1427	3/28/2011 9:37:02 AM	00:08:11	97.7 %	2127993476	I
▶	MABEL	BOYER	1315	3/28/2011 4:50:13 AM	00:07:44	-	6145536393	I
▶	NELDA	CONRAD	1289	3/28/2011 4:06:13 AM	00:08:11	87.1 %		O
▶	NELDA	CONRAD	1254	3/28/2011 1:46:25 AM	00:04:15	-		O
▶	KATELYN	MCCLURE	1043	3/28/2011 12:52:25 AM	00:08:11	-	2122934868	I

Logging Out

Once you have completed your session, it is very important to log out, for security purposes. To logout, simply click the **'Logout'** link located at the top-right of every page. Once you have successfully logged out, you will be returned to the login window.



Changing Your Password

Clicking on the 'Change Password' link in the upper right-hand corner of every page will direct you to a page that prompts you to enter a new password, and then confirm the password you have just entered. After you have entered your new password, click the Save button to save the new password.



Change Password	
New Password :	<input type="text"/>
Confirm New Password :	<input type="text"/>

Reporting Basics

In this chapter we will cover:

- ✓ Quick Links Page
- ✓ Reporting Tab Navigation
- ✓ Printable-Report Functions
- ✓ Common Report Criteria

Quick Links Page

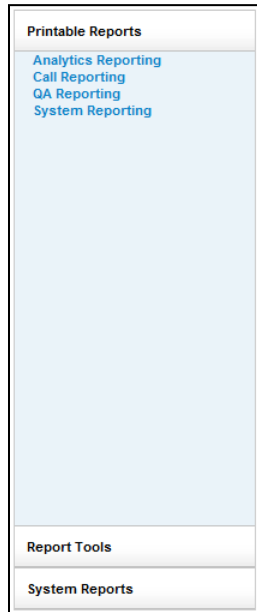
Upon clicking the Reporting tab in the upper left-hand corner of the cc: Discover web portal, you will access the page seen below. Individual printable reports can be accessed from this page by clicking on the name of the report (shown in blue underlined font).

These reports are also available from the menus on the left side of the Reporting tab. The Quick Links page just shows them can be organized by a filter such as Group.

The screenshot displays the 'Quick Links' page within the Reporting tab. On the left, a sidebar lists report categories: 'Printable Reports' (with sub-links for Call, QA, System, and Survey Reporting), 'Report Tools', and 'System Reports'. The main content area is titled 'Quick Links' and is organized into four sections based on report type:

- Printable Reports > Agent Reporting:** Filtered by 'By Agent', 'By Group', and 'By Call Type'. Reports include Agent Call Summary, Assigned Agents Report, Group Membership Report, Agent Call Summary, Analytics Speech Tag Detail, Call Recording Detail, and Duplicate ANI Report.
- Printable Reports > Quality Assurance:** Filtered by 'By Agent', 'By Group', and 'By Form'. Reports include Agent QA Summary, Agent Ranking By Period, Agents Needing Evaluation Detail, Agents Needing Evaluation Summary, Critical Question Summary, Critical Question Summary, Group QA Summary, Group Summary By Month, Group Summary By Period, QA Agent Periodical Trending Report, Agents Needing Evaluation Detail, Blank QA Form, Call Evaluation Detail, Completed QA Form, and Critical Question Detail.
- Printable Reports > Survey Reporting:** Reports include Survey Detail, Survey Overview, and Survey Summary.
- Printable Reports > System Reporting:** Reports include Disk History, System Activity Summary, and System Usage.

Reporting Tab Navigation



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

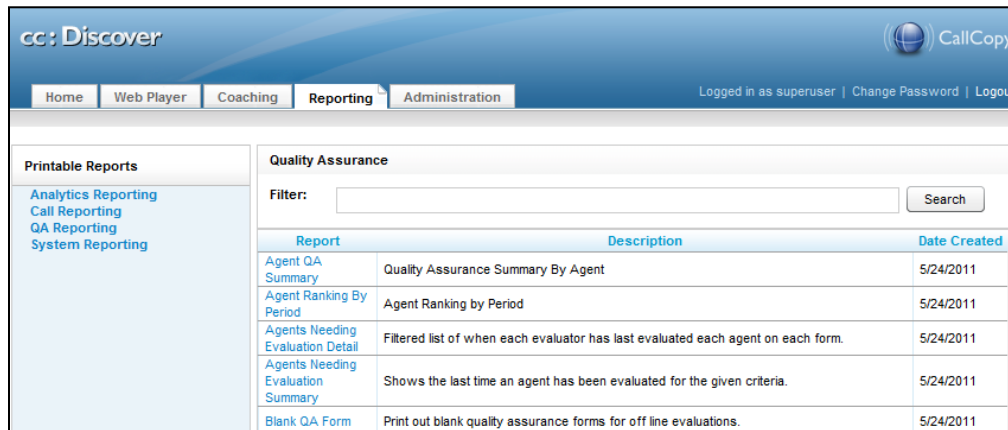
The Printable Reports menu has these links:

- 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.

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 possible reports. 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 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 reports relating to agent performance.

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.

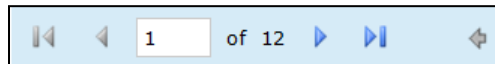
Enter a name for the report in the Search Name field. Select the Public box only if you want others to be able to view your saved report. Then click Save Search.

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.



Reporting Basics

Navigate Report Pages

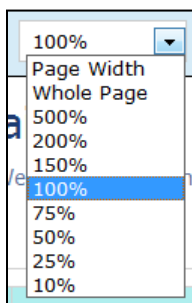
Use the navigation menu to move back and forth across appropriate report pages. The single arrow to the right takes you forward one page and the single arrow to the left takes you back one page. The double arrow to the right takes you to the last page of your report and the double arrow to the left takes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

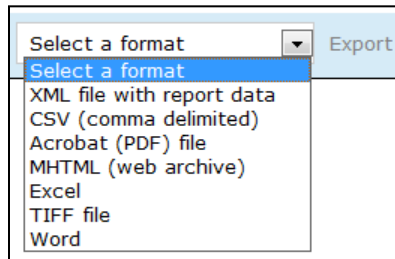
Search



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

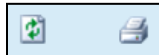
subsequent matches.

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 that your reporting data will be pulled from. 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 that your reporting data will be pulled from. 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.

Reporting Basics

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

In this chapter we will cover:

- ✓ Overview of Call Reporting
- ✓ Running the Call Reports

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.

Running the Call Reports

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:	<input type="text"/>	<input type="button" value="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
Pages :	<input type="text" value="1"/>	Go To Page : <input type="text" value="1"/> of 1 <input type="button" value="Go"/>

Agent Call Summary

Description


The Agent Call Summary displays call totals captured in the call recording system. The report displays the number of calls taken by an agent over a period of time, as well as Average Handle Time (AHT) information.

Agent Call Summary Back Generate Report

Start Date End Date Group

Call Direction

Results

 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

Description

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 ⌵

⌴

Results

 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 Reporting

Call Recording Detail

Description

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.

Call Recording Detail Back Generate Report

Start Date: End Date: Agents:
LAWANDA ANTHONY
JEFFERY AYALA
WHITNEY BARRETT

Record ID: Caller's Phone #: Dialed Phone #:

Gate: User 1: User 2:

User 3: User 4: User 5:

Results

Call Recording Detail									
For Monday, November 08, 2010 to Wednesday, December 08, 2010									
Record ID: 7410									
Agent: ZIMMERMAN, KARINA		ANI: 6145222965		DNIS: 8009876543		Call Direction: Inbound			
Time: 12/8/2010 1:07 AM		Duration: 7m 44s		Gate: Customer Care		Device: 4018		Channel: 5	
Account Number:		CSN:							
Salesforce Case: 00002137									
Public Bookmark:									
Record ID: 7287									
Agent: ZIMMERMAN, KARINA		ANI: 6142952127		DNIS: 8778274923		Call Direction: Inbound			
Time: 12/7/2010 9:23 PM		Duration: 6m 12s		Gate: Customer Care		Device: 4018		Channel: 46	
Account Number:		CSN:							
Salesforce Case: 00007246									
Public Bookmark:									

Duplicate ANI Report

Description

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.

Duplicate ANI Report Back Generate Report

Start Date: End Date: Call Direction:

ANI:

Results

Duplicate ANI Report	
For Saturday, April 23, 2011 to Friday, December 23, 2011	
Status: All	
ANI like: '1112223333'	
ANI	# Calls Observed
1112223333	3
Duplicate ANI Report - 6/23/2011 CallCopy Recorder Reporting Service Page 1 of 1	

Group Membership Report

Description

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

Group Membership Report Back Generate Report

Group Active

Results

		
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

In this chapter we will cover:

- ✓ Overview of QA Reporting
- ✓ Running the QA Reports

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.

Running the QA Reports

Quality Assurance		
Filter: <input type="text"/>		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

Pages : > >> Go To Page : of 2

Quality Assurance		
Filter: <input type="text"/>		Search
Report	Description	Date Created
QA Group Scorecard	QA Group Scorecard	3/1/2011
QA Group Trending Report	Trending reports allow you to read across the data to see changes over time. The QA group trending report breaks down scores by group and allows you to easy compare the performance of a group in different sections or on different questions.	3/1/2011
QA Pending Acknowledgement	Quality assurance evaluations that still require acknowledgement by the agent.	3/1/2011
QA Summary By Form	Quality Assurance Summary By Form	3/1/2011
QA Summary By Question	Quality Assurance Summary By Question	3/1/2011
QA Summary By Section	Quality Assurance Summary By Section	3/1/2011
Quality Assurance Detail	Quality Assurance Detail	3/1/2011
Weighted 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

Pages : << < Go To Page : of 2

Agent QA Summary

Description

This report displays the selected Group(s) or Agent(s) Quality Assurance (QA) performance on a selected form over a period of time. This report can be drilled-down into, to the Agent Performance Summary Report.

Agent QA Summary
Back
Generate Report

Start Date

Active

Groups
 Calibration
 ClientABC
 ClientXYZ

End Date

Forms
 Customer Service Evaluation
 Sales Evaluation

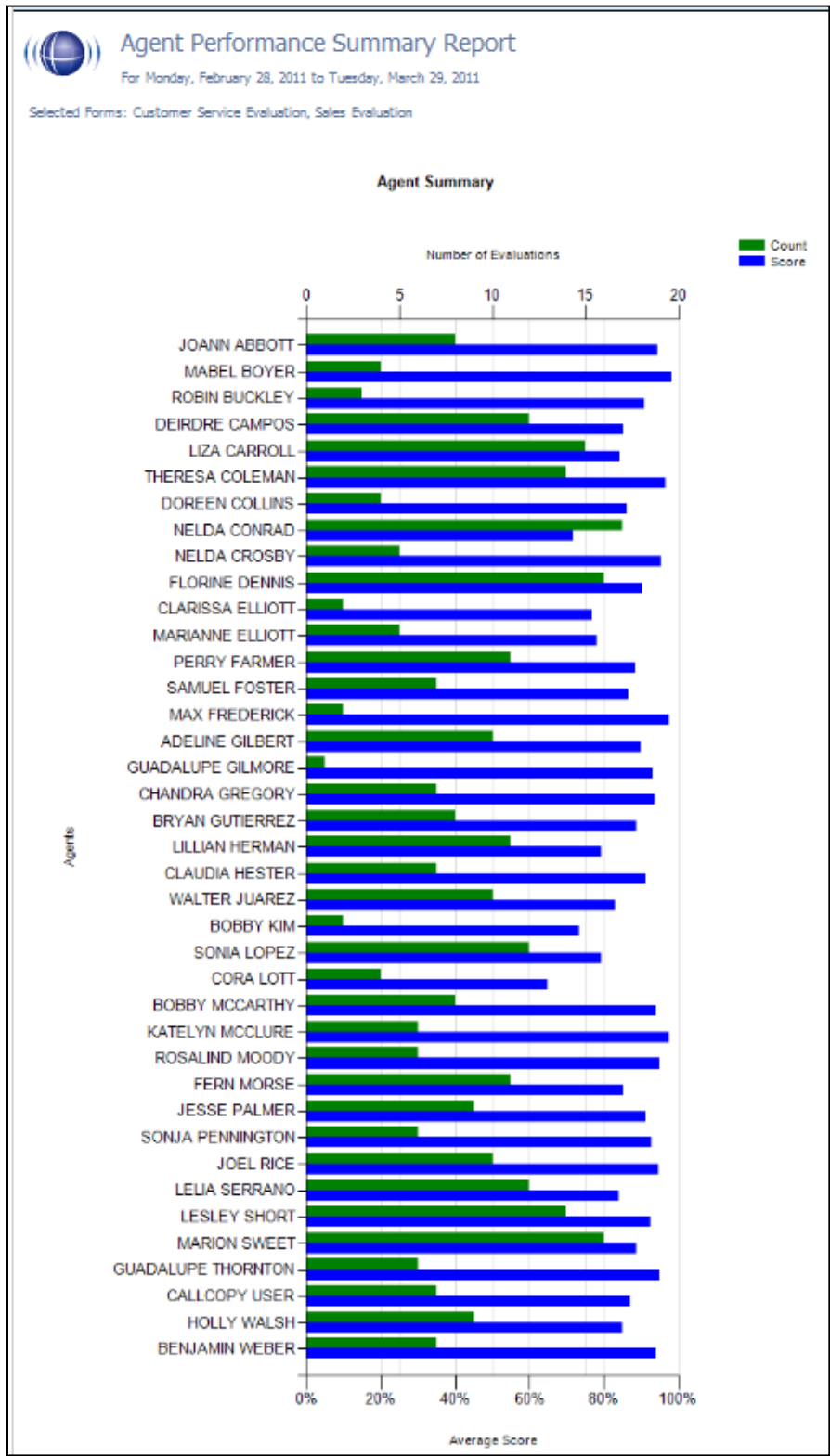
Users
 Administrator
 Barry Knack
 Bob Smith

Date Type

Agents
 VERONICA ALVAREZ
 URSULA AVERY
 TRACY BLACKBURN

Report Type

Results



Agent Ranking by Period

Description

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

Results

 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

Description

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.

Agents Needing Evaluation Detail
Back
Generate Report

Last Evaluated Before

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

Results

Agents Needing Evaluation Detail

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

Description


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

Agents Needing Evaluation Summary Back Generate Report

Last Evaluated Before: Status: Active 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

Results



Agents Needing Evaluation Summary

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


Description

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

Blank QA Form
Back
Generate Report

Form

Results



Sales Evaluation

Greeting	
Did Agent use branded greeting?	
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
Did the Agent state his/her name?	
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
Did the agent verify the promo code?	
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
<i>Agent should validate code against screen pop</i>	
Sales Skills	
Was sale closed?	
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
What objections were given?	
Price	<input type="checkbox"/>
Delivery time	<input type="checkbox"/>
Item not available	<input type="checkbox"/>
No objections given	<input type="checkbox"/>
How many rebuttals were used?	
None	<input type="checkbox"/>
1	<input type="checkbox"/>
2	<input type="checkbox"/>
Notes / Tips	

Call Evaluation Detail


Description

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.

Call Evaluation Detail
Back
Generate Report

Start Date	<input type="text" value="3/28/2011"/>	End Date	<input type="text" value="3/29/2011"/>	Date Type	<input type="text" value="Call Date"/>
Agent	<input type="text" value="All"/>	Evaluator	<input type="text" value="All"/>	Form	<input type="text" value="All"/>
Active	<input type="text" value="Active"/>	Group	<input type="text" value="All"/>	Question	<input type="text" value="Any"/>
Response	<input type="text" value="Any"/>	Caller's Phone #	<input type="text"/>	Dialed Phone #	<input type="text"/>
Gate	<input type="text"/>	User 1	<input type="text"/>	User 2	<input type="text"/>
User 3	<input type="text"/>	User 4	<input type="text"/>	User 5	<input type="text"/>
QA Record ID	<input type="text"/>				

Results

 Call Evaluation Detail									
For Monday, March 28, 2011 to Tuesday, March 29, 2011									
Agent: ABBOTT, JOANN									
Form Name			Call ID		Evaluated By		Complete Date		
Customer Service Evaluation			1792		Administrator		4/6/2011		
Group: #Error			ANI: 2129348361		DNIS: 8662758925		Call Direction: Inbound		
Time: 3/29/2011 3:32 PM		Duration: 00:06:12		Gate: Sales		Device:		4006 Channel: 10	
Account Number:		CSN:							
Salesforce Case: 00006035									
Public Bookmark:									
Section Name: Greeting									
Question		Evaluation		Score					
Did Agent state company name?		Yes		10.00 of 10.00 (100.0%)					
Did Agent state his/her name?		Yes		10.00 of 10.00 (100.0%)					
		Subtotal:		20.00 of 20.00 (100%)					
Section Name: Soft Skills									
Question		Evaluation		Score					
Did Agent use courtesy statements as appropriate?		Very Good		7.00 of 10.00 (70.0%)					
Did Agent demonstrate Active Listening?		Very Good		7.00 of 10.00 (70.0%)					
Did Agent use proper hold procedures?		Yes		10.00 of 10.00 (100.0%)					
Notes		Great improvement in your soft skills!		N/A					
		Subtotal:		24.00 of 30.00 (80%)					
Section Name: Use of Tools									
Question		Evaluation		Score					
Did Agent find record in CRM in timely manner?		Yes		10.00 of 10.00 (100.0%)					
Did agent navigate knowledgebase efficiently (if needed)?		Yes		10.00 of 10.00 (100.0%)					
Did Agent use correct closing code in CRM?		Yes		10.00 of 10.00 (100.0%)					
		Subtotal:		30.00 of 30.00 (100%)					
Section Name: Closing									
Question		Evaluation		Score					
Did Agent resolve call within support guidelines?		Yes		30.00 of 30.00 (100.0%)					
Did Agent probe for additional concerns?		Yes		10.00 of 10.00 (100.0%)					
Did Agent thank customer for calling?		Yes		5.00 of 5.00 (100.0%)					
Did Agent offer to transfer to customer sat survey?		Yes		15.00 of 15.00 (100.0%)					
		Subtotal:		60.00 of 60.00 (100%)					
Section Name: Notes									
Question		Evaluation		Score					
Reviewer Notes		We will use your call for systems training! Thanks for your hard work.		N/A					
		Subtotal:		N/A					
		Total:		134.00 of 140.00 (96%)					


Completed QA Form

Description

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.

Completed QA Form		Back	Generate Report
QA Record ID	<input type="text"/>		

Results

 Customer Service Evaluation			
Agent:	KIM, BOBBY	Date of Evaluation:	11/15/2010
Evaluator:	Bob Smith	Date of Recording:	11/10/2010
Call ID:	3370		
Greeting		Score: 20 of 20 (100.00%)	
Did Agent state company name?			
Yes	<input checked="" type="checkbox"/>	10pts	
No	<input type="checkbox"/>		
Did Agent state his/her name?			
Yes	<input checked="" type="checkbox"/>	10pts	
No	<input type="checkbox"/>		
Soft Skills		Score: 20 of 30 (66.67%)	
Did Agent use courtesy statements as appropriate?			
Excellent	<input type="checkbox"/>		
Very Good	<input type="checkbox"/>		
Good	<input checked="" type="checkbox"/>	5pts	
Fair	<input type="checkbox"/>		
Poor	<input type="checkbox"/>		
Did Agent demonstrate Active Listening?			
Excellent	<input type="checkbox"/>		
Very Good	<input type="checkbox"/>		
Good	<input checked="" type="checkbox"/>	5pts	
Fair	<input type="checkbox"/>		
Poor	<input type="checkbox"/>		
<small>Active listening includes repeating information back to the customer, such as a CC number or address, as well as affirmations statements such as "OK" and "I see" that demonstrate to the caller that you are engaged in the conversation.</small>			
Did Agent use proper hold procedures?			
Yes	<input checked="" type="checkbox"/>	10pts	
No	<input type="checkbox"/>		
Notes			
<i>We will coach you on your soft skills.</i>			

Critical Question Detail

Description

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 Detail Back Generate Report

Start Date: End Date: Group List:
 Form List: Agent List: User List:
 Date Type: Active:

Results

Critical Question Detail For Monday, February 28, 2011 to Tuesday, March 29, 2011						
Selected Forms: Critical Question Form						
Agent: CAMPOS, DEIRDRE						
Date of Call	Record	Date of Eval	Form	Question	Score	
3/29/2011	1000004	3/29/2011	Critical Question Form	Is this a critical question example?	10 of 10 (100.0%)	
Agent: GILBERT, ADELINE						
Date of Call	Record	Date of Eval	Form	Question	Score	
3/29/2011	1000003	3/29/2011	Critical Question Form	Is this a critical question example?	10 of 10 (100.0%)	
Agent: KIM, BOBBY						
Date of Call	Record	Date of Eval	Form	Question	Score	
3/29/2011	1000005	3/29/2011	Critical Question Form	Is this a critical question example?	0 of 10 (0.0%)	

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

Critical Question Summary

Description

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

Critical Question Summary
Back
Generate Report

Start Date

End Date

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

Date Type

Active

Results

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

Description

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


Evaluation List Report Back Generate Report

Start Date: End Date: Date Type:

Group: Agent Status: Agent:

Active Evaluations: Form: Evaluator:

Results

 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

Description

This report displays the results of your Evaluator's QA performance over a selected period of time. The initially generated report is a high level comparison, but it can be drilled-down into for more granular detail.

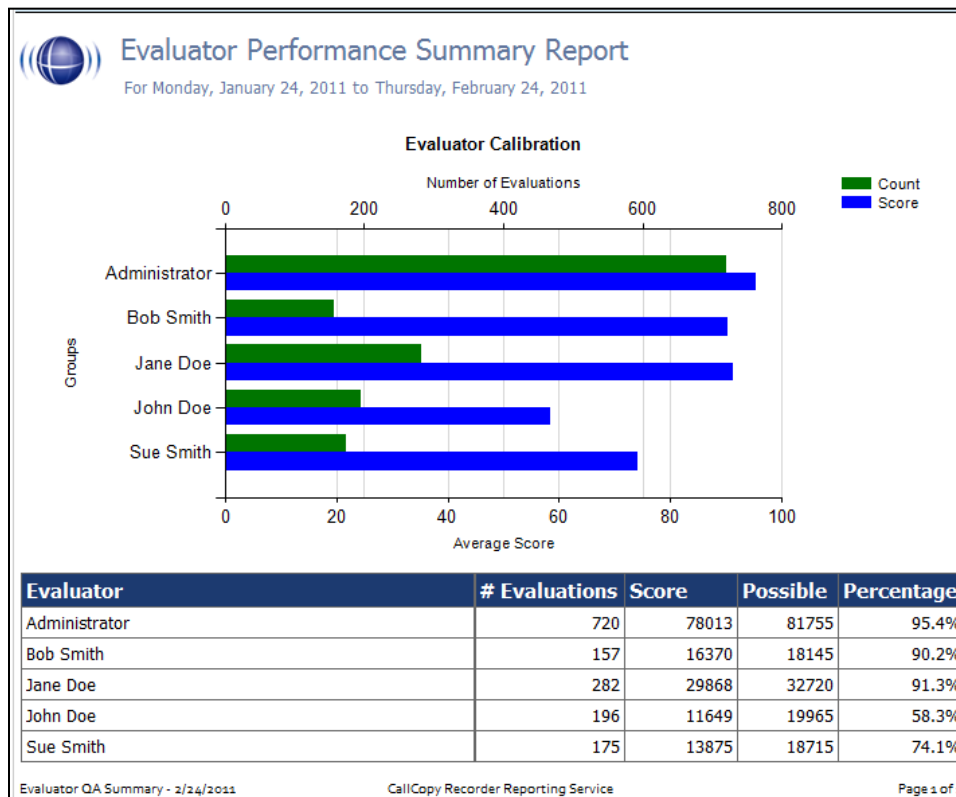
Evaluator QA Summary Back Generate Report

Start Date: End Date: Date Type:

Active: Forms: Agents:

Groups: Users: Report Type:

Results




Form and Section Failures Report

Description

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.

The screenshot shows a web-based configuration interface for a report. At the top, there is a title bar 'Form and Section Failures Report' with 'Back' and 'Generate Report' buttons. Below this are several filter fields: 'Start Date' (1/24/2011), 'End Date' (2/24/2011), and 'Date Type' (Call Date). There are also dropdown menus for 'Active' (Active), 'Form' (All), 'section' (All), 'Agents' (listing Veronica Alvarez, Ursula Avery, and Tracy Blackburn), 'Groups' (listing Calibration, ClientABC, and ClientXYZ), 'Users' (listing Administrator, Barry Knack, and Bob Smith), 'Report Type' (Agent), and 'Failure Type' (Any). The interface includes expand/collapse icons on the right side.

Results

 Form and Section Failure Report by Agent For Monday, January 24, 2011 to Thursday, February 24, 2011 Selected Groups: ClientXYZ					
Customer Service Evaluation			Greeting		
Agent			Failure Count		
HICKMAN, RONALD			Form Failures: 0, Section Failures: 1		
PATTERSON, GRETA			Form Failures: 0, Section Failures: 1		
REEVES, CECILIA			Form Failures: 0, Section Failures: 1		
SELLERS, ELLA			Form Failures: 0, Section Failures: 1		
SHEPHERD, LETHA			Form Failures: 0, Section Failures: 1		
TUCKER, SUSAN			Form Failures: 0, Section Failures: 1		
Total:			Form Failures: 0, Section Failures: 6		
Form	Section	Agent	Failure	Call ID	Date
Customer Service Evaluation	Greeting	HICKMAN, RONALD	Section	2237	2/4/2011
HICKMAN, RONALD		Total: Form Failures: 0, Section Failures: 1			
Customer Service Evaluation	Greeting	PATTERSON, GRETA	Section	5749	1/27/2011
PATTERSON, GRETA		Total: Form Failures: 0, Section Failures: 1			
Customer Service Evaluation	Greeting	REEVES, CECILIA	Section	9716	2/23/2011
REEVES, CECILIA		Total: Form Failures: 0, Section Failures: 1			
Customer Service Evaluation	Greeting	SELLERS, ELLA	Section	3181	2/16/2011
SELLERS, ELLA		Total: Form Failures: 0, Section Failures: 1			
Customer Service Evaluation	Greeting	SHEPHERD, LETHA	Section	8832	2/18/2011
SHEPHERD, LETHA		Total: Form Failures: 0, Section Failures: 1			
Customer Service Evaluation	Greeting	TUCKER, SUSAN	Section	508	2/22/2011
TUCKER, SUSAN		Total: Form Failures: 0, Section Failures: 1			
Greeting		Total: Form Failures: 0, Section Failures: 6			

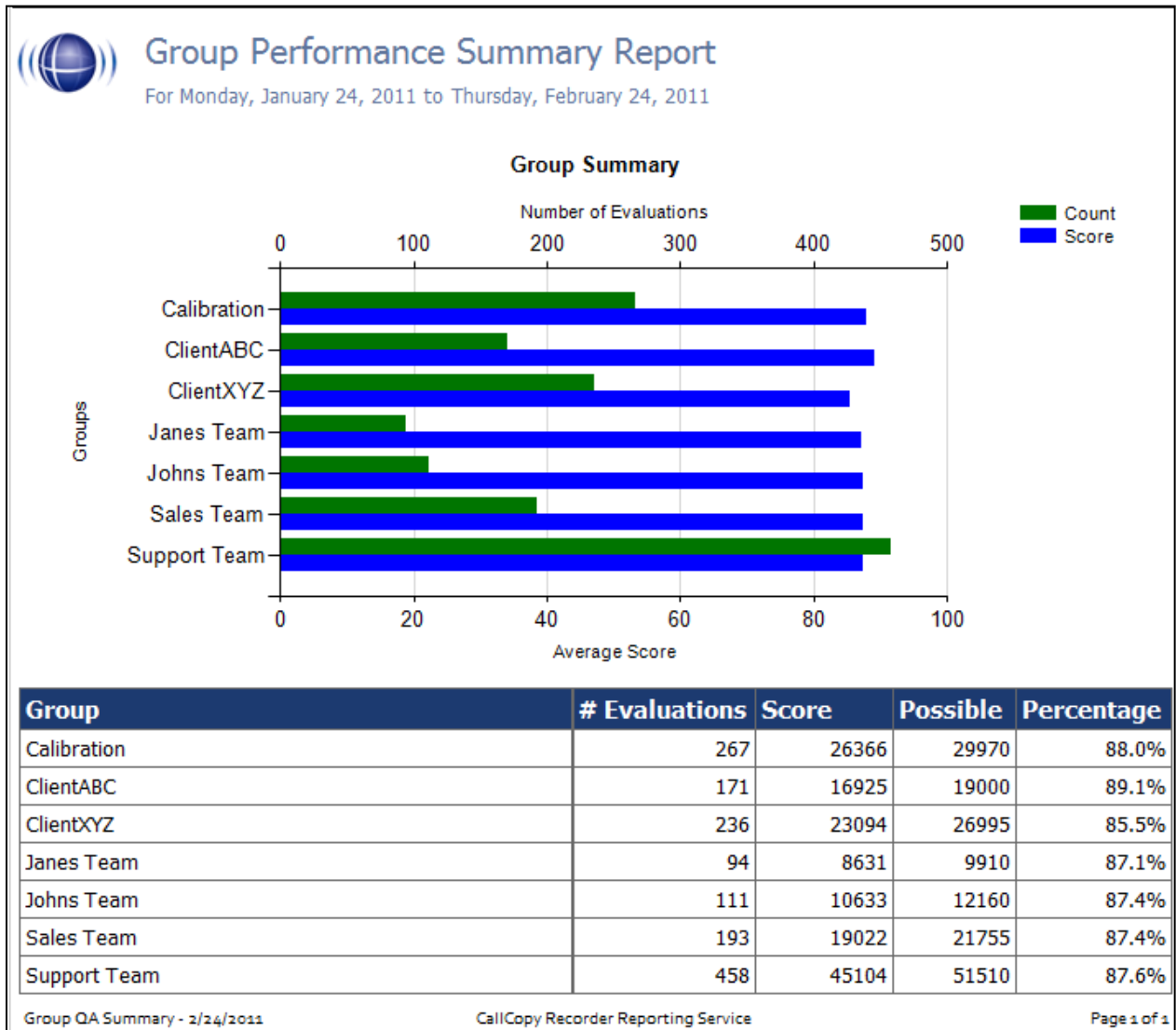
Group QA Summary

Description

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 is able to be drilled-down for additional data, at a more granular level.

The screenshot shows the 'Group QA Summary' configuration interface. At the top right, there are 'Back' and 'Generate Report' buttons. The interface includes several filter fields: 'Start Date' (1/24/2011), 'End Date' (2/24/2011), and 'Date Type' (Call Date). There are also dropdown menus for 'Active' (Active), 'Forms' (All, Customer Service Evaluation, Sales Evaluation), 'Agents' (All, VERONICA ALVAREZ, URSULA AVERY, TRACY BLACKBURN), 'Groups' (All, Calibration, ClientABC, ClientXYZ), 'Users' (All, Administrator, Barry Knack, Bob Smith), and 'Report Type' (Group). The interface is designed for selecting specific teams, forms, and agents to generate a performance report.

Results



Group Summary By Month

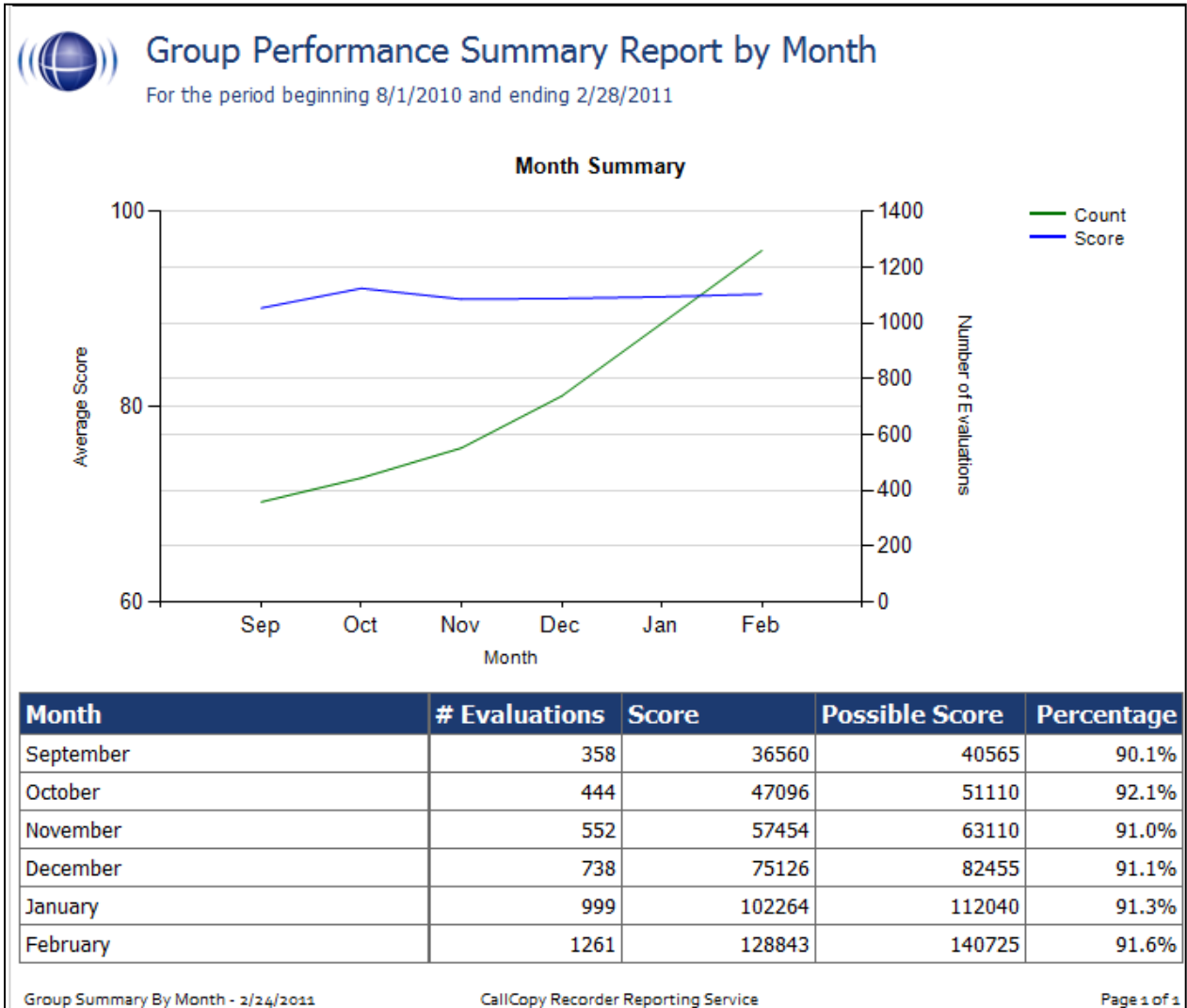
Description

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.

The screenshot shows the 'Group Summary By Month' configuration window. It includes a title bar with 'Back' and 'Generate Report' buttons. The main area contains several dropdown menus and lists for filtering the report data. The 'Month' is set to February, Year to 2011, and Periods to 6. The 'Active' status is set to Active. The 'Forms' list includes Customer Service Evaluation and Sales Evaluation. The 'Agents' list includes Veronica Alvarez, Ursula Avery, and Tracy Blackburn. The 'Groups' list includes Calibration, ClientABC, and ClientXYZ. The 'Users' list includes Administrator, Barry Knack, and Bob Smith. The 'Report Type' is set to Month.

Field	Value
Month	February
Year	2011
Periods	6
Active	Active
Forms	All, Customer Service Evaluation, Sales Evaluation
Agents	All, VERONICA ALVAREZ, URSULA AVERY, TRACY BLACKBURN
Groups	All, Calibration, ClientABC, ClientXYZ
Users	All, Administrator, Barry Knack, Bob Smith
Report Type	Month

Results



Group Summary By Period

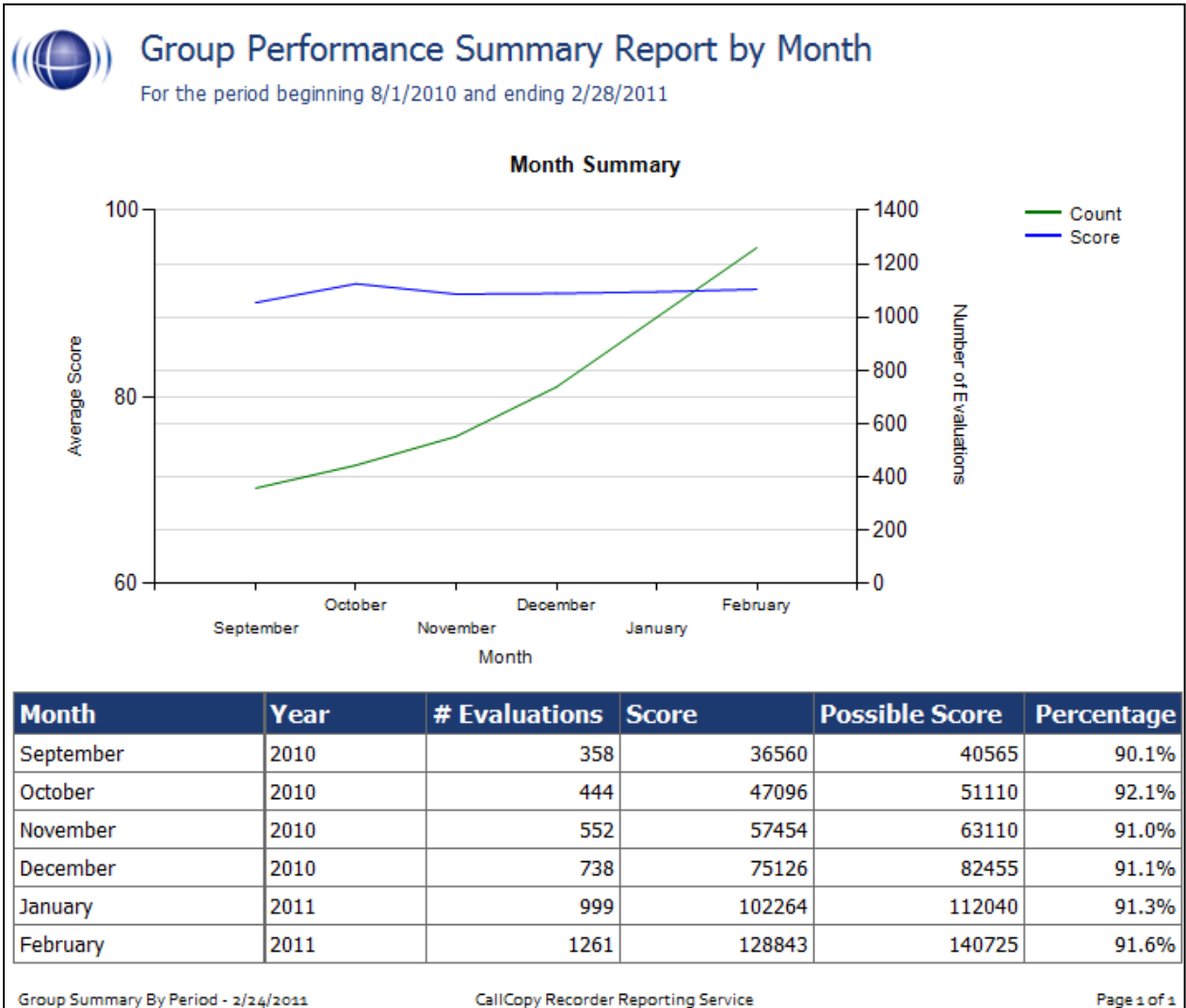
Description

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 screenshot shows the 'Group Summary By Period' configuration interface. At the top right, there are 'Back' and 'Generate Report' buttons. The interface includes several dropdown menus and lists for selection:

- Period Type:** Month
- Year:** 2011
- Period Name:** February
- Periods:** 6
- Active:** Active
- Forms:** A dropdown menu is open, showing 'All', 'Customer Service Evaluation', and 'Sales Evaluation'.
- Agents:** A dropdown menu is open, showing 'All', 'VERONICA ALVAREZ', 'URSULA AVERY', and 'TRACY BLACKBURN'.
- Groups:** A dropdown menu is open, showing 'All', 'Calibration', 'ClientABC', and 'ClientXYZ'.
- Users:** A dropdown menu is open, showing 'All', 'Administrator', 'Barry Knack', and 'Bob Smith'.
- Report Type:** Period

Results



Multiple Evaluations Summary

Description


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

Multiple Evaluations Summary Back Generate Report

Agent ID: Supervisor ID: Form ID:

End Date:

Results

 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

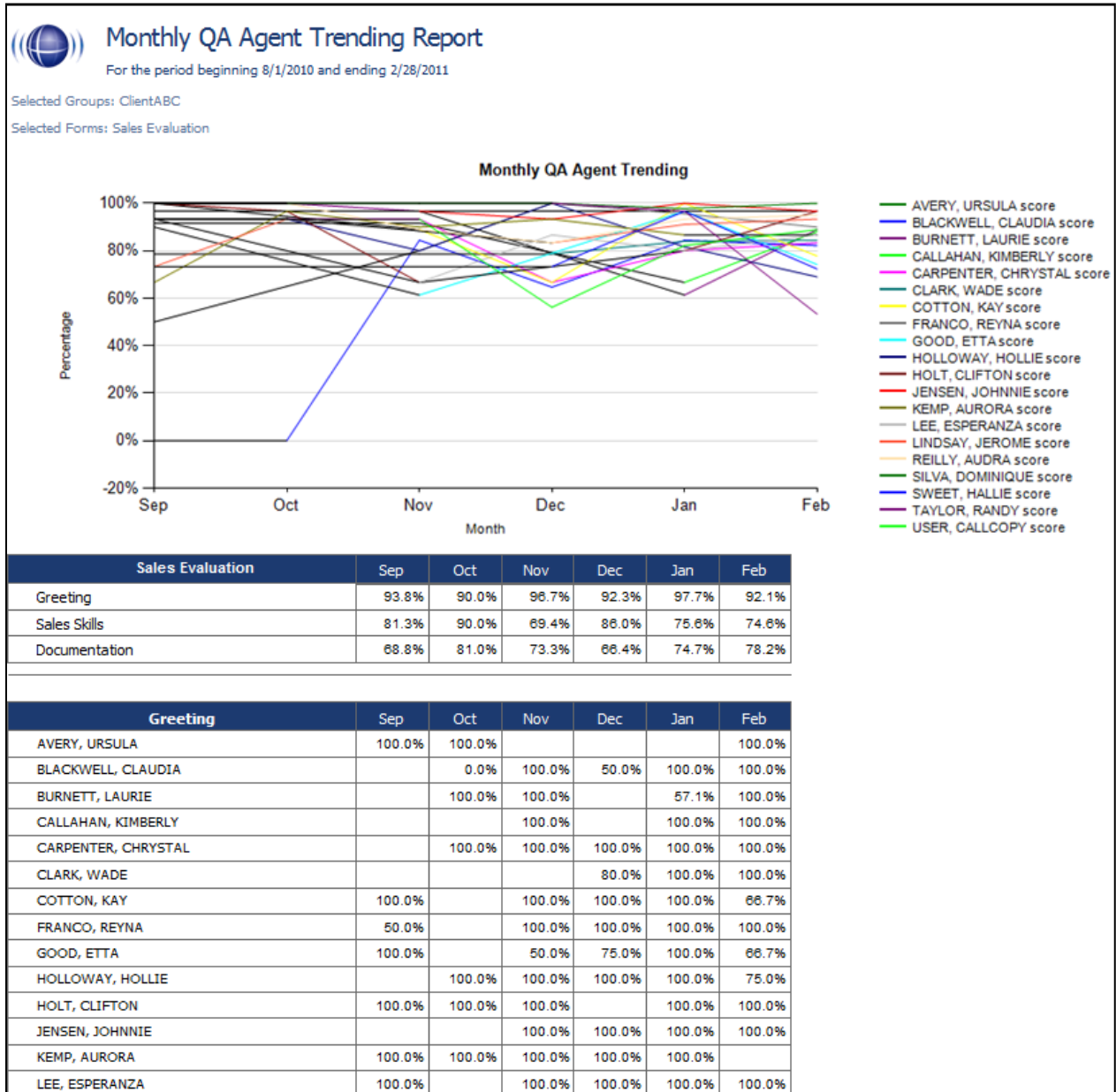
Description

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.

QA Agent Periodical Trending Report
Back
Generate Report

Report Type: <input type="text" value="Monthly"/>	Year: <input type="text" value="2011"/>	Period Name: <input type="text" value="February"/>
Periods: <input type="text" value="6"/>	Active: <input type="text" value="Active"/>	group list: <input type="text" value="All"/> Calibration ClientABC ClientXYZ
form list: <input type="text" value="All"/> Customer Service Evaluation Sales Evaluation	agent list: <input type="text" value="All"/> VERONICA ALVAREZ URSULA AVERY TRACY BLACKBURN	user list: <input type="text" value="All"/> Administrator Barry Knack Bob Smith
Date Type: <input type="text" value="Evaluation Date"/>		

Results



QA Agent Trending Report

Description

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.

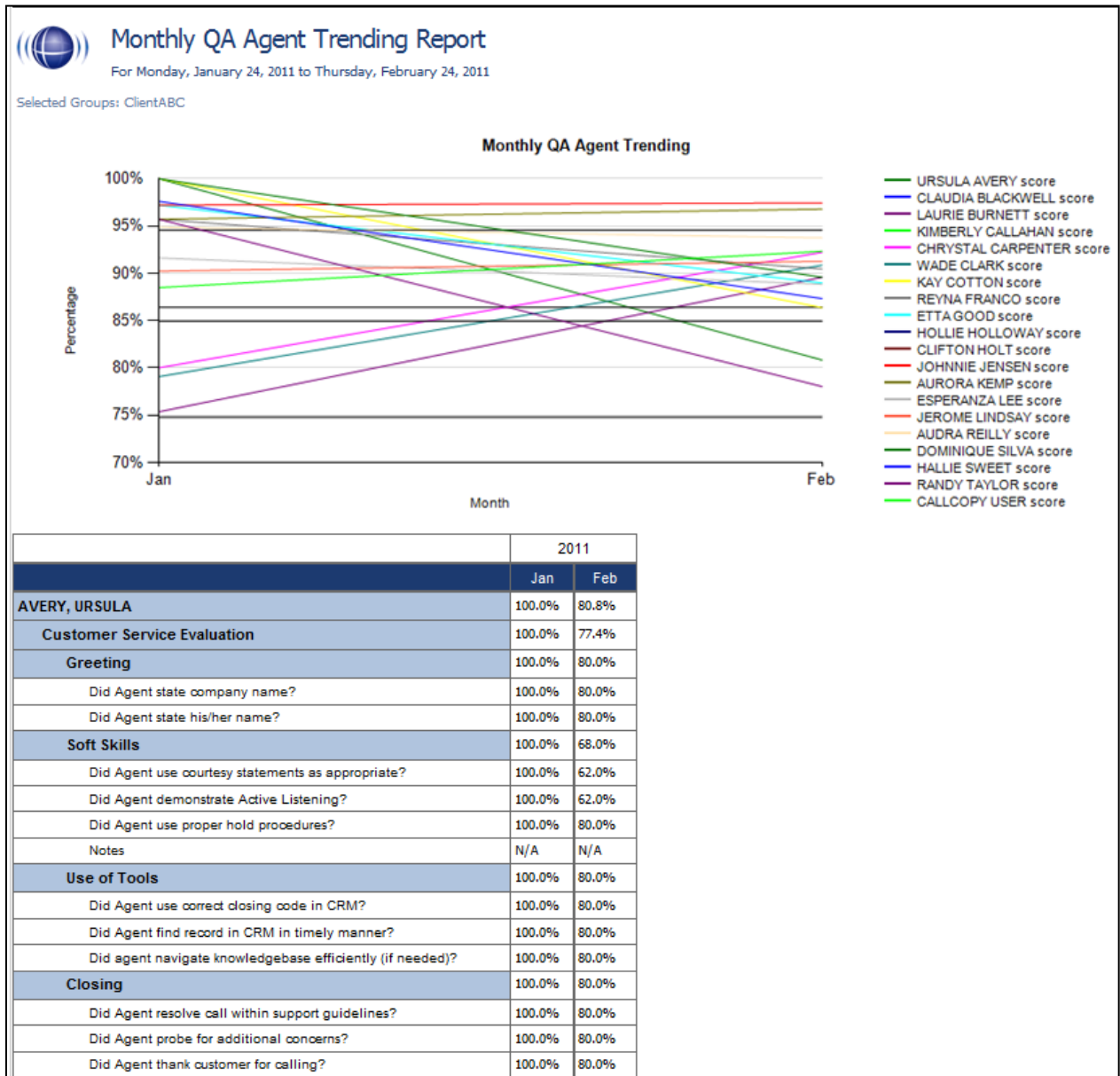
QA Agent Trending Report Back Generate Report

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 Reporting Period: Monthly

Results



QA Calibration Trending Report

Description

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.

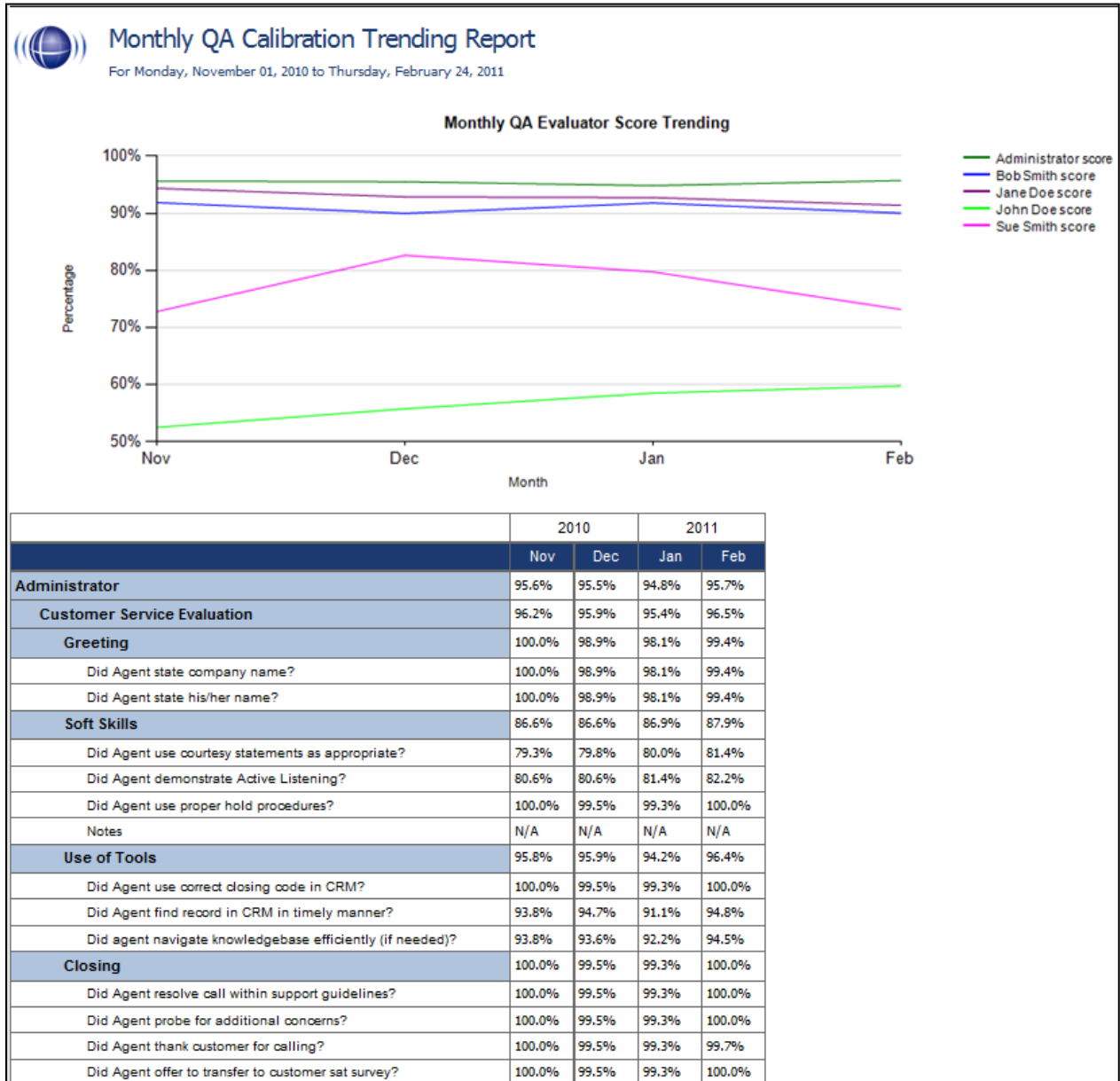
QA Calibration Trending Report Back Generate Report

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 Reporting Period: Monthly

Results



QA Form Trending Report

Description

This report displays the total quality performance on a particular form over a selected period of time.

QA Form Trending Report Back

Start Date: End Date: Reporting Period:

Active: Group List:
 Calibration
 ClientABC
 ClientXYZ

Form List:
 Customer Service Evaluation
 Sales Evaluation

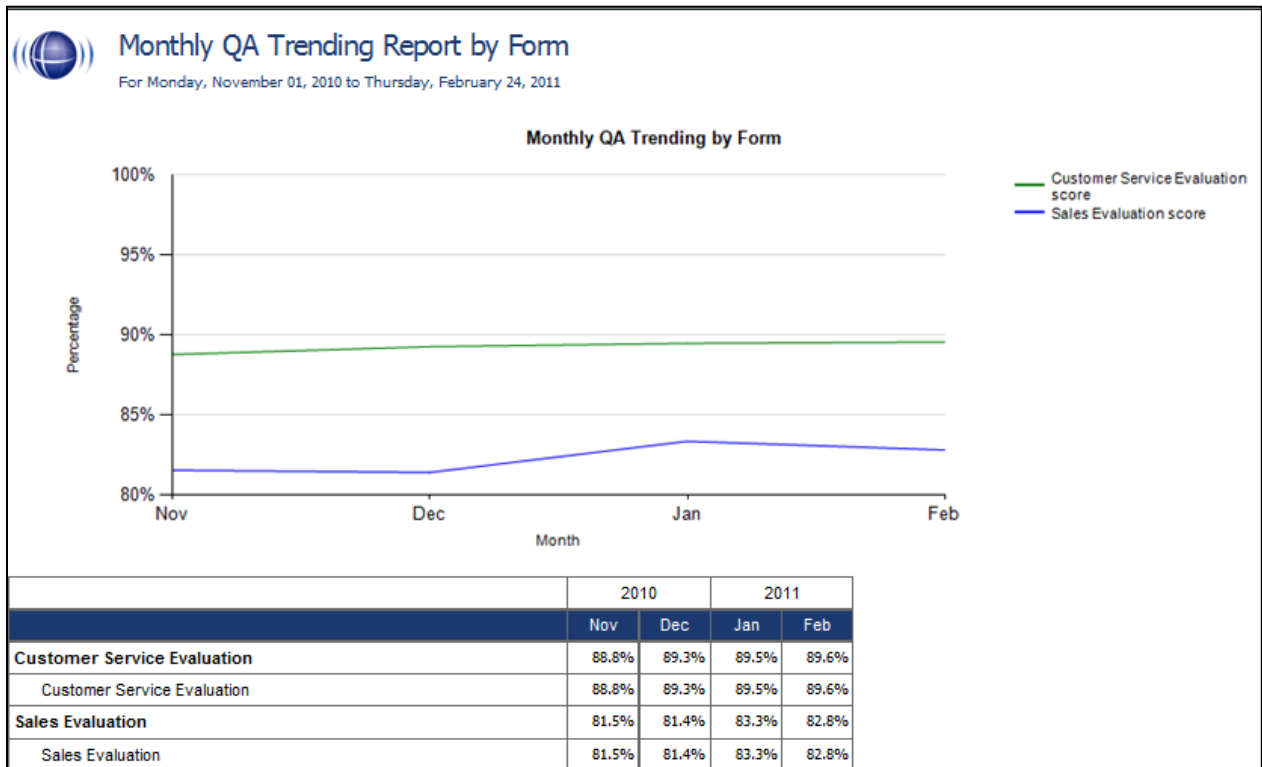
Agent List:
 VERONICA ALVAREZ
 URSULA AVERY
 TRACY BLACKBURN

User List:
 Administrator
 Barry Knack
 Bob Smith

Report Type:

Report Detail:

Results



QA Group Periodical Trending Report

Description

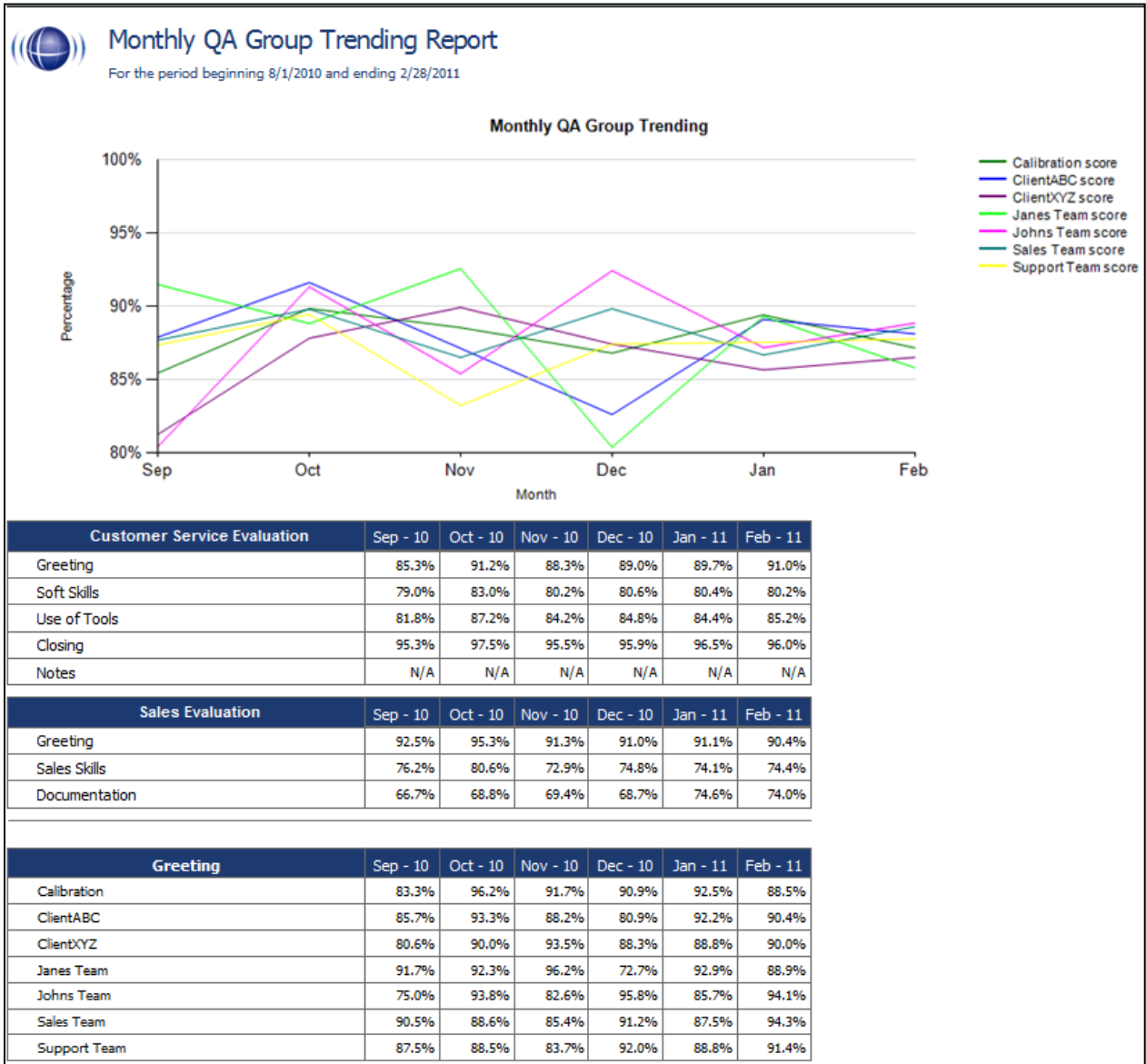
This report displays the performance of a selected group(s) on a form(s), charted over a certain number of periods (daily, weekly, monthly, quarterly, or yearly) based on your selection of a targeted end period. The data is broken down section by section.

The screenshot shows the configuration interface for the 'QA Group Periodical Trending Report'. At the top, there are 'Back' and 'Generate Report' buttons. The interface is divided into several sections for selecting report parameters:

- Report Type:** Monthly
- Year:** 2011
- Period Name:** February
- Periods:** 6
- Active:** Active
- group list:** A dropdown menu with options: All, Calibration, ClientABC, ClientXYZ.
- form list:** A dropdown menu with options: All, Customer Service Evaluation, Sales Evaluation.
- agent list:** A dropdown menu with options: All, VERONICA ALVAREZ, URSULA AVERY, TRACY BLACKBURN.
- user list:** A dropdown menu with options: All, Administrator, Barry Knack, Bob Smith.

Each dropdown menu has a blue highlight on the 'All' option. The interface also includes expand/collapse icons in the top right and bottom right corners.

Results



QA Group Scorecard

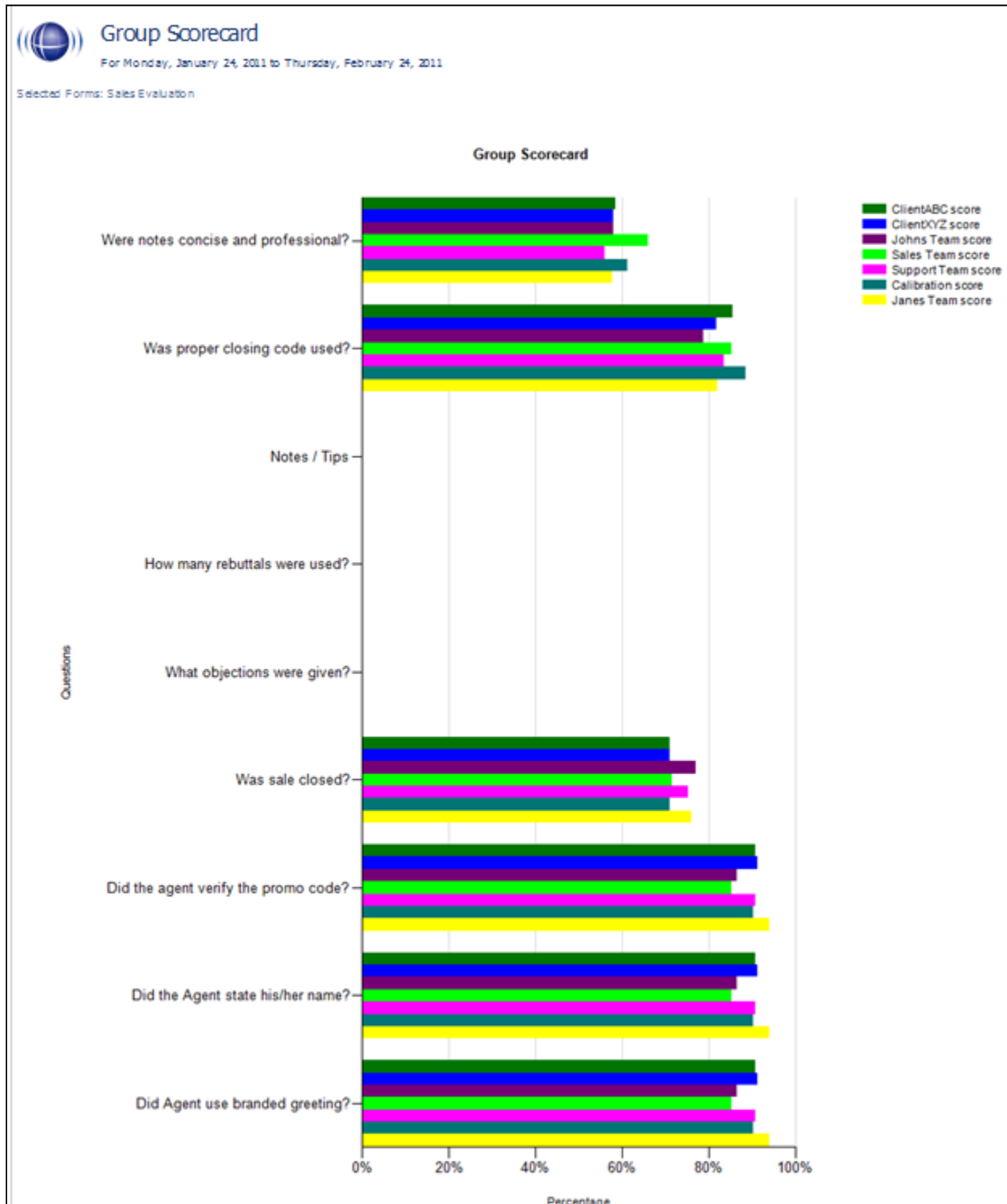
Description

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 screenshot shows the 'QA Group Scorecard' configuration window. At the top right, there are 'Back' and 'Generate Report' buttons. The main area contains several input fields and dropdown menus:

- Start Date:** 1/24/2011
- End Date:** 2/24/2011
- Date Type:** Call Date
- Active:** Active
- Group List:** All, Calibration, ClientABC, ClientXYZ
- Form List:** All, Customer Service Evaluation, Sales Evaluation
- Agent List:** All, VERONICA ALVAREZ, URSULA AVERY, TRACY BLACKBURN
- Evaluator:** All, Administrator, Barry Knack, Bob Smith

Results



QA Group Trending Report

Description

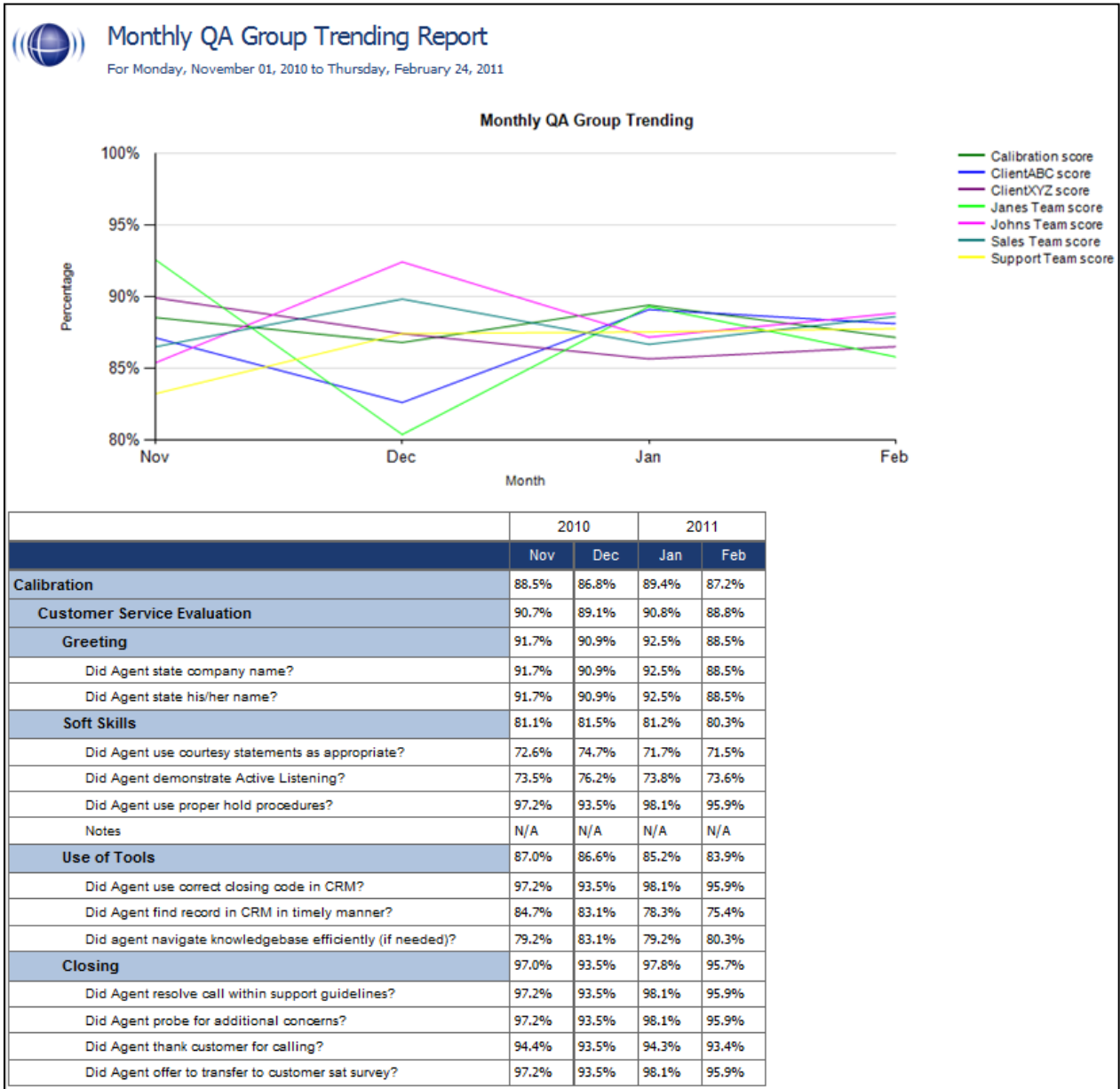
This report displays a group by group comparison of quality results of a form, at a question level, based on a selected period of time. The data is compared daily, weekly, monthly, or yearly based on your selection.

The screenshot shows the 'QA Group Trending Report' interface with the following settings:

- Start Date:** 1/24/2011
- End Date:** 2/24/2011
- Date Type:** Call Date
- Active:** Active
- Groups:** All, Calibration, ClientABC, ClientXYZ
- Agents:** All, VERONICA ALVAREZ, URSULA AVERY, TRACY BLACKBURN
- Users:** All, Administrator, Barry Knack, Bob Smith
- Forms:** All, Customer Service Evaluation, Sales Evaluation
- Reporting Period:** Monthly

Buttons for 'Back' and 'Generate Report' are located in the top right corner.

Results



QA Pending Acknowledgement

Description

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 Back

Older Than

Calibration
 ClientABC
 ClientXYZ
 Janes Team

Results

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

Description

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.

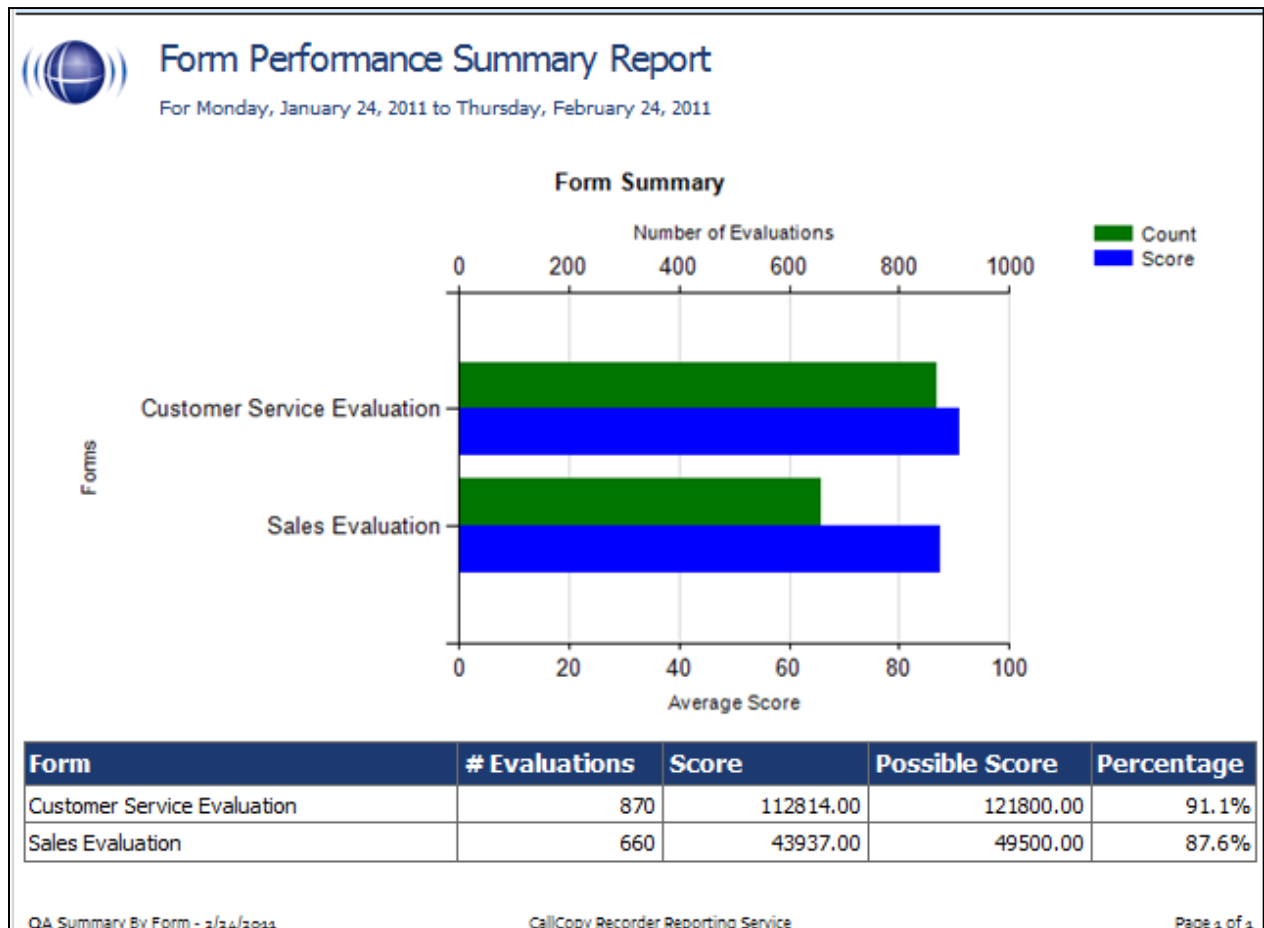
QA Summary By Form Back Generate Report

Start Date: End Date: Date Type:

Active: Forms: Agents:

Groups: Users: Report Type:

Results



QA Summary By Question

Description

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: End Date: Date Type:

Active: Groups:
Calibration Forms:
ClientABC Customer Service Evaluation
ClientXYZ Sales Evaluation

Agents:
VERONICA ALVAREZ Users:
URSULA AVERY Administrator
TRACY BLACKBURN Barry Knack
Bob Smith

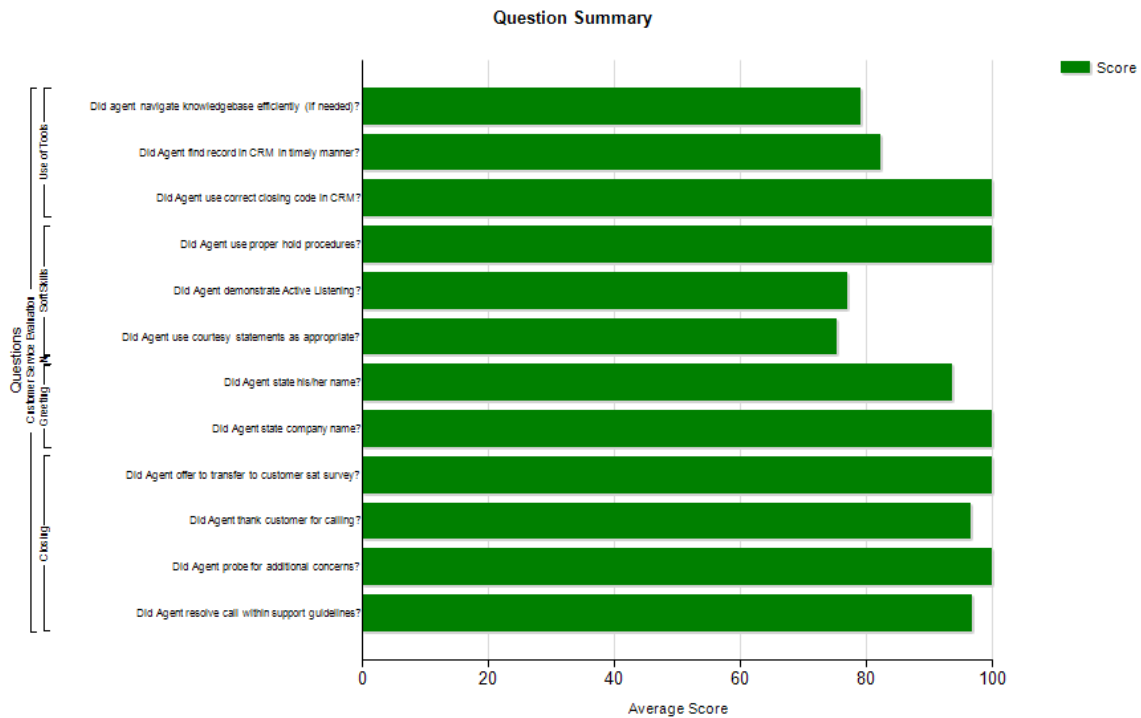
Report Type:


Results

Question Performance Summary Report

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

Selected Forms: Customer Service Evaluation



 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

Description

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.

QA Summary By Section Back Generate Report

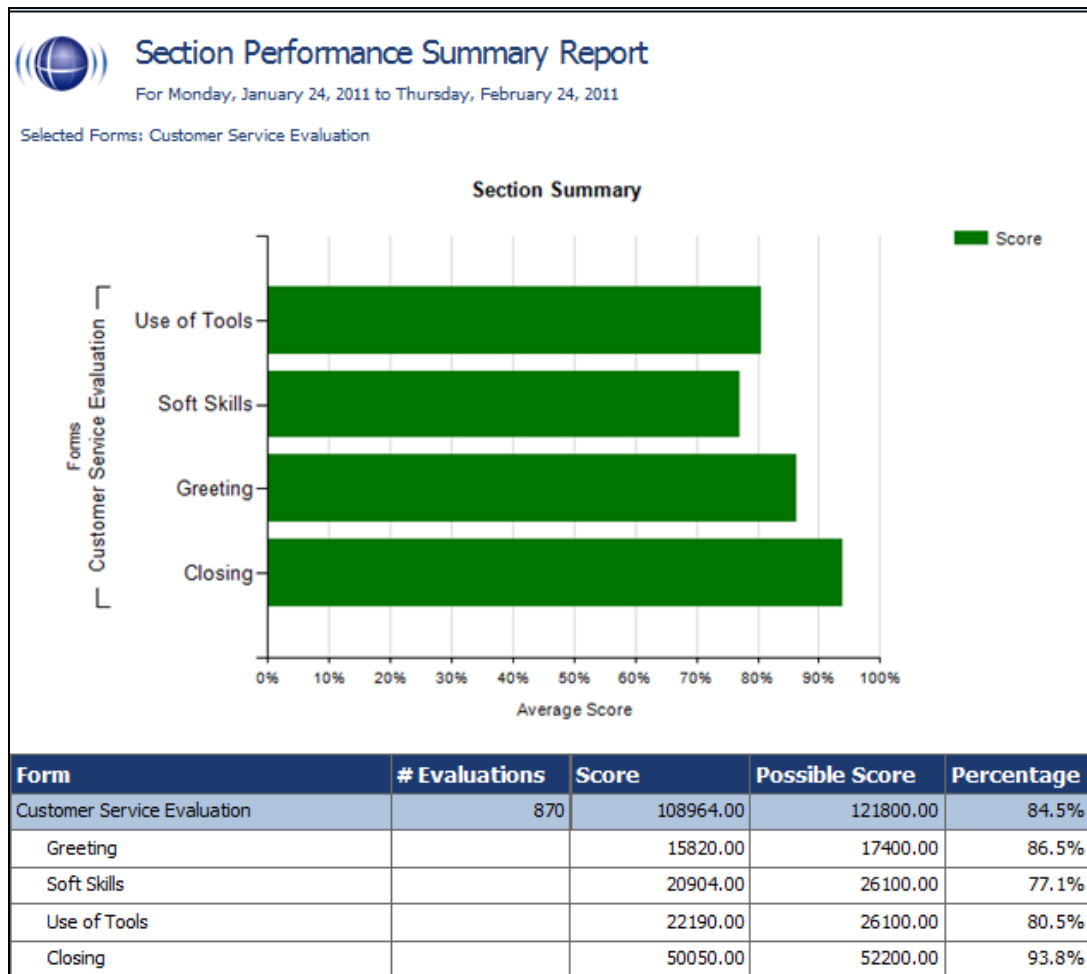
Start Date: End Date: Date Type:

Active: Groups:
Calibration Forms:
ClientABC Customer Service Evaluation
ClientXYZ Sales Evaluation

Agents:
VERONICA ALVAREZ Users:
URSULA AVERY Administrator
TRACY BLACKBURN Barry Knack
Bob Smith

Report Type:

Results



Quality Assurance Detail

Description

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


Start Date End Date Date Type

Agent Evaluator Form

Active Group Question

Response

Results

 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

Description

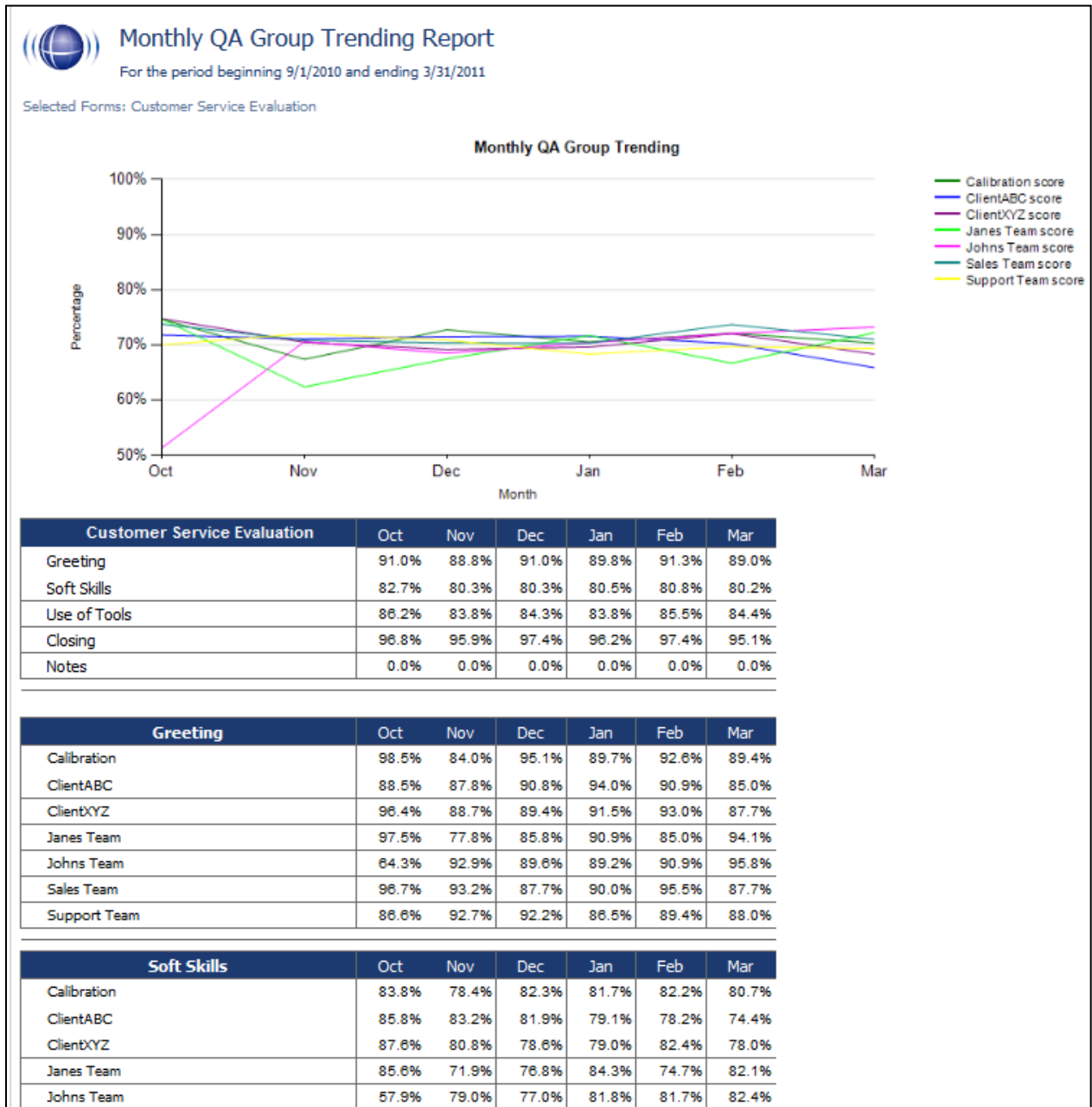
This report displays a group by group comparison of quality results of a form, at a section level, based on a selected period of time. The data is compared daily, weekly, monthly, or yearly based on your selection.

The screenshot shows a web-based configuration interface for a report. At the top, there is a title bar with the text "Weighted QA Group Periodical Trending Report" and two buttons: "Back" and "Generate Report". Below the title bar, there are several dropdown menus and lists for configuring the report parameters:

- Report Type:** Monthly
- Year:** 2011
- Period Name:** June
- Periods:** 6
- Active:** Active
- Forms:** A list containing "All", "Customer Service Evaluation", and "Sales Evaluation".
- Agents:** A list containing "All", "LAWANDA ANTHONY", "JEFFERY AYALA", and "WHITNEY BARRETT".
- Groups:** A list containing "All", "Calibration", "ClientABC", and "ClientXYZ".
- Evaluators:** A list containing "All", "Administrator", "Bob Smith", and "callcopy".
- Date Type:** Evaluation Date

Each list has a search icon and a scroll bar. The "All" option is selected in each list. There are also "Back" and "Generate Report" buttons at the top right of the interface.

Results



System Reports

In this chapter we will cover:

- ✓ Overview of System Reports
- ✓ Running the 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.

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

Pages : Go To Page : of 1

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.

Running the System Reports

Disk History

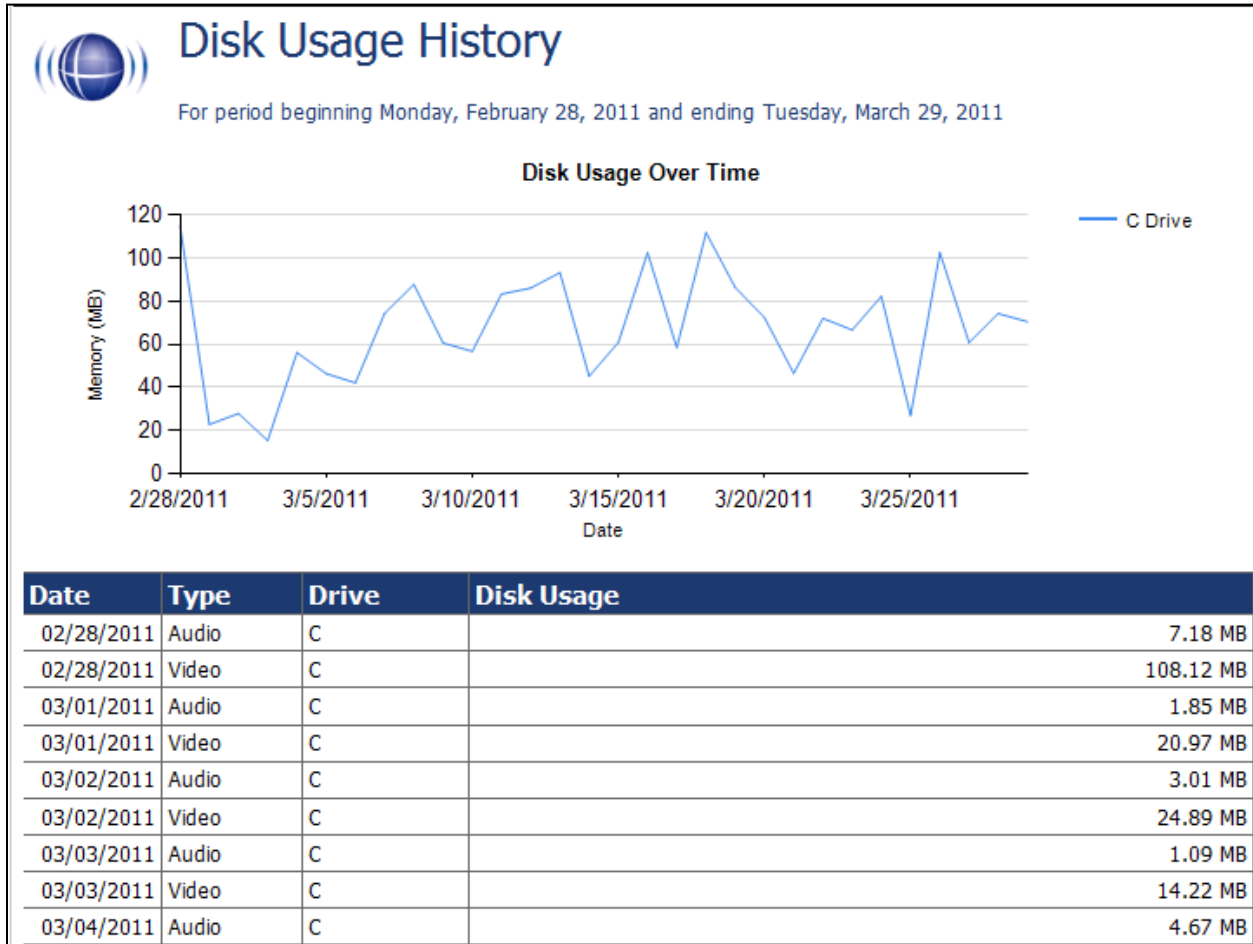
Description

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.

Disk History

Start Date: End Date:

Results



System Activity Summary

Description


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 Back Generate Report

Internal All Start Date End Date

User ID All

Results

 System Activity Summary			
For period beginning Monday, February 28, 2011 and ending Tuesday, March 29, 2011			
02/28/2011	No activity on this date.		
Date	User	Count	Event
03/01/2011	Administrator	1	Login
03/01/2011	Administrator	2	Playbacks Call
03/02/2011	No activity on this date.		
03/03/2011	No activity on this date.		
03/04/2011	No activity on this date.		
03/05/2011	No activity on this date.		
03/06/2011	No activity on this date.		
03/07/2011	No activity on this date.		
03/08/2011	No activity on this date.		
03/09/2011	No activity on this date.		
Date	User	Count	Event
03/10/2011	Administrator	4	Login
03/10/2011	Administrator	4	Logout
03/10/2011	Administrator	1	Playbacks Call
03/10/2011	Barry Knack	1	Login
03/10/2011	Barry Knack	1	Logout
03/10/2011	Beki Nowlan	1	Login
03/10/2011	Beki Nowlan	1	Logout

System Usage

Description


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.

System Usage Back Generate Report

Start Date End Date User ID ⌵

⌶

Results

 System Usage		
For period beginning Monday, February 28, 2011 and ending Tuesday, March 29, 2011		
Date	User	Time In System
03/01/2011	Administrator	23:55:59
03/02/2011	Administrator	24:00:00
03/03/2011	Administrator	24:00:00
03/04/2011	Administrator	24:00:00
03/05/2011	Administrator	24:00:00
03/06/2011	Administrator	24:00:00
03/07/2011	Administrator	24:00:00
03/08/2011	Administrator	24:00:00
03/09/2011	Administrator	24:00:00
03/10/2011	Administrator	11:26:13
03/10/2011	Barry Knack	00:01:34
03/10/2011	Beki Nowlan	00:01:34
	Total:	11:27:21
03/28/2011	Administrator	01:16:43
03/28/2011	Barry Knack	01:28:18
03/28/2011	Beki Nowlan	02:57:43
03/28/2011	CALLCOPY USER	00:02:33
	Total:	05:42:17

System Usage - 3/29/2011 CallCopy Recorder Reporting Service Page 1 of 1

IP Phone Status

Description

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,

Results

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

License Info

Description

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.

Results

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

Transcoder Status

Description

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.

Results

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

Description

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 example, when users change their passwords, it records the message "Success". When a user logs into the system, it records the IP address. When a call is played, it records the Call ID. Therefore, you can use the Message field to specify actions taken by an IP address, only successful password changes, and others.

System Reports

Audit Record Search
Search

User

Function Type

Message

Start Date

End Date

Results

Audit Record Search
Search

User

Function Type

Message

Start Date

End Date

Time	Function	User	Message
9/27/2010 3:46:40 PM	Logout	Administrator	
9/27/2010 3:46:48 PM	Login	Administrator	
9/27/2010 3:47:38 PM	PlaybackCall	Administrator	3889
9/27/2010 3:47:51 PM	PlaybackCall	Administrator	3889
9/27/2010 3:48:55 PM	Logout	Administrator	
9/29/2010 3:39:39 PM	Login	Administrator	
9/29/2010 3:39:52 PM	PlaybackCall	Administrator	4162
9/29/2010 3:59:58 PM	Logout	Administrator	
9/30/2010 10:35:12 AM	Login	Administrator	
9/30/2010 10:36:04 AM	PlaybackCall	Administrator	4629
9/30/2010 10:36:25 AM	PlaybackCall	Administrator	4792
9/30/2010 10:48:09 AM	Logout	Administrator	
12/10/2010 6:06:21 PM	Login	Administrator	
12/10/2010 6:09:36 PM	PlaybackCall	Administrator	6080
12/10/2010 6:10:47 PM	PlaybackCall	Administrator	1715
12/10/2010 6:11:00 PM	PlaybackCall	Administrator	1715
12/10/2010 6:11:32 PM	PlaybackCall	Administrator	4946
12/10/2010 6:11:46 PM	PlaybackCall	Administrator	6783
12/10/2010 6:32:51 PM	Logout	Administrator	
12/10/2010 6:32:51 PM	Logout	Administrator	

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Report Tools

In this chapter we will cover:

- ✓ Overview of Reporting Tools
- ✓ Report Subscriptions
- ✓ Report Library

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.

Managing 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.

Creating New Subscriptions

To create a new subscription, 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.

Subscription Details

In the subscription details section, you will need to select a report to subscribe to. Any Printable Report currently installed on the system is available to use for a subscription. Choose a report from the **Select a Report** field. The **Description** field is a custom title for your subscription. Enter a description in the field.

The screenshot shows a web form titled "New Report Subscription". At the top right of the form are two buttons: "Back" and "Save". Below the title bar is a section titled "Subscription Details". The form contains the following fields:

- Select a Report:** A dropdown menu with the text "- Select -" and a downward arrow.
- Description :** A text input field.
- Active :** A label.
- Event Type :** A label.
- Modified By:** A label.
- Owner:** A label.
- Last Executed :** A label.
- Date Modified:** A label.
- Path:** A label.
- Status:** A label.

Report Delivery Options

The report delivery options specify who the report results are e-mailed to, and the format the results will be displayed in.

Enter the e-mail addresses the report will be sent to in the **To:**, **CC:**, or **BCC:** fields.

The **Reply-To** field will be the e-mail address that any replies to the subscription e-mail will be sent to.

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.

The **Include Report** option will generate a file containing the report results, and attach it to the subscription e-mail. 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
- Image (TIFF) File
- MS Word (DOC) File
- Data (XML) File

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

Specify options for report delivery.

To:

Cc:

Bcc:

(Use (;) to separate multiple e-mail addresses.)

Reply-To:

Subject:

'@ReportName' is the name of the report. '@ProcessingTime' is the time the report was run.

Include Report Render Format: ▼

Include Link

Priority: ▼

Comment:

Subscription Schedule

Reports can be scheduled to be run on a Daily, Weekly, or Monthly schedule. For each option you can select the day(s) of the week the report will be generated and e-mailed out. 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 on.

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.*

Choose whether to run the report on an hourly, daily, weekly, monthly, or one time basis.

Daily Monthly Schedule
 Weekly
 Monthly

Months: Jan Feb Mar Apr
 May Jun Jul Aug
 Sep Oct Nov Dec

On week of month: 1st

On day of week: Sun Mon Tue Wed Thu Fri Sat

On calendar day(s): (Comma separated list)

Start time: 02 : 00 A.M. P.M.

Report Parameters

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.

Once the Report Parameters are selected, 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.

Set report parameters.

Start Date: 6/1/2010 Use Default

End Date: 6/30/2010 Use Default

Group: All Use Default





Call Direction: Incoming Use Default

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.